



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)
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



Phone: 905-895-1709
www.GumpTraining.com
info@gumptraining.com



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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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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
- Edate / DateValue
- 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)
- 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

Text with Values

- Showing text with a value
- Performing calculations

Trouble Shooting – Error Messages in Formulas

- How to fix errors
- Error indicators



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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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