



### MICROSOFT EXCEL® 2013, BEGINNER

Recommended for anyone who hasn't worked with formulas or charts before, or those with little to no experience with Excel. It's also a great refresher course for those who haven't used Excel in a while. Learn how to navigate the Excel user interface (Tabs, Ribbons, & Quick Access Toolbar). Learn keyboard shortcuts to speed up various tasks. Create, open, close, save, preview, and print a spreadsheet. Use AutoSum to add numbers. Understand cell references in formulas, and how to perform basic calculations. Use formulas to add, subtract, multiply, and divide numbers, calculate percentages. Learn how to AutoFill (copy) formulas. Much of the class will be devoted to creating formulas.

DATE	TIME	MEMBER	JUP	NON MEMBER	INSTRUCTOR
JULY 2, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
AUGUST 1, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
SEPTEMBER 4, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
OCTOBER 4, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
NOVEMBER 6, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
DECEMBER 4, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO

### MICROSOFT EXCEL® 2013, INTERMEDIATE

Create more complex formulas using Absolute Cell References (address that won't change when you copy the formula), and the Order of Operations. Combine data from different sheets located within the same workbook (file). Link data from different workbooks (files). Use Validation to improve speed and accuracy of data entry, set limits on what can be entered, add drop-down lists and pop-up explanation boxes. Use Pivot Tables and Pivot Charts to analyze large spreadsheets. Use Conditional Formatting to make critical data stand out by changing the appearance of values (negative numbers turn red) or cell background colors (background of cells with highest numbers turn green).

DATE	TIME	MEMBER	JUP	NON MEMBER	INSTRUCTOR
JULY 10, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
AUGUST 14, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
SEPTEMBER 12, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
OCTOBER 16, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
NOVEMBER 14, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
DECEMBER 19, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO

### MICROSOFT EXCEL® 2013, ADVANCED

This course takes users to a high level of knowledge using financial topics available in Excel such as financial functions, auditing and Charts. Working with lists, working with macros and user-defined functions, using basic analysis tools, using advanced analysis tools, using business analysis tool, new features in excel 2013 and additional features in office 2013

DATE	TIME	MEMBER	JUP	NON MEMBER	INSTRUCTOR
JULY 18, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
AUGUST 29, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
SEPTEMBER 27, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
OCTOBER 30, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
NOVEMBER 29, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO
DECEMBER 20, 2018	8:00 AM - 3:30 PM	\$215	\$0	\$315	FRANK PIPERATO

**PREREQUISITE:** Introduction to Windows or comparable experience. Must be proficient with mouse and keyboard.

**COURSE NOTES:** Students will use 2013 version in class. Laptop computers and software provided.

Breakfast and lunch are not provided.

**LOCATION:** LEARNSOFT TECHNOLOGY TRAINING CENTER Torrey Pines Bank Building, 4350 Executive Drive, Suite 100, San Diego, CA 92121

## EXCEL 2013 INTRODUCTION

Length: 1 Day

Summary: Students will learn the basics of creating, editing, and saving worksheets in the Excel Introduction class. They will work with formulas and functions to calculate and return values. Students will also learn how to change the appearance of a page, including adding headers and footers, format data and create charts.

### COURSE CONTENT

#### 1: EXCEL ESSENTIALS

- Starting Excel
- What is a Worksheet?
- What is a Workbook?
- Identifying Parts of the Screen
- Identifying the ribbon Components
- Getting Help
- Using Selection Techniques
- Selecting a Range of Cells
- Selecting Nonadjacent Cells and Ranges
- Selecting an Entire Worksheet
- Entering Data
- Entering Text Data into a Cell
- Entering Values
- Entering Data into a Range
- Quickly Adjusting a Column Width
- Finishing a Workbook
- Saving a Named Workbook
- Saving the Workbook in HTML Format
- Printing a Worksheet
- Closing a Workbook and Exiting from Excel

#### 2: FORMATTING TEXT AND PRINTING A DOCUMENT

- Opening a Workbook
- Creating a New Workbook
- Opening a Recently Used Workbook

- Creating Simple Formulas
- Creating a Formula by Pointing
- Using Functions
- Using the AutoSum Button
- Using the Formula Palette
- Editing Data on the Worksheet
- Editing the Data in a Cell
- Editing a Formula
- Clearing the Contents from a Cell or Range
- Using Undo and Redo

#### 3: MANAGING THE WORKSHEET

- Navigating in a Worksheet
- Using the Scroll Bars and Boxes
- Changing Worksheets
- Using Go To
- Changing the Worksheet Structure
- Deleting Cells, Rows, and Columns
- Performing a Simple Sort
- Creating and Using Named Ranges
- Automatically Naming Ranges
- Navigating with Named Ranges
- Using Range Names in Formulas
- Pasting a List of Named Ranges
- Deleting and Editing Range Names
- Creating Named Constants

#### 4: FORMATTING THE WORKSHEET

- Moving and Copying Data
- Copying Data
- Copying Data with AutoFill
- Creating a Series with AutoFill
- Defining Relative, Mixed, and Absolute References
- Copying Formulas
- Changing the Appearance of Data
- Changing Row Height
- Applying Fonts
- Adding Enhancements
- Aligning Data in Cells
- Merging and Centring Cells
- Rotating and Indenting Text
- Adding Borders and Shading
- Using Drawing Tools
- Creating Graphic Objects
- Editing a Graphic Object
- Creating and Editing 3-D Objects
- Using Other Drawing Tool

#### 5: PRINTING THE WORKSHEET/BOOK

- Printing a Single Worksheet
- Using Print Preview
- Creating Headers and Footers
- Removing the Grid
- Printing a Selection
- Printing a Selection
- Using Print Areas
- Using Advanced Printing Techniques
- Aligning the Printout
- Fitting a Document onto a Desired Number of Pages
- Working with Page Breaks
- Working with Page Breaks in Normal View
- Setting Print Titles
- Removing Print Titles

#### APPENDIX A: NEW FEATURES IN EXCEL 2013

- The Office Task Panes
- Smart Tags
- Smart Data Tags
- New Worksheet Features
- New Argument and Function Features
- Other New Features and Enhancements in Excel 2013

#### APPENDIX B: ADDITIONAL FEATURES IN OFFICE 2013

- Office 2013 – A New Platform
- At a Glance Highlights Across the Suite
- New Visual and navigational Features
- File formats
- User Assistance System (HELP)
- Collaboration features
- Themes and Quick Styles
- Application-specific changes
- General Keyboard Navigational Tips in Office 2013
- Beyond Office 2013

## EXCEL 2013 INTERMEDIATE

Length: 1 Day

Summary: This course shows students the financial topics available in Excel such as financial functions, auditing and Charts.

### COURSE CONTENT

#### 1: USING MULTIPLE WORKSHEETS AND WORKBOOKS

- Using Multiple Worksheets
- Inserting New Worksheets
- Renaming Worksheets
- Deleting Worksheets
- Creating Multiple Views
- Freezing Panes
- Viewing and Arranging Multiple Worksheet Windows
- Navigating in Multiple Workbooks
- Selecting and Viewing Multiple Workbooks
- Creating and Opening a Workspace
- Managing Multiple Worksheets and Workbooks
- Selecting Multiple Worksheets
- Moving and Copying Data between Worksheets
- Linking Data Between Worksheets
- Creating a 3-D Formula
- Assignment

#### 2: CHARTING

- Using Charts
- Creating a Chart
- Changing Chart Type, Style and Chart Sub-Type
- Changes to the Chart Source Data
- Add data to an existing chart
- Change the data in an existing chart
- Remove data from a chart

- Managing Chart Objects
- Moving and Resizing Chart Objects
- Deleting Chart Objects
- Adding Data Series and Objects to a Chart
- Changing the Chart Type
- Formatting Chart Objects
- Printing Charts

#### 3: ADVANCED FUNCTIONS

- Creating and Using Functions
- Using Built-in Functions
- Working with Arguments: The PMT Function
- Using Dates and Times
- Using Dates in Calculations
- Using Nested Functions
- Auditing Worksheets
- Identifying the Auditing Commands
- The Watch Window
- The Formula Evaluator
- V-Look Up
- Tracing and Correcting Worksheet Errors
- Assignment

#### 4: ADVANCED FORMATTING

- Using Comments in a Worksheet
- Reviewing, Showing, and Hiding Comments
- Deleting a Comment

- Working with Styles
- Applying a Style
- Modifying Existing Styles
- Using Format Painter
- Creating Custom Number Formats
- Applying an AutoFormat (Table Format)
- Conditional Formats
- Clear conditional formats

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- General Keyboard Navigational Tips in Office 2013
- Beyond Office 2013

## EXCEL 2013 Advanced

**Length:** 1 Day

**Summary:** Creating, maintaining, Filtering and using Subtotals in a List. Recording, Assigning, and Using Macros. Creating and Using User-Defined Functions, performing "What If" Analyses, working with Scenarios, Querying a Database, Importing and Exporting Files and Data. Protecting Data, Pivot Tables, Reports and Charts, other Advanced Business Analysis Tools.

## COURSE CONTENT

**Who Should Attend:** This course takes users to a high level of knowledge using financial topics available in Excel such as financial functions, auditing and Charts.

**Experience Needed:** Students should have an understanding of the Windows operating system. Students should have a good understanding of Microsoft Excel or alternatively should have attended the Introduction and Intermediate course.

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### Course Content

#### 1: WORKING WITH LISTS

- Using Multiple Worksheets
- Inserting New Worksheets
- Renaming Worksheets
- Deleting Worksheets
- Creating Multiple Views
- Freezing Panes
- Viewing and Arranging Multiple Worksheet Windows
- Navigating in Multiple Workbooks
- Selecting and Viewing Multiple Workbooks
- Managing Multiple Worksheets and Workbooks
- Selecting Multiple Worksheets
- Moving and Copying Data between Worksheets
- Linking Data Between Worksheets
- Creating a 3-D Formula
- Assignment

## 2: WORKING WITH MACROS AND USER-DEFINED FUNCTIONS

- Recording and Using Macros
- Assigning Macros
- Using User Defined Functions
- Assignment

## 3: USING BASIC ANALYSIS TOOLS

- Performing “What If” Analyses
- Working with Scenarios
- Assignment

## 4: USING ADVANCED ANALYSIS TOOLS AND EXTERNAL DATA

- Querying a Database
- Importing and Exporting Files
- Protecting Data
- Using Data Validation
- Using Worksheet Protection
- Password Protecting a Workbook
- Assignment

## 5: USING BUSINESS ANALYSIS TOOL

- Working with Pivot Tables and Pivot Charts
- Identifying the Parts of a Basic Pivot Table
- Pivot Table Reports
- Create a PivotTable from worksheet data
- Create a PivotTable from an external data source
- Create a PivotChart report from an existing PivotTable report
- Delete a PivotTable or PivotChart report
- Slicers
- Using slicers
- Formatting slicers for a consistent look
- Sharing slicers between PivotTables
- Sparklines
- Types of Sparklines
- Create a sparkline
- Customize sparklines
- Control which value points are shown
- Change the style of or format sparklines
- Online Analytical Processing (OLAP)
- Business intelligence
- What is Online Analytical Processing (OLAP)?

## APPENDIX A: NEW FEATURES IN EXCEL 2013

- New Chart Types
- Get and Transform
- One Click Forecasting
- 3D Maps
- PivotTable Enhancements
- Power BI
- Quick Shape Formatting
- Ink Equations
- Data Loss Protection
- Compatibility
- File Types
- The Ribbon and Toolbars
- Screen Resolutions
- Keyboard Shortcuts

## APPENDIX B: ADDITIONAL FEATURES IN OFFICE 2013

- Office 2013
- At a Glance Highlights Across the Suite
- New Visual and navigational Features
- File formats
- User Assistance System (HELP)
- Collaboration features
- Themes and Quick Styles
- General Keyboard Navigational Tips in Office 2013 Compatibility
- File Types
- The Ribbon and Toolbars
- Screen Resolutions
- Keyboard Shortcuts