

Excel Training Course Outline

EXL-202 – Working with Essential Functions

Course Information

Course Title	Working with Essential Functions
Course Number	EXL-202
Learning Series	Excel Learning Series 200 – Formulas & Functions
Prerequisites	Basic computer skills; comfort navigating Excel worksheets; understanding of rows, columns, cells, ranges, and basic formulas; completion of EXL-201 – Formula Fundamentals 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

Build practical Excel confidence by learning the functions that make everyday calculations faster, cleaner, and more reliable. Participants will learn how to calculate totals, averages, highest and lowest values, counts, rounded results, and filtered summaries—skills that directly support sales reporting, expense tracking, inventory review, financial summaries, and day-to-day business decisions.

Course Description

Excel functions help turn raw numbers into useful information. This hands-on course introduces participants to essential built-in functions that simplify calculations, improve accuracy, and make worksheet summaries easier to create and understand.

Through guided demonstrations and realistic practice activities, learners will apply SUM, AVERAGE, MIN, MAX, COUNT, COUNTA, ROUND, and SUBTOTAL to sales data and other workplace examples. The focus is practical: helping participants work more efficiently, reduce manual errors, and produce clearer reports.

Learning Outcomes

Learners will leave with practical, workplace-ready skills for choosing the right Excel function, building accurate data summaries, and presenting numerical information with greater confidence.

This course is designed for learners who understand basic formulas and are ready to save time, improve accuracy, and make better use of everyday Excel data.

Learning Objectives

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

- Recognize when to use formulas and when functions provide a faster, cleaner solution.
- Apply SUM, AVERAGE, MIN, MAX, COUNT, COUNTA, ROUND, and SUBTOTAL to real worksheet scenarios.
- Create accurate summaries for both filtered and unfiltered data.
- Analyze monthly sales data and present key results in a clear, professional worksheet summary.

Who Should Attend?

This course is a strong fit for anyone who works with numbers, reports, records, or recurring worksheet tasks, including:

- Administrative and office support professionals
- Small business owners
- Property managers
- Bookkeepers and accounting support personnel
- Students and job seekers
- Business analysts and anyone who works with numerical data in Excel

Whether participants are tracking expenses, preparing reports, reviewing sales, organizing records, or strengthening workplace skills, this course provides practical techniques they can use immediately.

Customization Options

- Course length can be adjusted to match client schedules and learning goals.
- Examples can be tailored to the audience, industry, or workplace setting.
- Additional demonstrations can be added for groups that need extra support or deeper practice.
- Industry-specific sample data can be incorporated for more relevant learning.
- Training is available in English, French, or a bilingual format.
- Printed participant guides and reference materials can be provided upon request.
- Follow-up coaching and additional Excel workshops are available for continued learning.

Learning Activities

Participants will build skills through guided practice, including opportunities to:

- Create common calculations using built-in functions and AutoSum.
- Review sales, expenses, and performance data using practical summary functions.
- Build a clear sales data summary using multiple Excel functions that highlight key performance indicators.

Module Breakdown

Module 1 – Introduction to Functions

Time: 15 minutes

Key Topics:

- What functions are and how they simplify calculations
- Formula versus function structure and syntax
- Using the Function Library and common Excel functions

Module 2 – Using the SUM Function

Time: 20 minutes

Key Topics:

- SUM function basics and AutoSum keyboard shortcut
- Selecting ranges and calculating multiple ranges
- Sales, expense, and reporting applications

Module 3 – Using AVERAGE, MIN, and MAX

Time: 20 minutes

Key Topics:

- AVERAGE, MIN, and MAX functions.
- Identifying trends and comparing results
- Analyzing sales performance using summary functions

Module 4 – Using COUNT and COUNTA

Time: 15 minutes

Key Topics:

- COUNT, COUNTA, and COUNTBLANK
- Counting numeric entries, non-blank cells, and blank cells
- Counting records within a sales database

Module 5 – Using the ROUND Function

Time: 15 minutes

Key Topics:

- ROUND function and decimal places
- Positive and negative rounding
- Financial calculations and presentation considerations

Module 6 – Using SUBTOTAL

Time: 20 minutes

Key Topics:

- SUBTOTAL function and function numbers
- Working with filtered lists and visible data
- Summarizing filtered sales information

Module 7 – Combining Functions

Time: 15 minutes

Key Topics:

- Using multiple functions in one worksheet
- Function best practices, error prevention, and troubleshooting
- Building a sales summary worksheet using multiple functions

Digital Resources Included

Participants receive practical digital resources designed to support learning during the course and provide helpful references afterward:

- 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
- Templates

Optional printed materials and templates can be added to support different learning preferences and workplace needs.

Upon Completion

Upon completion, participants will be able to use Excel's essential functions with greater confidence and efficiency. They will be better prepared to summarize data, reduce repetitive manual work, improve reporting accuracy, and continue into more advanced Excel topics such as logical functions, lookup functions, financial analysis, dashboards, and data-driven decision making.

Responsible Use

Participants are encouraged to use clear labels, verify formulas, document assumptions, and review results carefully before relying on worksheet calculations for business or financial decisions.

After This Course

To continue building Excel knowledge and confidence, participants may wish to explore:

- EXL-203 – Logical and Lookup Functions
- EXL-204 – Working with Dates and Times
- EXL-205 – Financial Functions
- EXL-301 – Data Analysis and Visualization

Ready to Build Your Excel Skills?

Reduce spreadsheet errors and work more confidently with everyday Excel data. EXL-202 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. Services are designed to make **technology, paperwork, organization, and digital learning feel more manageable, approachable, and useful in everyday life and work.**

- 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

Practical help. Clear guidance. Support when you need it.

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Questions?

Contact MCT Office Services to discuss
course options or request a free
consultation.

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