Course Outline

Microsoft Excel - Introduction

Duration	**6 hours** - (Can be Delivered over **Two – 3 Hour Sessions** or **One – 6 hour Session**)
Audience	New or occasional Excel users who want to create, edit and manage everyday spreadsheets with confidence.
Pre-Requisites	Basic computer skills, including using a keyboard and mouse and opening, saving and locating files. No previous Excel experience is required.
Delivery	Live virtual, with demonstrations, guided practice, discussion and supplied exercise files.
Group Size	Recommended maximum: 10 participants for an interactive session

Course objective

Build the confidence and practical skills needed to create, edit, calculate, organise and present information in Microsoft Excel. Participants will learn how to produce clear, accurate worksheets and use essential Excel features for everyday workplace tasks.

Learning Outcomes

- Navigate the Excel interface and move confidently through a workbook.
- Enter, edit, copy and organise text, numbers and dates.
- Format worksheets clearly and apply appropriate number formats.
- Create basic formulas and use essential functions.
- Turn a list into an Excel Table and sort and filter its contents.
- Control simple data entry and highlight important values.
- Create a basic chart and prepare a worksheet for printing or PDF sharing.
- Save, retrieve and manage workbooks safely.

Module 1: Getting Started with Excel

Understand the Excel environment

- What a spreadsheet is and when Excel is useful
- Workbooks, worksheets, rows, columns, cells and ranges
- Ribbon, tabs, commands, Formula Bar, Name Box and Status Bar
- File/Backstage view and Quick Access Toolbar
- Use Excel Help and ScreenTips

Create and manage files

- Create, open, save and close a workbook
- Use Save and Save As
- Choose a sensible file name and location
- Understand common Excel file types
- Recover an unsaved or previous version where available

Module 2: Entering, Editing & Navigating data

Work with cells and ranges

- Select cells, ranges, rows and columns
- Enter and edit text, numbers and dates
- Clear contents compared with deleting cells
- Insert and delete rows and columns
- Copy, cut, paste and move data
- Use Undo and Redo

Navigate efficiently

- Move to the edge of a data region
- Use keyboard and mouse navigation
- Use the Name Box and Go To
- Find and Replace
- Freeze the top row or first column
- Use Zoom and worksheet views

Speed up data entry

- Use AutoFill and the Fill Handle
- Create a simple series
- Use AutoComplete
- Use Flash Fill
- Understand when Flash Fill results should be checked

Module 3: Formatting clear, readable worksheets

Format data

- Apply font, fill, borders and alignment
- Wrap text and merge cells appropriately
- Adjust row heights and column widths
- Use Format Painter
- Apply number, currency, accounting, percentage and date formats
- Understand the difference between a stored value and its displayed format

Build a clear worksheet

- Create effective headings
- Use consistent spacing and alignment
- Avoid common layout problems
- Check spelling

Module 4: Basic Calculations & Functions

Build basic formulas

- Understand that formulas begin with =
- Use plus, minus, multiply and divide
- Use cell references rather than typing values into formulas
- Understand calculation order and brackets
- Copy formulas with the Fill Handle
- Introduction to relative and absolute references

Use essential functions

- Use AutoSum and SUM
- Calculate AVERAGE, MIN and MAX
- Count numeric and completed cells with COUNT and COUNTA
- Insert TODAY and NOW
- Use the function AutoComplete list and Function Arguments dialog

Recognise formula problems

- Understand #### display issues
- Recognise #DIV/0!, #VALUE!, #REF! and #NAME?
- Check formula ranges and references

Module 5: Organising and controlling data

Sort and filter

- Sort text, numbers and dates
- Sort using more than one level
- Apply, clear and reapply filters
- Search within a filter
- Filter by value or simple criteria

Excel Tables

- Convert a list into an Excel Table
- Choose a Table style
- Understand automatic expansion and header filters
- Use a Total Row
- Rename a Table
- Convert a Table back to a range

Simple Data Validation

- Create a basic drop-down list
- Restrict entries to whole numbers or dates
- Add an input message and error alert

Module 6: Highlighting and presenting information

Conditional Formatting

- Use Highlight Cells rules
- Identify duplicate values
- Apply Top/Bottom rules
- Use Data Bars, Colour Scales and Icon Sets
- Clear Conditional Formatting

Create a basic chart

- Choose suitable source data
- Create a column, bar or line chart
- Add and edit a chart title
- Move and resize a chart
- Change a simple chart style
- Understand when a chart may be misleading

Module 7: Manage, Print, Share Worksheets

Manage worksheets

- Insert, rename, move, copy and delete worksheets
- Change worksheet tab colour
- Enter a simple formula that refers to another worksheet

Prepare output

- Use Print Preview
- Set orientation, margins and scaling
- Set a Print Area
- Repeat headings on printed pages
- Add basic headers, footers and page numbers
- Export or save a worksheet as PDF
- Check the workbook before sharing