

Microsoft Excel Advanced Training

OVERVIEW

The **Microsoft Excel Advanced** course is designed for experienced Excel users who work with large or complex datasets and need advanced tools to analyse, validate, protect, and share data effectively. This one-day course focuses on advanced data manipulation, summarisation, automation, and collaboration features.

Participants learn how to work with imported and linked data, create advanced summaries using PivotTables and consolidations, apply validation and protection techniques, and record macros to automate repetitive tasks. These skills help users build more robust, efficient, and reliable Excel solutions.

LEARNING OUTCOMES

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

- **Modify Excel options** to suit advanced working requirements
- **Protect worksheets and workbooks** to safeguard sensitive data
- **Import, export, and link data** to create more efficient workbooks
- **Group data and use outlines** to manage complex worksheets
- **Create summaries using subtotals and data consolidation**
- **Build and manage data tables, scenarios, and Scenario Manager**
- **Create, analyse, and customise PivotTables and PivotCharts**
- **Apply advanced filters and data validation techniques**
- **Create and use form controls** within worksheets
- **Share workbooks and collaborate with other users**
- **Record macros** to automate repetitive Excel tasks

These outcomes enable users to build sophisticated Excel solutions and provide a strong foundation for progression into **specialist Excel** courses such as Data Analysis Add-Ins or VBA for Excel.

PREREQUISITES

- Participants should be confident working with formulas, functions, charts, and tables
- Experience with Intermediate-level Excel features is strongly recommended
- Completion of **Microsoft Excel Intermediate** 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**Setting Excel Options**

- Understanding Excel Options
- Personalising Excel
- Setting the Default Font
- Setting Formula Options
- Understanding Save Options
- Setting Save Options
- Setting the Default File Location
- Setting Advanced Options

Protecting Data

- Understanding Data Protection
- Providing Total Access to Cells
- Protecting a Worksheet
- Working With a Protected Worksheet
- Disabling Worksheet Protection
- Providing Restricted Access to Cells
- Password Protecting a Workbook
- Opening a Password Protected Workbook
- Removing a Password from a Workbook

Importing and Exporting

- Understanding Data Importing
- Importing From an Earlier Version
- Understanding Text File Formats
- Importing Tab Delimited Text
- Importing Comma Delimited Text
- Importing Space Delimited Text
- Importing Access Data
- Working With Connected Data
- Unlinking Connections
- Exporting to Microsoft Word
- Exporting Data as Text
- Inserting a Picture
- Modifying an Inserted Picture

Data Linking

- Understanding Data Linking
- Linking Between Worksheets
- Linking Between Workbooks
- Updating Links Between Workbooks

Grouping and Outlining

- Understanding Grouping and Outlining
- Creating an Automatic Outline
- Working With an Outline
- Creating a Manual Group
- Grouping by Columns

Summarising and Subtotaling

- Creating Subtotals
- Using a Subtotaled Worksheet
- Creating Nested Subtotals
- Copying Subtotals
- Using Subtotals with AutoFilter
- Creating Relative Names for Subtotals
- Using Relative Names for Subtotals

Data Consolidation

- Understanding Data Consolidation
- Consolidating With Identical Layouts
- Creating a Linked Consolidation
- Consolidating From Different Layouts
- Consolidating Data Using the SUM Function

Data Tables

- Understanding Data Tables and What-If Models
- Using a Simple What-If Model
- Creating a One-Variable Table
- Using One-Variable Data Tables
- Creating a Two-Variable Data Table

Scenarios

- Understanding Scenarios
- Creating a Default Scenario
- Creating Scenarios
- Using Names in Scenarios
- Displaying Scenarios
- Creating a Scenario Summary Report
- Merging Scenarios

PivotTables

- Understanding PivotTables
- Recommended PivotTables
- Creating Your Own PivotTable
- Defining the PivotTable Structure
- Filtering a PivotTable
- Clearing a Report Filter
- Switching PivotTable Fields
- Formatting a PivotTable
- Understanding Slicers
- Creating Slicers
- Inserting a Timeline Filter

PivotTable Features

- Using Compound Fields
- Counting in a PivotTable
- Formatting PivotTable Values
- Working With PivotTable Grand Totals
- Working With PivotTable Subtotals
- Finding the Percentage of Total
- Finding the Difference From
- Grouping in PivotTable Reports
- Creating Running Totals
- Creating Calculated Fields
- Providing Custom Names
- Creating Calculated Items
- PivotTable Options
- Sorting in a PivotTable

COURSE DETAIL (Cont..)

PivotCharts

- Inserting a PivotChart
- Defining the PivotChart Structure
- Changing the PivotChart Type
- Using the PivotChart Filter Field Buttons
- Moving PivotCharts to Chart Sheets

Advanced Filters

- Understanding Advanced Filtering
- Using an Advanced Filter
- Extracting Records with Advanced Filter
- Using Formulas in Criteria
- Understanding Database Functions
- Using Database Functions
- Using DSUM
- Using the DMIN Function
- Using the DMAX Function
- Using the DCOUNT Function

Validating Data

- Understanding Data Validation
- Creating a Number Range Validation
- Testing a Validation
- Creating an Input Message
- Creating an Error Message
- Creating a Drop-Down List
- Using Formulas as Validation Criteria
- Circling Invalid Data
- Removing Invalid Circles
- Copying Validation Settings

Controls

- Understanding Types of Controls
- Understanding How Controls Work
- Preparing a Worksheet for Controls
- Adding a Combo Box Control
- Changing Control Properties
- Using the Cell Link to Display the Selection
- Adding a List Box Control
- Adding a Scroll Bar Control
- Adding a Spin Button Control
- Adding Option Button Controls
- Adding a Group Box Control
- Adding a Check Box Control
- Protecting a Worksheet With Controls

Sharing Workbooks

- Sharing Workbooks via the Network
- Sharing Workbooks via OneDrive
- Saving to OneDrive
- Sharing Workbooks
- Opening Shared Workbooks
- Enabling Tracked Changes
- Accepting or Rejecting Changes
- Disabling Tracked Changes
- Adding Worksheet Comments
- Navigating Worksheet Comments
- Editing Worksheet Comments
- Deleting Comments

Recorded Macros

- Understanding Excel Macros
- Setting Macro Security
- Saving a Document as Macro Enabled
- Recording a Simple Macro
- Running a Recorded Macro
- Relative Cell References
- Running a Macro with Relative References
- Viewing a Macro
- Editing a Macro
- Assigning a Macro to the Toolbar
- Running a Macro from the Toolbar
- Assigning a Macro to the Ribbon
- Assigning a Keyboard Shortcut to a Macro
- Deleting a Macro
- Copying a Macro