



Upgrade to Excel Expert

Duration: 5 half-days (15 hours)

Objectives

You have used Microsoft® Office Excel® 2007 to perform tasks such as running calculations on data and sorting and filtering numeric data. In this course, you will extend your knowledge into some of the more specialized and advanced capabilities of Excel by automating some common tasks, applying advanced analysis techniques to more complex data sets, collaborating on worksheets with others, and sharing Excel data with other applications.

Target Audience

This course was designed for students desiring to gain the skills necessary to create macros, collaborate with others, audit and analyze worksheet data, incorporate multiple data sources, and import and export data.

Prerequisite

Some knowledge of basic spreadsheets; familiarity with the Microsoft Office work environment; an understanding of the Internet and web-page functionality.

Course Outline

Part 1: Advanced functions

- Logical functions
 - Using the IF function
 - Using OR and AND as nested functions
 - Using nested IF functions
- Math and statistical functions
 - Using SUMIF
 - Using COUNTIF
 - Using AVERAGEIF
 - Using ROUND



Learning

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- Financial functions
 - Using the PMT function
- Displaying and printing formulas
 - Showing, printing, and hiding formulas

Part 2: Lookups and data tables

- Using lookup functions
 - Using VLOOKUP to find an exact match
 - Using VLOOKUP to find an approximate match
- Using MATCH and INDEX
 - Using the MATCH function
 - Using the INDEX function
- Creating data tables
 - Creating a one-variable data table
 - Creating a two-variable data table

Part 3: Advanced list management

- Validating cell entries
 - Observing data validation
 - Setting up data validation
- Exploring database functions
 - Examining the structure of database functions
 - Using the DSUM function

Part 4: PivotTables and Pivot Charts

- Working with PivotTables
 - Creating a PivotTable
 - Adding fields to a PivotTable
- Rearranging PivotTables
 - Moving fields
 - Hiding and showing details
 - Refreshing the data in a PivotTable
- Formatting PivotTables
 - Formatting by using a Pivot style



- Changing field settings
- Pivot Charts
 - Creating a PivotChart

Part 5: Exporting and importing

- Exporting and importing text files
 - Exporting Excel data to a text file
 - Importing data from a text file into a workbook
- Exporting and importing XML data
 - Using the XML Source task pane
 - Importing XML data into a workbook
 - Exporting data from a workbook to an XML data file
 - Deleting an XML map
- Querying external databases
 - Using Microsoft Query to get data from an external database
 - Using a Web query to get data from the Web

Part 6: Analytical options

- Goal Seek and Solver
 - Using Goal Seek to solve for a single variable
 - Installing Solver and the Analysis ToolPak
 - Using Solver to solve for multiple variables
- The Analysis ToolPak
 - Using the Sampling analysis tool
- Scenarios
 - Creating scenarios
 - Switching among scenarios
 - Merging scenarios from another worksheet
- Views
 - Creating views
 - Switching among views

Part 7: Macros and custom functions

- Running and recording a macro



- Running a macro
- Recording a macro
- Assigning a macro to a button
- Working with VBA code
 - Observing a VBA code module
 - Editing VBA code

Part 8: Conditional formatting and SmartArt

- Conditional formatting with graphics
 - Creating data bars
 - Using color scales
 - Creating icon sets
- SmartArt graphics