Which Excel course is right for me?

Here at Growtrain we are continuously looking at ways to improve our training delivery. We listen to our customer feedback and work closely with tutors to makes changes to course delivery and content to reflect new features in technology, client and delegate needs.

We have also expanded our Excel topics to ensure delegates and our clients are provided with a full overview of how this versatile application can ensure users are applying their skills to create professionally presented, robust documents and well communicated worksheets to their colleagues.

With this in mind, we have made a couple of changes to our Excel training delivery and are asking delegates to check their current level of competence to ensure they sign up for the most appropriate level of training.

Below we have a summary of training levels and a table to complete in advance of training to ensure delegates are attending at the right level and getting the most out of our training events.

Please share these with delegates who can check their current level of understanding and ensure they attend the most appropriate level of training for them.

We also offer bespoke training to meet specific business needs and if you'd like to discuss these, please contact one of the team on 01243 216 278 or courses@growtrain.co.uk.

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Excel : An introduction – The Essentials and quite a bit more

For those that use Excel on a daily basis and users who are new to Excel will develop skills for efficient data entry; gain a full understanding of Excel data types and formats; print large worksheets to fit to pages with repeating header rows and numbered pages. Delegates will gain an in depth working practice of how to apply a full range of Excel formulas and simple statistical functions. Delegates will also create simple Pie, Column and Line charts to graphically represent numeric data.

Excel An Introduction – The Essentials and quite a bit more . . .	Y	N
What is Excel?		
• Understand the functions of spreadsheet application		
• Recognise the different elements of the Excel screen		
Creating a Workbook		
• Best Practices when creating a new Excel file and worksheets		
• Quick ways to navigate the worksheet using the mouse and keyboard		
• Select cells using the mouse and the keyboard		
• Use zoom tools to view a worksheet at different magnification		
• Customise Quick Access Toolbar for efficient working		
• Use Undo and Redo		
Entering and Editing Data		
• Enter text, values, and dates in cells		
• Edit cell contents		
Structuring a Worksheet		
• Modify the size of columns and rows		
• Insert and delete rows and columns		
• Insert and delete selected cells		
Formatting Cell Values		
• Apply value formats (currency, percent, date, comma)		
• Adjust the decimal place		
• Change the currency symbol		
• Apply other formats (accounting, time, text, general)		
Formatting Cell Contents		
• Apply font styles (typeface, size, colour, enhancements)		
• Modify the alignment and orientation of cell contents		
• Merge and unmerge cells (to centre headings across columns)		
• Apply and remove borders and shading		
• Indent text in a cell		
• Use the Format Painter to copy cell formats		
• Clear cell contents or formats		
Page Layout		
• Change paper size and orientation		
• Set page margins and alignment		
• Scale print output to fit a defined number of pages		

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Excel An Introduction – The Essentials and quite a bit more . . .	Y	N
• Print column and row titles and set other options		
• View a worksheet in Print Preview		
• Change margin and column widths in Print Preview		
• Insert and remove a page break		
• Set up headers and footers		
• Add fields in headers and footers (page number, date/time, file information)		
Save a Workbook		
• Save and Save As		
Creating a Formula		
• Understand what a formula is		
• Write simple formula to add, subtract, multiply and divide		
• Understand BODMAS (brackets and hierarchy of calculations)		
• Enter/edit a formula by using the Formula bar		
• Enter a range within a formula using the mouse		
• Edit and revise a formula		
• Copy a formula and understand relative cell references		
Moving and Copying Data		
• Use the AutoFill tool		
• Use custom lists - to create series of data - eg Months of the year		
• Use Drag-and-Drop to move or copy cell contents		
• Move, copy, and paste data using the Windows Clipboard		
Excel Functions		
• Use AutoSum Function to add up a column or row of figures		
• Create a formula using functions		
• Use Insert Function		
• Use basic arithmetic functions (SUM, AVERAGE, COUNT, MIN, MAX)		
• Customise the status bar to display results using Excel Functions		
• Resolve common error messages Interpret spreadsheet data		
Printing Worksheets and Workbooks		
• Print a workbook (all sheets in book)		
• Display formulas in worksheet cells		
• Print a range of cells		
• Set, print, and clear a print area		
• Print a group of worksheets		
Creating a Chart		
• Use the Chart Wizard to create different chart types		
• Reposition, resize, and delete a chart		
• Change the chart type		
• Preview and print a chart		
• Move and copy a chart		

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Excel Intermediate

To ensure the needs of our clients and delegates are fully covered, we have expanded our Excel Intermediate offering from one to two days, enabling delegates to focus on the topics that are most appropriate for their needs.
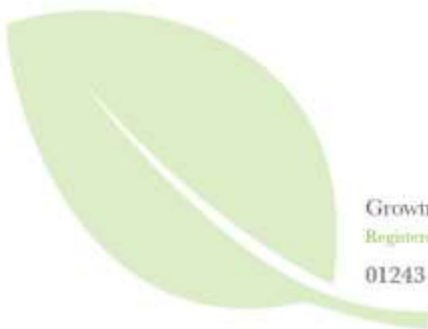
Excel Intermediate 1: Functions, List Management, Charts, Linking Worksheet Data

This one day intermediate Excel course is a natural progression for those who can enter, edit, format and set up worksheets and have some knowledge of basic formulas who wish to further develop their skills with more complex formulae, for example to perform calculations with dates; times; percentages. The course will demonstrate with practical tasks how to link data between worksheets and workbooks; apply statistical functions to data. Delegates will cover best practice in setting up worksheets in order to analyse data sets using database commands for multiple sorting, filtering and applying criteria. Delegates will apply conditional formatting to data sets to view critical data and write logical functions to flag critical data and create new data based on conditions within data sets. Delegates will learn about Excel Tables and the dynamic SUBTOTAL function and create meaningful charts and graphs.

Excel Intermediate 1: Functions, List Management, Charts, Linking Worksheet Data	Y	N
Review of Simple Formula		
• Use and understand the difference between relative and absolute cell references		
• Use keyboard shortcuts to create absolute / relative cell references		
Managing Worksheets		
• Work with multiple worksheets, naming, copying, tab colour, moving		
• Enter and edit data on multiple worksheets		
• Copy data between worksheets and workbooks		
• Insert and delete worksheets		
• Split a worksheet into different viewing panes		
• Freeze and unfreeze panes as worksheet titles		
• View a workbook in multiple windows		
• Hide and unhide rows and columns		
Linking data between Worksheets and Workbooks		
• Create a formula to link worksheets and workbooks		
• Use Copy and Paste Special to link worksheets and workbooks		
• Use Copy and Paste Special to manipulate data		
• Manage and update linked workbooks		
Statistical Functions		
• Apply SUM, COUNT, MAX, MIN and AVERAGE functions to ranges/column ranges		

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Excel Intermediate 1: Functions, List Management, Charts, Linking Worksheet Data	Y	N
• Find and insert statistical functions through the function library – eg COUNTA, COUNTBLANK, MEDIAN, MODE, RANK • Insert COUNTIF function using criteria, relative and absolute cell references		
Understanding Excel Tables		
• Table Tools ribbon		
• Totals Row		
• Dynamic SubTotals command in Tables		
• Structured Formulae		
• Filters in Tables		
• Adding new rows to Tables		
• Formatting Tables		
• Slicers		
Using Excel as a Database	-	
• Create a data list		
• Use a form to view, sort, and enter records		
• Perform single and multi-level sorts		
• Filter a list using AutoFilter		
• Use Custom Filters		
Conditional Formatting		
• Apply Conditional formatting using simple rules		
• Edit and manage rules		
• Apply conditional formatting using Icon Sets and Data Bars		
• Filter data with conditional formatting		
Logical Functions		
• Use IF function to test values and make decisions based on test results • IFERROR to trap errors, such as DIV/0		
Adding Comments		
• Add a comment		
• Review, edit, and delete comments		
• Print comments		
Working with Dates and Time		
• Understand how Excel works with Dates		
• Enter the date and time using functions and keyboard shortcuts (TODAY, NOW, DATE, TIME)		
• Return selected parts of a date or time value (YEAR, MONTH, DAY)		
• Perform calculations using date/time values		
• Use other date functions (NETWORKDAYS, WEEKDAYS, WEEKNUM)		
Creating and Applying Styles		
• Define a style		
• Apply a style to worksheet cells		
• Remove a style from cells		
• Modify an existing style		
• Copy styles between workbooks	-	
Proofing Tools		

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Excel Intermediate 1: Functions, List Management, Charts, Linking Worksheet Data	Y	N
• Use AutoCorrect		
• Use Find and Replace		
• Check spelling across the worksheet		
Formatting a Chart		
• Add, remove, move, resize, and modify chart elements (titles, labels, legend, axes, gridlines)		
• Format chart elements (borders, patterns, font, values)		
• Format chart axes (number format, text, line width)		
• Format data series (scale, shading, spacing, width)		
Protection - Protect Cells, Worksheets and Workbooks		
• Lock and Unlock Cells		
• Hide formula on the formula bar		
• Apply Worksheet Protection		
• Customise worksheet protection		
• Apply worksheet passwords		
• Apply workbook passwords		

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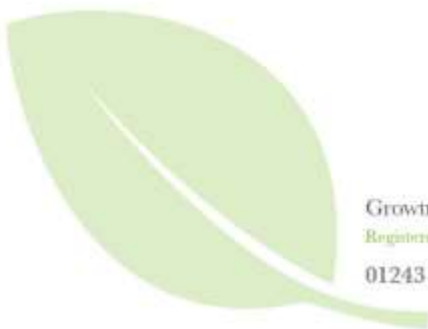01243 216278 | courses@growtrain.co.uk | www.growtrain.co.uk

Excel Intermediate 2 – Data Analysis and more functions and formulae

A one day intermediate Excel course for those who are currently Excel users, comfortable with setting up worksheets and writing formulae and using a range of Functions. This course will look in depth at data analysis using Excel Tables and Pivot Tables to summarise large data sets. Delegates will write complex criteria using advanced filters; apply the Subtotal tool and Subtotal function to extract records that meet conditions. Formulas will be used to apply conditional formatting to columns and rows to create RAG reports and display KPIs. Delegates will work with nested Excel Functions to look up valid data in other worksheets and workbooks.

Excel Intermediate 2 Data Analysis and more functions and formulae	Y	N
Review of Simple Formula	-	
• Use and understand the difference between relative and absolute cell references		
Tables		
• Recap and Overview of Tables – ribbon; Totals Row; Table formats		
• Dynamic SubTotals command in Tables		
• Naming Tables		
• Structured reference Formulae		
• Slicers		
• Referencing named tables in formulae on other worksheets		
Using Excel as a Database	-	
• Create a data list		
• Use a form to view, sort, and enter records		
• Perform single and multi-level sorts		
• Filter a list using AutoFilter		
• Use Custom Filters		
• Use the subtotals tool to add multiple statistical subtotals to data		
• Use Advanced Filters to copy data that meets criteria to new locations		
• Use Advanced Filters to extract unique records		
• Use Advanced Filters to remove Duplicate Records		
• Apply Database Functions eg DSUM, DCOUNT		
• Apply SUBTOTALS function to filtered and non filtered lists		
Conditional Formatting		
• Use conditional formatting on data		
• Managing the Rules of Conditional Formatting		
• Use conditional formatting such as Icon Sets and Data Bars		
• Use conditional formatting with formulas and mixed Absolute cell references		
Logical and Nested Functions		
• Use the IF, IFERROR, AND, OR, and NOT functions		

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Excel Intermediate 2 Data Analysis and more functions and formulae	Y	N
• Use nested IF functions		
Auditing Tools		
• Display the Auditing Toolbar		
• Trace precedent and dependent cells in formula, worksheets and workbooks		
• Evaluate a formula		
• Use the Watch Window		
Working with Dates and Time		
• Understand how Excel works with Dates		
• Fill Series of dates		
• Use Date and Text Functions to format and extract date parts		
• Perform calculations using date/time values		
• Use date functions (NETWORKDAYS, WEEKDAYS, WEEKNUM, EOM) to manipulate dates		
• Create a global company/organisation Calendar File		
• Use global Calendar File as a Lookup Table		
• Use Date functions for simple Project planning		
Working with Text (string) Functions		
• Join strings (CONCATENATE, &)		
• Extract text from a string (LEFT, RIGHT, MID)		
• Change case (UPPER, LOWER, PROPER)		
• Convert between text and number values (TEXT, VALUE, FIXED, DOLLAR)		
• Insert specific characters from the Windows character set (CHAR, CODE)		
Statistical Functions		
• Use functions to count or sum based on single and multiple criteria SUMIF(S) COUNTIF(S)		
Data Validation		
• Apply Data validation rules		
• Using Named Ranges within Pick Lists		
Lookup and Reference Functions		
• Use VLOOKUP to get values from multi-column tables		
• Use VLOOKUP to check for duplicates		
• Use VLOOKUP on Tables as an alternative to Nested IF Functions		
Pivot Tables and Pivot Charts		
• Understand the purpose of a Pivot Table		
• Create Pivot Table Reports		
• Modify a Pivot Table Report		

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Excel Intermediate 2 Data Analysis and more functions and formulae	Y	N
• Change Pivot Table Field settings		
• Understanding Pivot Table data		
• Extract data from a Pivot Table		
• Formatting a Pivot Table		
• Using Calculations within a Pivot Table		
• Printing Pivot Tables		
• Refreshing Pivot Tables with updated data		
• Modifying the original Pivot Table Source Data		
• Using Groups in Pivot Tables to further refine output		
• Inserting Slicers		
• Managing Slicer Connections		
• Creating A Pivot Chart		

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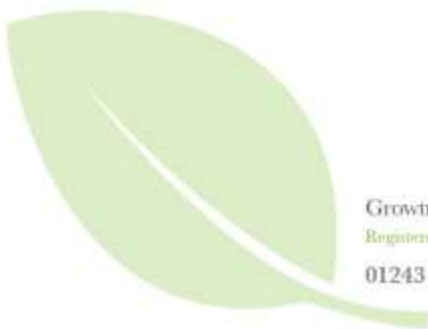## Excel Advanced – Dashboards, What-if Scenarios, more Functions and an introduction to Macros and VBA

This one day advanced Excel course is for those who wish to explore some of Excel's advanced tools and Functions to create dashboards with form controls and pivot tables. Delegates should have a sound knowledge of working with formulas and functions. The course will look at a range of What-If Scenario tools together with the Analysis tools Add-in for working with Histograms and Descriptive Statistics. The course will also cover importing and exporting data from a number of applications and file formats, work with LOOKUP, DATE, TEXT and INFORMATION functions. Finally delegates will be introduced to the Macro recorder for automating worksheet tasks and explore the Visual Basic Editor in order to edit recorded macros.

	Y	N
Excel Advanced – Dashboards, What-if Scenarios, more Functions and an introduction to Macros and VBA		
Custom Numbers and Lists		
• Apply number formats (accounting, currency, number)		
• Create a custom number or date format		
• Create a Custom List		
Using Named Ranges		
• Add and delete a named range		
• Named range vs Excel Table – advantages/disadvantages		
• Go To a specific cell or named range		
• Understand the purpose of naming cells and ranges		
• Name cells using the Name Box; Name ranges using the Name Box		
• Delete and Manage named cells		
• Use a named range in a formula		
• Use the INTERSECT feature with Named Ranges		
Importing and Exporting Data in Excel		
• Use Paste Special to import and manipulate data		
• Export worksheet data to other applications		
• Import data from a text file		
• Import a table from an HTML web page		
Workbook Templates		
• Create a template file for frequently used worksheet layouts		
• Edit and apply a template file		
Working with Multiple Workbooks		

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	Y	N
Excel Advanced – Dashboards, What-if Scenarios, more Functions and an introduction to Macros and VBA		
• Create and Save Custom Views within a Workbook		
• Use a workspace file		
• Link workbooks		
• Use Consolidate to perform arithmetic on multiple ranges automatically		
Lookup and Reference Functions		
• Use VLOOKUP and HLOOKUP to get values from multi-column tables		
• Use Error Trapping Functions - ISERROR to prevent lookup errors		
• Use INDEX, MATCH functions to lookup data		
• Use INDIRECT function to link worksheets		
• Use INDIRECT function to create multi-filtered lists		
Information Functions		
• Use Information functions to check data validity		
• Use Information functions to return workbook/worksheet information		
Financial Functions		
• Use range of financial functions eg PMT, FV, PV, NPV, RATE, IRR, SLN		
Text Functions		
• Use range of Text functions to Find and replace text within a string eg FIND, REPLACE, SUBSTITUTE, TRIM, CLEAN, LEN		
What If Scenarios		
• Use Goal Seek		
• Use Goal Seek on Worksheet Formulas		
• Use the Solver		
• Define and solve a problem using the Solver		
• Create a report using the Solver		
• Creating multiple "What-If" Scenarios		
Data Tables		
• Understanding Data Tables and the =TABLE function		
• Create a One-Input Table		
• Create a Two-Input Tables		
Dashboards using Pivot Tables and Pivot Charts		
• Creating and modifying Pivot Table reports		
• Pivot Table Field settings – functions and calculations		
• Formatting a Pivot Table		
• Creating calculation Fields		
• Creating calculated Items		

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	Y	N
Excel Advanced – Dashboards, What-if Scenarios, more Functions and an introduction to Macros and VBA		
• Refreshing Pivot Tables with updated data and changing source data		
• Pivot Tables from Ranges vs Tables		
• Using Groups in Pivot Tables to further refine output		
• Inserting Slicers and slicer connections		
• Working with multiple Pivot Tables		
• Modifying slicers to connect to multiple Pivot Tables and Pivot Charts		
Modifying Charts to create Dashboards		
• Reposition chart elements (titles, legend and labels)		
• Format chart axes (number format, text and line width)		
• Format data series (shading, spacing and width)		
• Explode segments of a pie chart		
• Modify the chart type for a data series		
• Delete a data series in a chart		
• Add a trendline to a chart		
• Create a combination chart		
• Insert an image into a chart		
• Store a custom chart as a chart template		
Sharing and Protecting Files		
• Lock and Unlock Cells		
• Hide formula on the formula bar		
• Apply Worksheet Protection		
• Customise worksheet protection		
• Apply worksheet passwords		
• Apply workbook passwords		
• Track Changes to a workbook		
• Set up user permissions		
• Accept or reject changes		
• View Change history		
Macros and Visual Basic for Applications (VBA) in Excel		
• Record a macro		
• Trigger and run a macro		
• Edit the VBA code		
• Assign a macro to a button on a worksheet		
• Use the Personal Macro Workbook		
• Record macros using both relative and absolute cell references		
• Limitations of the Macro Recorder		
Visual Basic for Applications		

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	Y	N
Excel Advanced – Dashboards, What-if Scenarios, more Functions and an introduction to Macros and VBA		
• Know your way around the VBA Environment and Project files		
• The Project Window		
• Code Window		
• Properties Window		
• Navigating between Excel and the VB Editor		
Editing Code + Methods of Executing		
• Using the Visual Basic Editor		
• Structure of a sub routine		
• Key Words		
• Navigation in a Module		
• Editing in a module		
• Use of Function Keys		

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Excel Specialist Areas – VBA for Excel and Microsoft Office users

This two day Visual Basic for Applications programming course is for those who wish to create automated procedures. Delegates should have a good working knowledge of Excel functions, Pivot Tables and named ranges. The course will look at the limitations of the macro recorder; the objects, properties and methods of the VBA language; writing procedures and user-defined Functions; program structure, flow and control. Delegates will design user forms and program form controls with Methods and Event triggers. Delegates will learn to debug and step through their code to create robust automated procedures.

Excel Specialist Areas – VBA Advanced for Excel users

This one day advanced VBA course follows on from our Excel 5 two day course and looks at programming with a number of Excel's objects – Charts and Graphs; Pivot Tables; Conditional Formatting; Excel Tables. Delegates will also learn how to work with Files and Folders within the VBA environment.