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## Microsoft Office Excel 2016 Level 3 Training

### Overview & Learning Outcomes

The skills and knowledge acquired in **Microsoft Excel 2016 – Level 3** are sufficient to be able to protect worksheet data, perform advanced data operations using summarising, data consolidations, filters and PivotTables, macros, and much more.

Upon successful completion of this course you should be able to:

- modify **Excel** options
- protect data in worksheets and workbooks
- import data into **Excel** and export data from **Excel**
- use data linking to create more efficient workbooks
- group cells and use outlines to manipulate the worksheet
- create summaries in your spreadsheets using subtotals
- use the **Data Consolidation** feature to combine data from several workbooks into one
- create, use and modify data tables
- create and work with scenarios and the **Scenario Manager**
- understand and create simple **PivotTables**
- construct and operate **PivotTables** using some of the more advanced techniques
- create and edit a **PivotChart**
- use advanced filters to analyse data in a list
- use a variety of data validation techniques
- create and use a range of controls in a worksheet
- share workbooks with other users
- create recorded macros in **Excel**

### Prerequisites

**Microsoft Excel 2016 – Level 3** assumes some knowledge of the software as well as a general understanding of personal computers and the Windows operating system environment.

### Duration:

1 Day

### Courseware:

High quality learning materials are available for purchase by participants.

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## **Microsoft Excel 2016** **Level 3 Training Course Outline**

### **Setting Excel Options**

Understanding Excel options  
Personalising Excel  
Setting the default font  
Setting formula options  
Understanding save options  
Setting save options  
Setting the default file locations  
Setting advanced options

### **Protecting Data**

Understanding data protection  
Providing total access to cells  
Protecting a worksheet  
Working with a protected worksheet  
Providing restricted access to cells  
Password protecting a workbook  
Opening a password protected workbook  
Removing a password from a workbook

### **Importing and Exporting**

Understanding data importing  
Importing from an earlier version  
Understanding text file formats  
Importing tab delimited text  
Importing comma delimited text  
Importing space delimited text  
Importing access data  
Working with connected data  
Unlinking connections  
Exporting to Microsoft Word  
Exporting data as text  
Inserting a picture  
Modifying an inserted picture

### **Data Linking**

Understanding data linking  
Linking between worksheets  
Linking between workbooks  
Updating links between workbooks

### **Grouping and Outlining**

Understanding grouping and outlining  
Creating an automatic outline  
Working with an outline  
Creating a manual group  
Grouping by columns

### **Summarising and Subtotalling**

Creating subtotals  
Using a subtotalled worksheet  
Creating nested subtotals  
Copying subtotals  
Using subtotals with AutoFilter  
Creating relative names for subtotals  
Using relative names for subtotals

### **Data Consolidation**

Understanding data consolidation  
Consolidating with identical layouts  
Creating a linked consolidation  
Consolidating from different layouts  
Consolidating data using the SUM function

### **Data Tables**

Understanding data tables and what-if models  
Using a simple what-if model  
Creating a one-variable table  
Using one-variable data tables  
Creating a two-variable data table

### **Scenarios**

Understanding scenarios  
Creating a default scenario  
Creating scenarios  
Using names in scenarios  
Displaying scenarios  
Creating a scenario summary report  
Merging scenarios

### **PivotTables**

Understanding PivotTables  
Recommended PivotTables  
Creating your own PivotTable  
Defining the PivotTable structure  
Filtering a PivotTable  
Clearing a report filter  
Switching PivotTable fields  
Formatting a PivotTable  
Understanding slicers  
Creating slicers  
Inserting a timeline filter  
Challenge exercise  
Challenge exercise sample

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### **PivotTable Features**

- Using compound fields
- Counting in a PivotTable
- Formatting PivotTable values
- Working with PivotTable grand totals
- Working with PivotTable subtotals
- Finding the percentage of total
- Finding the difference from
- Grouping in PivotTable reports
- Creating running totals
- Creating calculated items
- PivotTable options
- Sorting in a PivotTable

### **PivotCharts**

- Inserting a PivotChart
- Defining the PivotChart structure
- Changing the PivotChart type
- Using the PivotChart filter field buttons
- Moving PivotCharts to chart sheets

### **Advanced Filters**

- Understanding advanced filtering
- Using an advanced filter
- Extracting records with advanced filter
- Using formulas in criteria
- Understanding database functions
- Using database functions
- Using DSUM
- Using the DMIN function
- Using the DMAX function
- Using the DCOUNT function

### **Validating Data**

- Understanding data validation
- Creating a number range validation
- Testing a validation
- Creating an input message
- Creating an Error message
- Creating a drop down list
- Using formulas as validation criteria
- Circling invalid data
- Removing invalid circles
- Copying validation settings

### **Controls**

- Understanding types of controls
- Understanding how controls work
- Preparing a worksheet for controls
- Adding a combo box control
- Changing control properties
- Using the cell link to display the selection
- Adding a list box control
- Adding a scroll bar control
- Adding a spin button control
- Adding option button controls
- Adding a check box control
- Protecting a worksheet with controls

### **Sharing Workbooks**

- Sharing workbooks via the network
- Sharing workbook via OneDrive
- Saving to OneDrive
- Sharing workbooks
- Opening shared workbooks
- Enabling tracked changes
- Accepting or rejecting changes
- Disabling tracked changes
- Adding worksheet comments
- Navigating worksheet comments
- Editing worksheet comments
- Deleting comments

### **Recorded Macros**

- Understanding Excel macros
- Setting macro security
- Saving a document as macro enabled
- Recording a simple macro
- Running a recorded macro
- Relative cell references
- Running a macro with relative references
- Viewing a macro
- Editing a macro
- Assigning a macro to the toolbar
- Running a macro from the toolbar
- Assigning a macro to the ribbon
- Assigning a keyboard shortcut to a macro
- Deleting a macro
- Copying a macro

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