Microsoft 365 Excel Intermediate Reporting Course

8 – 12 March 2027
San Diego

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Training Center

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Ref: 855_164658 **Date:** 8 – 12 March 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Microsoft 365 Excel Intermediate Reporting Course is a one-week course for business professionals, coordinators, administrators, and reporting staff who leave with a Reliable Recurring Report Workbook. Participants organize tables, build structured formulas, apply lookups, prepare source data, summarize results with PivotTables, and create charts with validation and protection controls. The course addresses inconsistent inputs, broken references, manual summaries, and unclear report updates. Agile Leaders Training Center develops Microsoft 365 Excel intermediate reporting practice.

Who Should Attend

- Business support functions responsible for maintaining records and recurring reports
- Coordination functions responsible for tracking activities, deadlines, and exceptions
- Administrative functions responsible for structured lists, calculations, and document control
- Reporting functions responsible for summaries, charts, and distribution
- Operations functions responsible for performance data and routine decisions

The course assumes participants can enter, format, sort, and filter worksheet data and use basic formulas; it leaves out introductory navigation, relational modeling, macros, and advanced automation.

Departments and Industries

The course supports departments and industries that maintain operational records and recurring business reports.

- Administration, finance support, sales operations, and project coordination
- Human resources, procurement, customer service, and quality
- Retail, logistics, manufacturing, and professional services
- Healthcare, education, hospitality, and technology

Learning Objectives

By the end of this course, participants will be able to:

- Build structured tables with controlled inputs and references.
- Apply intermediate formulas and lookup methods to business records.
- Use Power Query for repeatable cleaning and combination.
- Build PivotTable summaries and decision-focused charts.
- Evaluate workbook validation, protection, and refresh checks.
- Build a recurring report workbook with handover guidance.

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Course Agenda

Day 1: Structure Reliable Worksheets

- Excel Table Design and Structured Reference Map
- Data Type, Format, and Naming Checklist
- Data Validation List and Input Message Pattern
- Duplicate, Blank, and Exception Review Method
- Workbook Sheet Purpose and Ownership Register

Day 2: Build Intermediate Formulas

- Relative, Absolute, and Mixed Reference Decision Guide
- IF, AND, and OR Business Rule Pattern
- SUMIFS and COUNTIFS Criteria Calculation Template
- XLOOKUP Match, Not-Found, and Return Pattern
- Formula Trace, Error Check, and Test Log

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Day 3: Prepare and Combine Data

- Text, Date, and Number Cleaning Method
- Remove Duplicates and Missing-Value Review
- Power Query Source Connection and Type Profile
- Merge and Append Transformation Flow
- Query Refresh and Source Change Checklist

Day 4: Summarize and Visualize Reports

- PivotTable Field, Layout, and Calculation Specification
- Grouping, Sorting, Filtering, and Slicer Control
- Chart Selection and Message Planning Matrix
- Trend, Comparison, and Exception Display Pattern
- Report Page Print and Distribution Checklist

Day 5: Practice Recurring Reporting

- Exercise: Repair Table Structure and Input Controls
- Exercise: Diagnose Formula References and Lookup Results
- Exercise: Rebuild Data Cleaning and Refresh Steps
- Exercise: Validate PivotTable and Chart Outputs
- Capstone: Reliable Recurring Report Workbook

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Practical Exercises

The course uses suggested activities based on administration, operations, sales, and service records.

- Suggested activity: convert an unstructured list into a controlled Excel table with validation and ownership fields.
- Suggested activity: build criteria calculations and XLOOKUP results with error tests and trace evidence.
- Suggested activity: clean and combine source tables, then refresh a PivotTable report and chart.
- Suggested activity: assemble a recurring report workbook with update, review, protection, and handover checks.

FAQs

Who suits Microsoft 365 Excel intermediate reporting training, and what does it assume?

Business support, coordination, administration, reporting, and operations functions suit the training. It assumes basic worksheet entry, formatting, sorting, filtering, and formulas.

How does Microsoft 365 Excel intermediate training differ from basic Excel training?

Intermediate training combines structured tables, conditional calculations, flexible lookups, repeatable data preparation, PivotTable summaries, chart decisions, and workbook controls rather than basic entry and formatting.

When should an intermediate Excel report use XLOOKUP?

XLOOKUP suits reports that match one field and return a related value while controlling missing matches and keeping the return column independent of its position.

Why use Power Query in an intermediate Excel reporting workflow?

Power Query records repeatable connection, cleaning, combination, reshaping, and refresh steps so recurring reports rely less on manual preparation.

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How should teams maintain recurring Excel reports?

Teams should define owners, source locations, input controls, formula tests, refresh steps, report checks, protection rules, distribution points, and handover notes.

Conclusion

Participants take back a Reliable Recurring Report Workbook containing controlled tables, tested formulas, lookup rules, query steps, PivotTable summaries, charts, validation, protection, update checks, and handover notes. It changes manual report rebuilding into a defined reporting cycle. The workbook supports consistent preparation, review, refresh, and distribution.