Uplatz

Microsoft Excel

Mircosoft Excel

Section 1: Foundation
Unit 1.1 – Excel Introduction
A description of the purpose and application of Excel – what it can do, why it's useful.
Unit 1.2 – The Excel Interface
Understanding and working with the Excel interface – getting to know your way around the application, how to access functionality and how to customize it. How to create, save and open Workbooks. Under Save As, a brief explanation of backwards compatibility and other formats (e.g. PDF) save options. Skydrive, alternative online storage, and 'local' saving. Basic printing.
Unit 1.3 – Basic Navigation & Editing
Selection and navigation. Moving around a spreadsheet efficiently. Entering information into cells, types of data (text, numbers, dates). Basic formatting. Working with multiple Worksheets.
Unit 1.4 – Getting going

Takes a quick look at a first 'real' spreadsheet, in order to introduce the concept of functions and formulas, and give a feel for how Excel can be useful.

Section 2: Orientation and efficiency
Unit 2.1 – Editing
Copying, pasting, inserting and deleting cells, ranges of cells, rows, columns and Worksheets. 'Special' pasting – for example to copy just formulas, or just values. Common problems with pasting. The differences between copying and 'cutting'. Excel aids to copying – Fill Handle and Flash Fill.
Unit 2.2 – Viewing
The various 'Views' or modes of spreadsheet display available in Excel, and how to choose the right View for the task in hand. Techniques for making working with a spreadsheet easier – Freezing Panes, splitting windows, and using multiple windows.
Unit 2.3 – Spreadsheet structure
Changing the structure of your spreadsheet to make it clearer. Grouping rows and columns; changing cells size and shape.
Unit 2.4 – Cell references
How (and why) to connect (or link) cells and ranges, and how connected cells behave. Fixed or absolute references (dollar signs) for cells; partially fixed references. The "F4" shortcut.
Unit 2.5 – Named Ranges
Making formulas clearer and more easily understood by replacing cell references with meaningful names.
Unit 2.6 – Basic Macros
Using Macros to automate repetitive tasks in Excel. (This Unit covers recorded Macros – the later unit 5.8 covers writing and editing Macros using VBA in detail.)
Unit 2.7 – Design
Why spreadsheet design important in increasing efficiency, reducing errors and aiding transparency. Principles of good spreadsheet design.

Section 3: Administration
Unit 3.1 – Customising Excel
Changing Excel settings to suit the way you use Excel. Includes: font face, number of worksheets, frequency of autorecovery, default view, Autocorrect and Ribbon alterations. Excel Add-Ins – Solver, Analysis TookPak. PowerPivot and Inquire.
Unit 3.2 – Housekeeping
Naming and storing Excel files. Version control. Making backups.
Unit 3.3 – Connecting Workbooks
- Setting up links between Workbooks. The dangers and pitfalls of doing so.
- Managing links between Workbooks and updating external references.
- Troubleshooting – finding 'missing links' and using auditing tools.
Unit 3.4 – Documentation
What to document, and how, in order to produce clear and robust spreadsheets.
Unit 3.5 – Protecting and Sharing
Protecting Workbooks and when it's useful or necessary locking cells, Worksheet protection, Workbook protections, allowing users to edit ranges.
Permissions and granting access to folders & files, how to work with others on the same files and different files (both in process terms and using Excel functionality; when not to use it, avoiding conflicts). Sharing via the Cloud.

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Unit 3.6 – Googledocs
What is Googledocs, and why use Google Spreadsheets for spreadsheeting?
Unit 3.7 – Excel troubleshooting
Common problems and how to avoid or overcome them. For example building in checks into spreadsheets, techniques for finding errors. Advanced techniques for diagnosing more complex problems.

Section 4: Data handling
Unit 4.1 – Sorting & Filtering
Techniques for sorting and filtering data, including controlling the order of precedence in a sort, advanced filters, and an introduction to PivotTables. Using sorting and filtering to check and 'clean' data.
Unit 4.2 – Controlling user input
Controlling the way users can enter data into a spreadsheet to reduce risk of error and increase efficiency. Covers Data Validation and using IS- functions to trap errors.
Unit 4.3 – Working with Dates and Times
Date and time formatting, performing basic maths with dates and times, and date and time functions.
Unit 4.4 – Working with Text
Entering and formatting text, extracting or combining parts of text. 'Cleaning' data for typos and bugs.
Unit 4.5 – Lookup & Reference
Looking up information in a basic table, and more flexibly. VLOOKUP() and the more flexible INDEX()/MATCH() combination. Advanced lookups.
Unit 4.6 – Logical Functions
Automatic decision making and error handling. Advanced logical tests. Matrix user of IF as an array function.

Section 5: Data analysis
Unit 5.1 – Working with Numbers
Maths: basic addition, subtraction, multiplication and division. How to use brackets to get the correct result. Powers. Rounding.
Unit 5.2 – Summarising data
Understanding a data set by summarizing it. Totals and counts – SUM(), COUNT() and COUNTA(). Other statistics. Conditional totals and counts. Advanced conditional sums, SUMPRODUCT and array formulas.
Unit 5.3 – PivotTables 1 – Simple Summaries
Uses of PivotTables. Summarising data (presenting database in terms of different subcategories). Understanding data (understanding categories, spotting typos, understanding range of values). Interpreting data (analysing to work out trends, areas of growth / profit / loss etc). Filtering. Sorting and grouping
Unit 5.4 – PivotTables 2 – Manipulating Data
Changing the layout and format of data in a PivotTable. Changing Value Field Settings to show counted rather than 'summed' data. Setting up references to a PivotTable.
Unit 5.5 – PivotTables 3 – Interpreting Data
Using PivotTables to understand and interpret data. Includes Slicers and Timelines, PivotCharts and Conditional Formatting of PivotTables.
Unit 5.6 – PowerPivot – Handling Big Data

Why PowerPivot is different to a normal PivotTable: size, data model (inclusion in 2013 standard Excel), DAX, KPIs. PowerPivot data tools. Connecting to data, managing multiple tables and connections, including data from within the Excel spreadsheet

Unit 5.7 – Formula Auditing
Understanding and debugging spreadsheets. Tracing calculations and monitoring the effect of changes. Formula evaluator, Watch window and the INQUIRE Add-In.

Unit 5.8 – Advanced Macros and VBA
Troubleshooting macros. Writing code directly. User defined functions. Program structures. Using Macros to interact with users.

Unit 5.9 – Modelling
Principles. What modelling is; modelling broken down into distinct stages; important principles - simplification, built-in checks; including a presentation-ready sheet
Techniques. Calculating growth with data points over several years; extrapolating that into the future; scenario modelling and optimisation; prioritisation (RANK); build process.

Section 6: Presentation

Unit 6.1 – Cell Formatting
Basic font formatting, alignment – Including horizontal and vertical alignment, wrapping, merging, orientation, Alt-Return; consistent, sensible row heights & column
Styles – to make spreadsheets more and consistent. Formatting tools

Unit 6.2 – Number Formatting
Types of number (E.g., currency, %, decimal, negative numbers) – and Excel formats best employed. Custom number formats and how to maximise impact and clarity.

Unit 6.3 – Conditional Formatting
Changing the format of cells depending on their value. Graphical conditional formats. Writing conditional format formulas.

Unit 6.4 – Graphs and Charts
Creating simple charts and editing them to control and improve formatting. Choosing the right chart
Principles and guidelines for communicating well with charts. Sparklines and Maps (when and how to use).

Unit 6.5 – Page & Print Setup
Displaying spreadsheets as pages. Page layout view, page breaks, print area,. Printing from multiple Worksheets (and that default will be to print only from active Worksheet). Headers and footers. Adjusting page setup. Printing very large sheets of data