



# Basic Excel Course Outline

## Module 1: How to Become an Excel Expert

### Learning Objectives:

Understand the attitudes and mindset required to be proficient in Excel.

### Subtopics:

- Loving Mistakes
- Mastering the Basics
- Progressive Overloading
- Breaking it down
- The best way to learn.
- On intentional learning
- Joining a community

## Module 2: Getting Started with Excel

### Learning Objectives:

- Understand the Excel interface and primary navigation.
- Customize the ribbon and toolbar for efficiency.
- Open, save, and manage Excel workbooks.

### Subtopics:

- Introduction to Excel Interface
- Workbook vs. Worksheet
- Rows vs Columns vs Cells: What is a Cell address?
- Ribbon, toolbar, and quick access toolbar
- Basic Navigation
- Using the scroll bars and keyboard shortcuts
- Go To and Name Box
- File Management
- Creating, opening, saving, and closing workbooks
- Workbook templates

### Practical Examples:

- Customize the ribbon to include frequently used commands.
- Navigate a large worksheet using keyboard shortcuts.



## Module 2: Entering Data in Excel

### Learning Objectives:

- Master different data entry techniques.
- Use AutoFill and Flash Fill for efficient data entry.
- Understand and manage different data types.

### Subtopics:

- Data Entry Basics (include duplicating previous row/column [ctrl + R/D])
- Entering and editing text, numbers, and dates
- AutoFill and Flash Fill
- Data Types
- Text, numbers, dates, and times
- Cell references and ranges
- Basic Data Management
- Copying, cutting, and pasting data
- Using Undo and Redo

### Practical Examples:

- Use Flash Fill to quickly separate first and last names.
- Practice copying and pasting data between cells and worksheets.

## Module 3: Basic Formulas & Functions

### Learning Objectives:

- Create and edit basic formulas.
- Use common functions for basic calculations.
- Understand and apply cell references.

### Subtopics:

#### **Creating Formulas**

- Basic arithmetic operations
- Using cell references in formulas

#### **Common Functions**

- SUM, AVERAGE, MIN, MAX
- COUNT, COUNTA, COUNTIF

#### **Cell References**

- Relative, absolute, and mixed references
- Using \$ to fix references.

### Practical Examples:

- Create a budget spreadsheet using SUM and AVERAGE functions.
- Use absolute references to create a multiplication table.



## Module 4: Useful Excel Shortcuts

### Learning Objectives:

- Increase efficiency with essential keyboard and mouse shortcuts.
- Master navigation and formatting shortcuts to enhance productivity.

### Subtopics:

- Keyboard Shortcuts
- Common shortcuts for efficiency
- Navigation shortcuts
- Formatting shortcuts
- Mouse Tricks
- Using the right-click menu
- Drag and drop techniques.

### Practical Examples:

- Format cells using keyboard shortcuts.
- Navigate a large dataset using keyboard and mouse tricks.

## Module 5: Formatting Worksheets

### Learning Objectives:

- Apply different formatting techniques to enhance worksheet readability.
- Use conditional formatting to highlight key data.
- Customize number formats for specific needs.

### Subtopics:

#### **Basic Formatting**

- Fonts, colours, and borders
- Cell styles and themes

#### **Number Formatting**

- Formatting numbers, dates, and times
- Custom number formats

#### **Conditional Formatting**

- Highlighting cells based on criteria.
- Creating and managing rules

### Practical Examples:

- Use conditional formatting to highlight high and low values.
- Create a custom date format for a report.



+254 721 693139



Elephant Plaza, Room 3  
Palm Beach Road, Diani, Kenya



crispexcel.com



info@crispexcel.com

## Module 6: Adjusting and Outlining Worksheets

### Learning Objectives:

- Modify worksheet layout to improve data presentation.
- Set up worksheets for optimal printing.
- Use outlining to organize and summarize data efficiently.

### Subtopics:

#### **Modifying Layout**

- Inserting, deleting, and resizing rows and columns
- Merging and splitting cells
- Aligning Titles

#### **Page Layout and Printing**

- Setting print area and page breaks
- Header and footer customisation
- Print preview and print settings

#### **Outlining Data**

- Creating outlines to group data
- Collapsing and expanding groups
- Using subtotal and summary functions within outlines

### Practical Examples:

- Prepare a worksheet for printing with headers and footers.
- Merge and center vs Center across selection titles
- Create an outline to organise a large dataset and use the Subtotal feature to summarise data within the outline.

## Module 7: Working with Multiple Worksheets and Workbooks

### Learning Objectives:

- Manage multiple worksheets and workbooks efficiently.
- Link data between worksheets and workbooks.

### Subtopics:

#### **Managing Worksheets**

- Adding, deleting, and renaming sheets
- Grouping and ungrouping sheets

#### **Linking Workbooks**

- Creating and managing external references
- Consolidating data from multiple sources

#### **3D Formulas**

- Using 3D references across sheets

### Practical Examples:

- Create a summary sheet consolidating data from multiple worksheets.
- Link data from one workbook to another.



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## Module 6: Basic Logic Functions

### Learning Objectives:

- Apply logical functions to analyse data.
- Use error handling functions to manage errors in formulas.

### Subtopics:

#### **IF Statements**

- Basic IF statements
- Nested IF statements

#### **Logical Operators**

- AND, OR, NOT, INFORMATION FUNCTIONS

#### **Error Handling Functions**

- IFERROR, ISERROR

### Practical Examples:

- Create an IF formula to determine pass/fail based on scores.
- Use IFERROR to manage division by zero errors.

## Module 7: Working with Large Datasets

### Learning Objectives:

- Efficiently sort, filter and validate large datasets.
- Use subtotals and grouping for data analysis.

### Subtopics:

#### **Data Sorting and Filtering**

- Sorting data by multiple criteria
- Using AutoFilter and advanced filtering

#### **Data Validation**

- Setting up data validation rules
- Using lists for data validation

#### **Subtotals and Grouping**

- Creating subtotals
- Grouping and outlining data

### Practical Examples:

- Sort a dataset by multiple columns and apply filters.
- Create data validation lists for data entry.

## Module 8: Introduction to Pivot Tables

### Learning Objectives:

- Create and analyze data using pivot tables.
- Customize pivot tables to present data effectively.

### Subtopics:

#### **Creating Pivot Tables**

- Selecting data for pivot tables
- Building pivot tables



### **Pivot Table Features**

- Sorting and filtering in pivot tables
- Using slicers and timelines

### **Customizing Pivot Tables**

- Value field settings
- Layout and design options

### Practical Examples:

- Create a pivot table to analyse sales data.
- Use slicers to filter pivot table data dynamically.

## **Module 9: Introduction to Power Query**

### Learning Objectives:

- Import and transform data using Power Query.
- Clean and shape data for analysis.

### Subtopics:

#### **Getting Started with Power Query**

- Importing data from various sources
- Understanding the Power Query editor

#### **Data Transformation**

- Cleaning and shaping data.
- Merging and appending queries

#### **Advanced Power Query**

- Creating custom columns
- Using M language basics

### Practical Examples:

- Import data from a CSV file and clean it using Power Query.
- Merge multiple data sources into a single query.

## **Module 10: Security and Sharing in Excel**

### Learning Objectives:

- Protect data and workbooks with security features.
- Share and collaborate on Excel workbooks effectively.

### Subtopics:

#### **Protecting Data**

- Password-protecting workbooks and sheets
- Using data encryption

#### **Sharing Workbooks**

- Sharing options in Excel
- Tracking changes and comments

#### **Collaborative Features**

- Using OneDrive and SharePoint for collaboration
- Co-authoring and real-time collaboration

### Practical Examples:

- Protect a worksheet with a password.
- Share a workbook via OneDrive and enable co-authoring.

