

## ME-EXL365L2: MICROSOFT® EXCEL 365 LEVEL 2



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

### INTRODUCTION

Welcome to the second part of our Microsoft Excel 365 courseware. This version of Excel incorporates some new features and connectivity options in an effort to make collaboration and production as easy as possible.

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. We will cover how to create and use advanced formulas, analyze data, organize worksheet data with tables, visualize data with charts, insert graphics, and enhance workbooks.

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

This one-day workshop will teach participants to:

- Analyze Data with Logical and Lookup Functions
- Organize Worksheet Data with Tables
- Create and Modify Tables
- Sort and Filter Data
- Visualize Data with Charts
- Modify and Format Charts
- Enhance Workbooks

### 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 1 courseware.

### PREREQUISITES

This manual assumes the user has completed or understands the materials covered in the first part of the Microsoft Office Excel 365: Part 1 courseware, including:

- Using absolute, relative, and mixed references
- Using formulas and functions in a worksheet
- Managing and organizing worksheet
- Editing and formatting Excel data
- Printing and saving Excel files
- Customizing the Excel interface

### COURSE OBJECTIVES

- Analyzing Data with Logical and Lookup Functions

- Organizing Worksheet Data with Tables
- Visualizing Data with Charts
- Enhancing Workbooks

## COURSE CONTENT

### Lesson 1: Creating Advanced Formulas

#### TOPIC A: APPLY RANGE NAMES

- Range Names
- Adding Range Names Using the Name Box
- Adding Range Names Using the New Name Dialog Box
- Using Range Names in Formulas
- Activity 1-1: Using Range Names in Formulas

#### TOPIC B: USE SPECIALIZED FUNCTIONS

- Function Categories
- Function Syntax
- Finding Excel Functions
- Function Entry Dialog Boxes
- Using Nested Functions
- Automatic Workbook Calculations
- Showing and Hiding Formulas
- Enabling Iterative Calculations
- Activity 1-2: Using Specialized Functions
- Summary
- Review Questions

### Lesson 2: Analyzing Data with Logical and Lookup Functions

#### TOPIC A: USE TEXT FUNCTIONS

- Text Functions
- The LEFT and RIGHT Functions
- The MID Function
- The LEN Function
- The TRIM Function
- The UPPER, LOWER, and PROPER Functions
- The TEXTJOIN Function
- The TRANSPOSE Function
- Activity 2-1: Analyzing Data Using Text Functions

#### TOPIC B: USE LOGICAL FUNCTIONS

- Logical Functions
- Logical Operators
- The AND Function
- The OR Function
- The IF Function
- The IFS Function
- Activity 2-2: Analyzing Data Using Logical Functions

#### TOPIC C: USE LOOKUP FUNCTIONS

- Lookup Functions
- The LOOKUP Function
- The VLOOKUP Function
- The HLOOKUP Function

- The MATCH Function
- The INDEX Function
- Activity 2-3: Analyzing Data Using Lookup Functions

#### TOPIC D: USE DATE FUNCTIONS

- The TODAY Function
- The NOW Function
- Serializing Dates and Times with Functions
- Activity 2-4: Analyzing Data Using Date Functions

#### TOPIC E: USE FINANCIAL FUNCTIONS

- The IPMT Function
- The PPMT Function
- The NPV Function
- The FV Function
- Activity 2-5: Using Financial Functions
- Summary
- Review Questions

### Lesson 3: Organizing Worksheet Data with Tables

#### TOPIC A: CREATE AND FORMAT TABLES

- Tables
- Table Components
- The Create Table Dialog Box
- The Table Design Contextual Tab
- Styles and Quick Style Sets
- Customizing Row Display
- Activity 3-1: Creating and Modifying a Table

#### TOPIC B: MODIFYING TABLES

- Adding Rows and Columns
- Total Row Functions
- Removing Duplicate Values
- Activity 3-2: Modifying Tables

#### TOPIC C: TABLE REFERENCES

- Naming Tables
- Using Structured References
- Database Functions
- Converting to Range
- Activity 3-3: Table References
- Summary
- Review Questions

### Lesson 4: Visualizing Data with Charts

#### TOPIC A: CREATE CHARTS

- Charts
- Chart Types
- Chart Insertion Methods
- Resizing and Moving the Chart
- Adding Additional Data

- Switching Between Rows and Columns
- Activity 4-1: Creating Charts

#### TOPIC B: MODIFY AND FORMAT CHARTS

- The Difference Between Modifying and Formatting Chart Elements
- Minimize Extraneous Chart Elements
- The Chart Contextual Tabs
- Formatting the Chart with a Style
- Adding a Legend to the Chart
- Activity 4-2: Modifying and Formatting Charts

#### TOPIC C: CREATE A TRENDLINE

- Trendlines
- Types of Trendlines
- Adding a Trendline
- The Format Trendline Task Pane
- Activity 4-3: Create a Trendline

#### TOPIC D: CREATE ADVANCED CHARTS

- Combination Charts
- Dual Axis Charts
- Creating Custom Chart Templates
- Activity 4-4: Creating Advanced Charts
- Summary
- Review Questions

### Lesson 5: Analyzing Data with PivotTables, Slicers, and PivotCharts

#### TOPIC A: CREATE A PIVOTTABLE

- PivotTables
- Start with Questions, End with Structure
- The Create PivotTable Dialog Box
- The PivotTable Fields Task Pane
- Summarize Data in a PivotTable
- The "Show Values As" Functionality of a PivotTable
- Format a PivotTable
- External Data
- PowerPivot
- PowerPivot Functions
- Activity 5-1: Creating PivotTables

#### TOPIC B: FILTER DATA USING SLICERS

- Slicers

- The Insert Slicers Dialog Box
- Activity 5-2: Filtering Data Using Slicers

### TOPIC C: ANALYZE DATA WITH PIVOTCHARTS

- PivotCharts
- Creating PivotCharts
- Applying a Style to a PivotChart
- Activity 5-3: Analyzing Data with PivotCharts
- Summary
- Review Questions

### Lesson 6: Working with Graphical Objects

#### TOPIC A: INSERT AND MODIFY GRAPHIC OBJECTS

- Graphical Objects
- Inserting Shapes
- Inserting WordArt
- Inserting Text Boxes
- Inserting Images
- The Picture Format Contextual Tab
- The Shape Format Contextual Tab
- The SmartArt Contextual Tabs
- Activity 6-1: Inserting Graphical Objects

#### TOPIC B: LAYER AND GROUP GRAPHICAL OBJECTS

- Layering Objects
- Grouping Objects
- Positioning Objects
- Activity 6-2: Layering and Grouping Shapes

#### TOPIC C: INCORPORATE SMARTART

- About SmartArt
- The Choose a SmartArt Graphic Dialog Box
- About the Text Pane
- Activity 6-3: Incorporating SmartArt
- Summary
- Review Questions

### Lesson 7: Enhancing Workbooks

#### TOPIC A: CUSTOMIZE WORKBOOKS

- Notes and Comments
- Comments
- Notes
- Watermarks
- Background Pictures
- Activity 7-1: Customizing Workbooks

#### TOPIC B: MANAGE THEMES

- About Themes
- Customizing Themes
- Activity 7-2: Managing Themes

#### TOPIC C: PROTECT FILES

- Recovering Lost Data
- The Protect Group
- The Protect Worksheet Option
- The Protect Workbook Option
- Mark Workbooks as Final
- Encrypting a Workbook
- Digitally Signing a Workbook
- Activity 7-3: Protecting a Worksheet and a Workbook

#### TOPIC D: PREPARING A WORKBOOK FOR MULTIPLE AUDIENCES

- Displaying Data in Multiple International Formats
- Utilize International Symbols
- Adding Alternative Text to Objects
- Activity 7-4: Preparing a Workbook for Multiple Audiences
- Summary
- Review Questions

## ASSOCIATED CERTIFICATIONS & EXAM

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