

Excel 2019/365

Introductory Course Manual Outline

Objectives:

This course is an Introduction to Excel and to spreadsheets. It assumes that you have never used Excel and explains from the beginning what Spreadsheets are and how they work. It teaches you how to Create, Edit, Open and Save a Workbook as well as Basic Formatting and Printing of your Worksheet.

Content

Lesson 1: Getting Started with Excel

In this lesson you will develop an understanding of Excel terminology and the different components of the Excel workbook. By having a good understanding of the working environment, you can confidently and quickly work with Excel

Lesson 2: Workbooks and Worksheets

In this lesson you will learn to create workbooks, and the worksheets within them.

Lesson 3: File Operations

This lesson covers the file operations necessary for saving and accessing Excel files.

Lesson 4: Entering data into your Worksheet

In this lesson you will learn how to effectively enter data into a worksheet. You will develop an understanding the fundamentals of data entry and how to adjust your worksheet to accommodate data.

Lesson 5: Creating calculations

In this lesson, you will learn the fundamentals of creating calculations in Excel. Understanding how to write formulas and use the built-in Excel functions is an essential part of using Excel. This chapter is focused on the creation of formulas and introducing the most commonly used Excel functions.

Lesson 6: Editing

In this lesson we will learn how to modify data in the worksheet. We will learn how to move and copy data in a worksheet, between worksheets and workbooks. Finally we will learn how to use the built-in Spell checker

Lesson 7: Formatting Worksheets

In this lesson we learn how to format worksheet for effective presentation.

Lesson 8: Printing

In this lesson, we look at how to view a worksheet before printing to ensure the layout is correct, and how to print all or part of a workbook

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Intermediate Course Manual Outline

Objectives:

This course assumes you have a basic knowledge of Excel. It will teach you to some additional features such as working with Multiple Worksheets and Workbooks, Naming Ranges, Advanced Functions, working with Tables of Data, Data Validation and Worksheet and Workbook Protection.

Content

Lesson 1: Workbook Display

This lesson teaches you how to make more efficient use of the Excel screen and how to make working with data easier and more manageable on screen.

Lesson 2: Using Multiple Worksheets

This lesson will show you how to use multiple worksheets. Utilising multiple sheets assists with the organisation and consolidation of data. For example, multiple sheets can be used to store data for each month of the year. Using the Linking command, data from each of the months can be consolidated into a single worksheet to summarise the year.

Lesson 3: Naming Cells and Ranges

This lesson shows you how to name cells and cell ranges within Excel for simplifying some tasks and in the creation of user-friendly Workbooks.

Lesson 4: Advanced Functions

This lesson will teach you to use some of the more advanced built-in functions to enable you to do more complex calculations such as What-If analysis, using String functions and Nesting functions.

Lesson 5: Working with Tables of Data

This lesson focusses on the database features of Excel. These are powerful in their ability to enable the user to manipulate lists of data and keep track of information in an orderly fashion. Sorting information is useful when you are trying to organise data, while filtering data lists enables you to locate and report on a subset of the data

Lesson 6: Grouping and Outlining in Worksheets

This lesson introduces the Group and Outline and Subtotal commands. Group and Outline will assist you in grouping columns and rows in your worksheet so as to assist with summarising information. Subtotalling allows you to subtotal values in a list

Lesson 7: Collaborating with Other users

This lesson introduces the Protect command. It is often necessary to prevent other users from making changes to your work. The Protect command allows you to apply a protection setting to the data and objects in the worksheet, and the structure of the workbook itself. Adding Comments and Notes (Excel 365) to your worksheet is a useful way of communicating with others. Comments and Notes can be hidden so as not to interfere with the layout of the worksheet.

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Advanced Course Manual Outline

Objectives:

This course assumes a good basic understanding of Excel to an intermediate level. It includes Importing and Exporting of Data, Conditional Formatting, Auditing, What-If Analysis, working with Charts, Pivot tables and Pivot charts as well working with Graphics.

Content

Lesson 1: Importing and Exporting data

Often data is imported in a format that we then need to manipulate until it is usable in Excel. In this lesson you will learn how to quickly work with imported data and how to export data into different file format.

Lesson 2: Conditional and Custom Formatting

This lesson introduces advanced formatting techniques. Conditional formatting checks the value of a cell against a set condition. If the condition is met the format of the cell will change. You create the format of your choice when you create the condition. Learning how to customise number formats will allow you to enhance the default format settings in Excel.

Lesson 3: Auditing

This lesson introduces auditing. Often it is difficult to identify why formulas and functions are returning errors. The auditing tools assist with locating cells that provide data to a formula and cells that are dependent on data from other cells.

Lesson 4: What-If Analysis

This lesson shows you how to use the Scenario Manager, Data tables to construct sensitivity analysis, as well as Goal seek to obtain a desired result. The Scenario Manager allows you to store different values for a cell or cells in a worksheet, and to construct a report based on these different values. Data tables allow you to create a sensitivity analysis as the tables provide results from one or more formulas based on one or two ranges or values. Goal Seek is a means to solving a problem whereby you provide the answer that you require, and Excel then calculates backwards to give you the numbers you should have had in the first place to obtain the desired result.

Lesson 5: Using Charts

This lesson shows you how to use charts in Excel. Charting data immediately gives a visual interpretation, making it much easier for comparisons and trends to be seen. For example, where daily sales have been captured in a table, a chart can quickly display this information so that the most and least successful days are easily observed.

Lesson 6: Pivot Tables and Charts

A pivot table or chart allows you to summarise large amounts of data in an interactive manner. Once you have created a pivot table or chart, you can adjust the filtering and summarising features to enable you to view the data in numerous ways.

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VBA Course Manual Outline

Objectives:

This course is designed for existing advanced Excel users who want to learn Excel VBA programming

Content

Lesson 1: Understanding Templates

A template is useful if you are re-creating a workbook on a repetitive basis, where the content and formatting of the workbook may be similar to one that you have previously created. A template can reduce repetition by allowing you to create a new workbook based on an existing workbook model. Templates contain unvarying information – for example, a wage sheet where staff names, hourly rates, tax rates and the days of the week have already been entered

Lesson 2: Introduction to Macro Programming

Macros are an excellent tool in lessening repetition in Excel. If you find yourself repeating things over and over again, you can write a macro that will in effect, do the repetition for you, thus speeding up your productivity and shortening man-hours needed on a specific project

Lesson 3: Learning to write code

This chapter covers writing code in VBA. It explains the VBE screen and looks at how the macro recorder creates the VBA code. It shows how to insert modules, forms and procedures and how the VBE helps the user to write the code using the Auto complete function, how to indent and comment code and how to use the right-mouse button to help with writing code.

Lesson 4: Understanding Objects, Methods, Properties & Events

Understanding Object, Properties, Methods and Events are essential to understanding Visual Basic code. This chapter explains each of these aspects of VBA as well as using the Range and Selection objects in a variety of procedures.

Lesson 5: Designing Forms

Forms are a way of making your template interactive with the user. They enable the user to fill in text boxes and click command buttons which in turn run your VBA code that is contained inside your form. This chapter introduces form design and CBF (code behind forms)

Lesson 6: Using Variables and Constants

Variables are a way of saving temporary data while running your code. Understanding how variables and constants work in VBA enable the user to create powerful code in order to populate and format worksheets.

Lesson 7: Control Structures

If statements have always been useful in Excel. This chapter introduces the IF decision structure in VBA code, enabling the user to re-direct the code according to a choice made by

the person running the code. Looping structures are another way of making the user direct the flow of the macros.

Lesson 8: Debugging and Error Trapping

Debugging and Error Trapping are essential in writing good code. They ensure that your user is not pushed into the visual basic code should an error occur. Debugging techniques are a powerful way of ensuring that the code that is written is bug free and error friendly.

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