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# Excel – Introductory

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Day 1 of this course is our *Excel – Basics* course.

Day 2 of this course is Day 1 of our *Excel – Intermediate* course.

National Competency Standard (BSB07)  
BSBITU202A Create and use spreadsheets



## Objectives

Upon completion of this course, attendees will be able to design, create and print simple spreadsheets for use by others, produce a wide range of charts and process simple databases.

## Pre-Requisites

Those attending this course should be familiar with personal computers and be competent in the use of the keyboard and mouse.

## Duration

2 Days

## Course Outcomes

1. Use a wide range of calculations and basic functions.
2. Edit and manipulate data in a spreadsheet document.
3. Format and print a spreadsheet document according to specified criteria.
4. Design and create simple business systems using both single and multiple worksheets
5. Process simple databases
6. Create a wide range of charts.
7. Complete everyday tasks faster and more effectively.
8. Construct and enter formulae and functions relevant to a business environment.

## Optional Assessment

**This is a nationally recognised training program.** Participants who successfully complete the optional assessment component of this course will receive a Statement of Attainment for the unit of competency outlined above (additional fee applies). Participants who choose not to be assessed will receive a Certificate of Attendance. The case study assignment is completed in the participant's own time.

## Course Content

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### DAY 1

#### File And Window Management

- Starting Excel
- Creating a New Blank Document
- Saving a Document
- Closing an Excel Document
- Opening an Existing Document
- Using Save As
- Exiting Excel

#### Navigation And Data Entry

- What is Excel?
- The Structure of a Spreadsheet
- The Active Cell
- Entering Text

- Selecting Cells
- Highlighting a Block of Cells
- Highlighting Non Adjacent Cells
- Highlighting Rows and Columns
- Changing Column Widths and Row Heights
- Inserting and Deleting Rows and Columns

#### Basic Calculations

- The Basic Excel Formula
- Entering a Formula
- Using Brackets in a Formula
- Absolute cell references

#### Basic Editing

- Cut and Paste

- Copy and Paste
- Undo and Redo
- Autofill

#### Basic Formatting

- General Formatting
- The Formatting Toolbar
- The Format – Cells Dialog
- Number Formatting
- Date and Time Formatting
- Cells Remember Formats

#### Basic Functions

- The Structure of a Function
- Inserting a Function
- Sum
- Max
- Min
- Average

- Count

### Viewing And Printing

- Views
- Normal
- Print Preview
- Page Break Preview
- Full Screen
- Zoom
- Page Setup
- The Page Tab
- The Margins Tab
- The Header/Footer Tab
- The Sheet Tab
- Split Window
- Freeze Panes
- Print Options

### Review

- Revision Exercises

## DAY 2

### Design Considerations

- Protection
- Protecting a Sheet
- Protecting the Workbook
- Protecting the File
- Hiding Rows and Columns
- Comments
- Inserting a Comment
- Visibility States
- Editing Comments
  - Moving/Resizing Comments
- Formatting Comments
- Deleting Comments

### Templates

- Creating a New Template
- Saving as a Template
- Using a Template from The Default Location
- Using a Template from Another Location
- Modifying the Original Template

### Basic Sheet Layout

- Basic Factors Affecting Layout
- General Guidelines
- Do Not Duplicate Data
- Do Not Put Numbers or Text in a Formula

### Multiple Sheets

- Basic Sheet Operations
- Inserting a New Sheet
- Deleting a Sheet
- Renaming a Sheet
- Moving and Copying Sheets
- Changing the Tab Colour
- Hiding a Sheet
- Highlighting a Contiguous Range of Sheets

- Highlighting a Discontinuous Range of Sheets
- Setting up a MultiSheet Workbook
- Creating a Simple Formula across Sheets
- Creating a Statistical Function across Sheets
- Protecting the Workbook

### Working With Data

- When Not to Use Excel to Store Data
- Size Issues
- Memory Issues
- Duplication of Fields
- When can Excel be Used to Store Data?
- Find and Replace
- Sorting
- Filtering
- Simple Filter
- Custom Filter
- Multiple Criteria on the Same Field
- Multiple Criteria Different Fields
- Top Ten
- Removing all Filters
- Creating a Table
- Managing a Table
- Selecting Rows and Columns
- Using the Drop Down Buttons
- Inserting Rows and Columns
- Total Row
- Demoting a List to a Range
- Splitting Columns

### Basic Charts

- Creating a New Chart
- The Chart Ribbon Tabs
- The Design Tab
- The Layout Tab
- The Format Tab
- Chart Types
- Column
- Line
- Pie
- Bar
- XY (Scatter)
- Source Data
- Chart Options
- Titles
- Axis Options
- Gridlines
- Legend
- Data Labels
- Data Table
- Chart Location

- Formatting Chart Elements
- Common Formatting Categories
- Data Series
- Data Point
- Axes
- Gridlines
- Title
- Legend

### Useful Calculations

- Percentage Increase/Decrease
- Percentages of a Total
- Running Total