

# Excel Essentials

## Level 1

### What Can You Expect?

This 1-day fast-paced course will provide the learner with Basic essential skills to get them started in Excel.

### What Is Required from You?

The learner would have experience in Windows, be able to save files and create folders, as well as have basic knowledge of spreadsheets and what they are used for.

### 1 Day Course Content

#### Getting Started with Microsoft Excel 2016

- Navigate the Excel User Interface
- Use Excel Commands
- Create and Save a Basic Workbook
- Enter Cell Data
- Use Excel Help

#### Performing Calculations

- Create Worksheet Formulas
- Insert Functions
- Reuse Formulas and Functions

#### Modifying a Worksheet

- Insert, Delete and Adjust Cells, Columns, and Rows
- Search for and Replace Data
- Use Proofing and Research Tools

#### Formatting a Worksheet

- Apply Text Formats
- Apply Number Formats
- Align Cell Contents
- Apply Styles and Themes
- Apply Basic Conditional Formatting
- Create and Use Templates

#### Printing Workbooks

- Preview and Print a Workbook
- Set Up the Page Layout
- Configure Headers and Footers

#### Managing Workbooks

- Manage Worksheets
- Manage Workbook and Worksheet Views
- Manage Workbook Properties

### What will I take back to work with me?

Practical, hands-on exposure to the basis of Excel will give you confidence and allow you to utilise your new skills with efficiency.



# Excel Essentials

## Level 2

### What Can You Expect?

This 1-day fast-paced course will fill knowledge gaps and provide the learner with tools beyond the basics.

### What Is Required From You?

The learner needs at least 1-year continuous use of Microsoft Excel and formal training to an Intermediate level.

### 1 Day Course Content

#### Working with Functions

- Work with Ranges
- Use Specialized Functions
- Work with Date & Time Functions
- Work with Text Functions

#### Working with Lists

- Sort Data
- Filter Data

#### Analysing Data

- Create and Modify Tables
- Apply Basic Conditional Formatting

#### Visualizing Data with Charts

- Create Charts
- Modify and Format Charts
- Use Advanced Chart Features

#### Using PivotTables and Pivot Charts

- Create a PivotTable
- Analyse PivotTable Data
- Present Data with Pivot Charts

### What Will I Take Back To Work With Me?

This practical course will give the skills and knowledge to return to work to improve your efficiency, maintain accuracy and produce professional output.



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# Excel Level 1 – Basic

## What Can You Expect?

This foundational course will provide you with essential Excel skills to create a spreadsheet, using basic functions and formulas, format, print and save.

**Duration – 2 Days**

## What Is Required From You?

You should be able to read and write in English. ABET or equivalent knowledge or qualification. You should have completed Computer Literacy or possess equivalent knowledge prior to attending this course.

## Assessment Strategy

The assessment methodologies used in this course are to determine and recognise learner competence against the criteria in the related unit standard. Learners are required to successfully complete both Formative and Summative assessments.

## Unit Standard Alignment

**SAQA ID:** 116937

**NQF Level:** 2

**Credits:** 4

**US Title:** Use a Graphical User Interface (GUI)-based spreadsheet application to create and edit spreadsheets

## Course Content

### Getting Started with Microsoft Excel 2016

- What are Spreadsheets?
- Start Excel
- Understand the Screen Layout
- Create a New Spreadsheet
- Save a File
- Understand and Use Save As
- Open and Close an Existing File
- Move Around the Worksheet Effectively
- Select Cell Ranges, Columns and Rows
- Enter Data into Cells
- Use Excel's Help Options
- Exit Excel

### Modify Worksheet Data

- Move and Copy Data
- Insert and Delete Columns and Rows

### Formatting a Worksheet

- Align Cell Data
- Change Font Size and Type
- Add Borders and Colours to Cells
- Adjust Column Width and Row Height

### Basic Calculations

- Use AutoSum to Total lists of Values
- Create Basic Arithmetic Formulas

### Printing Workbook Contents

- Adjust Page Setup Options
- Print Preview and Print a Spreadsheet

### Graphically Display Data

- Create a Chart
- Modify and Print a Chart

## What Will I Take Back To Work With Me?

This course will give you the necessary skills to create a spreadsheet from scratch. Format and set up for printing, and save for future use. This foundational course will give you skills to build on and grow your confidence as your learning path develops within Excel.





# Excel Level 2 – Intermediate

## What Can You Expect?

Cover all essential Excel functions to an Intermediate level, giving you the confidence and skills to produce professional accurate spreadsheets and prepare you for the advanced features.

## What Is Required From You?

You should have a basic knowledge of Excel, and be familiar with the Windows environment. Mouse and keyboard skills are necessary, along with the ability to open and close applications. Knowledge of working with files and folders will be beneficial.

## Assessment Strategy

The assessment methodologies used in this course are to determine and recognise learner competence against the criteria in the related unit standard(s). Learners are required to successfully complete both Formative and Summative assessments.

## Unit Standard Alignment

**SAQA ID:** 116940

**NQF Level:** 3

**Credits:** 6

**US Title:** Use a Graphical User Interface (GUI)-based spreadsheet application to solve a given problem.

## 2 Day Course Content

### Getting Started with Microsoft Excel 2016

- Understand the Screen Layout
- Create a New Spreadsheet
- Understand Save and Save As
- Open and Close an Existing File
- Move Around the Worksheet Effectively
- Select Cell Ranges Columns and Rows
- Enter Data into Cells
- Use Find & Replace
- Customise the Environment

### Modify Worksheet Data

- Use AutoFill Effectively
- Move and Copy Data
- Insert and Delete Columns and Rows

### Formatting a Worksheet

- Align Cell Data
- Change Font Size and Type
- Add Borders and Colours to Cells
- Adjust Column Width and Row Height
- Format Cells to Enhance a Spreadsheet
- Apply Cell Styles
- Apply Conditional Formatting – Data Bars

### Basic Calculations

- Use AutoSum
- Create Basic Arithmetic Formulas

### Modify a Workbook

- Insert and Rename Sheets
- Move and Delete Sheets
- Create and Use Templates

### Printing Workbook Contents

- Adjust Page Setup Options
- Add Headers and Footers
- Print Preview and Print a Spreadsheet
- Set and Clear Print Areas

### Enhancing Basic Formulas

- Absolute & Relative References
- Insert Functions into Formulas
- Display Formulas on Screen and Edit Formulas
- Use Formula Auditing Tools

### Managing Workbooks

- Hide and Unhide Columns and Rows
- Insert, Remove and Adjust Page Breaks
- Repeat Heading Rows at Top of each Page
- Freeze and Unfreeze Panes

### Graphically Display Data

- Create, Edit and Format a Chart



# Excel Level 3 - Data Management

## What Can You Expect?

You will learn how to work efficiently and smartly within an Excel database.

## What Is Required From You?

You should already have Excel Intermediate formal training or knowledge.

## Assessment Strategy

The assessment methodologies used in this course are to determine and recognise learner competence against the criteria in the related unit standard. Learners are required to successfully complete both Formative and Summative assessments.

## Unit Standard Alignment

**SAQA ID:** 258876

**NQF Level:** 4

**Credits:** 3

**US Title:** Work with Spreadsheets.

## 2 Day Course Content

### Databases

- Work with Databases and Lists
- Use Data Form
- Sort Data in a List
- Filter Data in a List
- Use Comparison Criteria for Filters
- Work with a Filtered List

### Use Data Management Tools

- Summarise Data in a List using Subtotals
- Use Nested Subtotals
- Data Consolidation
- Excel Tables
- Name Manager
- Conditional Formatting

### Data Validation

- Apply Data Validation
- Circle Invalid Data
- Remove Validation Circles

### Manage Workbooks and Worksheets

- Work with Sheets
- Group and Ungroup Sheets
- Create & Use Custom Views

### Import and Export Data

- Import External Data
- Adjust Connection Properties

### PivotTables

- Create PivotTables
- Customise PivotTables
- Create Formulas in a PivotTable
- PivotCharts

### Use Text Functions and Tools

- Concatenate Function
- Convert Text to Columns
- Change Case Functions

### Lookup Functions

- VLookup

### Macros

- Record and Run Macros
- Edit a Macro
- Delete a Macro

## What Will I Take Back To Work With Me?

This practical course will give you the skills to sort data, insert tables, design macros and create PivotTables which will save you time while increasing the quality and usability of your spreadsheets.



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# Excel Level 4 – Advanced Features and Formulas

## What Can You Expect?

You will learn how to create and utilise formulas that will enable you to work more efficiently, which will save you time while improving the quality and usability of your spreadsheets.

## What Is Required From You?

Excel Intermediate or equivalent experience.

## Assessment Strategy

The assessment methodologies used in this course are to determine and recognise learner competence against the criteria in the related unit standard. Learners are required to successfully complete both Formative and Summative assessments.

## Unit Standard Alignment

**SAQA ID:** 258882      **NQF Level:** 4      **Credits:** 4  
**US Title:** Manipulate Data and Ensure Integrity

## 2 Day Course Content

### Modifying Workbooks and Worksheets

- Compare Side by Side
- Create and Save a Template

### Paste Special

- Transpose Rows and Columns
- Paste Link

### Creating Advanced Formulas

- Relative, Absolute and Mixed References
- 3D Formulas
- Math & Trig Functions
- Statistical Functions
- Date and Time Functions
- Financial Functions
- Engineering Functions
- Nesting Functions
- Information Functions
- Array Formulas
- Text Functions
- Logical Functions
- Lookup Functions

### Formula Auditing

- Trace Precedent Cells
- Trace Dependent Cells

### Named Ranges

- Use the Name Manager
- Create Name Ranges

### Protect Worksheets and Workbooks

- Password Protect a Workbook
- Protect Worksheet Elements
- Allow Users to Edit Ranges
- Remove Protection

### Control Elements of the Excel Interface

- Adjust Excel Options
- Customise the Quick Access Toolbar
- Customise the Ribbon

### Advanced Formatting Techniques

- Conditional Formatting

### Data Tool Features

- Sort Data
- Subtotals
- What-If-Analysis
- Scenarios

### Annotate with Cell Comments

- Insert a Comment
- Show/Hide Comments
- Print Comments

## What Will I Take Back To Work With Me?

This hands-on course will give you the skills and confidence to refine and improve your spreadsheets while increasing efficiency and accuracy.





# Excel Level 5 – PivotTable and Dashboard Reporting

## What Can You Expect?

This course is aimed at learners who need to analyse information utilising PivotTables as the foundation for Dashboard reports. Dashboard reports present business information as a clear, concise picture that is easy to read, understand, and update.

A variety of results can be condensed into a single page for comparison purposes, simplifying and reducing the time taken to report on organisational performance.

## What Is Required From You?

Learners should have successfully completed Excel courses to an intermediate level or possess the equivalent knowledge. They should also have the ability to create mathematical formulas and formulas using basic functions (SUM, AVERAGE, COUNT, MAX, MIN). It is important that the learner is working on Microsoft Office 2013 or higher.

## 2 Day Course Content

### Preparation of Source Data

- Databases - What they are and how they work
- Entering information correctly into Excel
- Setting up a Database Table in Excel
- Custom Formats
- Using FlashFill
- Using Format as Table
- Using Conditional Format
- Creating Sparklines

### PivotTables

- Understand the layout of a PivotTable
- Create a PivotTable
- Navigate the PivotTable Field Lists
- Modify Design options of a PivotTable
- Using Analysis Tools to analyse the information in different ways
- Customise a PivotTable
- Create a Formula in a PivotTable
- Using Slicers

### PivotCharts

- Create PivotCharts
- Format PivotCharts
- Edit PivotCharts
- Move and Size PivotCharts
- Using chart options to change the design and layout of the Chart

### Dashboard

- Overview of what a dashboard is
- Create a Dashboard with PivotTables and Charts
- Create a Dashboard with PivotCharts Slicers and Timelines
- Using PowerView to display Charts
- An Introduction into using PowerPivots

## What Will I Take Back To Work With Me?

You will be able to work efficiently and effectively within databases and you will be able to produce instant results using your newly founded PivotTable skills and professional dashboards.



# Excel Master Class

## What Can You Expect?

This intense course focuses on the three Phase Method: INPUT, PROCESSING, OUTPUT.

This course takes a learner from:-

→ INPUT (Importing of data correctly)

→ PROCESSING (Evaluating and Analysing Data)

→ OUTPUT (Reporting of Analysed Data).

The course allows for interactive spreadsheets and to master advanced analysis techniques such as Charting and Pivoting. You will be introduced to new features of Excel and reporting in PowerPoint.

## What Is Required From You?

The learner would have completed an Excel Intermediate and Advanced course or at least worked daily in the application for at least 3 years.

## 3 Day Course Content

### Foundational Understanding

- Navigate the User Interface
- Set up and enter data correctly
- Formatting and Custom Format Data
- Creating Custom Lists
- Fixing errors in spreadsheets
- Using Flash Fill (2013/2016)

### Importing and Export Data

- Import & Export data
- Remove Duplicates
- Text to Columns

### Formula and Functions

- Basic Formulas and Functions
- Absolute vs Relative Cell Referencing
- Creating and using Name Ranges
- 3D Formulas to Link Spreadsheets
- Text Functions
- Date and Time Functions
- Logical Functions
- Lookup and Reference Functions
- Nested Functions

### Conditional Formatting

- Utilising the built in formats
- Using Formula to Apply Formats
- Manage Rules

### Understanding Excel Tables

- Setup and format
- Apply Table Styles and Options
- Using AutoFilter
- Custom Views
- Adding new data in table
- Creating Formulas
- Working with a Total Row
- Utilising Freeze Panes
- Insert Slicers

### Charts

- Creating a chart
- Adding Chart Elements
- Format Chart
- Different Chart Types
- Secondary Axis Charting
- Charts and Sparklines

### Applying Advanced Functionality

- Data Validation
- Creating Macros
- Working with Form Controls
- Working with functions
- Assigning macros
- Allow Users to Edit Ranges
- Protect Worksheets & Workbooks

### PivotTable and PivotCharts

- Creating PivotTables
- Number Formatting Techniques
- Designing Report Layout
- Filtering Labels and Values
- Summarize Data
- Inserting Formulas
- Date Analysis
- Copying PivotTables
- Creating PivotCharts
- Showing Report Filter Pages
- Linking PivotTables and PivotCharts in PowerPoint
- Conditional Formatting
- Creating and Formatting PivotCharts
- Adding Chart Elements
- Moving and sizing PivotCharts

### Reporting and Dashboards

- Building a Dashboard
- Building Chart Based & Table Dashboards
- Linking Tables & Charts in PowerPoint

## What Will I Take Back To Work With Me?

You will “master” Excel making reporting easy whether you are doing it in Excel or taking Excel reporting to PowerPoint for presenting.



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# Excel Data Visualisation

## What Can You Expect?

This workshop is designed for people who are currently working in Excel that need to fill knowledge gaps, learn additional features of Charts and Sparklines to visually represent data. This is the ideal course to attend prior to Data Management and/ or PivotTable and Dashboard Reporting.

## Assessment Strategy

The assessment methodologies used in this course are to determine and recognise learner competence against the criteria in the related unit standard(s). Learners are required to successfully complete both Formative and Summative assessments.

## Unit Standard Alignment

**SAQA ID:** 116940

**NQF Level:** 3

**Credits:** 6

**US Title:** Use a Graphical User Interface (GUI)-Based Spreadsheet Application to Solve a Given Problem

**SAQA ID:** 116943

**NQF Level:** 4

**Credits:** 3

**US Title:** Use a Graphical User Interface (GUI)-Based Spreadsheet Application, enhance the functionality and apply graph / charts to a spreadsheet.

## 1 Day Course Content

### Modify Worksheet & Workbook Data

- Use AutoFill Effectively
- Move and Copy Data
- Insert and Delete Columns and Rows
- Insert and Rename Sheets
- Move and Delete Sheets

### Formatting a Worksheet

- Format Cells to Enhance a Spreadsheet
- Apply Various Cell Styles
- Apply Conditional Formatting – Data Bars
- Inset and Format Sparklines

### Formulas and Functions

- Use Autosum to Total Lists of Values
- Basic Arithmetic Formulas
- Use Logical Operators in Formulas
- Use Absolute Cell References in Formulas
- Insert Functions into Formulas
- Display Formulas on Screen and Edit Formulas

### Managing Workbooks

- Hide and Unhide Columns and Rows
- Insert, Remove and Adjust Page Breaks
- Repeat Heading Rows at Top of Each Page
- Freeze and Unfreeze Panes

### Graphically Display Data

- Create, Edit and Format a Chart
- Load Data from External Data
- Insert, Edit and Format Objects
- Chart and Sparkline features
- Show trends – increases or decreases

### Printing Workbook Contents

- Adjust Page Setup Options
- Add Headers and Footers
- Print Preview and Print a Spreadsheet

## Expected Outcomes

On completion of this fast-paced course you will be able to create and format a spreadsheet effectively, utilise Excel formulas and functions, as well as create and modify charts to be visually professional and accurate.



# Excel Visual Basic for Applications

## What Can You Expect?

This course targets learners who require knowledge of Excel's underlying programming language, with a view to extending the functionality of macros, as well as creating functions and automating complex tasks.

## What Is Required From You?

To ensure success, you should have successfully completed all Excel levels or possess the equivalent knowledge.

## 3 Day Course Content

### Day 1

#### **Understand How VB Talks To Excel**

- Understand Automation
- Start Microsoft Excel Macros
- Record, Run and Edit A Macro
- Run A Macro From Visual Basic
- Step Through A Macro

#### **Understand the VB Environment**

- The Code Window
- The Project Explorer
- The Properties Window
- The Immediate Window
- The Object Browser

#### **Write Visual Basic Statements**

- Make Long Statements Easier To Read
- Create, Declare and Assign Variables
- Use Syntax Help In Visual Basic
- Exit Visual Basic Transpose
- Skip Blanks
- Link

### Day 2

#### **Work With Excel Objects in Visual Basic**

- Collections, Properties, Methods And Events
- Understand And Use Workbooks And Worksheets
- Understand And Define Ranges
- Manipulate Drawing Objects
- Manipulate Charts
- Use Values And Formulas In Ranges
- Understand And Use Relative And Absolute
- Enhancing Recorded Selection
- Simplifying Selection Pairs And Groups
- Manipulate PivotTables

### Day 3

#### **Control Visual Basic**

- Use Conditional Statements
- If... Then... Else
- Case Statements

#### **Create Loops**

- For Each Loops
- For Loops
- Do Loops

#### **Extend Excel and Visual Basic**

- Input Boxes
- Message Boxes

#### **Work With Functions**

- Using Excel Functions In Visual Basic
- Create Custom Functions
- Add Function Arguments
- Explore Volatile Functions

#### **Developer**

- Handle Errors: Ignore, Check For And Trapping Errors
- Launch Macros With Events
- Active X Controls
- Create Custom Forms
- Launch A Form
- Animate Objects
- Package The Application



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