

## ME-EXL365L3: MICROSOFT® EXCEL 365 LEVEL 3



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
1 Day	Advanced	Office 365	Instructor Led	NA

### INTRODUCTION

Welcome to the third part of our Microsoft 365 Excel courseware. Excel is Microsoft's powerful and easy-to-use spreadsheet program. This new version of Excel incorporates some new features and connectivity to make collaboration and production as easy as possible.

The training delivery is based on the desktop application and not on the online/browser version of the application.

### AUDIENCE PROFILE

This course is intended to help all users get up to speed on the different features of Excel and to become familiar with its more advanced selection of features. This manual assumes the user has completed or understands the materials covered in the first part of the Microsoft Office Excel 365: Part 2 courseware.

### PREREQUISITES

This manual assumes the user has completed, or has an understanding of the materials covered, in the first and second parts of the Microsoft Office Excel 365 courseware, including:

- Excel basics
- Working with data
- Modifying worksheets
- Printing workbook contents
- Managing large workbooks
- Customizing the Excel environment
- Creating advanced formulas
- Analyzing data with logical and lookup functions
- Organizing worksheets data with tables
- Visualizing data with charts
- Analyzing data with PivotTables, slicers, and PivotCharts
- Working with graphical objects
- Enhancing workbooks

### COURSE OBJECTIVES

By the end of this course, users should be comfortable in both the online and desktop environments, using automating functions, analysing and presenting data, auditing and error checking your work, working in multiple workbooks, and accessing and distributing data.

### COURSE CONTENT

#### Lesson 1: Excel Online

##### TOPIC A: Accessing and Using Excel Online

- About Excel Online
- Logging into Microsoft 365
- Edit Your File in the Excel Desktop Application
- Identify Where Your Workbook is Saved

- Save a Copy of Your Workbook to Your Local Machine
- Copy a Local Workbook to OneDrive
- Activity 1-1: Managing Workbooks Between Excel Online and the Excel Desktop Application

##### TOPIC B: Features that Differ Between Excel Online and the Excel Desktop Application

- Features Not Available in Excel Online
- Differences in Features Available in Both Excel Online and The Excel Desktop Application

- Activity 1-2: Features that Differ Between Excel Online and the Excel Desktop Application
- Summary
- Review Questions

## **Lesson 2: Worksheet Automation**

### **TOPIC A: Managing Workbook Properties**

- View Workbook Properties
- Using the Document Inspector
- Activity 2-1: Managing Workbook Properties

### **TOPIC B: Working with Macros**

- What is a Macro?
- Recording a Macro
- Saving a Macro
- Inspecting and Editing Macros
- Macro Security
- Activity 2-2: Working with Macros

### **TOPIC C: Create and Use a Template**

- Set the Custom Template Directory
- Save a Workbook as a Template
- Edit a Template
- Open a New Workbook Based on a Template
- Activity 2-3: Create and Use a Template

### **TOPIC D: Use Data Validation in a Workbook**

- The Data Validation Dialog Box
- Data Validation Settings
- Input Messages
- Error Alerts
- Activity 2-4: Use Data Validation
- Summary
- Review Questions

## **Lesson 3: Auditing and Error Checking**

### **TOPIC A: Tracing Cells**

- Show Formulas
- Trace Precedents and Dependents
- Tracer Arrows

- Activity 3-1: Tracing Cells

### **TOPIC B: Error Checking**

- Invalid Data
- Formula Errors and Their Types
- How to Check for Errors
- Activity 3-2: Error Checking

### **TOPIC C: Evaluating Formulas and Using the Watch Window**

- The Watch Window
- The Camera Tool
- The Evaluate Formula Tool
- Activity 3-3: Evaluating Formulas and Using the Watch Window

### **TOPIC D: Data List Outlines**

- Outlines
- Auto Outline
- The Subtotal Command
- Activity 3-4: Creating a Data List Outline
- Summary
- Review Questions

## **Lesson 4: Data Analysis and Presentation**

### **TOPIC A: Quick Analysis Tool**

- Access the Quick Analysis Tool
- Quick Analysis Options
- Activity 4-1: The Quick Analysis Tool

### **TOPIC B: Adding Sparklines**

- Sparkline Types
- Inserting and Editing Sparklines
- The Sparkline Tab
- Activity 4-2: Adding Sparklines

### **TOPIC C: What-If Analysis**

- The Scenario Manager
- Using Goal Seek
- Using Solver

### **Activity 4-3: What-If Analysis**

### **TOPIC D: The Analysis ToolPak**

- Load the Analysis ToolPak
- The Data Analysis Dialog Box
- Activity 4-4: Perform a Data Analysis with the Analysis ToolPak
- Summary
- Review Questions

## **Lesson 5: Working with Multiple Workbooks**

### **TOPIC A: Arrange Workbooks**

- Arrange Workbooks for Viewing
- View Workbooks Side by Side
- Use Synchronous Scrolling
- Activity 5-1: Arrange Workbooks

### **TOPIC B: Linking to Data in Multiple Workbooks**

- External References
- Editing Links
- Broken Links
- Activity 5-2: Linking to Data in Multiple Workbooks

### **TOPIC C: Consolidating Data**

- Data Consolidation
- Consolidation Functions
- Use the Consolidate Dialog Box
- Activity 5-3: Consolidating Data
- Summary
- Review Questions

## **Lesson 6: Exporting and Sourcing Data**

### **TOPIC A: Exporting Data**

- Export File Format Options
- Exporting Worksheet Data
- Activity 6-1: Export Worksheet Data

### **TOPIC B: Using Data Sources**

- Data Sources in Excel
- Importing a Delimited File
- Using a Web Query
- Activity 6-2: Using Data Sources

### **TOPIC C: Use a Microsoft Form for Data Collection**

- Insert a Microsoft Form into a Workbook
- Add Questions
- Preview a Form
- Share a Form
- Review the Results
- Activity 6-3: Use a Microsoft Form for Data Collection

## ASSOCIATED CERTIFICATIONS & EXAM

On successful completion of this course students will receive an attendance certificate.