Course Outline
Microsoft Excel - Advanced (Level 1)

Duration	**6 hours** - (Can be Delivered over **Two – 3 Hour Sessions** or **One – 6 hour Session**)
Audience	Competent Excel users who want to build more sophisticated formulas, create dynamic results and produce interactive reports with PivotTables.
Pre-Requisites	Participants must be confident with the skills covered in Microsoft Excel Intermediate, including Excel Tables, relative and absolute references, IF, SUMIF, COUNTIF, basic XLOOKUP, Data Validation, Conditional Formatting and charts.
Delivery	Live virtual, with demonstrations, guided practice, discussion and supplied exercise files.
Group Size	Recommended maximum: 10 participants for an interactive session

Course objective

Develop the advanced formula, data-control and reporting skills needed to solve more complex Excel tasks. Participants will combine functions, create dynamic results and build interactive PivotTable reports that update efficiently as source data changes.

Learning Outcomes

- Combine IF with AND, OR and calculations to handle multiple business rules.
- Use modern text and dynamic-array functions to clean, split, filter, sort and return unique data.
- Create dependable lookups with XLOOKUP and handle records that are not found.
- Build dynamic Data Validation lists and formula-driven Conditional Formatting.
- Create, analyse and present information with advanced PivotTables, Pivot Charts, slicers and timelines.
- Create formula-based summaries using GROUPBY and PIVOTBY where available.
- Understand which skills progress into Microsoft Excel Advanced – Level 2.

Module 1: Advanced Logical and Criteria formulas

- Review IF, SUMIF and COUNTIF in a business context
- Combine IF with AND/OR
- Include calculations inside IF
- Use nested IF or IFS for a manageable number of conditions
- Use SUMIFS and COUNTIFS with multiple criteria
- Handle expected errors with IFERROR

Module 2: Modern Text and Date Functions

Text functions

- Clean text with TRIM
- Extract text with LEFT, RIGHT, MID and LEN
- Combine text with CONCAT and TEXTJOIN
- Split text with TEXTSPLIT
- Return text with TEXTBEFORE and TEXTAFTER

Date and time functions

- Extract DAY, MONTH and YEAR
- Use TODAY, NOW, DATEDIF and WORKDAY
- Display dates as text
- Convert text to dates
- Convert time to decimal values

Module 3: Dynamic Array Functions

- Understand spill ranges and the #SPILL! error
- Create dynamic lists with SORT and SORTBY
- Return unique values with UNIQUE
- Filter records with FILTER
- Return selected rows or columns using TAKE, DROP, CHOOSEROWS and CHOOSECOLS
- Combine functions to create a dynamic report

Module 4: XLOOKUP, VLOOKUP and Dynamic Data Validation

XLOOKUP / VLOOKUP

- Review an exact-match XLOOKUP
- Return information from either side of the lookup field
- Return multiple columns
- Use the if-not-found argument
- Use XLOOKUP with Excel Tables
- Compare XLOOKUP with VLOOKUP

Dynamic Data Validation

- Create dynamic source lists using SORT and UNIQUE
- Create dependent drop-down lists
- Use named formulas or spill references where appropriate
- Circle invalid data and copy validation safely

Module 5: Formula-driven Conditional Formatting and protection

Advanced Conditional Formatting

- Create rules using formulas
- Use relative, absolute and mixed references correctly
- Highlight an entire row based on a value
- Highlight exceptions, deadlines and duplicates dynamically
- Manage rule order and Stop If True

Protecting worksheets and workbooks

- Lock formula cells while keeping input cells editable
- Protect selected ranges
- Control permitted user actions
- Protect workbook structure

Module 6: Presenting & Reporting Data

PivotTable analysis

- Create a PivotTable from an Excel Table
- Build two- and three-dimensional reports
- Change summary calculations and number formats
- Group dates and numeric data
- Control report layout, subtotals and grand totals
- Use drill-down and Show Values As
- Create and understand calculated fields

Interactive PivotTable reports

- Create and format a PivotChart
- Use slicers and timelines
- Connect slicers to multiple PivotTables
- Duplicate PivotTables for alternative views
- Use report filters and Generate Report Filter Pages
- Refresh reports when source data changes

Module 7: Formula-Based Summary Reports

GROUPBY and PIVOTBY

- Use GROUPBY to create a one-axis grouped summary
- Use PIVOTBY to create a two-axis formula summary
- Apply SUM, AVERAGE or COUNT as an aggregation