

Microsoft Excel Introduction Training

OVERVIEW

The Microsoft Excel Introduction course provides a thorough grounding in the core skills required to create, work with, and manage spreadsheets effectively. Designed for beginners or those with limited Excel experience, this one-day course focuses on building confidence while developing accurate, well-structured, and easy-to-maintain workbooks.

Participants learn how to navigate Excel, enter and manage data, create formulas, format worksheets professionally, and present information clearly using charts and printed output. Throughout the course, emphasis is placed on good spreadsheet design and techniques that help avoid common errors.

LEARNING OUTCOMES

By the end of the course, participants will be able to:

- **Navigate confidently within Microsoft Excel**, workbooks, and worksheets
- **Create, open, and manage workbooks**, including moving between worksheets
- **Enter, edit, copy, move, and fill data** using efficient Excel techniques
- **Work effectively with ranges**, including selecting, copying, and relocating data
- **Create and use formulas and basic functions**, understanding calculation logic
- **Apply correct cell referencing** to ensure formulas work as intended
- **Format worksheets professionally**, including fonts, alignment, number formats, rows, and columns
- **Sort and filter data** to organise and analyse information
- **Create clear and effective charts** to visually present data
- **Prepare and print worksheets** for sharing and reporting
- **Access Excel help resources** and apply best practices to avoid common spreadsheet problems

These outcomes provide a solid foundation for everyday Excel use and prepare participants to progress to **Microsoft Excel Intermediate**.

PREREQUISITES

No prior Excel or spreadsheet experience is required. A basic understanding of personal computers, files, and folders is recommended.

DURATION & DELIVERY

The duration of this course is 1 day, without alterations.

We offer flexible delivery to suit your team and environment:

- **Onsite at your workplace** – highly interactive, tailored to your organisation's data and workflows
- **Live online training** – instructor-led, hands-on sessions via your preferred platform
- **Customised delivery** – mix and match topics across **Introduction, Intermediate, and Advanced** to create a program that fits your goals and timeline

All sessions are led by experienced Microsoft Excel specialists with a strong focus on real-world applications.

MICROSOFT EXCEL TRAINING PATHWAY

Our Microsoft Excel training is offered across three progressive one-day courses – **Introduction, Intermediate, and Advanced** - supported by a range of **specialist Excel courses** focused on advanced analysis, functions, and automation. Whether you are new to spreadsheets, building stronger analytical skills, or automating complex Excel solutions, there is a course tailored to your needs.

All courses can be delivered as is, or we can customise a training program, so your team completes the exact topics they need in the number of days that suits your organisation.

CORE EXCEL COURSES

- **Microsoft Excel Introduction** – Learn the fundamentals of creating, editing, formatting, and managing spreadsheets, with a strong focus on accuracy, good design, and practical everyday use.
- **Microsoft Excel Intermediate** – Build more productive workbooks using formulas, functions, advanced formatting, charts, tables, and analysis tools such as Goal Seek and Quick Analysis.
- **Microsoft Excel Advanced** – Work with complex data, including PivotTables, data consolidation, advanced filtering, validation, protection, macros, and collaboration features.

SPECIALIST EXCEL COURSES

- **Microsoft Excel Functions** – Work confidently with logical, lookup, financial, statistical, text, and date functions.
- **Microsoft Excel Data Analysis Add-Ins** – Analyse and visualise data using Power View, Power Pivot, Get & Transform, and Power Map.
- **VBA for Excel** – Automate Excel processes and build custom solutions using VBA.

COURSEWARE

High quality learning materials are available for purchase for each student.

Some of the courseware provided is based on the **2016 edition of Microsoft Excel**. While the version number may appear older, the foundational concepts, workflows, scheduling logic, and functionality covered in the materials remain **fully relevant and accurate** for all current versions of Excel.

Where version differences exist — such as interface updates, new capabilities, or enhanced features — **our trainers will point these out during the session and incorporate them into the training**. This ensures participants always learn the most current, applicable, and practical information for the version your organization uses.

We do hope to update the courseware in the future.

COURSE DETAIL

Getting to Know Excel 2016

- Starting Excel from the Desktop
- Understanding the Excel Start Screen
- The Excel Workbook Screen
- How Excel 2016 Works
- Using the Ribbon
- Showing and Collapsing the Ribbon
- Understanding the Backstage View
- Accessing the Backstage View
- Using Shortcut Menus
- Understanding Dialog Boxes
- Launching Dialog Boxes
- Understanding the Quick Access Toolbar
- Adding Commands to the QAT
- Understanding the Status Bar
- Exiting Safely from Excel 2016

Creating a New Workbook

- Understanding Workbooks
- Using the Blank Workbook Template
- Typing Text
- Typing Numbers
- Typing Dates
- Typing Formulas
- Easy Formulas
- Saving a New Workbook on Your Computer
- Checking the Spelling
- Making Basic Changes
- Safely Closing a Workbook

Working With Workbooks

- Opening an Existing Workbook
- Navigating a Workbook
- Navigating Using the Keyboard
- Using Go To
- Recent Files and Folders

Editing in a Workbook

- Understanding Data Editing
- Overwriting Cell Contents
- Editing Longer Cells
- Editing Formulas
- Clearing Cells
- Deleting Data
- Using Undo and Redo

Selecting Ranges

- Understanding Cells and Ranges
- Selecting Contiguous Ranges
- Selecting Non-Contiguous Ranges
- Selecting Larger Ranges
- Selecting Rows
- Selecting Columns

Copying Data

- Understanding Copying in Excel
- Using Fill for Quick Copying
- Copying From One Cell to Another
- Copying From One Cell to a Range
- Copying From One Range to Another

Filling Data

- Understanding Filling
- Filling a Series
- Filling a Growth Series
- Extracting With Flash Fill

Moving Data

- Understanding Moving in Excel
- Moving Cells and Ranges
- Moving by Dragging

Formulas and Functions

- Understanding Formulas
- Creating Formulas That Add
- Creating Formulas That Subtract
- Formulas That Multiply and Divide
- Understanding Functions
- Using the SUM Function to Add
- Summing Non-Contiguous Ranges
- Calculating an Average
- Finding a Maximum Value
- Finding a Minimum Value
- Creating More Complex Formulas
- What if Formulas
- Common Error Messages

Formula Referencing

- Absolute Versus Relative Referencing
- Relative Formulas
- Problems With Relative Formulas
- Creating Absolute References
- Creating Mixed References

Font Formatting

- Understanding Font Formatting
- Working With Live Preview
- Changing Fonts
- Changing Font Size
- Growing and Shrinking Fonts
- Making Cells Bold
- Italicising Text
- Underlining Text
- Changing Font Colours
- Changing Background Colours
- Using the Format Painter

COURSE DETAIL (Cont..)

Cell Alignment

- Understanding Cell Alignment
- Horizontal Cell Alignment
- Vertical Cell Alignment
- Indenting Cells

Number Formatting

- Understanding Number Formatting
- Applying General Formatting
- Formatting for Money
- Formatting Percentages
- Formatting as Fractions
- Formatting as Dates
- Using the Thousands Separator
- Increasing and Decreasing Decimals

Row and Column Formatting

- Approximating Column Widths
- Setting Precise Columns Widths
- Setting the Default Column Width
- Approximating Row Height
- Setting Precise Row Heights

Working With a Worksheet

- Understanding Worksheets
- Changing the Worksheet View
- Worksheet Zooming
- Viewing the Formula Bar
- Viewing Worksheet Gridlines
- Inserting Cells into a Worksheet
- Deleting Cells from a Worksheet
- Inserting Columns into a Worksheet
- Inserting Rows into a Worksheet
- Deleting Rows and Columns
- Working With Multiple Worksheets
- Worksheet Wisdom

Sorting Data

- Understanding Lists
- Performing an Alphabetical Sort
- Performing a Numerical Sort
- Sorting on More Than One Column

Filtering Data

- Understanding Filtering
- Applying and Using a Filter
- Clearing a Filter
- Creating Compound Filters
- Multiple Value Filters
- Creating Custom Filters
- Using Wildcards

Printing

- Understanding Printing
- Previewing Before You Print
- Selecting a Printer
- Printing a Range
- Printing an Entire Workbook
- Specifying the Number of Copies
- The Print Options

Creating Charts

- Understanding the Charting Process
- Choosing the Right Chart
- Using a Recommended Chart
- Creating a New Chart from Scratch
- Working With an Embedded Chart
- Resizing a Chart
- Repositioning a Chart
- Printing an Embedded Chart
- Creating a Chart Sheet
- Changing the Chart Type
- Changing the Chart Layout
- Changing the Chart Style
- Printing a Chart Sheet
- Embedding a Chart into a Worksheet
- Deleting a Chart

Getting Help

- Understanding How Help Works
- Using Tell Me
- Accessing the Help Window
- Navigating the Help Window
- Using Google to Get Help
- Printing a Help Topic
- Other Sources of Assistance

A Guide to Brilliant Spreadsheets

- Good Planning Is Essential
- Organisation and Design
- Writing Effective Formulas
- Documented and Easy to Use
- The Appropriateness of Spreadsheets