

# Microsoft Excel Level 2

## Part of the Workers in Transition Technology Program Training Series – Transitioning to a New Job and Microsoft Office 2007

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**Course Title: Excel 2007 – Level 2 (Beyond Basics)**

### **Course Description**

Not just a tool for accountants, Excel has become a ubiquitous instrument used across all departments and disciplines and within organizations of all types. This is a 4 ½ hour course that moves beyond the fundamental application development in the Level 1 course, examining new features and functions and delving into greater detail on those topics covered in the previous course.

Both novice and experienced users will establish or confirm a clear understanding of more detailed or advanced features, functions and correct approaches to the use of this tool. The course is also designed to assist all users with the transition from earlier versions of Excel (97-2003) to the most current version (2007) and to prepare for both the continued evolution of this product and for advancement into more sophisticated usage.

### **Who Should Attend?**

This course is designed for both novice and experienced technology users, and specifically for those who have already taken the Level 1 companion class. This assists those with the need to expand their understanding of those fundamental topics and to move into more advanced usage of functions in formulas, and more detailed aspects of list arrangements, including: importing, exporting, sorting, filtering, pivot tables and charts.

Novice users should expect to build on their foundation, acquired in Level 1, for further use of this tool. Experienced users should continue to see some things they already know, but will also have the chance to both close up “gaps” in understanding, as well as any “workarounds” they may have developed (if they haven’t taken formal training).

### **Prerequisites**

Participants should have taken the Level 1 companion course in this series or have equivalent knowledge.

### **Session Goals**

- Explore the Microsoft® Office Excel® 2007 environment options
- Extend basic worksheet example from Level 1
- Manage a list with organization, sort, filter, subtotal and more ...
- Create / modify charts
- Create / modify pivot tables, pivot charts and work with other objects
- Examine and utilize functions in more advanced formulas
- Importing/Exporting
- Additional formatting approaches

## What You Will Learn - Course Outline

### **1 The Microsoft Excel 2007 environment**

- 1.1 Modifying Program Defaults
  - 1.1.1 Trusted Locations
  - 1.1.2 Default File Format
  - 1.1.3 Personalization

### 1.2 Add In Components/Features

### **2 Templates / Example Analysis**

- 2.1 Search templates
- 2.2 Show formulas
- 2.3 The Auditing Group
- 2.4 Template changes
- 2.5 Lock/Unlock Cells
- 2.6 Protect Worksheet and Save as Template

### **3 The Worksheet as a List**

- 3.1 Format as Table Organization and Calculation Options
- 3.2 Using the Filters
- 3.3 Converting to a Range
- 3.4 Create and Manage Named Ranges
- 3.5 Analyzing
  - 3.5.1 Sort
  - 3.5.2 Filter (Single/Multiple)
  - 3.5.3 Subtotal
  - 3.5.4 Group/Outline
- 3.6 Functions/Formulas
  - 3.6.1 VLookup
  - 3.6.2 3D Cell References
  - 3.6.3 Date/Time Functions
  - 3.6.4 Convert Text to Columns
  - 3.6.5 Correct Case Conversion
  - 3.6.6 Conditional Functions

### **4 Inserting /Editing Objects**

- 4.1 Insert/Edit Charts
- 4.2 Insert / Edit Pivot Table
- 4.3 Insert / Edit Smart Art
- 4.4 Insert/Edit Shapes

### **5 Formatting**

- 5.1 Further on Headers and Footers
- 5.2 Watermarks
- 5.3 Conditional Formatting

### **6 Page Setup Dialog Box**

- 6.1 Print Titles Each Page
- 6.2 Header / Footer Management

### **7 Additional Subjects (Time Permitting)**

- 7.1 Comments
- 7.2 Hyperlinks
- 7.3 Web based research tools