



Microsoft Excel 365

MICROSOFT 365 EXCEL: INTRODUCTION

Duration	Level	Technology	Delivery method
1 Day	Introduction	Microsoft Office 365	Classroom ILT • Virtual ILT

MICROSOFT 365 EXCEL: ADVANCED

Duration	Level	Technology	Delivery method
1 Day	Advanced	Microsoft Office 365	Classroom ILT • Virtual ILT

MICROSOFT 365 EXCEL: EXPERT

Duration	Level	Technology	Delivery method
1 Day	Expert	Microsoft Office 365	Classroom ILT • Virtual ILT

Introduction to Excel 365

Introduction

Welcome to the first part of our Microsoft 365 Excel courseware. Excel is Microsoft's powerful and easy-to-use spreadsheet program, which provides you with an extensive set of tools to organize, analyse, present, and store data. This course is intended to help all novice computer users get up to speed with Excel quickly. We will cover:

- Getting started with the app
- Working with formulas and functions
- Modifying worksheets
- Printing workbook contents
- Managing workbooks
- Customizing the Excel environment

MODULE 1: GETTING STARTED

LESSONS :

TOPIC A: Getting to Know Excel

TOPIC B: Creating Workbooks

TOPIC C: Getting Help in Excel 365

- Microsoft 365 Excel
- What are Spreadsheets, Worksheets, and Workbooks?
- What are Columns, Rows, Cells, and Ranges?
- The Excel Interface
- Navigating in Excel
- Keyboard Navigation Options
- The Ribbon
- The Backstage View
- Data Types
- Excel 365 File Formats
- The Save and Save As Commands
- Saving to Microsoft OneDrive
- Compatibility Mode
- The Convert Option
- The Compatibility Checker
- Checking for Accessibility Issues
- Using the Microsoft Search Box
- Accessing Advanced Help Options

MODULE 2: WORKING WITH DATA

LESSONS

TOPIC A: Using Formulas and Functions

TOPIC B: Modify Slide Masters and Slide Layouts

TOPIC C: Working with Data

TOPIC D: Working with Rows and Columns

TOPIC E: Sorting and Filtering Data

- Excel Formulas
- The Formula Bar
- Elements of an Excel Formula
- Mathematical Operators
- The Order of Operations
- Types of References
- About Functions
- Creating a Function with AutoComplete
- Using the Insert Function Dialog Box
- Using AutoSum
- Viewing AutoSum Calculations in the Status Bar
- Automatic Workbook Calculations
- Selecting Cells
- The Cut, Copy, and Paste Commands
- Using Paste Options
- Live Preview
- The Transpose Option
- Moving Data with Drag and Drop
- The Undo and Redo Commands
- Using AutoFill
- Using Flash Fill
- Inserting Rows and Columns
- Deleting Rows and Columns

Pre-requisites

This Course assumes that the user understands the basics of using a Windows-based computer. Students should be comfortable using the keyboard, mouse, and Start menu. Understanding and experience with printing and using a web browser is an asset, but not required. No previous experience with other versions of Excel is necessary.

Course objectives

By the end of this course, users should be comfortable with creating a new spreadsheet, working with basic formulas and functions, making their spreadsheet look professional and presentable, and saving and printing a spreadsheet

- Clearing Data from Cells
- Changing Column Width and Row Height
- The Hide and Unhide Options
- The Difference Between Sorting and Filtering
- Sorting Data
- Enabling Filtering
- Using the Filter Menu
- Using Text Filters
- Clearing a Filter

MODULE 3: MODIFYING A WORKSHEET

LESSONS

TOPIC A: Formatting Text

TOPIC B: Formatting Cells

TOPIC C: Aligning Cell Content

TOPIC D: Search For and Replace Data

TOPIC E: Spell Check a Worksheet

- What is a Font?
- The Font Group
- The Format Cells Dialog Box
- The Format Painter
- Live Preview and Formatting
- The Mini Toolbar
- Creating Links
- Applying a Border
- Applying a Fill
- Changing the Number Format
- Formatted Numbers and Cell Width
- Customizing Number Formats
- Alignment Options
- The Indent Commands
- The Wrap Text Command
- Merge & Centre Options
- Cell Names and Range Names
- The Find Command
- The Replace Command
- The Go To Command
- The Spelling Dialog Box

MODULE 4: PRINTING WORKBOOK CONTENTS

LESSONS

TOPIC A: Define the Basic Page Layout for a Workbook

TOPIC B: Refine the Page Layout and Apply Print Options

- Topic Objectives
- The Print Options in Backstage View
- The Page Setup Dialog Box
- The Print Preview Option
- Workbook Views
- Headers and Footers
- Header and Footer Settings
- Page Margins
- Margins Tab Options

- Page Orientation
- Zoom Options
- Page Breaks
- Page Break Options
- The Print Area
- Print Titles
- Scaling Options

MODULE 5: MANAGING LARGE WORKBOOKS

LESSONS

TOPIC A: Format Worksheet Tabs

TOPIC B: Manage Worksheets

TOPIC C: Manage the View of Worksheets and Workbooks

- Renaming Worksheet Tabs
- Changing Tab Colour
- Grouped Worksheets
- Repositioning Worksheets
- Inserting or Deleting Worksheets
- Hiding and Un-hiding Worksheets
- Worksheet References in Formulas
- The Freeze Options
- The Split Command
- The Switch Windows Command
- The New Window Command

MODULE 6: CUSTOMIZING THE EXCEL ENVIRONMENT

LESSONS

TOPIC A: Customize General and Language Options

TOPIC B: Customize Formula Options

TOPIC C: Customize Proofing and Save Options

TOPIC D: Customize the Ribbon and Quick Access Toolbar

TOPIC E: Understanding and Enabling Add-Ins

TOPIC F: Customize Advanced and Trust Centre Options

- The Excel Options Dialog Box
- The General Category
- The Language Category
- The Formulas Category
- The Proofing Category
- The Save Category
- Version Control
- The Customize Ribbon Category
- The Quick Access Toolbar Category
- What Are Add-ins?
- The Add-Ins Category
- The Developer Tab
- The Advanced Category
- The Trust Centre Category

Microsoft 365 Excel: Advanced

Introduction

Welcome to the second part of our Microsoft 365 Excel courseware. This version of Excel incorporates some new features and connectivity options in efforts to make collaboration and production as easy as possible.

This course is intended to help all users become familiar with the more advanced selection of features of Excel. We will cover how to create and use advanced formulas, analyze data, organize worksheet data with tables, visualize data with charts, work with graphical objects, and enhance workbooks.

Pre-requisites

This manual assumes the user has completed the first part of the Microsoft 365 Excel courseware or has an understanding of the information presented in that course, including:

- Getting started with the app
- Working with formulas and functions
- Modifying worksheets
- Printing workbook contents
- Managing workbooks
- Customizing the Excel environment

Course objectives

By the end of this course users should be comfortable in creating advanced formulas, analyzing data with functions, analyzing data using functions and PivotTables, working with tables, visualizing data with charts, working with graphical objects, and enhancing workbooks.

LESSON 1: CREATING ADVANCED FORMULAS

LESSONS:

TOPIC A: Apply Range Names

TOPIC B: Use Specialized Functions

- Range Names
- Adding Range Names Using the Name Box
- Adding Range Names Using the New Name Dialog Box
- Using Range Names in Formulas
- Function Categories
- Function Syntax
- Finding Excel Functions
- Function Entry Dialog Boxes
- Using Nested Functions
- Automatic Workbook Calculations
- Showing and Hiding Formulas
- Enabling Iterative Calculations

LESSON 2: ANALYZING DATA WITH LOGICAL AND LOOKUP FUNCTIONS

LESSONS:

TOPIC A: Use Text Functions

TOPIC B: Use Logical Functions

TOPIC C: Use Lookup Functions

TOPIC D: Use Date Functions

TOPIC E: Use Financial Functions

- Text Functions
- The LEFT and RIGHT Functions
- The MID Function
- The LEN Function
- The TRIM Function
- The UPPER, LOWER, and PROPER Functions
- The TEXTJOIN Function
- The TRANSPOSE Function
- Logical Functions
- Logical Operators
- The AND Function
- The OR Function
- The IF Function
- The IFS Function
- Lookup Functions
- The LOOKUP Function
- The VLOOKUP Function
- The HLOOKUP Function
- The MATCH Function
- Logical Functions
- Logical Operators
- The AND Function
- The OR Function
- The IF Function
- The IFS Function
- Lookup Functions
- The LOOKUP Function

- The VLOOKUP Function
- The HLOOKUP Function
- The MATCH Function
- The INDEX Function
- The TODAY Function
- The NOW Function
- Serializing Dates and Times with Functions
- The IPMT Function
- The PPMT Function
- The NPV Function
- The FV Function

LESSON 3: ORGANIZING WORKSHEET DATA WITH TABLES

LESSONS:

TOPIC A: Create and Format Tables

TOPIC B: Modifying Tables

TOPIC C: Table References

- Tables
- Table Components
- The Create Table Dialog Box
- The Table Design Contextual Tab
- Styles and Quick Style Sets
- Customizing Row Display
- Adding Rows and Columns
- Total Row Functions
- Removing Duplicate Values
- Naming Tables
- Using Structured References
- Database Functions
- Converting to Range

LESSON 4: VISUALIZING DATA WITH CHARTS

LESSONS

TOPIC A: Create Charts

TOPIC B: Modify and Format Charts

TOPIC C: Create a Trendline

TOPIC D: Create Advanced Charts

- Charts
- Chart Types
- Chart Insertion Methods
- Resizing and Moving the Chart
- Adding Additional Data
- Switching Between Rows and Columns
- The Difference Between Modifying and Formatting
- Chart Elements
- Minimize Extraneous Chart Elements
- The Chart Contextual Tabs
- Formatting the Chart with a Style
- Adding a Legend to the Chart
- Trendlines
- Types of Trendlines
- Adding a Trendline
- The Format Trendline Task Pane

- Combination Charts
- Dual Axis Charts
- Creating Custom Chart Templates

LESSON 5: ANALYZING DATA WITH PIVOTTABLES, SLICERS, AND PIVOTCHARTS

LESSONS

TOPIC A: Create a PivotTable

TOPIC B: Filter Data Using Slicers

TOPIC C: Analyze Data with PivotCharts

- PivotTables
- Start with Questions, End with Structure
- The Create PivotTable Dialog Box
- The PivotTable Fields Task Pane
- Summarize Data in a PivotTable
- The "Show Values As" Functionality of a PivotTable
- Format a PivotTable
- External Data
- PowerPivot
- PowerPivot Functions
- Slicers
- The Insert Slicers Dialog Box
- PivotCharts
- Creating PivotCharts
- Applying a Style to a PivotChart

LESSON 6: WORKING WITH GRAPHICAL OBJECTS

LESSONS

TOPIC A: Insert and Modify Graphic Objects

TOPIC B: Layer and Group Graphical Objects

TOPIC C: Incorporate SmartArt

- Graphical Objects
- Inserting Shapes
- Inserting WordArt
- Inserting Text Boxes
- Inserting Images
- The Picture Format Contextual Tab
- The Shape Format Contextual Tab
- The SmartArt Contextual Tabs
- Layering Objects
- Grouping Objects
- Positioning Objects
- About SmartArt
- The Choose a SmartArt Graphic Dialog Box
- About the Text Pane

LESSON 7: ENHANCING WORKBOOKS

LESSONS

TOPIC A: Customize Workbooks

TOPIC B: Manage Themes

TOPIC C: Protect Files

TOPIC D: Preparing a Workbook for Multiple Audiences

- Notes and Comments
- Comments
- Notes
- Watermarks
- Background Pictures
- About Themes
- Customizing Themes
- Recovering Lost Data
- The Protect Group

- The Protect Worksheet Option
- The Protect Workbook Option
- Mark Workbooks as Final
- Encrypting a Workbook
- Digitally Signing a Workbook
- Displaying Data in Multiple International Formats
- Utilize International Symbols
- Adding Alternative Text to Objects

Microsoft 365 Excel: Expert

Introduction

Welcome to the third part of our Microsoft 365 Excel courseware. Excel is Microsoft's powerful and easy-to-use spreadsheet program. This new version of Excel incorporates some new features and connectivity to make collaboration and production as easy as possible.

This course is intended to help all users get up to speed quickly on the advanced features of Excel. We will cover:

- Using Excel Online
- Worksheet Automation
- Auditing and Error Checking
- Data Analysis and Presentation
- Working with Multiple Workbooks
- Exporting and Sorting Data

Pre-requisites

This manual assumes the user has completed, or has an understanding of the materials covered, in the first and second parts of the Microsoft Office Excel 365 courseware, including:

- Excel basics

- Working with data
- Modifying worksheets
- Printing workbook contents
- Managing large workbooks
- Customizing the Excel environment
- Creating advanced formulas
- Analyzing data with logical and lookup functions
- Organizing worksheets data with tables
- Visualizing data with charts
- Analyzing data with PivotTables, slicers, and PivotCharts
- Working with graphical objects
- Enhancing workbooks

Course objectives

By the end of this course, users should be comfortable in both the online and desktop environments, using automating functions, analyzing and presenting data, auditing and error checking your work, working in multiple workbooks, and accessing and distributing data.

LESSON 1: EXCEL ONLINE

LESSONS:

TOPIC A: Accessing and Using Excel Online

TOPIC B: Features that Differ Between Excel Online and the Excel Desktop Application

- About Excel Online
- Logging into Microsoft 365
- Edit Your File in the Excel Desktop Application
- Identify Where Your Workbook is Saved
- Save a Copy of Your Workbook to Your Local Machine
- Copy a Local Workbook to OneDrive
- Features Not Available in Excel Online
- Differences in Features Available in Both Excel Online and The Excel Desktop Application

LESSON 2: WORKSHEET AUTOMATION

LESSONS:

TOPIC A: Managing Workbook Properties

TOPIC B: Working with Macros

TOPIC C: Create and Use a Template

TOPIC D: Use Data Validation in a Workbook

- View Properties Workbook
- Using the Document Inspector
- What is a Macro?
- Recording a Macro
- Saving a Macro
- Inspecting and Editing Macros
- Macro Security
- Set the Custom Template Directory
- Save a Workbook as a Template
- Edit a Template
- Open a New Workbook Based on a Template
- The Data Validation Dialog Box
- Data Validation Settings
- Input Messages
- Error Alerts

LESSON 3: AUDITING AND ERROR CHECKING

LESSONS:

TOPIC A: Tracing Cells

TOPIC B: Error Checking

TOPIC C: Evaluating Formulas and Using the Watch Window

TOPIC D: Data List Outlines

- Show Formulas
- Trace Precedents and Dependents
- Tracer Arrows
- Invalid Data
- Formula Errors and Their Types
- How to Check for Errors
- The Watch Window
- The Camera Tool
- The Evaluate Formula Tool
- Outlines
- Auto Outline
- The Subtotal Command

LESSON 4: DATA ANALYSIS AND PRESENTATION

LESSONS

TOPIC A: Quick Analysis Tool

TOPIC B: Adding Sparklines

TOPIC C: What-If Analysis

TOPIC D: The Analysis ToolPak

- Access the Quick Analysis Tool
- Quick Analysis Options
- Sparkline Types
- Inserting and Editing Sparklines
- The Sparkline Tab
- The Scenario Manager
- Using Goal Seek
- Using Solver
- Load the Analysis ToolPak

- The Data Analysis Dialog Box

LESSON 5: WORKING WITH MULTIPLE WORKBOOKS

LESSONS

TOPIC A: Arrange Workbooks

TOPIC B: Linking to Data in Multiple Workbooks

TOPIC C: Consolidating Data

- Arrange Workbooks for Viewing
- View Workbooks Side by Side
- Use Synchronous Scrolling
- External References
- Editing Links
- Broken Links
- Data Consolidation
- Consolidation Functions
- Use the Consolidate Dialog Box

LESSON 6: EXPORTING AND SOURCING DATA

LESSONS

TOPIC A: Exporting Data

TOPIC B: Using Data Sources

TOPIC C: Use a Microsoft Form for Data Collection

- Export File Format Options
- Exporting Worksheet Data
- Data Sources in Excel
- Importing a Delimited File
- Using a Web Query
- Insert a Microsoft Form into a Workbook
- Add Questions
- Preview a Form
- Share a Form
- Review the Results