

## INFORMATION TECHNOLOGY

# Microsoft Excel 2007 - Advanced

Gwyneth Grocott

---

### General Course Information

- General Description:** This course focuses on the more advanced features of Microsoft Excel, covering advanced analysis tools, pivot tables, Solver, outlining and summarizing and the key Automation features such as Macros.
- Learning Outcomes:** At the completion of this course participants will be able to:
- use a range of lookup and reference functions
  - modify Excel options
  - create and use labels and names in a workbook
  - protect data in worksheets and workbooks
  - summarise data using subtotals and relative range naming
  - use data linking to create more efficient workbooks
  - use the Data Consolidation feature to combine data from several workbooks into one
  - understand and create PivotTables
  - construct and operate PivotTables using some of the more advanced techniques
  - use goal seeking to determine the values required to reach a desired result
  - group cells and use outlines to manipulate the worksheet
  - use Solver to solve more complex and intricate problems
  - create recorded macros in Excel
  - use the macro recorder to create a variety of macros.
- Target Audience:** This course is designed for users who are already familiar with basic Excel features and operations and who are now ready to explore more of the advanced analysis and automation tools.
- Prerequisites:** The course assumes experience in the construction and modification of workbooks. The student should be able to copy within Excel, create charts and basic formulas. It would be beneficial to have a general understanding of personal computers and the Windows operating system.
- Methodology:** A hands-on approach is taken during this course. The exercises are designed to impart relevant skills and knowledge by having participants work through real-life examples and scenarios.
- Course Material & Lunch:** A comprehensive training manual and a light lunch is included. Please advise in advance any specific dietary requirements.

# Microsoft Excel 2007 - Advanced

---

## Table of Contents

### 1. SETTING EXCEL OPTIONS

Understanding Excel Options  
Personalising Excel  
Setting the Default Font  
Setting Formula Options  
Understanding Save Options  
Setting Save Options  
Setting the Default File Location  
Setting Advanced Options

### 2. LABELS AND NAMES

Understanding Labels and Names  
Creating Names Using Text Labels  
Using Names in New Formulas  
Applying Names to Existing Formulas  
Creating Names using the Names Box  
Using Names to Select Ranges  
Pasting Names into Formulas  
Creating Names for Constants  
Creating Names from a Selection  
Scoping Names to the Worksheet  
Using the Name Manager  
Documenting Range Names

### 3. LOOKUP FUNCTIONS

Understanding Data Lookup Functions  
Using CHOOSE  
Using VLOOKUP  
Using VLOOKUP for Exact Matches  
Using INDEX

### 4. PROTECTING DATA

Understanding Data Protection  
Providing Total Access to Cells  
Protecting a Worksheet  
Working With a Protected Worksheet  
Disabling Worksheet Protection  
Providing Restricted Access to Cells  
Password Protecting a Workbook  
Opening a Password Protected Workbook  
Removing a Password from a Workbook

### 5. SUMMARISING AND SUBTOTALLING

Creating Subtotals  
Using a Subtotalled Worksheet  
Creating Nested Subtotals  
Copying Subtotals  
Using Subtotals with AutoFilter  
Installing the Conditional Sum Wizard  
Using the Conditional Sum Wizard  
Creating Relative Names for Subtotals  
Using Relative Names for Subtotals

### 6. DATA LINKING

Understanding Data Linking  
Linking Between Worksheets  
Linking Between Workbooks  
Updating Links between Workbooks

### 7. DATA CONSOLIDATION

Understanding Data Consolidation  
Consolidating with Identical Layouts  
Creating an Outlined Consolidation  
Consolidating with Different Layouts

### 8. PIVOTTABLES

Understanding Pivot Tables  
Creating a PivotTable Shell  
Dropping Fields Into A PivotTable  
Filtering a PivotTable  
Clearing a Report Filter  
Switching PivotTable Labels  
Formatting a PivotTable

### 9. PIVOTTABLE TECHNIQUES

Using Compound Fields  
Counting in a PivotTable  
Formatting PivotTable Values  
Working with PivotTable Grand Totals  
Working with PivotTable SubTotals  
Finding the Percentage of Total  
Finding the Difference From  
Grouping in PivotTables  
Creating Running Totals  
Creating Calculated Fields

Providing Custom Names  
Creating Calculated Items  
PivotTable Options  
Sorting in a PivotTable

### 10. PIVOTCHARTS

Creating a Pivot Chart Shell  
Dragging Fields for the Pivot Chart  
Changing the Pivot Chart Type  
Using the Pivot Chart Filter Pane  
Moving Pivot Charts to Chart Sheets

### 11. GROUPING AND OUTLINING

Understanding Grouping and Outlining  
Creating an Automatic Outline  
Working with an Outline  
Creating a Manual Group  
Grouping by Columns

### 12. RECORDED MACROS

Understanding Excel Macros  
Setting Macro Security  
Saving a Document as Macro Enabled  
Recording a Simple Macro  
Running a Recorded Macro  
Relative Cell References  
Running a Macro with Relative References  
Viewing a Macro  
Editing a Macro  
Assigning a Macro to the Toolbar  
Running a Macro from the Toolbar  
Assigning a Keyboard Shortcut to a Macro  
Deleting a Macro  
Copying a Macro  
Tips for developing Macros

### 13. RECORDER WORKSHOP

Preparing Data for an Application  
Recording a Summation Macro  
Recording Consolidations  
Recording Divisional Macros  
Testing Macros  
Creating Objects to Run Macros  
Assigning a Macro to an Object

THE TRAINER: Gwyneth has worked for a number of years as a business administrator, with clients throughout the government, tertiary and private sector. This has included both individual and group training in IT from basic through to advanced levels.

COURSE LOCATION: The venue for this course can be found on your tax invoice/receipt under "Course Information". Please allow sufficient time to locate your course venue.

***Important:*** *Please be aware there is no free parking on the ANU campus during business hours Monday to Friday. A one-day parking permit may be purchased from the CCE Office (in Anutech Court) but can only be used in the PERMIT PARKING areas as indicated on your map. However, parking spots are often difficult to find and arrival prior to 9am on the day of your course is advisable if you require parking. We recommend North Oval as the most likely available parking area.*