

Microsoft Excel Intermediate Training

OVERVIEW

The **Microsoft Excel Intermediate** course is designed for users who already understand the basics of Excel and want to work more efficiently with their data. This one-day course focuses on building more productive workbooks using formulas and functions, improving data presentation, and applying tools that support analysis and decision-making.

Participants learn to work more effectively with worksheets, apply advanced formatting and charting techniques, and use features such as tables, Quick Analysis, Goal Seek, and Fill operations to save time and improve accuracy.

LEARNING OUTCOMES

By the end of the course, you will be able to:

- **Use Fill operations** to create and extend data series efficiently
- **Create more complex formulas and functions** to perform calculations accurately
- **Apply common worksheet functions** to analyse and manipulate data
- **Use defined names** to simplify formulas and improve workbook readability
- **Apply advanced formatting**, including borders, number formats, and conditional formatting
- **Prepare worksheets for printing** using page setup and layout features
- **Use Goal Seek** to determine input values needed to achieve desired results
- **Work with tables and Quick Analysis tools** to explore and summarise data
- **Create and enhance charts** using a range of formatting and design features

These outcomes enable participants to work more efficiently with data-driven workbooks and provide a strong foundation for progression to **Microsoft Excel Advanced**.

PREREQUISITES

- Participants should be comfortable creating, editing, formatting, and printing basic worksheets
- A working knowledge of ranges, copying, and basic formulas is recommended
- Completion of **Microsoft Excel Introduction** or equivalent experience is assumed

DURATION & DELIVERY

The duration of this course is 1 day, without alterations.

We offer flexible delivery to suit your team and environment:

- **Onsite at your workplace** – highly interactive, tailored to your organisation's data and workflows
- **Live online training** – instructor-led, hands-on sessions via your preferred platform
- **Customised delivery** – mix and match topics across **Introduction, Intermediate, and Advanced** to create a program that fits your goals and timeline

All sessions are led by experienced Microsoft Excel specialists with a strong focus on real-world applications.

MICROSOFT EXCEL TRAINING PATHWAY

Our Microsoft Excel training is offered across three progressive one-day courses – **Introduction, Intermediate, and Advanced** - supported by a range of **specialist Excel courses** focused on advanced analysis, functions, and automation. Whether you are new to spreadsheets, building stronger analytical skills, or automating complex Excel solutions, there is a course tailored to your needs.

All courses can be delivered as is, or we can customise a training program, so your team completes the exact topics they need in the number of days that suits your organisation.

CORE EXCEL COURSES

- **Microsoft Excel Introduction** – Learn the fundamentals of creating, editing, formatting, and managing spreadsheets, with a strong focus on accuracy, good design, and practical everyday use.
- **Microsoft Excel Intermediate** – Build more productive workbooks using formulas, functions, advanced formatting, charts, tables, and analysis tools such as Goal Seek and Quick Analysis.
- **Microsoft Excel Advanced** – Work with complex data, including PivotTables, data consolidation, advanced filtering, validation, protection, macros, and collaboration features.

SPECIALIST EXCEL COURSES

- **Microsoft Excel Functions** – Work confidently with logical, lookup, financial, statistical, text, and date functions.
- **Microsoft Excel Data Analysis Add-Ins** – Analyse and visualise data using Power View, Power Pivot, Get & Transform, and Power Map.
- **VBA for Excel** – Automate Excel processes and build custom solutions using VBA.

COURSEWARE

High quality learning materials are available for purchase for each student.

Some of the courseware provided is based on the **2016 edition of Microsoft Excel**. While the version number may appear older, the foundational concepts, workflows, scheduling logic, and functionality covered in the materials remain **fully relevant and accurate** for all current versions of Excel.

Where version differences exist — such as interface updates, new capabilities, or enhanced features — **our trainers will point these out during the session and incorporate them into the training**. This ensures participants always learn the most current, applicable, and practical information for the version your organization uses.

We do hope to update the courseware in the future.

COURSE DETAIL

Filling Data

- Understanding Filling
- Filling a Series
- Filling a Growth Series
- Filling a Series Backwards
- Filling Using Options
- Creating a Custom Fill List
- Modifying a Custom Fill List
- Deleting a Custom Fill List
- Extracting With Flash Fill
- More Complex Flash Fill Extractions
- Extracting Dates and Numbers

Worksheet Techniques

- Inserting and Deleting Worksheets
- Copying a Worksheet
- Renaming a Worksheet
- Moving a Worksheet
- Hiding a Worksheet
- Unhiding a Worksheet
- Copying a Sheet to Another Workbook
- Changing Worksheet Tab Colours
- Grouping Worksheets
- Hiding Rows and Columns
- Unhiding Rows and Columns
- Freezing Rows and Columns
- Splitting Windows

Page Setup

- Strategies for Printing Worksheets
- Understanding Page Layout
- Using Built in Margins
- Setting Custom Margins
- Changing Margins by Dragging
- Centring on a Page
- Changing Orientation
- Specifying the Paper Size
- Setting the Print Area
- Clearing the Print Area
- Inserting Page Breaks
- Using Page Break Preview
- Removing Page Breaks
- Setting a Background
- Clearing the Background
- Settings Rows as Repeating Print Titles
- Clearing Print Titles
- Printing Gridlines
- Printing Headings
- Scaling to a Percentage
- Fit to a Specific Number of Pages

Applying Borders

- Understanding Borders
- Applying a Border to a Cell

Applying Borders (cont.)

- Applying a Border to a Range
- Applying a Bottom Border
- Applying Top and Bottom Borders
- Removing Borders
- The More Borders Command
- Using the More Borders Command
- Drawing Borders
- Drawing a Border Grid
- Erasing Borders
- Formatting the Drawing Pencil

Essential Functions

- Key Worksheet Functions
- Using IF With Text
- Using IF With Numbers
- Nesting IF Functions
- The CHOOSE Function
- The LOOKUP Function
- Using Counting Functions
- The ROUND Function
- Rounding Up and Rounding Down
- Manipulative Functions
- The MOD Function
- The TODAY Function
- The NOW Function
- The DATE Function
- The PMT Function

Complex Formulas

- Scoping a Formula
- Long-Hand Formulas
- Preparing for Complex Formulas
- Creating the Base Formula
- Adding More Operations
- Editing a Complex Formula
- Adding More Complexity
- Copying Nested Functions
- Switching to Manual Recalculation
- Pasting Values From Formulas
- Documenting Formulas

Defined Names

- Understanding Defined Names
- Defining Names From Worksheet Labels
- Using Names in Typed Formulas
- Applying Names to Existing Formulas
- Creating Names Using the Name Box
- Using Names to Select Ranges
- Pasting Defined Names Into Formulas
- Defining Names for Constant Values
- Creating Names From a Selection
- Scoping Names to a Worksheet
- Using the Name Manager
- Documenting Defined Names

COURSE DETAIL (Cont..)

Number Formatting Techniques

- Applying Alternate Currencies
- Applying Alternate Date Formats
- Formatting Clock Time
- Formatting Calculated Time
- Understanding Number Formatting
- Understanding Format Codes
- Creating Descriptive Custom Formats
- Custom Formatting Large Numbers
- Custom Formatting for Fractions
- Padding Numbers Using Custom Formatting
- Aligning Numbers Using Custom Formats
- Customising the Display of Negative Values

Conditional Formatting

- Understanding Conditional Formatting
- Formatting Cells Containing Values
- Clearing Conditional Formatting
- More Cell Formatting Options
- Top Ten Items
- More Top and Bottom Formatting Options
- Working With Data Bars
- Working With Colour Scales
- Working With Icon Sets
- Understanding Sparklines
- Creating Sparklines
- Editing Sparklines

Goal Seeking

- Understanding Goal Seeking
- Using Goal Seek

The Quick Analysis Tools

- Understanding Quick Analysis
- Quick Formatting
- Quick Charting
- Quick Totals
- Quick Sparklines
- Quick Tables

Worksheet Tables

- Understanding Tables
- Creating a Table from Scratch
- Working With Table Styles
- Inserting Table Columns
- Removing Table Columns
- Converting a Table to a Range
- Creating a Table from Data
- Inserting or Deleting Table Records
- Removing Duplicates
- Sorting Tables
- Filtering Tables
- Renaming a Table
- Splitting a Table
- Deleting a Table

Chart Elements

- Understanding Chart Elements
- Adding a Chart Title
- Adding Axes Titles
- Repositioning the Legend
- Showing Data Labels
- Showing Gridlines
- Formatting the Chart Area
- Adding a Trendline
- Adding Error Bars
- Adding a Data Table

Chart Object Formatting

- Understanding Chart Formatting
- Selecting Chart Objects
- Using Shape Styles
- Changing Column Colour Schemes
- Changing the Colour of a Series
- Changing Line Chart Colours
- Using Shape Effects
- Colouring the Chart Background
- Understanding the Format Pane
- Using the Format Pane
- Exploding Pie Slices
- Changing Individual Bar Colours
- Formatting Text
- Formatting With WordArt
- Changing WordArt Fill
- Changing WordArt Effects