Microsoft Excel Beginner

Who Should Attend?

This workshop is open to all UCSF staff, supervisors, and managers.

Schedule:

July 15
Excel Intermediate
(8:30-12:00pm)
Excel Intermediate
(1:00-4:30pm)

August 11
Excel Beginner
(8:30-12:00pm)
Excel Intermediate
(1:00-4:30pm)

September 20
Excel Intermediate
(8:30-12:00pm)
Excel Advanced
(1:00-4:30pm)

Fee: $70 per workshop

Location:
Laurel Heights
3333 California St.
Computer Room 307

Register Now:
Log into the **UC Learning Center** and enter "Excel Half-Day"
For Questions contact:
LearningandDevelopment@ucsf.edu

Microsoft Excel Beginner (half-day)

This workshop is for users who have used Excel but only minimally, and would like to get a thorough understanding of Excel's capabilities to help them leverage it more effectively in their work environment. The session includes presentations and hands-on exercises intended to give users the opportunity to practice the concepts and techniques that are discussed and ask questions. Users are encouraged to bring their own spreadsheets if they have existing spreadsheets that they would like to work on or ask questions about.

Key topics covered:

➤ Overview of Excel fundamentals: Terminologies, finding your way in the Excel window, shortcuts for navigation, selecting data and auto fill.

➤ Creating worksheets: Formatting guidelines and tricks, review of copying and moving cells, freezing panes and splitting windows.

➤ Basic formulas and functions: Calculating sums, average and percentages. Using built-in functions, math hierarchy and symbols.

➤ Working with tables and charts: Creating and formatting tables and charts.

➤ Printing Tips and Options: Adding headers and footers, page numbers and manual page breaks.

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** Each participant is responsible for cancelling his/her registration in the UC Learning Center before the cancellation date reflected in the course details. Not doing so will result in paying for the full cost of the class. This applies to both late cancellation and not showing up without cancellation.

Microsoft Excel Intermediate

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Microsoft Excel Intermediate (half-day)

This workshop is for business users who are already familiar with Microsoft Excel and want to take their skills to the next level. In this workshop, users learn powerful techniques that can help them save significant time, analyze data and extract important business insights, present information in a compelling way, and collaborate with others more effectively. This workshop assumes that you have taken the beginner Excel or used Excel for six months and are familiar with the fundamentals and have some experience creating workbooks, worksheets, cells, ranges, and using a variety of functions and formulas.

Key topics covered:

➢ Data manipulation: Managing budgets and projections, as well as handling large lists of data. Basic and advanced formulas, 3-D ranges, sorting and filtering techniques, database functions, and several other features are covered.
➢ Data presentation: Using the powerful analysis and reporting tools, such as PivotTables to extract important information, and present it appropriately to various audiences.
➢ Data entry and validation: Using Excel's ability to gather and validate data when applicable. This includes validation rules and conditional formatting.
➢ Collaboration: Enabling multiple users to review and edit workbooks by sharing them on the network or via e-mail. Protecting sheets or cells within a sheet to ensure data integrity and confidentiality. Tracking changes, reviewing changes, and accepting changes.
➢ Efficiency: Using templates and styles to reuse worksheets, and to set standards and ensure consistency. This also includes dozens of shortcuts and tips that can be applied on a daily basis.

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Microsoft Excel Advanced

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Excel Intermediate
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Excel Advanced
(1:00-4:30pm)

Fee: $70 per workshop

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Microsoft Excel Advanced (half-day)

In this workshop you will learn the most powerful capabilities of Excel Pivot Tables and how they can be an invaluable tool in helping you analyze your data and present your findings in compelling ways. If you have been using PivotTables and wondering what more you can do with them, or maybe running into obstacles and wishing you can get around them, this workshop will help you unleash the power of PivotTables and get outstanding results. This workshop also covers Excel Macros, providing you with an understanding of the VBA scripting language and how Macros can help you add important functionality to your workbooks.

➢ Getting your data ready for PivotTable Reports and Charts including eliminating duplicates, organizing your data efficiently, and defining proper relationships between data sets.
➢ Using custom functions to perform more advanced analysis and comparisons such as counts, statistical functions, % of row, % of column, and many more.
➢ Filtering your report to display subsets of the data and reveal hidden insights about your customers, product lines, and other subsets of data sets.
➢ Formatting your reports, sorting them automatically, manually, or based on pre-determined sort orders, as well as grouping them based on user-defined groups that reflect your business environment.
➢ Adding formulas to your PivotTables and Charts so they include the calculations and ratios that are specific to your needs.
➢ Incorporate your PivotTables reports and Charts into Word documents and linking them so they stay up-to-date.
➢ Writing Macros and accessing the properties, methods, and events of Excel Objects such as workbooks, worksheets, and ranges, in order to add more significant functionally.
➢ Using Macros to respond to user events and therefore making your workbooks more user friendly and better addressing the specific needs of your users.

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