

## Administrative Excel

**Course Description:** This course will demonstrate to the power user how to edit spreadsheets for both individual and group use. Featured topics included validating data, applying various levels of protection, sharing workbooks for collaboration, and working with formula links. The user will also be exposed to various auditing and analysis tools including features such as Goal Seek, Solver, creating Scenarios, and using the FORECAST function.

**Objective:** Upon completion of this course the Excel power user will be able to modify worksheet files so that multiple users can both enter and access data without disrupting delicate workbook structure. Additionally, they will be exposed worksheet auditing and use various analysis tools.

- 1) Data Validation
- 2) Protection
  - A) File Access
  - B) Write Reservation
  - C) Sheet Protection
  - D) Cell-level Protection
  - E) Workbook Protection
- 3) Sharing Workbooks
- 4) Linking
  - A) Internal worksheet links
  - B) External workbook links
- 5) Consolidating data
- 6) Formula Auditing
- 7) Data Scenarios and Forecasting
  - A) Using Goal Seek
  - B) Using Solver
  - C) The FORECAST Function

## Basic Formulas

**Course Description:** The *Basic Formulas* class will acquaint the user with an overview of Excel formulas where cell addresses are featured for effective formula copying. Relative vs. absolute referencing is discussed and demonstrated as well as exposure to general formula functions such as SUM, AVERAGE, MAX, MIN, and COUNT. The user will also be shown various Date functions such as TODAY, NOW, MONTH, YEAR, and DAY.

**Objective:** Upon completion of this course the novice Excel user will be able to complete spreadsheets by using a variety of formulas featuring basic computation along with using built-in Excel Functions.

- 1) Copying formulas using the Fill Handle
- 2) Relative vs. Absolute References
- 3) Using AUTOSUM
- 4) Basic Functions
  - A) AVERAGE
  - B) MAX
  - C) MIN
  - D) COUNT
  - E) Date Functions
    - a) TODAY & NOW
    - b) MONTH, YEAR, and DAY
    - c) The DATE Function
- 5) Conditional Formatting

## Charts

Course Description: This course will demonstrate to the Excel user how to create effective charts off of spreadsheet data. A discussion of chart basics will be featured along with the creation of column charts, pie charts, three-dimensional charts, and a variety of chart formatting techniques. The user will also be exposed to more advanced charting such as secondary axis charts, combination charts, the Pie of Pie chart, and adding a trendline.

Objective: Upon completion of this course the user will be able to use charts and charting techniques to visually display their data graphically.

- 1) Chart basics
  - A) Common do's and don'ts
  - B) Exploring the data source
  - C) Switching row and column data
- 2) Column charts
  - A) Two-dimensional charts
  - B) Three-dimensional charts
- 3) Chart Formatting
  - A) Color fills and lines
  - B) Axis editing
  - C) Data points and labeling
- 4) Pie charts
  - A) Adding data labels
  - B) Rotating 3D charts
  - C) Exploding slices
- 5) Advanced Charts
  - A) Secondary Axis
  - B) Combination charts
  - C) Pie of Pie charts
- 6) Adding a Trendline

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- 6) Copying formulas using the Fill Handle
  - 7) Relative vs. Absolute References
  - 8) Using AUTOSUM
  - 9) Basic Functions
    - A) AVERAGE
    - B) MAX
    - C) MIN
    - D) COUNT
    - E) Date Functions
      - a) TODAY & NOW
      - b) MONTH, YEAR, and DAY
      - c) The DATE Function
  - 10) Conditional Formatting
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### Advanced Formulas: Lookup Functions

**Course Description:** This more advanced Excel course will demonstrate to the user how to use formulas that extend across multiple worksheets as well as exploring the deeper function category Lookup and Reference. These will include such lookup functions as HLOOKUP and VLOOKUP, where mixed-cell referencing is featured in formulas as well as using named ranges. This course will also delve into data mining using the INDEX and MATCH functions in conjunction with each other.

**Objective:** Upon completion of this course the Excel user will be able to work with lookup functions along with mixed-cell referencing and named ranges. Featured functions include HLOOKUP and VLOOKUP, the LOOKUP function, as well as INDEX and MATCH.

- 1) Multi-sheet Formulas
  - A) Grouping worksheets
- 2) Lookup Functions
  - A) HLOOKUP
    - a) Formulas with Mixed Cell Referencing
  - B) VLOOKUP
    - a) Using Named Ranges in formulas
  - C) The LOOKUP Function
    - a) Using Table Fields in formulas
  - D) INDEX and MATCH

### Advanced Formulas: Logical Functions

**Course Description:** This more advanced Excel course will demonstrate how to use conditional formulas namely in the Logical category. In addition, aggregate functions with testing conditions will be featured. This course will also expose the user to mixed-cell referencing as well as how to create array formulas.

**Objective:** Upon completion of this course the Excel user will be able to work with logical functions, mixed-cell referencing, and arrays. Featured functions include IF, OR, AND, as well as Nested IF and the SUMIF and SUMIFS functions.

- 3) Logical Functions
  - A) IF function
    - a) AND & OR
    - b) Nested IF statement
- 4) Conditional Aggregate Functions
  - A) SUMIF and SUMIFS
    - a) Mixed-cell references
- 5) Array Formulas
  - A) The SUMPRODUCT Function
  - B) Creating IF Array formulas

### Data Lists and Tables

**Course Description:** This course will expose the user to the use of data lists and tables where both simple and complex sorting is involved. They will also work with a variety of filters and learn how to create subtotals on their data. In addition, the user will create table field formulas and use spreadsheet formulas that feature table fields. There will also be an exploration of the Database Function category where criteria can be used to create aggregate functions on list and table data.

**Objective:** Upon completion of this course the Excel user will be able to effectively sort and filter list and table data, use DFunctions, and create subtotals on data lists.

- 1) Observing a Data List
  - A) Sorting data
    - a) Simple sorting
    - b) Complex sorting
      - (i) Specified custom sorting
  - B) Filtering data
    - a) Using AutoFilter
    - b) Multi-field filters
      - (i) The Advanced Filter
- 2) Creating Subtotals
  - A) Grouping data by sorting
  - B) Single and multi-level subtotals
- 3) Using Tables
  - A) Table options
  - B) Formula Fields
  - C) Using Table Fields in formulas
- 4) Using Database Functions
  - A) DSUM
  - B) DAVERAGE
  - C) DMAX
  - D) DMIN
  - E) DCOUNT

### PivotTables

Course Description: This course will demonstrate to the Excel user how to create and use list and table data to create analytical Pivot Tables. This will include an exploration of both one and two-dimensional Pivot Tables, feature data filtering and slicers, as well as creating Pivot Charts. The user will also be exposed to using external data for Pivot analysis.

Objective: Upon completion of this course the advanced Excel user will be able to create and modify Pivot Tables and Charts where advanced filtering techniques are featured.

- 1) Creating Pivot Tables
  - A) One-dimensional
  - B) Two-dimensional
  - C) Refreshing data
- 2) Filtering Pivot Table data
  - A) Filtering Pivot data fields
  - B) The Filter Section
  - C) Using Slicers
- 3) Grouping Data Fields
  - A) Creating date ranges
  - B) Creating numeric pocket ranges
- 4) Pivot Charts
  - A) Stacked Column Charts
  - B) Pie Charts
  - C) Data filtration
- 5) Using External Data
  - A) Importing data from a database file
  - B) Creating a Pivot Table from an external source

**Excel Tips & Tricks**

Course Description: This course will demonstrate to the user how to use effective techniques for viewing large worksheet data, hiding data, using paste special and Go To, and using a variety of fills. This will also include how to effectively navigate through a spreadsheet using named ranges and hyperlinks, using styles, along with a deep exploration of conditional formatting.

Objective: Upon completion of this course the Excel user will be able to effectively maximize their productivity by creating spreadsheets that utilize a variety of special features focused on various time-saving techniques.

- 8) Working with Splits
  - A) Splitting large spreadsheet data
  - B) Creating multiple windows
    - a) Viewing multiple worksheets simultaneously
    - b) Synchronous scrolling
- 9) Hiding worksheet column data
  - A) Hide and unhide columns
  - B) Using group outlining
- 10) Using the Paste Special command
  - A) Pasting values
    - a) Using mathematical operations
  - B) Pasting formulas and links
  - C) Column widths
  - D) Transposing data
- 11) Using Go To and Go To Special
  - A) Spreadsheet navigation
  - B) Making specified range selections
- 12) Creating a Worksheet using Fills
  - A) The Fill Series feature
  - B) Auto-filling months and weekdays
  - C) Copying formulas without disrupting preset formatting
  - D) Creating Custom Lists
- 13) Reusing Formatting
  - A) Using the Format Painter
  - B) Creating Styles
- 14) Effective Worksheet Navigation Techniques
  - A) Using Named Ranges
  - B) Creating Hyperlinks
  - C) Creating a Navigation Home Page
- 15) Conditional Formatting
  - A) Using Excel presets
    - a) Modifying presets
  - B) Creating data range formatting
  - C) Using conditional formulas to format data
  - D) Sorting data using conditional formatting

**VBA-1: Macros**

Course Description: This course will demonstrate to the user how to effectively coordinate macros along with exposing them to the basic foundations of Visual Basic programming. The macro recorder will be used to create the base code that will be edited using coherent VB fundamentals.

Objective: Upon completion of this course the user will be able to create a blueprint for developing a macro project by applying the principles outlined. They will also discover various ways to execute macro programs such as using keystrokes and toolbar icons.

- 16) Exploring Macros
  - A) Macro security
  - B) Construction
  - C) Naming
- 17) Using the Macro Recorder
- 18) Exploring Visual Basic code
  - A) The VB Editor
  - B) Editor options
  - C) Modularized programming
- 19) Nesting procedure code
- 20) Macro execution
  - A) Keyboard shortcuts
  - B) Quick Access Toolbar button
  - C) Auto\_Open and Auto\_Close
- 21) Macro distribution
  - A) Saving as a .bas file
  - Exporting and importing

**VBA-2: Variables and Constants**

Course Description: This course will delve deeper into the core components of the Visual Basic language. The internal framework of code structure will be discussed, including objects, properties, and methods. The user will also be exposed to variable and constant declaration as well as the scope and lifetime of those variables. This course will also cover blanket methods for trapping program errors.

Objective: Upon completion of this course the user will effectively construct code blocks where explicit variables will be used to control user input values as well as define and use constant values in VBA procedures. Basic error-trapping techniques will also be explored.

- 22) Structuring VBA code
  - A) Objects, Properties, and Methods
    - a) The Offset Property
    - b) Using Command buttons
- 23) Declaring Variables
  - A) Data Types
  - B) The DIM statement
  - C) Scope and Lifetime
  - D) Public and Private Modules
- 24) Declaring Constants
- 25) The InputBox function
  - A) Returning variable values to a spreadsheet
- 26) Error Trapping
  - A) The *On Error* statement
  - B) Creating an error subroutine

### VBA-3: Branching and Looping

Course Description: This course will explore the programming capabilities of conditional branch constructs as well as repetitive looping structures. The builds will be cumulative, beginning with the core basics and expanding to include interactive message boxes to control program flow. In addition, basic error-trapping techniques will be featured.

Objective: Upon completion of this course the user will coordinate constructive code blocks that will run coherent loops controlled by conditional statements. They will also use the *IF...Then...Else* construct to control flow processes featuring conditional branches. Additionally, global methods for trapping program errors will be used.

- 27) Program Looping
  - A) Creating an exit condition
  - B) Using the *Do Until...Loop* construct
  - C) Quitting a faulty loop
- 28) Controlling Program Flow
  - A) Writing an *IF...Then...Else* statement
  - B) Adding additional conditional branches
    - a) The *Elseif* statement
  - C) Using interactive message boxes
- 29) Error Trapping
  - A) The *On Error* statement
  - B) Creating an error subroutine

### VBA-4: Custom Functions and Forms

Course Description: This course will expose the user with the construction of custom Visual Basic functions which can be used either in programming code or spreadsheet formulas. This course will also demonstrate how to create custom dialog forms for gathering data input and returning values into the spreadsheet.

Objective: Upon completion of this course the user will be able to create functions for computing values that can be used in programming procedures or in spreadsheet operations. In addition, the user will create custom forms featuring a variety of ActiveX controls designed to return input values into spreadsheet cells.

- 30) Creating Custom Functions
  - A) Function procedures
    - a) Function arguments
    - b) Using the Immediate Window for testing
    - c) Working with Array Variables
    - d) Writing a *Select Case* statement
  - B) Using functions in code structures
  - C) Using functions in spreadsheet formulas
- 31) Creating Custom Dialog Forms
  - A) Exploring ActiveX controls
    - a) Text boxes
    - b) Combo boxes
    - c) Option groups
    - d) Spin buttons
    - e) Command buttons

### Word: Tables and Document Sections

Course Description: This course will discuss the creation of tables in a Word document, modifying and formatting, nesting tables, sorting data tables, and creating formulas in tables. This course will also delve deeply into creating document sections, continuous and next page section breaks, and modifying multiple headers and footers.

Objective: Upon completion of this course the user will be able to use tables to house both text and graphic data plus create multiple sections within a document for effective chaptering as well as identifying and modifying multiple headers and footers.

- 1) Creating Tables
  - A) Inserting columns and rows
  - B) Sizing and formatting tables
  - C) Merging and splitting cells
  - D) Nesting tables within tables
  - E) Sorting data
  - F) Creating table formulas
- 2) Creating Document Sections
  - A) Continuous section breaks
  - B) Next Page section breaks
  - C) Changing page layout options
- 3) Using Multiple Headers and Footers
  - A) Discontinuing "Same as Previous"
  - B) Using Quick Parts
    - a) Inserting Fields
  - C) Using Top/Bottom borders

### Word: Using Reference Tools

Course Description: This course will display for the user how to organize long documents by using various document reference tools. Included in the topics will be how to use built-in styles along with creating custom styles, setting up outline levels, using styles to build a table of contents, marking index entries, and creating bookmarks and cross-references. This course will also demonstrate for the users how to make both endnotes and footnotes.

Objective: Upon completion of this course the user will be able to effectively organize a long document through the use of desktop publishing tools. Using styles for table of contents creation will be demonstrated as well as other features including bookmarking entries for making cross-references, creating an index, and making footnotes or endnotes.

- 4) Using Styles
    - A) Built-in Headings
    - B) Custom styles
    - C) Outlining a document
  - 5) Creating a Table of Contents
    - A) Using styles
    - B) Multiple outline levels
    - C) Regenerating a TOC with new entries
  - 6) Creating Cross-References
    - A) Bookmarking entries
    - B) Inserting a cross-reference
    - C) Hyperlinking page numbers
  - 7) Creating an Index
    - A) Marking index entries
    - B) Main and sub entries
    - C) Adding new entries
  - 8) Footnotes and Endnotes
    - A) Making footnotes
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- B) Exploring options
- C) Swapping footnotes with endnotes

#### Word: Mail Merging

Course Description: This course will expose the user to the creation of a form file to be merged with a data source for creating a mailing output; either to a document, printer, labels, envelopes, or email. The data source will vary from a Word table document, Excel data list or table, or a database file. The user will also create selective record outputs through the use of applying data filters.

Objective: Upon completion of this course the user will be able to create a form file document and connect it to a valid data source for the purpose of performing a mass mailing. The output file can either be a stored document, mailing labels, mailing envelopes, letters, or directly to a printer or through email.

- 1) Creating a Form File
  - A) Form letters
- 2) Connecting to a Data Source
  - A) Word table document
  - B) Excel datasheet
  - C) Database file
- 3) Inserting Data Fields
  - A) Direct input
  - B) Using an Address Block
  - C) Using a Greeting Line
- 4) Performing a Merge
  - A) Mailing letters
  - B) Mailing labels
  - C) Envelopes
  - D) Merging through email
    - a) Verifying an email field
    - b) Entering the subject line
    - c) Merging a document attachment
    - d) Direct email body merging

#### PowerPoint Tips & Tricks: Designing a Presentation

Course Description: This course will demonstrate to the user how to create a presentation file by importing an outline from Word and customizing design content in the Master Slide view. This will involve using graphics as logos and watermarks while customizing bullets, fonts, and other design features.

Objective: Upon completion of this course the user will be able to create customized design content for use in a presentation file as well as reusing a design template for future files.

- 5) Importing a Word Outline
  - A) Using Word to create an outline
  - B) Defining outline levels for slides
  - C) Saving an outline in Rich Text Format
- 6) Working in the Master Slide View
  - A) Defining layout styles
  - B) Adding picture files
    - a) Creating a logo
    - b) Creating a watermark
  - C) Customizing bullet styles

- D) Working with fonts
  - a) Slide titles
  - b) Slide text styles
- E) Creating background color schemes
- F) Saving the design as a template
- 7) Working with Animations
  - A) Text animation
    - a) 'Fly-in' settings
    - b) Timings and speeds
  - B) Graphic animation

#### Outlook: Advanced Features (T/P)=Time Permitting

Course Description: This course will explore the deeper components of using Outlook email for better communication and storage of Outlook items. Topics discussed will include advanced searching techniques, creating email rules, organizing messages by the use of categories, Quick Steps, and flagging. It will further explore how email can be maintained within their data size limits by using archives. This will apply to all Outlook items in addition to email, such as calendar entries, contacts, and tasks.

Objective: Upon completion of this course the user will be able to effectively maintain their Outlook inbox and other item folders via creating multiple archives plus organize their work using categories and applying advanced searching techniques.

- 8) Organizing Email
  - A) Using Categories
  - B) Flagging messages
  - C) Using Quick Steps
- 9) Searching for messages
  - A) Using the Search Ribbon
  - B) The Advanced Search Window
  - C) Creating Search Folders
- 10) Creating Rules
  - A) Auto-delivery rules
  - B) The Run Rules Now option
  - C) Exporting rules
  - D) Out-of-Office rules
- 11) Archiving Email
  - A) Auto-Archive settings
  - B) Creating Outlook Data Files
  - C) Opening/Closing archives
  - D) Searching archives
  - E) Using rules for archives
- 12) Advanced Calendar Options (T/P)
  - A) Sharing calendar
    - a) Setting permissions
    - b) Opening shared calendars
    - c) Viewing multiple calendars
- 13) Working with Contacts (T/P)
  - A) Exporting a contact list
  - B) Sending a contact via email
  - C) Creating a mail merge
- 14) Working with Tasks (T/P)
  - A) Personal tasks
  - B) Task requests

1:

- a) Maintaining task requests
- b) Sending a Status Report

