

## **Spreadsheets (Excel) Basics**

This 4-hour introductory course covers the basics of Spreadsheets using Microsoft Excel, from basic navigation and file creation to saving in the location and format of choice. The course aims to give participants a good understanding of the fundamentals of creating and working with spreadsheets through practical exercises linked to real-life scenarios. Emphasis is placed on well-designed spreadsheets leading to accurate and easy to understand presentation. On completion, participants should be able to create basic spreadsheets, produce reports, budgets and lists and perform other similar tasks. It is recommended participants have a good understanding of Windows, File explorer and folder structures before undertaking this course.

### **Getting started**

- Excel principles explained.
- Starting Excel. Understanding the Start Screen, the Workbook Screen
- Using the Ribbon. - showing and collapsing
- Backstage View.
- Dialog boxes
- The Quick Access Toolbar.
- The Status bar
- Exiting Excel correctly

### **Workbook Creation**

- Workbooks and worksheets explained
- Entering Text, Numbers, Dates, Formulas
- Checking Spelling
- Editing your worksheet/workbook
- Saving and closing your workbook

### **Workbooks and Worksheets**

- Opening an existing workbook
- Navigating a workbook
- Overwriting cell contents
- Editing formulas
- Clearing cells
- Deleting data
- Using Undo and Redo

### **Cells and Ranges**

- Cells and ranges explained.
- Selecting contiguous (adjoining) and non-contiguous (gaps in-between) ranges
- Selecting larger ranges
- Selecting Rows and Columns
- Copying. Cell to cell, cell to a range, one range to another
- Fill
- Using Fill for quick copying, Filling a series, Filling a growth series
- Extracting with Flash Fill
- Moving cells and ranges

## Formulas and Functions

- Formulae overview
- Creating a Formula: addition, subtraction, multiply and divide
- Functions explained
- Using SUM with contiguous and non-contiguous ranges
- Averages
- Maximum and Minimum values
- What-if scenarios
- Absolute versus Relative cell referencing
- Relative Formulas and things to watch out for
- Creating absolute references

## Worksheet Appearance

- Font Formatting – *Type*, **SIZE**, **bold**, underline, *italics*, **Colours**, **background**
- Live Preview
- Growing and shrinking fonts
- Using Format Painter
- Cell Alignment.
- Indenting cells
- Number formatting
- Formatting. General, Money, Percentages, Fractions, Dates etc
- Using the thousands separator
- Increasing and decreasing decimals (eg 24.34, 24.339) from 2 to 3 decimal places

## Worksheet Layout

- Column Widths. Approximate (dragging) and Precise (input value)
- Default column width
- Row Height. Approximate (dragging) and Precise (input value)
- Worksheet Views, Zooming, Formula Bar, Gridlines
- Inserting and deleting cells, columns and rows
- Multiple worksheets
- Naming worksheets

## Sorting and Filtering Data

- Understanding Lists
- Sorting - alphabetically and numerically
- Sorting on more than one column
- Understanding filtering
- Applying and Using a filter
- Clearing a filter
- Creating compound filters
- Multiple value filters
- Creating custom filters

## Printing

- Printing explained
- Print Preview
- Selecting a printer
- Printing a range
- Printing an entire workbook
- Print Options

## Charts

- The Charting process explained
- Chart selection and recommended charts
- Creating a new chart
- Working with an embedded chart
- Resizing and repositioning a chart
- Printing an embedded chart
- Creating a chart sheet
- Changing the chart type, layout and style
- Printing a chart sheet
- Embedding a chart into a worksheet
- Deleting a chart

## Getting Help

- The Help Window - accessing and navigating
- Printing a Help topic

## If you want a great spreadsheet spend some time on the following

- Don't rush, spend some time planning
- Be well organised and design layouts/fonts/colours carefully
- Make sure your formulae are correct
- If it's quite complicated ensure it's well documented and easy to use
- Ask yourself if you're using the right application – many don't!!