

Excel Level 3

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

Course Title: Excel 2007 – Level 3 (More Analysis, Functions, Formulas and Tools)

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 both the fundamental application development in the Level 1 course and the examination of more advanced topics in the Level 2 course from this series.

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 and Level 2 companion classes. This assists those with the need to expand their understanding of those fundamental and more advanced topics and to move into additional areas of usage. Examine macros, collaboration, more analysis tools, and more functions in formulas.

Novice users should expect to build on their foundation, acquired in Level 1 and 2, 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 and Level 2 companion courses from these sessions or have equivalent knowledge.

Session Goals

- Explore the use of Macros for Worksheet Automation
- Add Validation Criteria
- Set and Use Revision Tracking
- Examine more Functions in Formulas and the Insert Function Dialog Box
- Examine analysis tools (Goal Seek, Solver, Scenarios and more ...)
- Manage Views
- Structure Workbooks with XML

What You Will Learn - Course Outline

1 Automating Microsoft Excel 2007 through Macros

- 1.1 Create / edit macros
- 1.2 Attach macros to menus, command buttons or toolbars

2 Views

- 2.1 Review the Visual Basic Window
- 2.2 Manage Windows
- 2.3 Freeze Panes
- 2.4 The Watch Window
- 2.5 Splits
- 2.6 Workspaces
- 2.7 Hide/Unhide
- 2.8 View Formulas

3 Data Validation and Control

- 3.1 Data Validation Dialog Box
- 3.2 Data Validation Criteria and Rules
- 3.3 Remove Duplicates

4 Collaboration

- 4.1 Share a Workbook
- 4.2 Set Revision Tracking / Reviewing / Merging
- 4.3 Inserting Comments
- 4.4 Restrict Document Access
- 4.5 Consolidation
- 4.6 Making a Workbook Final and Changing Properties

5 Functions and Formulas

- 5.1 Function A (TBD)
- 5.2 Function B (TBD)
- 5.3 Function C (TBD)
- 5.4 The Insert Function Dialog Box

6 Analysis Tools

- 6.1 Goal Seek
- 6.2 Solver
- 6.3 Scenarios
- 6.4 Conditional Sums
- 6.5 Data Analysis Tools

7 XML

- 7.1 Develop XML Maps
- 7.2 Import/Export XML Data