



MICROSOFT EXCEL TRAININGS

Find our lesson plans and the competencies summary taught in our trainings.



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Competencies Table

Targeted competencies	EXE-101	EXE-102	EXE-103	EXE-202	EXE-203	EXE-301	EXE-302	EXE-303
Use Excel to efficiently enter data.	✓							
Understand the role and interface of Excel.	✓							
Know the composition of a sheet (<i>status bar, moves, selection, columns and rows</i>).	✓							
Recognize the different types of data.	✓							
Efficiently enter your information and data.	✓							
Manipulate and manage workbooks and file formats.	✓							
Know how to duplicate and copy information in a few clicks.	✓	✓						
Use Excel to automate common calculations.		✓						
Master basic arithmetic formulas.		✓						
Understand the basic functions and their syntaxes (<i>Average, Min, Max, NB, NBVAL, NB.SI</i>).		✓						
Find and apply Excel functions from the library.		✓						
Master absolute addressing by integrating the \$ symbol into your formula.		✓						
Improve the visual presentation of your data in Excel.			✓					
Master cell formats and format them.			✓					
Use conditional formatting.			✓					
Quickly format multiple sheets simultaneously.			✓					
Layout an Excel file ready for export/print.			✓					

Competencies Table

(More)

Targeted competencies	EXE-101	EXE-102	EXE-103	EXE-202	EXE-203	EXE-301	EXE-302	EXE-303
Create lists manually and through the table tool.				✓				
Create drop-down menus in your cells.				✓				
Control the contents of your cells in Excel using data validation tools.				✓				
Display error messages in case of incorrect input.				✓				
Sort and filter the data in a list.				✓				
Use list management functions.				✓				
Visually present your data using Excel charts.					✓			
Produce and manipulate graphics.					✓			
Master complex calculations in Excel.						✓		
Manipulate nested functions.						✓		
Advanced functions (<i>logic, search, text...</i>).						✓		
Work with the name manager.						✓		
Automate your calculations and data analysis using PivotTables.							✓	
Produce and manipulate PivotTables.							✓	
Create buttons to filter your data with one click using segments							✓	
Produce Pivot Charts.							✓	
Save time by creating macros for all your repetitive actions in Excel.								✓
Create macros using the recorder.								✓
Launch macros via buttons.								✓
Preview of the Visual Basic Editor.								✓

EXE-101

Become familiar with the essential features of Excel



Objectives

With this training, you will be able to:

- Master the Excel work environment
- Use quick methods for data entry
- Know how to move quickly through a table
- Manipulate your rows and columns efficiently (insert, delete, show, hide, width and height)

Practical information

Duration	3 hours
Level	Beginner
Number of participants	7 participants
Languages available	English - French

Prerequisites

General knowledge of the Windows environment

Target audience

Managers, administrative staff, and new Excel users

Content

1-Know how to use the interface

- Display accelerator keys
- Share command

2-Help

- Use the *Search* bar
- Classic help

3-Spreadsheets

- Defining a sheet
- Status bar
- Activate, rename a sheet
- Grouping worksheets
- Selection (cells, cell range, columns and rows, entire sheet)
- Using columns and rows (size, insertion, deletion)

4- Enter and modify different types of data

- Text, numbers, dates, etc.
- AutoComplete function
- Use the drop-down list of choices
- Output an incremented listing
- Change data
- Look for/replace data
- Use the Convert tool to fix malformed data

5- Views

- Arrange all
- Synchronous scrolling
- Freeze Panes

6- Managing workbooks

- File formats
- New, open, save, save as / save a copy
- Save a document (standard, with macro, binary, old version, PDF, export)
- Create, rename a workbook, create a folder
- Closing a workbook, Closing Excel

Included with your training



Complete manual with step-by-step explanations



Exercise worksheets seen in class



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Post-training follow-up offered for 6 months

EXE-102

Master calculations, formulas, and basic functions of Excel



Objectives

With this training, you will be able to:

- Understand formulas and master basic mathematical operations (+ - X /)
- Understand the most used functions (SUM, AVERAGE, COUNT, COUNTIF, etc.)
- Work with references in formulas (A5, A\$5, \$A\$5)
- Apply these calculations on multiple Excel sheets

Practical information

Duration	3 hours
Level	Beginner
Number of participants	7 participants
Languages available	English - French

Prerequisites

Have completed workshop EXE-101 or knowledge equivalent.

Target audience

Managers and administrative staff

Content

1- Mathematical Operations

- Enter and modify formulas
- Priority order of operators
- Addition, subtractions, multiplication, division

2- Functions

- Using basic functions (Average, Min, Max, COUNT, COUNTA, COUNTIF)
- Automatic sum
- Syntax and arguments of a function
- Function library

3- Modify a calculation

- Edit using a cell
- Edit using the formula bar
- Edit using the dialog box

4- Manipulating data

- Using the Clipboard
- Paste options
- Paste special
- Copy data using the Copy-back handle (dates, formulas, numbers)

5- 3-D reference

- Create 3-D formulas

6- Addressing the cells

- Relative and absolute addressing
- Mixed addressing
- Change addressing quickly

Included with your training



Complete manual with step-by-step explanations



Exercise worksheets seen in class



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EXE-103

Discover the Basics of Formatting and Page Layout in Excel



Objectives

With this training, you will be able to:

- Use formatting to customize the look and feel of your tables and reports
- Improve the layout of your tables and reports for efficient printing
- Master the most popular conditional formatting options

Practical information

Duration	3 hours
Level	Beginner
Number of participants	7 participants
Languages taught	English - French

Prerequisites

Have completed workshop EXE-101 or knowledge equivalent.

Target audience

Managers and administrative staff

Content

1- Formatting worksheet data

- Format numbers (accounting, percentage, thousands, drop-down list of choices)
- Change the number of decimals
- Align cell content
- Copy or delete formatting

2- Styles

- Use Cell Styles
- Apply a predefined style
- Table styles

3- Conditional Formatting

- Highlight Cells rules
- Top/Bottom rules
- Data bars, Colour Scales, Icons Sets
- Create a Conditional Formatting Rule

4- Using Multiple Worksheets

- Show Multiple Windows, the Workbook
- Group and separate consecutive and non-consecutive worksheets

5- Layout and Print

- Layout options
- Scaling
- Header and Footer
- Page Break Preview
- Print Preview and Print

Included with your training



Complete manual with step-by-step explanations



Exercise worksheets seen in class



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EXE-202

Learn how to use Excel to manage your data lists efficiently



Objectives

With this training, you will be able to:

- Organize your data lists better and faster
- Avoid input errors through data validation (drop-down list, etc.)
- Use simple or custom sorting and standard or advanced filters
- Display and group the main data of a table (Outline)

Practical information

Duration	3 hours
Level	Intermediate
Number of participants	7 participants
Languages available	English - French

Prerequisites

Have completed Workshops EXE-101 and EXE-102 or knowledge equivalent.

Target audience

Managers and administrative staff

Content

1-Designing a Data List

- Enter the name of the data list fields
- Enter data list records

2-Use Data Validation

- Use and modify the validation criteria
- Input message
- Error Alert
- Delete a validation

3-Sort data

- Simple and Multiple Sorting

4-Filter the data

- Automatic filter, Filter by criteria, Customized automatic filter
- Display all records in a Field, view all data list records
- Name the data list
- Use slicers to filter a table
- Filter the list to another location
- Manage all the DB functions

5- Manage Views

- Create and use a custom view
- Delete a view
- Create and use individual Sheet Views in a co-editing M365 context

6- Create, use, and customize Outlines

- Outline the data manually
- Outline the data automatically
- Show and hide outline details
- Remove an Outline

7- Subtotal control

- Create a subtotal
- SUBTOTAL function

Included with your training



Complete manual with step-by-step explanations



Exercise worksheets seen in class



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EXE-203

Show your Data Graphically in a Clear and Precise Way



Objectives

With this training, you will be able to:

- Learn how to choose the right chart based on your data
- Illustrate your different reports with graphs
- Manipulate all elements of a chart (title, legend, etc.)
- Add options to your charts (secondary axes, trendline, etc.)
- Save and reuse your custom templates

Practical information

Duration	3 hours
Level	Intermediate
Number of participants	7 participants
Languages available	English - French

Prerequisites

Have completed workshop EXE-101 or knowledge equivalent.

Target audience

Managers and administrative staff

Content

1-Create Charts

- Insert a chart in Excel
- Types of charts (histogram, curve, sector, bar, area, subdivision, cascade)
- Elements of charts (graph area, plot area, titles, legends, axes wall, floor, grid, series)
- Modify a chart (type, data, layout, styles, label and axes, background)
- Add a secondary axis
- Add WordArt text and drawings
- Add or remove a trend line
- Create and use graphical template
- Use Sparkline mini charts

Included with your training



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step-by-step explanations



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EXE-301

Discover all the Possibilities offered by Excel Built-In Functions



Objectives

With this training, you will be able to:

- Calculate statistics (IF, AND, OR, SUMIF, AVERAGEIFS...)
- Create and modify complex and nested functions
- Merge values from multiple cells into one
- Search for a value in another table according to a criterion (VLOOKUP, XLOOKUP, etc.)

Practical information

Duration	6 hours
Level	Advanced
Number of participants	7 participants
Languages available	English - French

Prerequisites

Have completed Workshops EXE-101 and EXE-201 or knowledge equivalent.

Target audience

Managers and administrative staff

Content

1- Managing built-in features

- Syntax and argument of a function
- Function Wizard
- Use different categories of functions
- Math & trig (=SUMIF, =SUMIFS, =PRODUCT, =ROUND)
- Statistics (=AVERAGEIFS, =COUNTBLANK, =COUNTIF, =MAXIFS)
- Date & time (=NOW, =TODAY, =YEAR)
- Logical (=IF, =AND, =IFS, =IFERROR)
- Text (=CONCATENATE, =UPPER, =RIGHT)
- Look-up & matrix (=VLOOKUP, =INDEX, =XLOOKUP)
- Use nested functions

2- Use named ranges

- Set a name
- Editing rules for a name
- How to enter a noun
- Reach a range
- Delete and change names
- Use names in formulas

3- Explore the formulas audit tools

- Trace histories
- Trace Dependents
- Remove all tracer arrows
- Search for a circular reference
- Correct a #VALUE! error

Included with your training



Complete manual with step-by-step explanations



Exercise worksheets seen in class



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EXE-302

Take Full Advantage of Excel PivotTables



Objectives

With this training, you will be able to:

- Analyze and group data
- Synthesize your data by date or segments
- Correctly add new data for the Update of the table
- Make calculations in a pivot table format
- Have a global overview of the data and keep an updated table

Practical information

Duration	3 hours
Level	Advanced
Number of participants	7 participants
Languages available	English - French

Prerequisites

Have completed Workshops EXE-101, EXE-102 and EXE-202 or knowledge equivalent.

Target audience

Managers and administrative staff

Content

1-PivotTables

- Create a Pivot table
- Analyze data of various tables
- Create a field of filters
- Create, edit, and delete a calculated field
- Create, edit, and delete a calculated item
- Insert segments
- Insert a timeline
- Update a Pivot table
- Change the roll-up functions
- Move and delete fields in PivotTable
- Mask and show items
- Format a Pivot table
- Insert a group
- Insert total and subtotal
- Design a detailed worksheet
- Show filter pages of reports

2- PivotCharts

- Insert a PivotChart
- Format a PivotChart

3- Manage Excel data sources

- Manual process
- Selection of Excel column and tables
- Dynamic range appellation

4- Data Dissemination

- Export data
- Import data (text or from Access)

Included with your training



Complete manual with step-by-step explanations



Exercise worksheets seen in class



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EXE-303

Simplify the use of Excel by automating your actions



Objectives

With this training, you will be able to:

- Save execution time with the use of macros
- Automate repetitive tasks to reduce the risk of error
- Differentiate a relative macro from an absolute macro
- Associate an icon with a macro
- Use a macro with multiple workbooks

Practical information

Duration	3 Hours
Level	Advanced
Number of participants	7 participants
Languages taught	English - French

Prerequisites

Have completed Workshops EXE-101, EXE-102 or knowledge equivalent.

Target audience

Managers and administrative staff

Content

1-Using Macros

- Understand Macros
- Types of Macros
- Repetitive tasks – 2 types

2-Saving a workbook that contains Macros

- Record a Macro
- Save and open a workbook containing macros
- Create a trusted folder

3-Running a macro

- From the Ribbon
- From the Quick Access Toolbar
- From a shortcut key
- From a button
- From an image, a form or a SmartArt object
- From an absolute or relative reference
- Delete a macro

4- Visual Basic programming language

- Create/edit a macro from the Microsoft Visual Basic Editor
- Produce simple code
- Insert comments
- Run a macro from the Microsoft Visual Basic Editor

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