

# Microsoft Excel 2007-2016

## 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)  
What is Quick Analysis (2013/2016)  
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

Setting column widths  
Setting row heights  
Inserting columns and rows  
Deleting columns and rows

### 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  
Page breaks  
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

# Microsoft Excel 2007-2016

## Level 2: Expand Your Knowledge

1 Day Course

### Training at Your Office

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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. (The depth of each topic covered is tailored to the needs of the group. For example, some groups do not require an in-depth knowledge of Charts. This outline lists each topic in full detail.)

## 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  
Using data forms  
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  
Using formulas in rules  
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  
Sheet background picture  
View multiple sheets on the screen

### Multiple Windows

View areas within the same file or other files together  
Creating new windows  
Switching windows  
Arranging together on the screen  
Hiding windows  
Closing all windows  
Save Workspace (2007/2010)

### 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  
Creating headers and footers  
Printing column/row titles on every page  
Solve printing problems by understanding all Page Setup options and how page breaks work

### Charts (Graphs)

Creating a column chart  
Moving and sizing a chart  
Show chart with data or its own sheet  
Flipping axes, changing chart type  
Changing data ranges for series  
Using styles and pre-set layouts  
Adding a title, legend, data table, data labels, axis titles, gridlines, trendlines  
How to format any item on a chart  
Using the chart buttons (2013/2016)  
Creating pie charts and combo charts  
A look at some unusual chart types  
Printing charts  
Unlinking charts from data  
Using Sparklines (2010/2013/2016)

### Other Topics

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

# Microsoft Excel 2007-2016

## Level 3A: Working with Formulas

1 Day Course

### Training at Your Office

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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
- Order of Calculation

### Using Functions

- Using Sum & Average
- Using AutoSum
- 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
- Max / Min / Average
- Round / RoundUp / RoundDown
- SumIf
- Left / Mid / Right / Search
- Lower / Upper / Proper
- Value / NumberValue (2013/2016)
- Trim / Len

### 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
- NetworkDays / Workday
- Value with dates
- Days (2013/2016)

### The IF Function

- Quick overview
- Rules and conditions
- True and false
- Using Data Validation
- IFs without IF
- Nesting IF's
- Closing brackets
- Multiple conditions with AND/OR

### The VLOOKUP Function

- Quick overview
- Creating a lookup table
- Using VLookup with that table
- Numbers outside the range
- Using IF and OR with VLookup
- Using IFNA with VLookup (2013/2016)
- Using Data Validation with VLookup
- Vlookup vs. HLookup

### 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
- Converting formulas to values
- Splitting one column into several
- Flash Fill to split data (2013/2016)
- Using manual calculation
- Protecting formulas

### Multiple Sheet/File Formulas

- Formulas that Reference Other Sheets
- Formulas that Reference Other Files

### Mapping Formulas with Auditing

- Tracing formulas
- Tracing dependents and precedents
- Step into a formula
- Error checking
- The watch window

### Text with Values

- Showing text with a value
- Performing calculations

### Trouble Shooting – Error Messages in Formulas

- How to fix errors
- Error indicators

# Microsoft Excel 2007-2016

## Level 3B: Pivot Tables & Managing Data

1 Day Course

### Training at Your Office

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

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## COURSE DESCRIPTION

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

### Review of Setting up a Database

Proper database design  
The current region

### Review of Sorting

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

### Review of 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  
Using data forms

### 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

### Advanced Filter

AutoFilter vs. Advanced Filter  
The three ranges  
Entering simple and formula-based criteria  
Performing a filter  
Using OR conditions and range names  
Copy unique records  
Using Subtotal, Sumif/ifs, Averageif/ifs and Countif/ifs  
Duplicate records (finding/removing)

### 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

### Basic Pivot Tables

Creating a pivot table  
Recommended pivot tables  
Adding columns, rows & filters  
Moving & removing fields  
Adding multiple fields in an area  
Hiding/showing data  
Accessing tools and options  
Refreshing data  
Using value field settings  
Using and creating styles

### Advanced Pivot Tables

Creating and working with groups  
Adding a timeline (2013/2016)  
Collapse and expand fields  
Changing report layout  
Using subtotals and grandtotals  
Using calculated fields  
Using calculated items  
Listing formulas used  
Creating drill-downs  
Creating report filter pages  
Filtering pivot table fields  
Using slicers (2010/2013/2016)  
Setting pivot table options  
Multiple consolidation ranges  
Creating pivot charts

### Importing Data

From another spreadsheet  
Paste link  
Insert object

### Get External Data

Importing from Access  
Importing text files  
Importing from web  
Working with connections  
Open external files