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# Excel – Advanced

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**Day 1 of this course is Day 2 of our Excel – Intermediate course.**

National Competency Standards (BSB07)

BSBITU402A – Develop and use complex spreadsheets



## Objectives

Upon completion of this course, attendees will have the knowledge and skills to design effective spreadsheets and work with financial or other business applications in an efficient manner. Attendees will have the skills to design and create larger and more complex spreadsheets incorporating protection, automation with macros, and importing /exporting data to and from other applications. They will be able to use advanced techniques to analyse historical data and compare future scenarios.

## Pre-Requisites

Skills equivalent to the NDA Computing Excel Introductory course.

## Duration

2 Days

## Course Outcomes

1. Design larger and more complex spreadsheet solutions.
2. Design spreadsheet solutions that require linked workbooks and linked applications.
3. Complete everyday tasks faster and more effectively.
4. Construct and enter formulae and functions relevant to a business environment.
5. Use a wide range of statistical, text, logical and lookup functions.
6. Use advanced techniques to analyse historical data.
7. Use advanced charting techniques to analyse graphical data.
8. Use advanced techniques to project current data and analyse future scenarios.

## Optional Assessment

**This is a nationally recognised training program.** Participants who successfully complete the optional assessment component of this course will receive a Statement of Attainment for the unit of competency outlined above (additional fee applies). Participants who choose not to be assessed will receive a Certificate of Attendance. The case study assignment is completed in the participant's own time.

## Course Content

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### DAY 1

#### Worksheet Design

- Formula Auditing  
The Formula Auditing toolbar or button Group  
Tracing Precedents  
Removing Precedent Arrows  
Tracing Dependants  
Removing Dependant Arrows
- Formula Evaluation
- Validation  
Validation Criteria  
Input Message  
Error Alert

- Named Cells  
Naming a Cell or Cell Range  
Assigning a Name to a Constant  
Converting Existing Labels to Names  
Applying Names to Formulas  
Creating a List of Names

#### Outlining

- Outlining Concepts
- Creating an Automatic Outline
- Creating a Manual Outline
- Copying from an Outline

- Removing an Outline

#### Linking Workbooks

- Referencing an External File
- Paste Link
- Data Consolidate
- Hyperlinks

#### Custom Formatting

- Creating a Custom Format
- Format Sections for Numbers
- Format Codes for Numbers
- Format Codes for Dates and Times  
Days Months and Years

Hours, Minutes and Seconds

Other Codes

- Conditional Formatting

### Useful Functions

- Numeric and Time Functions  
ROUND  
COUNTA  
COUNTIF  
SUMIF  
PMT  
NOW
- Text Functions  
LEFT  
RIGHT  
MID  
LEN  
CONCATENATE  
TRIM  
UPPER  
LOWER  
PROPER
- Logical and Lookup Functions  
IF  
AND  
OR  
VLOOKUP

## DAY 2

### Importing Data

- Opening Other File Formats
- Text Files
- Access Databases
- Microsoft Query Access Database
- Using an ODBC Connection

### Analysing Data

- Advanced Filter  
Standard Criteria  
Finding Unique Records
- Subtotals
- Pivot Tables
- Creating a Pivot Table
- Changing the Data Area Function
- Rearranging a Pivot Table
- The Page Area
- Grouping
- Expanding Items
- Creating a Sub Table

- Changing Data Area Totals
- Changing Source Data
- Refreshing Data
- Creating a Chart

### Advanced Charting

- Combination Charts
- Secondary Axes
- Chart Templates
- Trendlines  
Types of Trendline  
Adding a trendline  
Changing trendline settings  
Displaying the R-squared value for a trendline  
Removing a trendline  
Extending the Line

- Graphics

### Forecasting Future Performance

- Goal Seek
- Solver
- Scenario Manager  
Adding a Scenario  
Viewing Scenarios  
Deleting a Scenario  
Editing a Scenario  
Scenario Summary  
Scenario PivotTable Report
- What If Tables  
Single Input  
Two Input Tables
- Custom Views  
Adding a Custom View  
Showing a Custom View  
Deleting a Custom View

### Macros

- The Developer Tab
- Macro Security
- Recording a Macro
- Playing a Macro
- Creating a Macro in the VB Editor
- Editing a Macro
- Assigning Macros to Toolbars and Keyboard Shortcuts
- Assigning Macros to Objects

### Customising

- Arranging Commands on the Toolbar

- Adding and Customising a Macro Button
- Customising Button Icons
- Keyboard Shortcuts