

# Excel Foundations Course Overview

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# Course Modules

## Essentials

- The Ribbon – what’s in there, what’s important, what’s not.
- Layout of a workbook and a worksheet.
- Creating a file, saving, printing and the Quick Access Toolbar.
- Working fast in Excel – fast navigation and top keyboard shortcuts.

## Formulae

- Overview of the Function Library.
- Common functions and their application: VLOOKUP, HLOOKUP, XLOOKUP, SUM, SUMIFS, COUNTIFS, IF.
- How to create a calculation.

## Formatting

- Formatting words and numbers.
- Colouring and styling cells and worksheets.
- Grouping and hiding rows and columns.
- Filtering and sorting data.

## Arranging data

- Organising data into Tables.
- Presenting information through Graphs.
- Summarising and slicing & dicing data with Pivot Tables.

## Reviews & Views

- Reviewing spelling and creating comments.
- Protecting and Unprotecting cells and workbooks and using passwords.
- Freeze panes, Page break preview and Gridlines.

## What isn't covered

- VBA and Macros.
- In-depth graphs and graphical representations.

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# Course objectives & format

## Course objectives

- Gain a solid foundation in Excel suitable for day-to-day users.
- Apply a range of useful, relevant Excel functionality to your work.
- Learn to construct simple formulae involving common functions.
- Utilise a range of inbuilt Excel tools in your daily tasks.
- Be able to format your work to look professional and presentable.
- Increase the speed with which you can work in Excel.

## Format

- Theory elements are taught through short video lectures, followed by video demos of the theory applied within Excel.
- High quality exercises are provided throughout to download and put your new knowledge into practice. These are set within a commercial context, making learning relevant, challenging and realistic.
- All exercises are accompanied by a downloadable solution file, along with a comprehensive video of the solution.
- Regular quizzes are provided to help test your knowledge along the way.

## This is for...

- Newcomers to Excel and light users with limited experience of Excel's functionality or uses.
- Those looking to produce presentable work and wanting a thorough overview of Excel's applications.
- Staff from all areas of a business that use Excel.

# Content Examples

## Theory Based

Theory is introduced by way of instructor-presented video lectures. These include thorough, descriptive explanation, and graphical examples.

Lectures are followed by comprehensive and clear Excel demos that show how the theory is applied in a variety of ways.

### Working Fast – Action Shortcuts

Shortcut	What it does	When to use
Ctrl + Alt + V	Opens Paste Special dialog box following a Copy	To paste selected features of a copied cell e.g. Values
Ctrl + F / H	Opens Find and Replace dialog box	Find: Locate text or values anywhere in your spreadsheet. Replace: Very useful to rapidly edit large blocks of formula.
Ctrl + G then Alt + S	Opens Go To Special dialog box	To quickly select all cells with a chosen characteristic e.g. constants, formulas, comments etc.
Ctrl + Z / Y	Undo and Redo	Cycle backwards or forwards through recent actions
Ctrl + ` (below Esc button)	Toggle worksheet formula view	To identify cells with formula and then to highlight precedents as the active selection navigates over cells

### Pivot Tables – Overview

**Overview**

- Pivot Tables are excellent for organising, summarising, analysing, slicing & dicing and dissecting large amounts of data...last!
- Essential for an analyst working in a company with large amounts of financial and non-financial data.
- A table summarising a chosen field(s) can be created by grouping rows and columns by other selected fields. Additionally, values in a particular field can be filtered out of the table.
- The example shows Worldwide Gross firm takings, summarised by Year and Certificate. The original 250 rows of data can be summarised like this in seconds!
- Note, whilst Pivot Tables are ideal for analysing data, they should generally be avoided in dynamic modelling i.e. the creation of business or financial models that Pivot Tables (or overwrite as)

### SORTING & FILTERING

1) Sort the below table by Genre (A-Z) and then IMDb ranking (Highest to Lowest)

2) Apply a filter to the below table and practice the below tasks. Enter the number of results you get in the blue cells to the right.

3) Show only Columbia Pictures and Paramount films.

4) Show films with a PG-13 certificate and an IMDb rating above 8.0.

5) Show only films in blue shaded rows.

6) Show all films that were released between 01/07/2010 and 30/06/2013 that grossed £1bn or over.

7) Show all films that have the word 'and' anywhere in the title.

Title	Studio	Year	Release Date	Worldwide Gross (\$m)	Genre	Certificate	IMDb Rating	Length	Rank in Year
Captain America: The Winter Soldier	Marvel Studios	2014	04-Apr-14	\$724,707,561	PG-13	7.8	7.8	136	7
Downs of the Heart of the Ages	20th Century Fox	2014	11-Jun-14	\$708,826,501	PG-13	7.7	7.7	130	9
Guardians of the Galaxy	Marvel Studios	2014	01-Aug-14	\$678,177,561	PG-13	8.1	8.1	124	3
Interstellar	Paramount	2014	07-Nov-14	\$662,274,561	PG-13	8.7	8.7	109	10
Misbehaving	Walt Disney Pictures	2014	30-May-14	\$746,658,561	PG	7.1	7.1	97	4
The Amazing Spider-Man 2	Columbia Pictures	2014	02-May-14	\$709,582,561	Fantasy	PG-13	6.9	142	8
The Hobbit: The Battle of the Five Armies	Warner Bros	2014	17-Dec-14	\$955,114,561	Fantasy	PG-13	7.5	144	2

### SUMIFS & COUNTIFS Functions

**SUMIFS**  
(sum\_range, criteria\_range1, criteria1, ...)

- Sums all values in a range that satisfy one or more criteria
- Often used to summarise data by Type (e.g. product) or by Period (e.g. year)
- The sum\_range must be 1-dimensional

**COUNTIFS**  
(criteria\_range1, criteria1, ...)

- Counts all values in a range that satisfy one or more criteria
- Many applications including performance analysis, probability and KPIs
- The criteria\_range must be 1-dimensional

### ACTION SHORTCUTS

1) Copy and Paste from the Green cells to the Blue cells. Use Ctrl + C to Copy and then Ctrl + V to Paste.

0.70	0.14	0.12	-%	-%	-%
0.56	0.18	0.56	-%	-%	-%
0.17	0.23	0.85	-%	-%	-%

2) Copy and Paste Special Values from the Green cells to the Blue cells. Use Ctrl + Alt + V to open Paste Special dialog box.

0.70	0.14	0.12	-%	-%	-%
0.56	0.18	0.56	-%	-%	-%
0.17	0.23	0.85	-%	-%	-%

3) Copy and Paste Special Formats from the Green cells to the Blue cells. NB: The numbers in the blue cells do not change, just the format of them.

0.70	0.14	0.12	60%	70%	44%
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### SUM & SUMIFS functions

1) Summarise the quarterly sales data annually in the blue cells above. Use SUMIFS and only use one criteria.

2) How many Male trench coats were sold in Autumn/Winter quarters across 2015-2018? Use SUMIFS and only use one criteria. Refer to criteria in the yellow cell and return the answer in the blue cell.

3) Summarise annual and quarterly quantity of shoes sold by gender in the blue cells below. Use SUMIFS and use two criteria.

	Year	2015	2016	2017	2018	2015	2016	2017	2018
Quarter						Q1	Q2	Q3	Q4

## Practical Based

Throughout the course, participants will put into practice the theory they have just learnt by downloading comprehensive and commercially-orientated exercises, supported by solution files and videos.

Additionally, regular quizzes are provided to further challenge and test your knowledge.

# EXCEL SPREADSHEET *EXPERTS*

All Claritix courses are created by Dan Stockdale, a former PwC modeller and trainer who taught best practice modelling and Excel courses within the Firm. Dan also has a background in Finance teams across several industries, having worked in Commercial Analysis and Management Accounting. He qualified with the Chartered Institute of Management Accountants (CIMA) in 2010 and holds the ACMA and CGMA designations.

Our training courses are transformative. They have not been diluted down to go only halfway. They are broad and intensive, and expose participants to a wide range of Excel skills, as well as commercial knowledge, thinking and approach.

Practical experience in Finance, Analyst, Consulting and Strategy roles has been drawn upon to tailor content to include the most useful, powerful and relevant functionality that Excel provides, and omit the less so.

Participants can expect to leave the course with a step-change in applicable Excel knowledge. This aims to boost productivity, reduce risk in deliverables, and empower staff using the World's most prevalent and powerful business tool to add value in their work.