



Microsoft Excel 2007-2019/365

Level 1: Creating Spreadsheets

1 Day Course

Training at Your Office

\$ 250 per person (minimum charge of 3 people)

Discounts available for groups of 6 or more.

Rates are per training day. HST is extra.

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COURSE DESCRIPTION

Whether you've never touched Excel in your life, or you've only used spreadsheets created by others, this course will cure that Excel phobia and get you well on your way to being a pro. By the end of the day you will know how to create your own spreadsheets, add text & data, and make it all look pretty.

COURSE TOPICS

Getting Started with Excel

The startup screen
Workbooks and sheets
Customize the Quick Access Toolbar
Using the Ribbon

Entering Text, Numbers & Formulas

Rules for entering data
Deleting cell contents
Editing cell entries
Moving around a worksheet
Selecting cells (shortcuts)
Using Clear
Using Undo and Redo

Formulas & SUM/AVERAGE

Entering a basic formula
Operators & order of operations
Using the Sum & Average functions

Using Number Formats

Choosing number formats
Date formats & custom date formats
How Excel stores dates
The Today and Now functions
Setting decimal places
Negative value display

Cell Alignment Options

Left, center and right
Vertical cell alignment
Centering a heading
Wrapping text
Rotating text
Using indent to create space

Columns & Rows

Column widths & row heights
Hiding & unhiding
Inserting & deleting

Cut, Copy, Paste and Paste Special

Drag & Drop to move or copy
Cut, Copy, & Paste (different in Excel)
Using Paste Special

Using Fill

Automate entering months, days, a series of numbers, and more
Using Fill to copy formulas
Fill options / Fill tricks
Using Flash Fill (2013/2016)

Fonts, Borders & Cell Colour

Changing fonts and sizes
Bold, italic, underline
Font colour & cell colour
Applying borders

Databases - Quick Overview

Understanding/setting up a database
A quick look at sorting
A quick look at filtering

Files

Saving & opening
Working with multiple files open
Closing files
Creating new files

Page Layout & Printing

Portrait & landscape
Scaling
Paper size
Margins
Centre on page
Print preview
Printing

Zooming In and Out

Using the zoom bar & dialog box
Zoom to selection

Optional Topics (if time permits)

Using AutoCorrect
Using Find and Replace



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Level 2: Expand Your Knowledge

1 Day Course

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COURSE DESCRIPTION

Build upon your basic Excel knowledge with the power to handle large datasets and display information graphically. By the end of the day you will know how to deal with multi-page spreadsheets, create automatic formatting based on changing data, and display information with beautiful charts and graphs.

COURSE TOPICS

Setting up a Database

Proper database design
The current region

Sorting

Multiple level sorting
Sort options
Sort warning
Custom sorts & custom lists for Fill
Sorting by colour/icon
Back to original sort order

Filtering With AutoFilter

Activating filter
Using the search box / check marks
Entering custom criteria
Understanding arguments
And vs. Or
Filter on cell values
Formulas with filters
Reapplying a filter
Clearing filters
Using the Subtotal function
Saving filters (see Custom Views)

Split & Freeze

Splitting the screen into 2 or 4 panes
View widely separated areas simultaneously
Freezing panes to lock headings
Removing a split or freeze

Conditional Formatting

Highlight cell rules
Top/bottom rules
Data bars, color scales, icon sets
Using Quick Analysis (2013/2016)
Pre-set and custom formats
A trick for finding duplicates
More rules / new rules
Using manage rules
Clearing rules

Multiple Sheets

Navigating from sheet to sheet
Sizing sheet display area
Adding, deleting, renaming sheets
Setting sheet tab colour
Moving and copying sheets
Hiding & unhiding sheets
Setting defaults for all sheets
Setting default number of sheets
Protecting a Workbook

Multiple Windows

Creating & switching windows
View multiple sheets/multiple files
Arranging together on the screen
Hiding windows
Closing all windows

Creating Custom Views

Saving multiple print settings/switching
Saving multiple filters/displaying
Saving window, zoom and other settings

Advanced Page Setup & Printing

Normal, layout and page break views
Headers & footers and print titles
The Page Setup options
Using page breaks

Charts

Create column, bar, line & pie charts
Instant charts
Selecting, moving & sizing charts
Changing the chart type
Transposing the data
Chart titles & data labels
Printing charts
Quick chart layouts & chart styles
Selecting, moving & sizing elements
Formatting chart elements

Other Topics

Using format painter to copy formats
Customize the Ribbon (2010-2016)
Customize the Quick Access Toolbar



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Level 3A: Working with Formulas

1 Day Course

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COURSE DESCRIPTION

Multiply your knowledge of formulas. By the end of the day, you will have the skill set to leverage Excel's hundreds of built-in formulas/functions (such as IF and VLOOKUP) and handle almost any situation, simple or complex.

COURSE TOPICS

Formulas Basics

Creating a Basic Formula
Copying and Filling Formulas
Operators / Order of Calculation

Using Functions

Using Sum & Average
Using the AutoSum icon
Quick Analysis Totals (2013/2016)
Using Insert Function
The Function icons
Understanding Function Syntax

Absolute Formulas

Relative vs absolute
Full & partial absolute formulas

Range Names in Formulas

Why use a range name
Range name rules
Different ways to create range names
Using Range Names in new and existing formulas

A Quick Look at These Functions

Count / CountA / CountBlank / Rank
Max / Min / Average / Large / Small
Round / RoundUp / RoundDown
SumIf / Product
Left / Mid / Right / Search
Lower / Upper / Proper
Value / NumberValue (2013/2016)
Trim / Len / Text

Entering and Formatting Dates

Entering dates and times properly
How Excel interprets dates & times
Formatting – pre-set and custom
Formulas to calculate dates or times

Date and Time Functions

Today / Now
Day / Month / Year / Weekday / Date
Edate / EOMonth / DateValue
NetworkDays / Workday
Days (2013/2016)

The IF Function

Quick overview / IF Arguments
Skipping Arguments
True and false
Using Data Validation
IF without IF
Nesting IF's
Multiple conditions with AND/OR
Conditional Formatting with IF
IFS Function (Excel 365)

The VLOOKUP Function

VLookup Arguments
Vlookup vs. HLookup
Using VLookup
Numbers outside the range
IF and OR with VLookup
IFNA with VLookup (2013/2016)
Using Data Validation with VLookup
The Match Argument / #REF Error

Using Index Match

INDEX MATCH instead of VLOOKUP
Using MATCH alone
Using INDEX alone
Using INDEX and MATCH together
Using with Data Validation

More About Formulas

Using Transpose to flip data
Tips for editing formulas
Displaying formulas (sheet or cells)
Reference a single cell in a formula
Concatenating formulas
Concat (Excel 365) / TextJoin (Excel 365)
Converting formulas to values
Splitting one column into several
Flash Fill to split data (2013/2016)
Protecting formulas
Formulas that reference other sheets
Formulas that reference other files
Text shown with values

Mapping Formulas with Auditing

Tracing formulas
Tracing dependents and precedents
Step into a formula
Error checking

Trouble Shooting – Error Messages in Formulas

How to fix errors
Error indicators
Using IFERROR



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Level 3B: Pivot Tables & Managing Data

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COURSE DESCRIPTION

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Ever wonder "what the heck is a pivot table, and why do I always hear so much about them?" By the end of the day you will learn how to use one of Excel's most powerful - and intimidating - features to make sense of large sets of data. You will also learn other techniques for building/managing an Excel database.

COURSE TOPICS

Quick Review of Databases

- Setting up a Database
- Sorting
- Using AutoFilter

Create and Format a Table

- Why use a table and how to create one
- Using table tools
- Filtering & Sorting with Tables
- Using Slicers (2013/2016)
- Displaying Totals
- Design Your Own Table Style

Group, Outline & Subtotals

- Grouping rows/columns on a sheet
- Showing/hiding details in an outline
- Display/hide outline symbols
- Creating Groups
- Adding automatic subtotals
- Adding other automatic analysis (Average, Count, etc.)
- Removing subtotals

PivotTables – Part 1

- Proper Database Design
- Use a Table as the Source
- Creating a PivotTable
- Using/Modifying the Fields List Adding Column/Rows/Values/Filters
- Moving & Removing fields
- Inside vs Outside the PivotTable
- Changing Report Layout
- Applying Basic Formatting
- Refreshing a PivotTable

PivotTables – Part 1 (continued)

- Changing the Source Range
- Editing Database Data
- Editing the PivotTable Data
- Saving Formatting on Refresh
- Undo with PivotTables
- Grand Totals On/Off
- Changing the Summary Function
- Basic Filters with Filter Fields
- Modifying the Fields List Window

PivotTables – Part 2

- More About Multiple Rows/Columns
 - Changing the Field Order
 - Expanding/Collapsing
 - Showing All Items in Each Group
 - Increase/Decrease Indent
 - Blank Lines Between Groups
 - Multiple Subtotals
- Handling Blank Values
- Showing Details (Drill Downs)
- The PivotTable Cache
- Using Multiple Value Columns
- Percent, Running Totals, Ranking, etc.
- Using and Creating Styles
- Move / Copy a PivotTable
- Sorting Data
- More About Filters
 - Data Filters
 - Creating Filter Pages
 - Hiding/Keeping Items
 - Applying Label & Value Filters
- Creating Custom Groups
- Grouping Dates

PivotTables – Part 3

- Calculations/Formulas
 - Adding Calculated Fields
 - Adding Calculated Items
 - Listing Formulas
 - Calculations Outside the PivotTable
 - Using Conditional Formatting with Values
- Adding Timelines (2013/2016)
- PivotTable Slicers (2010/2013/2016)
- Multiple Consolidation Ranges
- Creating Pivot Charts
- Creating a PivotTable/Chart Dashboard

Importing Data

- From another spreadsheet
- Paste link / Insert object
- Importing other formats such as Access, CSV, Text, etc.



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