

Microsoft Excel Training Agenda (Level 200)

Overview

Intermediate overview of Microsoft Excel. This assumes the user already has a strong understand of the basic features of Excel, can navigate the application, and has a grasp on the use of functions and custom formulas. When presenting material, take advantage of pre-made content found within the Contoso demo tenants, found at demos.microsoft.com.

Introduction

This training outline will focus on intermediate features within Microsoft Excel. This will give an overview of functions, formatting, restrictions, pivot tables, and accessibility features. When presenting this material, it is strongly advised to distribute a copy of exercise files that you select to use, this way your attendees will be able to follow along step-by-step.

Functions

Functions are pre-built formulas built into Excel that serve as a powerful tool based on the user's needs. It is very easy to become overwhelmed with the amount of functions that can be used, but some notably common and flexible ones are:

- VLOOKUP, HLOOKUP
- INDEX
- MATCH
- TODAY
- IF, IFS, IFERROR
- AND, OR
- COUNT, COUNTA, COUNTBLANK, COUNTIF

Cell Formatting

By default, each cell within Excel will be categorized as General, which allows the user to perform a wide variety of basic inputs. But depending on what the user is intending to do, they may need to manipulate what they want Excel to interpret a specific cell to do or be.

Cell Type	Description
General	Cells with no specific number format
Number	General number display, with the ability to manipulate decimal places, and negative values
Currency	Like the Number format but used for monetary values. Also allows user to assign a specific currency type based on location (e.g. US Dollar, Yen, Euro, etc.)
Accounting	Like the Currency format, but adjusts inputs to line symbols and decimals by accounting standards
Date	Customize how you would like to format various dates, with ability to specify location
Time	Customize how you would like to format time inputs, with ability to specify location
Percentage	Formats cells to display a percentage. Note that it will multiply the entry by 100
Fraction	Adjust how you would like to display input numbers in a fraction format

Scientific	Convert input numbers to exponential format
Text	This will display exactly what is entered, no formatting will be applied
Special	Used for tracking and database usage
Custom	Assign a custom format

More information on Excel Cell Formats can be found [here](#).

Conditional Formatting

This will allow users to apply either preset or custom rule sets to data that remains dynamic. There is handful of great pre-made rules already present within the Conditional Formatting section that users can take advantage of.

- Highlight Cell Rules
- Top/Bottom Rules
- Data Bars
- Color Scales
- Icon Sets

Make sure you are familiar with each one, and remember that Excel works off mathematical equations and you will need to remember this concept while applying formatting and creating new rules.

Review Rule Editing:

- New Rule
- Clear Rules
- Manage Rules

Format as Table

This is a great feature that will allow users to quickly filter data in an easy to read manner. This is best applied to tables that do not have an extraordinary amount of data present (which would be more applicable for a Pivot Table), but you would like to still have a structured table built. When presenting this feature, this is a great opportunity to discuss Contextual Tabs as we have a new tab appear when we select our newly created table, Table Design.

- Highlight premade table types
- Auto population of table headers if not present
- Table Design Tab
 - Table Name
 - Convert to range
 - Table Style Options
 - Discuss customization options
 - Total Row – this is a very powerful feature to illustrate and should be a standout

Pivot Tables

- Creating Pivot Tables
- Field Customization:
 - Filters
 - Columns
 - Rows
 - Values

- Pivot Table Name (re-introduce the concept of Contextual Tabs)
- Slicers

Note: Pivot Tables can become extremely in-depth and serve as a great asset to many organizations while analyzing data. It is imperative that you do not manipulate customer data or offer/agree to create a Pivot Table for them.

Restrictions

- Protecting a Workbook
- Protecting a Worksheet
- Locking cells

Accessibility Options

- How to check for accessibility issues
- Overview of Alternative Text and how to apply

Associate Training

- [Microsoft Excel Office Support](#)
- [MOS Excel Associate – LinkedIn Learning](#)
- [MOS Excel Expert – LinkedIn Learning](#)

Question and Answer

- Partner with the organization's point of contact to field any questions before hand, set expectation that Microsoft Store Employees are not present to create business specific solutions, only to demonstrate the skills and features that will allow them to do so.
- Include Q+A session at the end of the training