

## **Microsoft Office 97: Advanced Excel 97**

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# How to Use the Course

## To start the course

If you are using the course completely independently and you have to install it for yourself, consult the section "Installation Procedure" in this manual.

Normally, the course will have been installed for you, and all you will have to do is start it up.

First turn on your computer.

Make sure you know which drive the course is installed on. (The course administrator or whoever is in charge of the installation should be able to tell you. It is normally installed on the C: drive or on your LAN.)

Run windows, open the appropriate CBT group and then select the course.

All you have to do now is follow the instructions on screen.

### ***If the Student Registration system is in place***

Type your user-number. This will be supplied by whoever is administering the course. You may also be asked to type a password. This will be supplied by your course administrator.

### ***If the Student Registration system is not in place***

Type 0 when you are asked for your user-number.  
This will take you straight to the main menu screen.

### ***If the Self Registration system is in place***

If you have not been allocated a user-number, type *self*.  
You will then be prompted to enter your name and whatever number you choose.  
Your user-number will then be created for you, and any time you re-enter the course, you should enter this user-number.

## Main menu/course map

When you first enter the course, you will be presented with the course map, which also functions as the course menu, with course units listed.

To see the topics menu for any unit, click that unit. To see the topics menu for another unit, there is no need to close the current topics menu: simply click the relevant unit in the list of course units to replace the current topics list with the required topics list.

Double-click any topic to enter the unit at the start of that topic.

Double-click any screen number to enter the unit at the start of that particular screen.

| Option button       | Keypress | Action  |
|---------------------|----------|---|
| <u>B</u> ookmark    | Alt + b  | Takes you back to the start of the screen you were in when you last left the course (only active if you have been into the course before)   |
| <u>T</u> est        | Alt + t  | Takes you to the test menu  |
| <u>P</u> rogress    | Alt + p  | Shows parts of the course accessed and your test score (if applicable)  |
| <u>G</u> lossary    | Alt + g  | Takes you to the course glossary  |
| <u>O</u> K          | Alt + o  | Takes you into the course at the topic or screen selected   |
| C <u>l</u> ose      | Alt + l  | Takes you back to the point in the course where you chose the <b>Navigate</b> option (only active if you have entered the course map from the <b>Navigate</b> option in the course) |
| <u>E</u> xit course | Alt + x  | Takes you out of the course   |

# Course screens

## Unit aim and objectives screen

| Option button | Keypress | Action  |
|---------------|----------|---|
| Objectives    | Alt + o  | Displays objectives   |
| Exit course   | Alt + x  | Takes you out of the course   |
| Help          | Alt + h  | Takes you to the course help  |
| Navigate      | Alt + n  | Takes you to the course map, from where you can navigate through the course |
| Footnote      | Alt + f  | Not active on this screen   |
| Step back     | Alt + s  | Not active on this screen   |
| Continue      | Alt + c  | Takes you to the first screen of the course                                 |
| Close         | Alt + l  | Closes the objectives window  |

### Unit Navigation

Right-clicking the mouse anywhere on the screen displays a pop-up menu with a list of all the topics in the current unit. Left-clicking on the topic name displays the screen numbers relevant to that topic. Left-clicking on a screen number brings you to the start of that topic screen.

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## Unit summary screen

| Option button | Keypress | Action  |
|---------------|----------|---|
| Summary       | Alt + s  | Displays full summary for the unit  |
| Exit course   | Alt + x  | Takes you out of the course   |
| Help          | Alt + h  | Takes you to the course help  |
| Navigate      | Alt + n  | Takes you to the course map, from where you can navigate through the course |
| Footnote      | Alt + f  | Not active on this screen   |
| Step back     | Alt + s  | Not active on this screen   |
| Continue      | Alt + c  | Takes you to the course map   |
| Close         | Alt + l  | Closes the full summary   |

### Unit Navigation

Right-clicking the mouse anywhere on the screen displays a pop-up menu with a list of all the topics in the current unit. Left-clicking on the topic name displays the screen numbers relevant to that topic. Left-clicking on a screen number brings you to the start of that topic screen.

## Regular course screen

| Option button       | Keypress | Action  |
|---------------------|----------|---|
| <u>E</u> xit course | Alt + x  | Takes you out of the course   |
| <u>H</u> elp        | Alt + h  | Takes you to the course help  |
| <u>N</u> avigate    | Alt + n  | Takes you to the course map, from where you can navigate through the course   |
| <u>S</u> tep back   | Alt + s  | Displays the previous block of text along with its graphic. Clicking repeatedly on this button allows you to backtrack to the start of the current screen |
| <u>F</u> ootnote    | Alt + f  | Displays extra text relevant to the point you are at in the course (active only when a footnote is available)   |
| <u>C</u> ontinue    | Alt + c  | Takes you forward through the course, by bringing up the next piece of text, graphic or question  |

### Unit Navigation

Right-clicking the mouse anywhere on the screen displays a pop-up menu with a list of all the topics in the current unit. Left-clicking on the topic name displays the screen numbers relevant to that topic. Left-clicking on a screen number brings you to the start of that topic screen.

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## Simulation screen

| Option button       | Keypress         | Action  |
|---------------------|------------------|---|
| <u>E</u> xit course | Ctrl + shift + x | Takes you out of the course   |
| <u>H</u> elp        | Ctrl + shift + h | Takes you to the course help  |
| <u>N</u> avigate    | Ctrl + shift + n | Takes you to the course map, from where you can navigate through the course                             |
| <u>S</u> kip task   | Ctrl + shift + s | Allows you to bypass tasks  |
| <u>C</u> ontinue    | Ctrl + shift + c | Takes you forward through the course, by bringing up the next piece of text, graphic, question, or task |



## Question window

| Option button  | Keypress            | Action  |
|----------------|---------------------|---|
| <u>O</u> K     | Alt + o<br>or Enter | 1. Confirms choice<br>2. Closes question window after feedback  |
| <u>C</u> ancel | Alt + c             | Takes you forward to correct answer   |
| <u>H</u> elp   | Alt + h             | Shows question help   |
| <u>H</u> int   | Alt + i             | Provides a hint to help you to answer the question  |
| <u>R</u> edo   | Alt + r             | Undoes any attempt you have made at the question and allows you to start again (only available before you choose OK to complete the question) |

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## Test question window

| Option button     | Keypress            | Action  |
|-------------------|---------------------|---|
| <u>O</u> K        | Alt + o<br>or Enter | 1. Confirms choice<br>2. Closes question window after feedback  |
| <u>R</u> edo      | Alt + r             | Undoes any attempt you have made at the question and allows you to start again (only available before you choose OK to complete the question) |
| <u>H</u> elp      | Alt + h             | Shows question help   |
| <u>S</u> tatus    | Alt + s             | Tells you how much of the test you have completed and gives your percentage score so far  |
| <u>E</u> xit Test | Alt + x             | Allows you to abandon the test. In this case, your score so far will be discounted  |

# Questions and Tasks

As you work through the course, you will find that presentation of material is constantly tempered by questions.

Some questions are asked in order to check that you have understood a point you learned earlier in the course. But more often, you are asked discovery questions. These are questions that you may not know the answers to. This is part of our teaching technique and is a strategy for drawing you into active participation in your own learning.

Discovery questions are there not to test you but to provide you with the opportunity to enter into dialog with the course. They are asked in a spirit of involvement, nudging you towards conclusions, helping you to make connections. Instead of being a passive recipient of snippets of narrative, you are asked to take an active part, attempting to work out for yourself how you think the narrative will unfold. For this reason, you should not feel intimidated by these questions, or feel that you should be able to answer them all. If you answer a question incorrectly, that is not a mark of failure; look on it simply as an opportunity to learn the right answer.

In addition, the course may include simulations, where you are invited to practice using the application by completing a series of tasks. If you complete a task correctly, you will not normally be given feedback, but your action will simply have the result it would have in a real application environment. If you do not complete the task successfully, you will either be invited to try again, or the task will be completed for you.

# Taking the Test

The test is presented in two formats: you can take a course test, where you are tested on the contents of the whole course; or there may also be individual unit tests.

We recommend that you should follow the course and then take the course test. The test results indicate which units if any you need to review. We suggest that you should review the recommended units, and then take the appropriate unit tests (if available). You could also repeat the full course test if you wish.

The course test can also be used as a pre-course test. If you feel you are reasonably proficient in the course material, you could test your skills by taking the course test before you follow the course. The results may indicate that you should take the whole course, or that you should concentrate on particular units. Again, if you decide to concentrate on particular units, you can test your knowledge of these units afterwards by taking the unit test.

In any case, it is not recommended that you follow a unit and then take the unit test immediately. It is better to allow a time lapse, and perhaps to take a group of unit tests together.

To take the test, click the option button **Test** at the foot of the Course Map screen. You will be presented with a menu, from where you can choose the test you require.

The first option on this menu is **Full Course Test**. If you choose this option, you will be taken into a test consisting of a large number of randomly generated questions ranging over the content of the whole course. Because the questions are randomly generated, you may take the full course test more than once without being presented with the same selection of questions.

Alternatively, you may choose to be tested on any individual unit, simply by selecting that unit from the test menu. Note that the questions in the unit-based tests are not randomly generated, so if you repeat any unit test, you will be asked the same series of questions.

Although the questions in the test look much like questions in the course, it is important to realize that they serve a different function - that of assessing your assimilation of material covered in the course. For this reason, questions in the test are more strictly judged than questions in the course. You will not have the option to skip questions (ie the **Cancel** button will not be active) and you will not normally have a second chance to attempt a question after feedback has been given.

At the end of the test you will be given your results, and it will be indicated to you which units of the course you need to review, if any.

It is especially important to type answers carefully in the test. The test is not designed to accept as wide a range of spelling errors as the course.

Your score is electronically recorded via the CMI (computer managed instruction) system. If you take the course test, and subsequently take individual unit tests, your score in the unit test will over-ride your score in the same units in the course test. If you take the course test again, your latest course-test score will over-ride any other tests you may have taken earlier.

Your test score is accessible to the course administrator and you can also check it yourself at any point from the main menu screen. Simply click on the **Progress** button (or press Alt+ p) at the foot of the main menu screen.

# Microsoft Office 97: Advanced Excel 97

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**Preceding course:** *Microsoft Office 97: Intermediate Excel 97*

**Following course:** *Microsoft Office 97: Excel 97 for Power Users*

**Course duration:** 3 hours

**Audience:** People already proficient in the use of Excel 97, and people aiming for Expert User certification

**Pre-requisites:** Proficiency in the use of Excel 97, and comprehensive understanding of all the topics covered in the preceding course  
*Microsoft Office 97: Intermediate Excel 97*

**Course aim:** To prepare students to maximize their usage of all of Excel 97's functionality, and to partially prepare students for certification as Expert Users of Excel 97

**Learning objectives:**

After taking this course, the student should be able to

- q perform advanced editing tasks
- q implement security and auditing procedures
- q create and modify outlines
- q consolidate data
- q manage large sheets

**Course incorporates:**

Test

Hands-on exercises

## Units and topics in Microsoft Office 97: Advanced Excel 97

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### Advanced editing

Using templates  
Hands-on: Creating a template  
Group editing  
Hands-on: Editing a group  
Editing shared workbooks  
Hands-on: Sharing a workbook

### Displaying data

Creating and modifying outlines  
Consolidating data  
Hands-on: Consolidating data  
Managing large sheets

### Security and auditing

Protecting worksheets  
Hands-on: Protecting a worksheet  
Protecting workbooks  
Tracing dependents  
Hands-on: Tracing dependents  
Tracing and correcting precedents  
Hands-on: Precedents

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### To run the course, you need

- \* 386SX or faster PC, MS-DOS V3.1 or later, Windows 3.1
- \* VGA monitor and card
- \* 4MB of RAM
- \* at least 21MB of space available on the hard disk

The course will be installed in a directory called **MSOAE**.

# **Course Guide**

## **Units in Microsoft Office 97: Advanced Excel 97**

**Advanced editing**

**Security and auditing**

**Displaying data**

# Advanced editing

## Topics

Using templates

Hands on: Creating a template

Group editing

Hands on: Editing a group

Editing shared workbooks

Hands on: Sharing a workbook

## Unit aim

To explain how to use templates and shared workbooks, and how to edit multiple worksheets at the same time

## Unit objectives

After completing this unit you should be able to

- q describe how to create and use templates
- q explain how to move and copy worksheets, and how to edit multiple worksheets at the same time
- q describe how to share a workbook and how to manage changes made to a shared workbook

## Unit summary

A template allows you to create a workbook or worksheet quickly that is formatted in the way you require.

To create a template, you save a workbook or worksheet as a template in the Templates folder.

To move or copy worksheets, you drag the sheet or group to the new position, or use the Move or Copy dialog box.

To move or edit multiple worksheets at the same time, you select each worksheet to form a group.

Any changes you make to one sheet in a group are reflected in all the other sheets in the group.

Multiple users can edit a shared workbook at the same time.

When working on a shared workbook, you can view the changes made to the workbook by other users, and resolve conflicting changes between users.

You can create multiple copies of a workbook so that they can each be edited and then merged.



## User's Notes

# Security and auditing

## Topics

Protecting worksheets

Hands on: Protecting a worksheet

Protecting workbooks

Tracing dependents

Hands on: Tracing dependents

Tracing and correcting precedents

Hands on: Precedents

## Unit aim

To demonstrate how to protect and audit worksheets and workbooks in Excel 97

## Unit objectives

After completing this unit you should be able to

- q describe how to protect a worksheet
- q describe how to protect a workbook
- q explain how to trace the dependents of a formula
- q describe how to trace and correct precedents, and how to trace the causes of error values

## Unit summary

You can protect a worksheet to prevent users

- q making changes to locked cells
- q viewing hidden rows or columns
- q viewing hidden formulas
- q making changes to graphic objects
- q removing the protection from the sheet

You can set passwords that grant users different levels of access to a workbook.

You can protect a workbook to prevent users

- q viewing hidden sheets
- q moving, deleting, hiding, or renaming sheets
- q inserting sheets
- q moving or copying sheets to other workbooks
- q changing the size or position of the windows for the workbook
- q closing the windows for the workbook using the Close Window button
- q removing the protection from the workbook

You can use Excel's auditing tools to find the formulas to which a specific cell provides data.

You can trace dependents on the same or different worksheets.

You can use Excel's auditing tools to find the cells that provide data to a specific formula.

Tracing precedents provides you with an easy way to detect errors in formulas.

Excel allows you to trace the cause of an error value in a specific cell.

## User's Notes

# Displaying data

## Topics

Creating and modifying outlines  
 Consolidating data  
 Hands on: Consolidating data  
 Managing large sheets

## Unit aim

To demonstrate how to consolidate data, and how to manage large worksheets in Excel 97

## Unit objectives

After completing this unit you should be able to

- q explain how to create and modify outlines
- q describe how to consolidate data
- q consolidate data
- q explain how to use the Excel features that help you to view and print large sheets

## Unit summary

Excel allows you to outline a sheet so that different levels of detail on the sheet can be displayed or hidden.

To outline a sheet automatically, the sheet must contain rows and columns that summarize the data in other rows and columns.

You can summarize the data in a set of worksheets by consolidating it on a single worksheet.

The Consolidate dialog box allows you to select the data to be consolidated and the way in which it should be consolidated.

You can link consolidated data to source data, so that changes in the source data are reflected in the consolidated data.

Excel allows you to split a window into separate panes so that you can view different parts of a sheet at the same time.

You can freeze panes to ensure that row and column headings remain visible.

When printing a sheet on more than one page, Excel allows you to

- q print the row and column labels on each page
- q set page breaks to control the way in which a sheet is divided into pages

## User's Notes



# Installation Procedure

## To install the course

First run Windows.

Then insert disk 1 in the A or B drive, as appropriate.

From the Program Manager, choose **File - Run**.

Next either

- q type **a:setup** (or **b:setup**, as appropriate) and press **Enter**

or

- q use the **Browse** option and select your floppy disk drive and then **setup.exe**

You will then be given the option to change the drive on which the course is to be installed. When you are happy with the options here, click **Continue**.

Next, you will be asked to specify where you wish to install the Windows resource files which the course needs. You may choose to install these in the course directory or in your Windows **SYSTEM** directory. If installing on a network, read *Considerations for network use* on the next page before installing.

You will be prompted to insert further disks as required.

## To remove the course

Run Windows.

Insert the course disk 1 in drive A or B, as appropriate.

From the Program Manager, choose **File - Run**.

Next either

- q type **a:remove** (or **b:remove**, as appropriate) and press **Enter**

or

- q use the **Browse** option and select your floppy drive and then **remove.exe**

You will then be asked to select the drive where *Microsoft Office 97: Advanced Excel 97* is installed.

If you choose **Continue**, and if the course is on the selected drive, the course will be deleted and the subdirectory removed.

## Considerations for network use

There are a number of Windows resource files which the course needs in order to run.

During installation, you are given the choice of installing these in either the course directory or the Windows **SYSTEM** directory.

If you are installing the course on a **LAN** drive, it is best to put these files in the **course** directory, so that they will be accessible to other workstations on the network.

## Access from other workstations

To access the course from a workstation other than the one used to install the course, follow these steps:

Load Windows.

Either create a program group for **CBT Systems courses**, or open this group if it already exists on the workstation.

Choose **File - New - Program Item**.

Using the **Browse** option, select the file **MSOAE.EXE** in the course directory on the network drive where you installed the course.

Click **OK** when satisfied with the options.

There will now be an icon for the course on your Windows desktop. Double-clicking on this icon will run the course.



# Computer Managed Instruction Administration

The course is administered via a CMI (Computer Managed Instruction) system. Normally, only the course administrator has access to the CMI system.

## How to install the CMI Administration system

It's best to install the CMI Administration system on the **course administrator's** PC. But remember, the CMI system must be able to access the course - if the course is not on a LAN, you must install the CMI system and the course on the same PC.

First run Windows (version 3.1 or later required).

Insert the **CBT Curriculum - CMI Admin Disk** in drive A or B, as appropriate.

From the Program Manager, choose **File - Run**.

Next either

type **a:setup** or **b:setup** (as appropriate), and press **Enter**

or

use the **Browse** option to select your floppy disk drive and then type **setup.exe**

You are now given the option of changing your CMI system installation drive.

When you're ready, click **Continue**.

The CMI Administration system is now installed on your selected drive, and a program group called "CBT Systems CMI Administration" is created.

This group contains the program icon. If you want, you can move this icon to another group.

## How to enter the CMI Administration system

Run Windows and select the CMI Administration icon from the appropriate group.

On entering the program, you will be asked to enter your CMI password.

If this is the first time the program is being run, enter a new password - this will then become the CMI password.

If the program has been run before, you must enter the existing CMI password.

If you want to change the existing password, click the **New** button. You must then enter the existing password, before entering your choice for the new password.

The CMI password is not case-sensitive.

## How to register a course with the CMI Administration system

From the **Setup** drop-down menu select **Register Course(s)**.

Specify the drive(s) you wish to search for CBT courses.

To specify all drives, click the **Select All** button.

Click the **Search** button.

Your specified drive(s) will now be searched for CBT courses, and you are given a list of all that are found.

Highlight the course(s) you wish to register.

Click **Select All** if you want to highlight all courses found.

Click the **Register Course(s)** button.

Your selected course(s) are now registered.

**\*NOTE\* If you have previously registered any other course, all existing students will automatically be registered in the new course or courses.**

*Course registration - drive selection options*

|                          |   |
|--------------------------|---|
| <b>Select <u>A</u>ll</b> | selects all listed drives                                 |
| <b><u>S</u>earch</b>     | initiates the search for courses on the selected drive(s) |
| <b><u>C</u>ancel</b>     | closes the drive list and returns to the main menu        |

*Course registration - list of course options*

|                                  |   |
|----------------------------------|---|
| <b><u>R</u>egister Course(s)</b> | registers the selected courses                      |
| <b>Select <u>A</u>ll</b>         | selects all listed courses for registration         |
| <b><u>C</u>ancel</b>             | closes the course list and returns to the main menu |

**How to de-register a course with the CMI Administration system**

From the **Setup** drop-down menu select **De-register Course(s)**. You are given a list of all registered courses.

Specify the course(s) you want to de-register.

If you want to de-register all courses, click the **Select All** button.

Click the **De-register** button.

After individual confirmation, each selected course will be de-registered.

**\*NOTE\*** This procedure only removes the course from the CMI Administration system. The course itself - and all student details related to it - is not affected.

*Course de-registration - list of course options*

|                           |   |
|---------------------------|---|
| <b><u>D</u>e-register</b> | de-registers the selected course(s)                 |
| <b>Select <u>A</u>ll</b>  | selects all listed courses for de-registration      |
| <b><u>C</u>ancel</b>      | closes the course list and returns to the main menu |

## How to register a student to the CMI Administration system

From the **Setup** drop-down menu select **Register Student**.

Fill in the two fields, Name and Number, in the Student registration dialog box.

Select **Register**.

### *Student registration dialog box options*

- |                 |  |
|-----------------|--|
| <b>Register</b> | confirms your entries in the Name and Number fields and registers the student to the system  |
| <b>Cancel</b>   | closes the dialog box  |
| <b>Advanced</b> | displays the Site/Dept, Mastery, and Password fields, for more detailed student registration |

### *Student registration dialog box fields*

- |           |  |
|-----------|--|
| Name      | for name of the student to be registered   |
| Number    | for number of the student to be registered (the number must be alphanumeric and can consist of up to eight characters) |
| Site/Dept | to identify the student by department or site (optional field)   |
| Mastery   | allows you to set the pass level for course tests (70% is the default)   |
| Password  | for a password for the student to be registered  |

## How to change a student's registration details

From the **Setup** drop-down menu, choose **Change Student Details**.

Select the student whose details you want to change, and click the **Change** option button.

When the Change student details dialog box appears, make the required changes in the appropriate fields.

Click the **Accept** option button.

*Student selection dialog box options*

|                      |   |
|----------------------|---|
| <b><u>C</u>ancel</b> | cancels the operation, closes the dialog box and returns you to the main CMI menu screen  |
| <b><u>C</u>hange</b> | accepts the selected student and moves you to the next dialog box, where changes are made |

*Change student details dialog box options*

|                      |  |
|----------------------|--|
| <b><u>A</u>ccept</b> | confirms changes made (or current student details) in the dialog box fields                      |
| <b><u>C</u>ancel</b> | closes the Change student details dialog box and returns you to the Student selection dialog box |

*Change student details dialog box fields*

These are the same as the Student registration dialog box fields.

**\*Note\***    **Before changing student details, ensure that all CBT courses are registered.**

**How to remove a student from the CMI Administration system**

From the **Setup** menu choose **Delete Student(s)**.

Highlight the appropriate student name(s).

Click **Delete**.

*Delete Student(s) dialog box option buttons*

|                                 |   |
|---------------------------------|---|
| <b><u>C</u>ancel</b>            | closes the dialog box                               |
| <b><u>S</u>elect <u>A</u>ll</b> | selects all the listed students (for deletion)      |
| <b><u>D</u>elete</b>            | deletes the selected student(s) from the CMI system |

**\*Note\***    **Before removing students, ensure that all CBT courses are registered.**

## How to generate a report on a student's progress

From the **Reports** drop-down menu choose **Student Progress**.

Highlight the student(s) for whom you require a report.

Click **Report**.

*Select Students dialog box option buttons*

|                          |   |
|--------------------------|---|
| <b><u>C</u>ancel</b>     | closes the dialog box                                     |
| <b>Select <u>A</u>ll</b> | selects all the listed students (for reports)             |
| <b><u>R</u>eport</b>     | displays the Student Progress - Report Options dialog box |

*Student Progress - Report Options dialog box options*

|                                  |   |
|----------------------------------|---|
| <b>Report Type</b>               | allows you to select either general or detailed student course progress report(s)                                       |
| <b>Output Destination</b>        | allows you to select to have your report(s) sent to a text or comma-separated file, displayed on screen, or printed out |
| <b><u>G</u>enerate</b>           | generates the report for the selected student(s)  |
| <b><u>C</u>ancel</b><br>ML000572 | closes the report options dialog box  |