

Intermediate Excel 2007

What?

This course is a second level, intermediate, Excel 2007 course aimed at the general user who wants to move up from the basic level. The course is hands on and highly practical with examples being used that cover a wide variety of business and commercial settings.

Whilst the course will begin with a review of some functions and utilities from earlier versions of Excel, the majority of this course will relate to Excel 2007.

- **What you will be able to do**
- In summary, delegates will come to enhance their general spreadsheeting knowledge and skills and all within this five day programme. The objectives of the course include enabling delegates to be able to:
 - Investigate the functions new in Excel 2007
 - Use the critical financial, mathematical, statistical and logical functions built into a spreadsheet to increase reporting productivity and design
 - Create efficient formulae for a wide variety of uses
 - Create stunning visual reports by using conditional formatting
 - Explore the benefits of hidden yet exceptionally powerful formatting
 - Enhance your dashboards with a variety of advanced charts
 - Analyse data using both the Analysis ToolPak and Excel 2007 in built functions
 - Use goal seek and SOLVER features to maximise your financial models
 - Use array formulas
 - Use pivot tables to enhance the reporting functionality of your spreadsheet model
 - Learn and use a range of shortcuts and tips for spreadsheet users
- **How we will do it**
- Delegates must bring their own personal laptop computers to the course with a full installation of Excel 2007® **including** the complete ToolPak and SOLVER Add Ins (call or email us for help here if necessary). The training comprises sessions in which the trainer will work through a live demonstration of a topic: delegates will work through the demonstration in real time too. A follow up exercise will normally then follow. Delegates will be provided with templates as appropriate throughout the course.
- Some demonstrations will be video based and the delegates will be given free copies of all such videos for their further training back at their place of work and at home.

Why?

The use of Excel 2007® as a tool to assist in resolving issues will greatly enhance delegates' skills in using this powerful software package. Basic modelling techniques will be explored to enable participants to return to the work place and build models appropriate to their company and industry.

Each person on the course will develop an improved understanding of Excel 2007®. Moreover, the power of this major software package from Microsoft will become more and more available to delegates as they work through each element of the course.

Key reasons why you should attend this course:

- The presenter is an accounting practitioner as well as a spreadsheet practitioner and trainer so his knowledge and expertise covers both areas to a high level

- All materials and examples are up to date and comprehensive and many have been specifically devised for this course
- The materials and examples are often based on real life situations encountered by the presenter as well as high quality situations taken from other case studies
- Delegates will receive copies of all materials: hard copies and soft copies of all files, examples and cases used throughout the course

Who Should Attend?

- Spreadsheet users who are seeking to take their knowledge and skills to a higher level and who wish to enhance their understanding of the practicalities of spreadsheet modelling and reporting.
- Financial and Non Financial employees whose work may require them to compile and/or respond to financial and/or quantitative reports
- Any Staff seeking to enhance their spreadsheet and database knowledge and skills
- **Prerequisite:** Participants should already have at least a basic understanding of Excel 2007 and must bring their own laptop computer with a full installation of Excel 2007®, **including** the complete ToolPak and SOLVER Add Ins.

How?

How are we going to achieve the objectives we have set for this course?

Throughout this course we will be using the *Best Practice Spreadsheet Modelling Standards* version 6.0 as published by Spreadsheet Standards Review Board.

Functions new to Excel 2007

- IFERROR
- SUMIFS
- AVERAGEIFS
- COUNTIFS

We will also review a wide variety of inbuilt functions under the following headings:

- **Financial Functions** FV, RATE, NPER, PV, IPMT, PMT, PPMT, IRR, MIRR
- **Mathematical** ABS, INT, POWER, PRODUCT, ROUND ... DOWN ... UP, SUMIF, SUMPRODUCT
- **Statistical** AVERAGE, AVERAGEA, CORREL, COUNT, COUNTA ... BLANK, FREQUENCY, MEDIAN,
- MODE, STDEV
- **Logic** AND, IF, NOT, OR
- **Text** CHAR, CONCATENATE, FIND, LEFT, MID, REPT, RIGHT, SEARCH, TEXT

Conditional Formatting

- Basic formatting examples: format all cells based on their values
- Format only cells that contain
- Format only top or bottom ranked values
- Format only values that are above or below average
- Format only unique or duplicated values
- Use a formula to determine which cells to format

Custom Formatting

- formatting cells according to a wide variety of criteria
 - text
 - values
 - how to combine text and values
 - using such operators as ?, 0 and many more: doing away with the need for complex IF(...) statements

Charts

- Selecting data
- Formatting your chart
- Quick ways to create charts

Advanced charts

We will deal with as many of the following as time allows:

- Combination charts
- Picture charts
- Custom chart types
- Regression and trendlines
- Creating chart templates
- Category Axis Contains Labels from Three Columns
- Conditional Colours
- Waterfall Chart
 - Create a Stacked Column Chart
 - Finished Waterfall Chart
 - Alternatives
 - Percentage Waterfall Chart
- Radar Chart
- Self Expanding Chart
- Selecting Data from a Combo Box
- Table and Chart Selection Including a Combobox
- Charts with Scroll Bars
- Basic Chart and Rates of Change Chart

Excel Tables

New to Excel 2007: we will explore the simple but very versatile world of the Excel 2007 table. These tables are ideal in the situation where new data will be added: both rows and/or columns. Excel 2007 tables can also be used in advanced charting scenarios ... learn how!

Data Analysis

Using the statistical analysis tools that are built into Excel 2007

- Descriptive statistics
- Correlation
- Histograms
- Regression

What if? and other types of Analysis

In this section we will use three very useful techniques that are also built into Excel 2007:

- Scenarios
- Goal Seek
- SOLVER

Having used these techniques you will be able to construct budgets, models, forecasts. Start with a basic budget or model or forecast and then change a variable ... what happens now?

Collaborating with Others

When we want to share files with colleagues and others, there are things that we need to think about: in this section we will consider how to protect, track and manage the various aspects of collaborating with others.

- Protect Files
- Share a Workbook
- Set Revision Tracking
- Review Tracked Revisions
- Merge Workbooks
- Administer Digital Signatures
- Restrict Document Access

Auditing Worksheets

Even if we are perfect(!), there are times when things just don't work. We need a strategy for dealing with these situations and in this section we will develop and work on that strategy.

- Trace Cells
- Troubleshoot Errors in Formulas
- Troubleshoot Invalid Data and Formulas
- Watch and Evaluate Formulas
- Create a Data List Outline

Array Formulas

Experience shows that the majority of basic users of Excel spreadsheets have neither heard of nor use array formulas. By the end of this section you will come to see why you NEED to appreciate and use array formulas.

- Single cell array formulas
- More complex array formulas for a variety of situations

LOOKUP Functions

- HLOOKUP, VLOOKUP, LOOKUP
- Using MATCH to find values
- Combining MATCH and INDEX
- Using OFFSET
- The INDIRECT function

Pivot Tables

- Creating pivot tables
- Swapping rows, columns and pages
- Grouping fields
- Drill down
- Calculated Fields ... and their limitations
- Calculated items
- Analysing one set of data in many ways: sum, average, count ...
- Pivot charts