

# Microsoft Excel and Forms 365 Level 1 Course Outline

Duration: 1 Day

Unlock the full potential of Microsoft Forms and Excel with this comprehensive Forms and Excel training course. Learn how to create professional forms, quizzes, and polls, and seamlessly link them with Excel for real-time data management. Master essential Excel formulas and PivotTable skills to analyse and visualise your data effectively.

## What You'll Learn

- Create and customise forms, quizzes, and polls with Microsoft Forms
- Analyse data using Excel functions such as VLOOKUP, XLOOKUP, IF, and SUMIF
- Generate PivotTables and PivotCharts for interactive data visualisation
- Link Microsoft Forms to Excel for real-time data collection
- Share and collaborate on Forms and Excel files with your team

## Course Prerequisites

This course is suitable for Office 365 users with basic Excel knowledge. Delegates attending this course should:

- Be familiar with navigating and editing Excel spreadsheets
- Have experience with simple formulas and functions like SUM and AVERAGE
- Be comfortable using Office 365 applications such as Forms

## Full Course Outline

### Microsoft Forms

Locating Microsoft Forms

Creating and naming forms with components such as choice, text, ratings, and file uploads

### Customising Forms

Changing form themes and settings

Adding images, videos, and other multimedia

### Sharing and Managing Forms

Creating links, QR codes, or embedding forms on websites

Exporting form responses to Excel for analysis

## Advanced Features

- Building quizzes with branching logic
- Collaborating on form results

## Microsoft Excel

- Tables
- Creating, sorting, and filtering tables
- Applying table formulas

## Formulas

- Using VLOOKUP, XLOOKUP, IF, and SUMIF for data analysis

## Basic PivotTables

- Creating and navigating PivotTables
- Restructuring and formatting PivotTables

## PivotCharts

- Building and customising bar, column, pie, and doughnut charts

## PivotTable Features

- Using slicers, timelines, and percentage views
- Setting up auto-refresh for dynamic data

## Using Forms and Excel Together

- Linking Forms to Excel
- Creating forms linked to Excel in real time
- Storing and managing linked forms

## Training Benefits

**Comprehensive training materials:** Access detailed notes and exercise files for future reference.

**Post-training support:** Enjoy three months of assistance via email, phone, or screen sharing for follow-up questions.

**Certificate of completion:** Celebrate your achievement with a certificate that recognises your effort and skills.

**Practical learning environment:** Experience hands-on training designed to build confidence and inspire trust.