

Half day Excel workshops – suggested content

Excel Introduction: (Session 1 of 2)

- opening a workbook
- the Excel screen layout, including the Ribbon and the Quick Access Toolbar
- entering and editing data
- simple calculations (using +, -, *, /)
- Undo and Redo
- selecting cells
- resizing rows and columns
 - ~ wrapping text
- formatting cells
 - ~ text
 - ~ numbers
 - ~ using Comma style
- using the Fill handle
- using the SUM function
- using AutoSum
- using the AVERAGE function
- on-screen calculations
- calculating percentages by creating a simple formula
- displaying all formulas on screen
- creating a simple column chart
- saving and closing a workbook

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Excel Introduction: (Session 2 of 2)

- recap of session 1 topics
- how to copy formulas correctly
- relative and absolute cell addressing
- naming cells and cell ranges
 - ~ using named ranges in formulas and functions
- customising the Quick Access Toolbar
- inserting and deleting rows and columns
- hiding and unhiding rows and columns
- introduction to data handling in Excel
 - ~ creating a list
 - ~ the AutoComplete feature
 - ~ freezing column headings
 - ~ sorting and filtering data
 - ~ pivot tables
- creating a Table
 - ~ the difference between a Table and a list

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Excel “Bridge”

This covers some topics which are included in the Excel Introduction course, but which are essential for proceeding to the intermediate and advanced training.

Formulas and functions

- writing formulas correctly
- writing functions correctly
- understanding the difference between formulas and functions

Relative and absolute cell addressing

- how and why to make cell references absolute
- understanding the difference between relative and absolute
- copying formulas and functions correctly

Naming cells

- how to name cells and cell ranges
- three reasons for naming cells
- how to delete named cells and cell ranges
- how to list named cells and cell ranges on the worksheet

Customising the Quick Access Toolbar

- adding and removing buttons on the QAT

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Excel Advanced

Six half-day workshops.

Pre-requisites

All delegates are expected to have the following skills prior to attending any of the advanced workshops:

- creating simple formulas and functions
- understanding relative and absolute cell addressing
- naming cells
- customising the Quick Access Toolbar

Workshop 1: Spreadsheet security

Who is the course for?

Anyone who wishes to make their Excel spreadsheets more secure and less prone to errors.

- spreadsheet design
- creating control totals
- displaying formulas on the screen
- locking cells
- protecting worksheets and workbooks
- formula auditing
- adding comments to cells
- data validation
- conditional formatting
- passwording Excel workbooks

Workshop 2: Data analysis

Who is the course for?

Anyone who holds data in an Excel list will benefit from understanding how Excel can be used to sort, analyse and cross-tabulate information quickly and easily.

- creating a list in Excel
- using a form in Excel to enter data into a list
- sorting and filtering data
- custom filters
- pivot tables
- creating a table
- the difference between a list and a table

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Workshop 3: Linking worksheet data

Who is the course for?

Anyone who needs to use or aggregate data held in a number of different spreadsheets.

- linking worksheets within an individual workbook
- linking worksheets in more than one workbook
- using the Consolidate command to aggregate data held in multiple workbooks

Workshop 4: Advanced functions

Who is the course for?

Anyone who wishes to use some of the advanced text and number functions in Excel.

- IF statements
- SUMIF, SUMIFS
- COUNT, COUNTA, COUNTBLANK, COUNTIF
- Text functions including TRIM
- VLOOKUP

Workshop 5: What-if analysis (data modelling)

Who is the course for?

Anyone who is responsible for budget projections or resource allocation will find the *What-if analysis tools* useful. *Scenario Manager* allows the user to create and compare different scenarios of data, such as best- and worst- case assumptions. *Solver* allows you to model problems which involve many variables, can help you to find combinations of variables which maximise or minimise a target cell, and allows you to specify constraints - conditions which must be met for the solution to be valid.

- Scenario Manager
- Solver

Workshop 6: Using macros

Who is the course for?

Anyone who wishes to use macros to automate repetitive tasks in Excel.

(Please note that this is NOT a workshop in Visual Basic programming.)

- recording a macro
- running a macro
- assigning a macro to a button on the worksheet or the Quick Access toolbar
- deleting and managing macros