

Microsoft Excel Training

Microsoft Excel Intermediate (Level 2)

About The Course

This one-day Excel Intermediate course takes learners through the techniques associated with building better, faster and more reliable workbooks. It covers the core function families used in day-to-day business work, including conditional aggregation, logical, date and time, and lookup functions.

The course teaches XLOOKUP as the primary lookup method alongside VLOOKUP and HLOOKUP, introduces dynamic array functions such as UNIQUE, SORT and FILTER, and includes a full unit on Excel Tables and structured references. Participants then apply these skills to PivotTables, PivotCharts, conditional formatting, custom number formats and chart presentation. Training is delivered through business scenarios with hands-on practical work throughout.

Duration: 1 day

Class size: 10 students max

Times: 9:00am to 5:00pm

Price: Refer to our website for current course and package pricing

After the course?

Each student will receive:

- Certificate of completion
- Training manual
- 12 months FREE email support
- FREE class re-sit (if necessary)

Who Should Do This Course?

Designed for current Microsoft Excel users, this course is for those wanting to build on existing fundamental skills and go beyond building simple workbooks. At the end of the course, students should be able to use intermediate techniques to structure, summarise, analyse and present data, and to create more effective and more maintainable workbooks.

Prerequisites

Participants should have already completed the Excel Beginner (Level 1) course before attending this course, or have equivalent skills creating formatted spreadsheets containing formulas, functions, sorting, filtering and simple charts.

Learning Outcomes

Upon successful completion of this course, students will be able to:

- Use fill operations, custom lists and Flash Fill to speed up data entry
- Work with defined names in a workbook
- Use conditional counting and summing functions, and apply rounding and loan repayment calculations
- Work with logical functions to build decision-making formulas
- Use date and time functions to perform calculations
- Look up and match data using XLOOKUP, XMATCH, VLOOKUP and HLOOKUP
- Understand dynamic arrays and use UNIQUE, SORT, SORTBY, FILTER and SEQUENCE
- Create and manage Excel Tables and write formulas with structured references
- Apply custom filters, wildcards and Advanced Filter
- Create, structure, filter and format a PivotTable
- Create and modify a PivotChart
- Apply conditional formatting to ranges in a worksheet
- Build and apply custom number formats
- Add and format chart elements to produce presentation quality charts
- Find and replace data, formulas and formats across a worksheet

Content

Unit 1: Filling Data and Flash Fill

- Understanding Filling
- Filling a Series
- Filling a Growth Series
- Filling Using Options
- Creating and Modifying a Custom Fill List
- Extracting with Flash Fill
- More Complex Flash Fill Extractions

Unit 2: Defined Names

- Understanding Defined Names
- Creating Names Using the Name Box
- Creating Names from a Selection
- Using Names in Typed Formulas
- Applying Names to Existing Formulas
- Defining Names for Constant Values
- Scoping Names to a Worksheet
- Working with Name Manager

Unit 3: Essential Worksheet Functions

- Reviewing Important Worksheet Functions
- Using COUNTIF and COUNTIFS
- Using SUMIF and SUMIFS
- Using AVERAGEIF and AVERAGEIFS
- Using MAXIFS and MINIFS
- Using the ROUND Function
- Rounding Up and Rounding Down
- Using the PMT Function

Unit 4: Logical Functions

- Working with Logical Functions
- Using the IF Function with Text
- Using the IF Function with Numbers
- Nesting IF Functions
- Using the IFS Function
- Using the AND Function
- Using the OR Function
- Using the NOT Function
- Using the IFERROR Function
- Using the SWITCH Function

Unit 5: Date and Time Functions

- Understanding Date and Time Functions
- Using the TODAY and NOW Functions
- Calculating Future Dates
- Calculating the Difference Between Dates
- Using the DATE Function
- Using the WEEKDAY Function
- Using the WORKDAY Function
- Using the EOMONTH Function
- Working with Hours and Minutes

Unit 6: Lookup Functions

- Understanding Data Lookup Functions
- Using VLOOKUP for Exact Matches
- Using VLOOKUP for Approximate Matches
- Using HLOOKUP
- Understanding the Limitations of VLOOKUP and HLOOKUP
- Introducing XLOOKUP
- Using XLOOKUP for Exact Matches
- Returning a Message When XLOOKUP Finds Nothing
- Using XLOOKUP for Approximate Matches
- Performing Reverse Lookups with XLOOKUP
- Returning Multiple Columns with XLOOKUP
- Using the XMATCH Function
- Trapping Lookup Errors with IFNA

Unit 7: Working with Dynamic Arrays

- Understanding Dynamic Arrays and Spilling
- Recognising the Spill Range and Spill Errors
- Using the UNIQUE Function
- Using the SORT Function
- Using the SORTBY Function
- Using the FILTER Function
- Filtering on More Than One Condition
- Handling Empty Results Returned by FILTER
- Using the SEQUENCE Function
- Referencing a Spill Range with the Hash Operator
- Building a Simple Dynamic Summary Report

Unit 8: Working with Excel Tables

- Understanding Excel Tables
- Converting a Range to a Table
- Understanding Table Elements and the Table Design Tab
- Naming a Table
- Applying and Modifying Table Styles
- Adding Rows and Columns to a Table
- Understanding Structured References
- Writing Formulas with Structured References
- Working with Calculated Columns
- Displaying and Using the Total Row
- Sorting and Filtering a Table
- Removing Duplicate Values from a Table
- Inserting and Formatting Slicers
- Using a Table as the Source for a Chart
- Converting a Table Back to a Range

Unit 9: Advanced Filtering Techniques

- Creating Custom Filters
- Using Wildcards in a Filter
- Using Date Filters
- Filtering by Colour
- Understanding Advanced Filter
- Building a Criteria Range
- Copying Advanced Filter Results to Another Location
- Extracting Unique Records

Unit 10: PivotTables

- Understanding PivotTables
- Creating Your Own PivotTable
- Creating a PivotTable from an Excel Table
- Defining the PivotTable Structure
- Filtering a PivotTable
- Switching PivotTable Fields
- Counting in a PivotTable
- Formatting a PivotTable
- Formatting PivotTable Values
- Refreshing PivotTable Data
- Adding Slicers to a PivotTable
- Inserting a Timeline Filter

Unit 11: PivotCharts

- Inserting a PivotChart
- Defining the PivotChart Structure
- Changing the PivotChart Type
- Using the PivotChart Filter Field Buttons
- Connecting Slicers to a PivotTable and PivotChart

Unit 12: Conditional Formatting

- Understanding Conditional Formatting
- Formatting Cells Containing Values
- Clearing Conditional Formatting
- Formatting Top and Bottom Items
- Working with Data Bars
- Working with Colour Scales
- Working with Icon Sets
- Creating and Editing Sparklines
- Creating Custom Rules with a Formula
- Managing and Prioritising Rules

Unit 13: Custom Number Formats

- Working with Number Formats
- Understanding Format Codes
- Creating Descriptive Custom Formats
- Custom Formatting Large Numbers
- Customising the Display of Negative Values
- Formatting Calculated Time
- Applying Colour Within a Custom Format

Unit 14: Chart Elements and Formatting

- Understanding Chart Elements
- Adding a Chart Title and Axes Titles
- Repositioning the Legend
- Showing Data Labels and Gridlines
- Adding a Trend Line
- Adding a Data Table
- Creating a Combination Chart
- Adding a Secondary Axis
- Selecting Chart Objects
- Using Shape Styles
- Changing the Colour of a Series
- Formatting the Chart Area and Background

- Working with the Format Pane
- Creating an Exploded View for Pie Slices

Unit 15: Finding and Replacing Data

- Understanding Find and Replace Operations
- Finding Text
- Replacing Values
- Using Replace to Change Formulas
- Replacing Within a Range
- Finding Formats
- Using Go To Special
- Finding the Last Cell

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Alternatively please contact our office on 1300 888 724