ASA Research

Excel for Advanced Users

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2010 Excel Advanced
Course Information

Learning Objectives	To increase the productivity of accountants and CPAs using Excel by introducing them to advanced capabilities within Excel
Course Level	Advanced
Pre-Requisites	Good Familiarity with Microsoft Excel
Advanced Preparation	None
Presentation Method	Live lecture using full color projection systems and live Internet access with follow up course materials
Recommended CPE Credit	8 hours
Handouts	Templates, checklists, web examples, manual
Instructors	J. Carlton Collins, CPA
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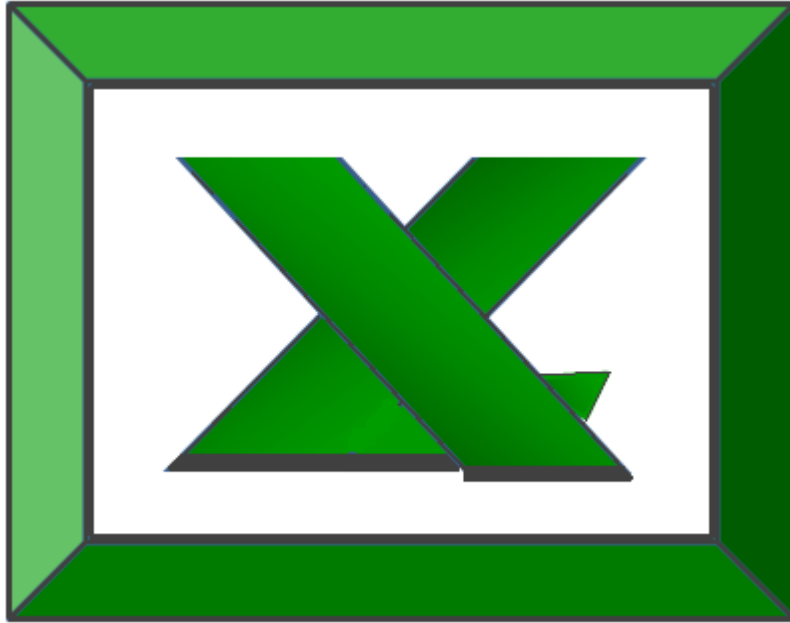
Chapter 1

Excel Advanced Concepts

1. **E-Mail Merge from Excel**
   a. Demonstrate

2. **Validation**
   a. Drop Down List
   b. Dates, Whole Numbers, Decimals
   c. Comments
   Also:
   a. Color of Data Input Cells
   b. =TODAY
   c. =VLOOKUP
   d. Macro & Macro Buttons

3. **Macros**
   a. Create "Page Setup" Macro
      a. Simply turn on macro recording, press keys, turn off macro recording
      b. No Spaces allowed in macro name
      c. Assign macro to icon or object for easy access
   b. Record in workbook vs. personal macro workbook
   c. Absolute vs. relative reference
   d. Create an "Erase" Macro
   e. Create a "Print" Macro
   f. Create Macro Buttons
   g. Show Developer Tab
   h. Introduction to VBA (Not too deep)
   i. Insert VBA elements into Excel – Combo Box
   j. Displays the Macro dialog box - ALT+F8
   k. Displays the Visual Basic Editor - ALT+F11

4. **Hyperlinks**
   a. Text
   b. Objects
   c. Text Box
   d. Icons
   e. To Web Sites
   f. To E-mail Addresses
   g. To Bookmarks
   h. To Other Files

5. **Administrative Page**
   a. Title, Company, Date, Notes, Review Notes, Etc.
   b. Table of Contents (Linked to worksheets, named ranges and other documents)
   c. Macro Buttons