

Excel: XLOOKUP, Advanced Tools & Dashboards

Fast-track your Excel skills with real-world applications.

6 Days

24 HOURS

34

TOPICS

6

HANDS-ON ACTIVITIES

COURSE OVERVIEW

This course covers Excel data tools such as sorting, filtering, Flash Fill, data consolidation and validation, followed by lookup and reference functions including VLOOKUP, HLOOKUP and XLOOKUP. It then addresses logical and conditional functions such as IF, IFS, SUMIFS, COUNTIFS and conditional formatting, before moving to text and date functions for cleaning and calculating data. It continues with PivotTables, PivotCharts, slicers and timelines, and concludes with building interactive dashboards using Scenario Manager, Goal Seek and Power Query basics.

WHO THIS COURSE IS FOR

Data Analysts

Financial Analysts

Business Analysts

Report Developers

Administrative Staff

Excel Users

LEARNING OBJECTIVES

- Apply data tools such as sorting, filtering and Flash Fill
- Configure data validation with drop-down lists and custom rules
- Compare VLOOKUP, HLOOKUP and XLOOKUP for data retrieval
- Apply logical functions such as IF, IFS and IFERROR
- Analyse data with SUMIFS, COUNTIFS and conditional formatting
- Apply text and date functions to clean and calculate data
- Build PivotTables and PivotCharts with slicers and timelines
- Develop interactive dashboards using Scenario Manager and Power Query

TRAINING APPROACH

Each day includes explanation, guided practice, mini-project, and recap.

34 Topics

DAY 1 Excel Refresher & Data Tools

4 hours

TOPICS

Hands-on exercise

- **Quick Refresher:** Important Excel concepts (cells, ranges, tables, named ranges)
- Working with large datasets – Freeze Panes, Split, Navigation tips

DATA TOOLS

- Sorting (custom sort, multi-level sort)
- Filtering (auto filter, advanced filter)
- Flash Fill for quick formatting & extraction
- Data Consolidation across multiple sheets/workbooks
- Data Validation (drop-down lists, custom rules, error alerts)

DAY 2 Lookup & Reference Functions

4 hours

TOPICS

Practice

- Understanding relative, absolute, and mixed references

LOOKUP FUNCTIONS

- VLOOKUP (exact & approximate match)
- HLOOKUP
- XLOOKUP (modern replacement for VLOOKUP/HLOOKUP)
- Nested lookup examples for real-life scenarios

DAY 3 Logical & Conditional Functions

4 hours

TOPICS

Mini-project

- | | |
|--------------------------------|---|
| ■ IF, IFS, Nested IFs | ■ COUNTIF, COUNTIFS |
| ■ AND, OR within IF statements | ■ Using IFERROR for cleaner results |
| ■ SUMIF, SUMIFS | ■ Conditional formatting (highlighting rules, formulas in formatting) |

TOPICS

Practice

- **Text Functions:** LEFT, RIGHT, MID, LEN, TRIM, PROPER, UPPER, LOWER
- FIND, SEARCH, REPLACE, SUBSTITUTE
- CONCAT, TEXTJOIN, & "&" operator
- **Date & Time Functions:** TODAY, NOW, DAY, MONTH, YEAR
- DATEDIF, NETWORKDAYS, EDATE, EOMONTH
- **Practical Scenarios:** Age calculation, project timelines, cleaning messy text data

TOPICS

Small Project

- Creating PivotTables from raw data
- Grouping, filtering, sorting in PivotTables
- Value field settings (Sum, Count, % of Total, Running Total)
- Slicers and Timelines for interactive analysis
- PivotCharts – connecting visuals to PivotTables

BUILDING AN INTERACTIVE DASHBOARD

Final Project

- Combining PivotTables, PivotCharts, Slicers
- Using Conditional Formatting for KPI highlights
- Creating drop-down-driven analysis (Data Validation + Formulas)
- **What-If Analysis:** Scenario Manager, Goal Seek
- Introduction to Power Query basics (import & clean data)

NOTES

- One 15-min break included each day in the middle.
- End Outcome: Participants will be able to analyze, clean, transform, and present data through practical Excel dashboards.

Practise What You Learn

MODULE	ACTIVITY
Excel Refresher & Data Tools	Hands-on exercises: Hands-on exercises throughout
Lookup & Reference Functions	Practice: Creating a product price lookup sheet
Logical & Conditional Functions	Mini-project: Automating a sales performance report with logical formulas + formatting
Text & Date Functions	Practice: Employee attendance & reporting project
Pivot Tables & Pivot Charts	Small Project: Building a Pivot-based Sales Analysis Dashboard
Interactive Dashboards & Advanced Tools	Final Project: Create a fully interactive dashboard

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Hands-on exercises throughout the course
- Delivery by certified instructors and subject matter experts
- Course completion certificate from Koenig

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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Live Online Classes (ILO)

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