

# Grapevine Computing

## Introduction to Microsoft Excel

**Duration:** One day

**Overview** - This course will introduce the user to creating, formatting and printing worksheets. From late morning onwards the delegate is introduced to simple functions and then to creating formulas to extract and use spreadsheets effectively.

**Who Should Attend** - This course is designed for either new users of Excel, those who have primarily been using the system to input data and print worksheets created by others or users wishing to understand and created formulas and functions. The prime aim of this course is to ensure users are equipped with the necessary skills to create a professional looking spreadsheet complete with basic formulas and functions.

## Content

### Getting Started

- ★ Create and save workbooks
- ★ Understand Excel screen elements
- ★ Select and edit cells
- ★ Shortcuts to input text
- ★ Using the help menu

### Building a worksheet

- ★ Enter text, numbers, dates,
- ★ Adjusting the sizes of columns and rows
- ★ Select ranges of data using both mouse and keyboard methods
- ★ Use copy and paste
- ★ Use drag and drop
- ★ Undo
- ★ Aligning cell content
- ★ Merging cells
- ★ Formatting text, numbers and dates
- ★ Using format painter
- ★ Adding shading
- ★ Adding borders
- ★ Amending font size and colour

### Working with Functions

- ★ Understand the principles behind creating functions
- ★ Using the Fill handle
- ★ Use AUTOSUM, AVERAGE
- ★ Use COUNT, COUNTIF, COUNTBLANK, COUNTA
- ★ Use MAX, MIN
- ★ Combining functions to produce calculations

### Printing worksheets

- ★ Print preview
- ★ Adding headers and footers
- ★ Changing orientation
- ★ Aligning worksheets

### Creating Formulas

- ★ Understand how and why to use brackets
- ★ Understand the rules to follow when creating formulas
- ★ Creating formulas
- ★ Hands on practice using formulas in spreadsheet examples

**Training available in Microsoft 2000, 2003 or 2007**

**Recommended follow-on courses:** Intermediate Microsoft Excel

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## Intermediate Microsoft Excel

**Duration:** One day

**Overview** - This course introduces features that enable data to be extracted from the spreadsheet and manipulated to improve data analysis. Please note that functions and formulas are introduced and explained in the Introductory course and are only used in this course where appropriate to complete other tasks.

**Who Should Attend** - Users should be familiar with the content of the Introductory course or comfortable creating a basic spreadsheet and simple formulas. The prime aim of this course is to introduce users to some of the many tools available within Excel that enable better analysis and manipulation of data.

### Content

#### General Techniques

- ★ Using paste special
- ★ Add comments to cells
- ★ Apply conditional formatting to text and numbers
- ★ Use absolute references to improve the efficiency of spreadsheets
- ★ Practise exercises to consolidate knowledge

#### Creating Charts

- ★ Use the Chart Wizard
- ★ Amend the chart type
- ★ Change the appearance of a chart
- ★ Change the axis parameters
- ★ Format the text on legends, headings and axis
- ★ Add pictures to pie charts
- ★ Create and manipulate 3D charts

#### Using the Database Feature in Excel

- ★ Use the form feature to quickly add, search and delete data
- ★ Use AutoFilter to search for data
- ★ Use the custom filter
- ★ Find the highest or lowest entries in the list
- ★ Sort data

#### Using the Subtotals and Outlining features

- ★ Add automatic subtotals to long lists of data
- ★ Remove subtotals
- ★ Add Outlining to quickly hide and show rows and columns

#### Working with Multiple/Large Worksheets

- ★ Move and copy worksheets
- ★ Use group mode to quickly apply changes
- ★ Link worksheets
- ★ Print large worksheets
- ★ Insert page breaks
- ★ Repeat column and row headings on multiple pages
- ★ Print row and column headings
- ★ Print gridlines

#### Customising Workbooks

- ★ Freeze workbooks
- ★ Split the screen
- ★ Hide columns and rows
- ★ Save customised screen layouts
- ★ Validate data entry to minimise input errors
- ★ Protect worksheets and workbooks

**Training available in Microsoft 2000, 2003 or 2007**

**Recommended follow-on courses:** Advanced Microsoft Excel Part 1

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## Advanced Microsoft Excel – Part 1

**Duration:** One day

**Overview** - Users should be competent and experienced in using basic functions within Microsoft Excel as this course builds upon the functions covered in the Introductory Course. More complex functions are introduced such as If, Sumif and Countif as well as then moving on to nested functions. PivotTables, scenarios and macros as well as other data analysis techniques are covered in this comprehensive and in-depth course.

**Who Should Attend** - Users should be competent and experienced in using basic functions in Microsoft Excel. The prime aim of this course is to introduce more complex functions and data analysis techniques.

### Content

#### Working with multiple workbooks

- ★ Linking workbooks
- ★ Using formulas between workbooks
- ★ Using the consolidation feature
- ★ Viewing multiple workbooks
- ★ Saving workspace

#### Using Advanced Database Features

- ★ Use DCount, DSum, DAverage, DMax, Dmin functions to extract information from a list of data.
- ★ Use advanced filter to produce complex searches
- ★ Use advanced filter to copy data to another location
- ★ Remove duplicates from a list.

#### Using Conditional Features

- ★ Understand the IF function
- ★ Use nested IF to overcome multiple options
- ★ Using Sumif and Countif to extract data from lists of information.

#### Working with Named Ranges

- ★ Creating named ranges
- ★ Using named ranges in formulas

#### Working with PivotTables

- ★ Creating and modifying a PivotTable
- ★ Formatting the data
- ★ Understanding the data within a PivotTable
- ★ Grouping dates
- ★ Sorting and filtering data
- ★ Creating PivotCharts

#### Scenario Manager

- ★ Creating different scenarios for quick comparison
- ★ Viewing scenarios
- ★ Use Goal Seek

#### Macros

- ★ Recording simple macros
- ★ Storing macros
- ★ Running macros
- ★ Assigning shortcuts to macros (2003)
- ★ Assigning macros to toolbars (2003)
- ★ Creating macro buttons (2003)

#### Customising Excel

- ★ Modifying toolbars (2003)
- ★ Creating toolbars (2003)
- ★ Using the Quick Access Toolbar (2007)
- ★ Creating custom list

**Training available in Microsoft 2000, 2003 or 2007**

**Recommended follow-on courses:** Advanced Microsoft Excel Part 2

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## Advanced Microsoft Excel – Part 2

**Duration:** One day

**Overview** – This course builds upon the functions introduced in Advanced Excel Part 1, taking some elements of the functions to a higher level and introducing many new functions. The If function is expanded to include AND and OR elements and Vlookup and error functions are introduced.

**Who Should Attend** – Any user who has a sound knowledge of Excel wanting to expand their knowledge of the functions available. The aim of this course is to give the user a good overview of the many different types of functions available and the way many of them work together to produce powerful manipulative spreadsheets.

### Content

#### Financial Functions

- ★ Use functions to calculate monthly payment, interest payments and future values of investments using functions such as PMT, CUMIPMT and FV

#### Text Functions

- ★ Extract data from text within your spreadsheets by using functions such as LEFT, RIGHT, MID, TRIM, UPPER, LOWER and REPLACE.

#### Using Logical Functions

- ★ Make the IF function more powerful by incorporating AND or OR to allow different scenarios
- ★ Using Sumif to group dates
- ★ Nesting functions to remove error codes
- ★ Using Vlookup and Hlookup

#### Data Analysis Tools

- ★ Use Solver

#### Working with Data Tables

- ★ Create multiple scenarios by creating data tables to extrapolate information

#### Conditional Formatting

- ★ Highlight alternate rows, or highlight cells with a value higher than the range average using advanced conditional formatting features

#### Other Functions

- ★ Learn functions such as ABS, ROUND, ROUNDUP, ROUNDDOWN, CEILING and FLOOR and also use them nested in other functions

#### Using Date and Time Functions

- ★ Use the various Date and Time functions to add versatility to your spreadsheet. WEEKDAY, DATE, NOW, TODAY and NETWORKWEEK.

**Training available in Microsoft 2000, 2003 or 2007**

**Recommended follow-on courses:** Automating Excel

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## Automating Excel

**Duration:** One day

**Overview-** This course will look at techniques to improve the efficiency of Excel users. The delegate will use both the macro recorder and the VBA screen to automate and speed up everyday tasks. The delegate will use spin boxes, drop down boxes and Vlookup to automatically update fields based on the input criteria entered in other fields and then use macros to automate processes such as copying data and printing invoices. The user will also look at the visual basic code behind the application to rearrange or amend data within spreadsheets. The delegate will also create custom functions and write simple VBA to manipulate data imported into Excel.

**Who Should Attend** – Users should be competent users of Excel

### Content

#### Using the Macro Recorder

- ★ Absolute and relative referencing
- ★ Recording macros
- ★ Running macros
- ★ Assigning shortcuts to macros
- ★ Assigning macros to toolbars
- ★ Creating macro buttons

#### VBE Window

- ★ Viewing VBA code
- ★ Editing VBA code
- ★ Using modules
- ★ Indenting code
- ★ Using comments
- ★ Calling macros

#### Customising Excel

- ★ Modifying toolbars
- ★ Creating toolbars

#### Working with VBA code

- ★ Moving around worksheets
- ★ Moving around workbooks
- ★ Cutting and pasting data
- ★ Deleting data
- ★ Editing cells
- ★ Manipulating data
- ★ Simple if else statements
- ★ Using formulas in VBA

#### Creating Custom Functions

- ★ Creating user defined functions
- ★ Storing user defined functions
- ★ Using user defined functions

**Training available in Microsoft 2000, 2003 or 2007**