

Excel in the Virtual classroom

- Emphasis is on best practices, shortcuts, providing solutions to real situations not just how to click a button, but why you should click the button! As good as the real classroom – delegates only need to do the modules that are relevant! Mix and match. Ask questions and receive help and support after the sessions
- Pick from any of the 1-hour modules to learn and develop your Microsoft Excel skills. All sessions are delivered through Zoom or Microsoft Teams - easy to use - I'll send you all the information you need to make sure our sessions run smoothly.
- Prior to each session, delegates will receive the files and instructions needed to successfully follow and practice the skills and techniques. The virtual classroom will provide delegates with:
 - the opportunity to ask questions
 - facility to share their screens and to send instant messages/chat.
 - Practice time
 - Step by step PDF to follow
 - Follow up exercises will also be provided for consolidation of learning.
 - Delegates will be supported after the training.

Who am I

Based in West Sussex, providing training throughout the UK offering a range of IT courses that can be tailored to suit your needs. Experienced learning and development professional providing a comprehensive package of training and support services to the private and public sectors - Health, NHS, Financial, Legal, Banking, Investment, Education, Land-based, Automotive and Engineering, Commercial.

Friendly and approachable with a love of learning and sharing knowledge and skills.

Celia describes herself as a competent, conscientious and energetic trainer; an experienced learning and development professional with a natural ability and enthusiasm to assimilate and disseminate new technologies and soft skills. Committed to delivering first class training enabling learners and clients to meet and exceed their expectations.



Contact me for a free trial session and see how much you will learn.

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Excel - The Essentials

The topics on this section are suitable for those new to Excel and those who wish to gain the necessary skills to create, edit, manipulate data records, format and print from Microsoft Excel worksheets.

MODULE 1: Getting Started
<ul style="list-style-type: none">• The Interface and Workspace• Navigating a Worksheet – whizz around like a pro• Understanding Excel Mouse pointers and you’ll be in charge• Enter, Edit and Delete, Undo Data• Quick ways to move, duplicate, copy data• Adjusting individual or multiple Column Widths• Use Autofill effectively and stop it doing what you don’t want it to!• Freeze panes (stop the top row and side columns from disappearing)• Lots of keyboard shortcuts and best practices
MODULE 2: Format and present data
<ul style="list-style-type: none">• Understand what all those font, alignment and number formats actually do (and how to clear them)• Font formatting, borders and shading• Align data, Wrap Text, Merge Cells• Number formats - Date, Currency, Percentages and Text Formats• Cell styles and galleries• Clear Formats• Lots of keyboard shortcuts and best practices
MODULE 3: Managing Lists
<p>Understand how to sort your records into alphabetical, date and number order – don’t let Excel scramble your data!</p> <ul style="list-style-type: none">• Sort single or on multiple columns to get your records in order• Filter – put the filter buttons on correctly so you can see just the records and rows that are most important
MODULE 4: Printing
<p>If you need to print your data, you need to know how to:</p> <ul style="list-style-type: none">• Set up the sheet for printing just what is needed• Get it to fit on the page• Repeat the important header rows on every printed sheet• Include your logo, repeating headers and footers• Preview the print out before you hit the print button• Understand the print options
MODULE 5: Managing multiple worksheets
<p>If you have more than one worksheet in your file you should know how to:</p> <ul style="list-style-type: none">• Delete and rename worksheets• Use the navigation option to quickly find worksheets without scrolling• Move and copy worksheets• Colour code the worksheet tabs• Insert worksheets• Link worksheet data

MODULE 6: Calculations – Formulas and Functions

Do you need to add up a column or row of figures?

Do you need to count the entries on a worksheet?

Do you need to know how many widgets you sold last month?

Do you need to work out percentages?

Do you need to work out how many days between two dates?

Do you need to see if you have hit target or gone over budget?

If you answered yes to any of the above you probably need to know about:

- Relative Formulas that add, subtract, multiply and divide – using numbers, currency, percentages and dates
- Excel built in functions that automatically Add a column or row, work out averages and count how many
- Absolute cell references

All explained in simple terms, with step by step approach – you will even learn to love Excel!

Intermediate level topics

The topics on this course are for those who want to expand their basic knowledge of Microsoft Excel to work with larger spreadsheets, create charts, manage tables of data and develop their knowledge of Excel's functions. Emphasis is on best practices, shortcuts, providing solutions to real situations not just how to click a button, but why you should click the button!

MODULE 7: Managing Lists

Quick Recap of interface basics

- Use Autofill effectively and stop it doing what you don't want it to!
- Freeze panes (stop the top row and side columns from disappearing)
- Split Screen
- Print Preview
- Customise Quick Access Toolbar
- Work with comments, notes, text boxes and screen shots
- Keyboard shortcuts and best practices

Managing Lists

- Single and multiple column sorting
- Create filters to work with view, print and manage records that meet criteria on dates, currencies, text and numbers.
- Set simple and complex filters to view records that fall in 'top' or 'bottom' ranges by value/percentage; above/below average; contain partial text
- Create custom views to save complex filter setups to be reapplied to new or added data

MODULE 8: Conditional Formatting

Automatically colour code cells or values that meet criteria. Highlight dates that are coming up to deadlines, colour code values that fall outside acceptable ranges. Use RAG report icon sets to group and highlight data.

- Apply simple conditional formatting by pre-written rules
- Create your own rules to automatically highlight cells
- Colour code using icon sets; colour bars to help colleagues quickly identify focus areas
- Use Filters to select colour coded cells
- Remove and reset conditional formatting

MODULE 9: Linking data

Link data from one worksheet to another to create summaries and look up information stored on other worksheets or workbooks. This ensures your worksheets are more accurate and up to date. This session which show you which technique/Function to use in a variety of situations

- Grouping worksheets
- SUMMING / AVERAGING / COUNTING through multiple worksheets
- Copy and Paste Values only
- Copy and Paste Link
- SUMIF function to link data based on criteria
- VLOOKUP – look up data across worksheets/workbooks that matches a unique value – eg account name or number.

MODULE 10: An in-depth look at Excel's built in Functions

Excel Functions

Explore the library of Excel Functions to generate statistics, manipulate text, work with dates and make decisions

- Function Library, Formula bar, how the Function Wizard helps to put a function together, understand the syntax and arguments of all Excel Functions
- COUNTA, COUNTBLANK, COUNTIF
- IF functions to make decisions
- Nested IF to test for multiple conditions
- IF with nested AND and OR functions to test for combination of conditions
- DATE functions to extract date parts, manipulate and calculate ages and elapsed durations

Auditing Tools

Use Auditing and error tracing tools to correct and track formulas through worksheets and workbooks

- Know how to evaluate the structure of a workbook and track formulas and trace errors
- Displaying/Removing Dependent and Precedent Arrows
- Tracing Cells Causing Errors
- Evaluating a formula
- Using the Watch Window

MODULE 11: Tables and Pivot Tables

By converting your standard data range into a named Excel Table you are adding more tools to the analysis tool pack. Improved sort and filter, faster and more accurate ways to add formulas and quick Total tools for generating statistics.

Then convert the Table into a Pivot Table and you have a range of tools for reporting summaries and complex statistics.

Tables

- Convert range to table
- Table formatting
- Table header and total rows with Dynamic SUBTOTAL function
- Formulas in Tables using structured references
- Analysing data with the Slicer

Pivot Tables

- How to construct a Pivot Table report
- Create Pivot Tables from ranges vs Tables
- Work with Fields
- Updating and refreshing Pivot Table data
- Slicers vs Filters

MODULE 12: Charts, Graphs and Sparklines

- Creating, Moving, Resizing, Printing & Deleting Charts
- Formatting Chart Objects & Data Series
- Creating User-Defined Charts
- Changing the Data Source; Editing Text/Axis Titles
- Removing/Adding Axes Labels; Adding Data Labels & Tables
- Creating Combination Charts
- Using a Secondary Axis
- Adding a Trendline
- Sparklines

Advanced level topics

The topics here will expand your knowledge of Excel further to import and work with dynamic data, use built in Scenario and What-if tools, apply complex look ups, utilise the new dynamic array functions and build dashboards.

MODULE 13: Lookup functions and Named Ranges

Linking data and lookups are used to create solutions to a wide variety of situations. This session covers which Lookup function to use and why some are better in some scenarios than others.

- VLOOKUP and HLOOKUP to compare data, retrieve and link data across sheets and workbooks
- Use the TRUE and FALSE arguments within LOOKUPS to replace nested Ifs
- MATCH and INDEX functions to create dynamic lookups
- Naming ranges make complex functions easier to read and manipulate
- Using named ranges and named Tables within complex functions

MODULE 14: Data tools | Advanced Filters and Outlines | Data Validation | Removing Duplicates

- Custom Views for saving and re-using filtered and hidden columns
- Working with Advanced Filters and Database Functions
- Use the Advanced Filter Feature to Display and Extract Data from Tables
- Database Functions
- Outlines, applying, expanding and collapsing.
- SUBTOTALS function to apply statistics to filtered data
- SUBTOTALS tool to work with outlined and grouped data
- Validating Data
- Creating a Custom Error Message
- Removing a Data Validation
- Removing Duplicates

MODULE 15: Importing Data with the Query Editor

- Importing data from text files, Excel files, Access Database files and from the Web using GET DATA
- Query Editor and Query definitions
- Transform, Edit and Load dynamic data

MODULE 16: Advanced Pivot Tables, Charts and Slicers for Dashboards

- Calculations and Grouping in Pivot Tables
- Working with multiple Pivot Tables
- Slicers to control multiple Pivot Tables
- Pivot Charts to create dashboards controlled with single slicer and timeline commands
- Calculations in Pivot Tables – Calculating fields and Calculating Items
- Timelines
- Functions to summarise and analyse data
- Grouping Data
- Adding, Moving, Deleting PivotTable Report Fields
- Creating Pivot table charts and graphs
- Sorting and filtering pivot table data
- GETPIVOTDATA function

MODULE 17: New Dynamic Array functions

- Excel 2016 and Excel 365 users will be able to use the new Dynamic array functions – this session will discuss how these can replace standard ARRAY (CSE) functions
 - FILTER function
 - RANDARRAY function
 - SEQUENCE function
 - SORT function
 - SORTBY function
 - UNIQUE
 - #Spill Errors

MODULE 18: What If Scenarios, Goal Seek and Data Tables

- Using Goal Seek
- Using the Scenario Manager
- Displaying a Scenario
- Creating a Scenario Summary Report
- Data Tables and Break Even Charts