



First Call
Stress free IT

Excel for Microsoft 365 Course Profile

Understanding the Fundamentals

½ day

This course is suitable for delegates who are new to Excel or are self-taught and wish to ensure the foundation of their Excel knowledge is accurate and proficient. You must have a basic understanding of the use of your PC and operating system, including keyboard and mouse familiarity.

Objectives

The aim of the course is to provide you with the skills to create and print a spreadsheet containing text, numbers and simple formulae and calculations. You will be able to enter and edit your data proficiently. You will be able to create formulae using traditional operators to add and multiple values, use percentages, calculate VAT and total a column or row of numbers. You will be able to apply formatting to your spreadsheet to ensure your data is easy to read on screen or when printed.

Course Outline

- Creating a new workbook
- Excel application window
- Entering data into a cell
- Entering a label
- Entering a value
- Entering a date and time
- Using AutoComplete
- Editing cell content
- Cancel editing
- Deleting cell content
- Selecting cells
- Using Undo and Repeat
- Using the Spell Check
- Saving a workbook
- Opening a workbook
- Adjusting the column width and row height
- Inserting or deleting cells, rows and columns
- Character formatting
- Number formatting
- Text alignment
- Creating a formula
- Using operators to add, subtract, multiple and divide values
- Calculations with percentages
- Using dates in formulae
- Understanding relative cell references
- Using AutoFill to copy a formulae
- Adding up a column/row of numbers with AutoSum
- Printing your spreadsheet

Delegates will be asked to carry out exercises to reinforce the information they have been given. Handouts will be provided for reference after the course.

Equipment required

Delegates – 1 PC each with Excel for Microsoft 365 loaded and connected to a printer; pen and paper
Trainer – projector/screen to connect to laptop; whiteboard or flip chart

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Speed up your use of Excel

½ day

Objectives

The aim of the course is to provide delegates with the skills to use Excel efficiently, including the ability to move around a spreadsheet proficiently, skills to avoid entering duplicate data, separating data into multiple worksheets, and the use of advanced printing functionality.

Prerequisites

Delegates must have previously attended the “Understanding the Fundamentals” Excel 2016 course or gained similar knowledge in the workplace, and therefore are confident entering and editing data, creating simple formulae, formatting and printing their spreadsheets.

Course Outline

- Revision of the “Understanding the Fundamentals” course
- Short cuts for moving around a worksheet
- Short cuts for selecting cells, columns, rows and ranges
- Using Go To Special
- Changing the magnification
- Hiding rows and columns
- Splitting and freezing a workbook window
- Using Find & Replace
- Cut, copy and paste
- Using Paste Special
- Using Fill
- Creating a series
- Creating a custom list
- Working with worksheets
- Grouping worksheets
- Renaming worksheets
- Move and copy worksheets
- Page setup and printing
- Changing the margins
- Scaling the spreadsheet
- Using Headers and Footers
- Using Print Titles
- Page Break preview

Delegates will be asked to carry out exercises to reinforce the information they have been given. Handouts will be provided for reference after the course.

Equipment required:

Delegates – 1 PC each with Excel for Microsoft 365 loaded and connected to a printer; pen and paper
Trainer – projector/screen to connect to laptop; whiteboard or flip chart

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Further Progress in Excel

½ day

Objectives

The aim of the course is to provide delegates with the skills to use functionality that will make formulae easier to work with, to create formulae using data from multiple worksheets, and to apply more complex formatting.

Prerequisites

Delegates must have previously attended the “Speed up your use of Excel” course or gained similar knowledge in the workplace.

Course Outline

- Revision from the “Speed Up your use of Excel” course
- Further character and number formatting
- Customised number formats
- Applying borders and shading
- Using Format Painter
- Formatting rows and columns
- Using Styles
- Using statistical functions and functions in general
- Using Absolute cell references
- Using named cells and ranges in formulae
- Creating formulae across worksheets
- Using AutoSum across worksheets
- Viewing formulae in worksheets

Delegates will be asked to carry out exercises to reinforce the information they have been given. Handouts will be provided for reference after the course.

Equipment required:

Delegates – 1 PC each with Excel for Microsoft 365 loaded and connected to a printer; pen and paper
Trainer – projector/screen to connect to laptop; whiteboard or flip chart

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Analysing data

½ day

Objectives

The aim of the course is to provide delegates with the skills to manage and analyse large amounts of data in a worksheet.

Prerequisites

Delegates must have previously attended the “Further Progress in Excel” course or gained similar knowledge in the workplace.

Course Outline

- Revision of the “Further Progress in Excel” course
 - Data layout principles
 - Using Data Validation
 - Sorting data
 - Using Auto Filter
 - Using Conditional Formatting
 - Using Comments
 - Consolidating data
 - Summarising data using Subtotals
 - Outlining Data
 - Creating, editing and formatting a chart
 - Using Pivot Tables
- If time available:
- Using Tables
 - Using Database Functions
 - Using an Advanced filter

Delegates will be asked to carry out exercises to reinforce the information they have been given. Handouts will be provided for reference after the course.

Equipment required:

Delegates – 1 PC each with Excel for Microsoft 365 loaded and connected to a printer; pen and paper
Trainer – projector/screen to connect to laptop; whiteboard or flip chart

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Advanced Formulae

½ day

Objectives

The aim of the course is to provide delegates with the skills to use further Excel Functions, such as the use of conditional logic in formulae and date & time functions.

Prerequisites

Delegates must have previously attended the “Further Progress in Excel” course or gained similar knowledge in the workplace.

Course Outline

- Revision from the “Further Progress in Excel” course
- Using the IF function
- Using AND and OR functions
- Using nested functions in formulae
- Using the SUMIF and COUNTIF functions
- LookUp tables

If time available:

- Using Date and Time functions
- String formulae
- Formulae auditing

Delegates will be asked to carry out exercises to reinforce the information they have been given. Handouts will be provided for reference after the course.

Equipment required:

Delegates – 1 PC each with Excel for Microsoft 365 loaded and connected to a printer; pen and paper
Trainer – projector/screen to connect to laptop; whiteboard or flip chart

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Further Functionality in Excel

½ day

Objectives

The aim of the course is to provide delegates with additional skills available in Excel, such as creating a template and protecting the use of this template; importing and exporting data between applications; and keeping track of changes made to a workbook. Plus a mop up of features where time was not available on previous courses.

Prerequisites

Delegates must have previously attended the "Further Progress in Excel" course or gained similar knowledge in the workplace.

Course Outline

- Revision of the "Further Progress in Excel" course
- Using Templates
- Using Custom Views
- Protecting your workbook and worksheets
- Linking workbooks
- Opening and arranging multiple workbooks
- Import and Exporting data
- Linking data
- Recording a macro

Delegates will be asked to carry out exercises to reinforce the information they have been given. Handouts will be provided for reference after the course.

Equipment required:

Delegates – 1 PC each with Excel for Microsoft 365 loaded and connected to a printer; pen and paper
Trainer – projector/screen to connect to laptop; whiteboard or flip chart

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