

Course Outline & Learning Options

MCT-EXL-201- Formula Fundamentals

Course Information

Course Title	Formula Fundamentals
Course Number	EXL-201
Learning Series	Excel Learning Series: 200 – Formulas and Functions
Prerequisites	Completion of EXL-101 and EXL-103 or equivalent knowledge.
Duration	Self-Study: 1.5–2 hours; Instructor-Led Workshop: 2.5–3 hours
Delivery Format	• Self-study • Instructor-led training • Virtual training • One-on-one coaching
Languages	English, French, or bilingual delivery available
Pricing	Please refer to the current MCT Learning Options & Pricing Guide for details.
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Practical Skills You'll Gain

Participants will learn to create accurate Excel formulas, apply the order of operations, use relative, absolute, and mixed references, calculate totals with AutoSum, troubleshoot common formula errors, and build dynamic worksheets that update automatically when data changes.

Course Description

Formulas are the foundation of Excel and allow users to perform calculations automatically, improve accuracy, and reduce manual work. This course introduces participants to the essential concepts of creating and working with formulas in Excel 365.

Through guided demonstrations and practical exercises, participants learn how formulas are structured, how Excel performs calculations, and how to use references effectively. The course concludes with a hands-on budget exercise that combines formula creation, AutoSum, references, and troubleshooting.

Learning Outcomes

Participants will gain the knowledge and confidence to build accurate, reusable formulas for personal, administrative, and business worksheets.

This course is ideal for learners who already know basic worksheet navigation and want to automate everyday calculations with greater accuracy.

Learning Objectives

By the end of this course, participants will be able to:

- Understand the structure and components of Excel formulas.
- Create formulas using arithmetic operators and apply the order of operations.
- Use relative, absolute, and mixed references appropriately.
- Use AutoSum and common formula techniques to calculate totals and subtotals.
- Troubleshoot common formula errors and improve formula accuracy.
- Create a simple budget worksheet that updates automatically when values change.

Who Should Attend?

This course is designed for:

- Beginners
- Individuals
- Seniors
- Students
- Administrative professionals
- Small business owners
- Professionals
- Lifelong learners

Whether you're managing a household budget, organizing information, tracking expenses, creating reports, or building workplace skills, these practical, hands-on workshops will help you use Microsoft Excel with greater confidence and efficiency.

Customization Options

- Duration may be adjusted to meet client needs.
- Content may be customized for the audience, setting, and learning goals.
- Additional demonstrations may be included.
- Industry-specific examples may be added.
- English, French, or bilingual delivery is available.
- Printed participant guides and reference materials are available.
- Follow-up coaching and additional workshops are available.

Learning Activities

Participants will:

- Create simple formulas using values and cell references.
- Compare results using different calculation methods and parentheses.
- Copy formulas across rows and columns using relative references.
- Use fixed tax, discount, or savings rates with absolute references.
- Build formulas using mixed references in a pricing worksheet.
- Complete a household or business budget exercise using formulas, AutoSum, and reference types.

Module Breakdown

Module 1 – Understanding Excel Formulas

Time: 20 minutes

Key Topics:

- What a formula is and how formulas are structured
- Equal sign, arithmetic operators, and cell references
- Formula best practices and the difference between formulas and functions
- Activity: Create simple formulas using values and cell references

Module 2 – Order of Operations

Time: 20 minutes

Key Topics:

- Mathematical operators and Excel calculation sequence
- Using parentheses to control results
- Common calculation mistakes and how to avoid them
- Activity: Compare formula results using different calculation methods

Module 3 – Relative References

Time: 20 minutes

Key Topics:

- Relative references and automatic reference adjustment
- Copying formulas and using the Fill Handle
- Formula replication across multiple rows
- Activity: Create formulas and copy them across multiple rows

Module 4 – Absolute References

Time: 20 minutes

Key Topics:

- Absolute references and dollar signs
- Using the F4 key to cycle through reference types
- Locking rows and columns for fixed values
- Activity: Create formulas using fixed tax and discount rates

Module 5 – Mixed References

Time: 15 minutes

Key Topics:

- Mixed references with fixed rows or fixed columns
- When to use mixed references
- Practical examples and formula design strategies
- Activity: Build formulas using mixed references in a pricing worksheet

Module 6 – Using AutoSum

Time: 15 minutes

Key Topics:

- AutoSum and SUM function basics
- Totals, subtotals, and common AutoSum applications
- Productivity techniques for faster calculations
- Activity: Calculate totals using AutoSum

Module 7 – Formula Troubleshooting

Time: 10 minutes

Key Topics:

- Common display and formula errors, including column width issues
- #DIV/0!, #NAME?, and #VALUE! errors
- Error prevention and formula auditing basics
- Activity: Correct common formula errors

Module 8 - Practical Exercise – Building a Household or Business Budget

Time: 20 minutes

- Create formulas to calculate totals, balances, and percentages
- Use AutoSum and appropriate reference types
- Verify formula accuracy by updating values and confirming that the results change as expected.
- Expected result: A functional budget worksheet that calculates totals and balances automatically

Digital Resources Included

Participants receive the following digital learning resources to support learning during and after the course:

- Participant Guide (Digital PDF)
- Step-by-Step Exercise Workbook
- Practice Files
- Completed Exercise Files
- Excel Quick Reference Guide
- Keyboard Shortcut Reference Card
- Certificate of Participation (optional)

Note

Optional Materials

- Printed Participant Guide
- Printed Exercise Workbook
- Laminated Excel Quick Reference Card
- Laminated Keyboard Shortcut Guide

Upon Completion

Upon successful completion, participants will be able to create, edit, and troubleshoot Excel formulas; use cell references appropriately; perform calculations efficiently; and build worksheets that update automatically as data changes.

Responsible Use

Participants are encouraged to verify formulas, review results for accuracy, and use spreadsheet calculations responsibly when preparing budgets, reports, estimates, or financial worksheets. Formula outputs should be checked before being used for business, tax, or financial decisions.

After This Course

Participants may wish to continue their learning with:

- EXL-202 – Essential Functions
- EXL-203 – Logical and Lookup Functions
- EXL-204 – Working with Dates and Times
- EXL-301 – Data Analysis and Visualization

Ready to Build Your Excel Skills?

Build accurate formulas, reduce errors, and gain confidence working with everyday calculations. **EXL-201** can be delivered as a self-study course, instructor-led workshop, virtual session, or personalized coaching experience.

- Request a free consultation to discuss your training goals.
- Ask about customized examples using your industry or workplace scenarios.
- Choose English, French, or bilingual delivery.
- Book a session for individuals, small groups, or workplace teams.

Contact MCT Office Services today to plan practical Excel training that fits your needs.

About MCT Office Services



**Helping you work more efficiently, stay organized,
and use technology with confidence.**

MCT Office Services provides friendly, patient, and practical support for individuals, seniors, community groups, and small businesses that need help with technology, paperwork, organization, and digital learning.

- Technology support and troubleshooting
- Forms, paperwork, and online applications
- Document creation, formatting, and organization
- Guidance with digital tools, including beginner-friendly AI support
- Administrative and organizational support
- One-on-one coaching and small-group workshops

No memberships. No contracts. Just practical help when you need it.

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Questions?

Contact MCT Office Services for a free
consultation.

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