Excel Formulas and Functions with Copilot

HRD Corp Claimable (SBL-Khas)

Work smarter with Excel 365 and Copilot as a productivity accelerator.

Objective

By the end of this workshop, participants will:

- Be updated with Excel 365 functions & Copilot content
- Understand the core functionality of formulas and how to apply commonly used formulas
- Learn to apply specific formulas in specific scenarios
- Learn formula logic well enough to validate Copilot results
- Gain deeper insight into the old and new platforms of Excel

Setup Requirements

- Stable Internet Connection
- Webcam and Earphones
- Required software: Microsoft for Excel 365
- For best experience, participants are encouraged to use Microsoft Excel 365 with a full Copilot version, and two computer monitors.

Course Content

Module 1: Introduction

- Absolute and relative cell references
- The Formula Bar and the Insert Function tool
- The Name Box, naming and editing cell ranges
- The Status Bar

- Basic Excel function syntax
- Nested formulas

Module 2: The New Array Formula Platform

- Evaluating array formulas v normal formulas
- Spilled array behavior of formulas
- What's best?

Module 3: Logical Functions

- IF
- IFS
- OR, AND

Module 4: Sum and Count Functions

- SUMIF, SUMIFS, DSUM
- AVERAGE, AVERAGEA
- COUNT, COUNTA, COUNTBLANK, COUNTIF, COUNTIFS
- SUMPRODUCT

Module 5: Text Functions

- CONCATENATE
- CONCAT
- TEXTJOIN
- LEFT, RIGHT, MID, TEXT
- LOWER, UPPER, PROPER
- TRIM, CLEAN
- SUBSTITUTE
- FIND
- TEXT

Module 6: Date and Time Functions

- The date format and value of date cells
- EDATE, EOMONTH, DAYS, DAYS360, NETWORKDAYS, NETWORKDAYS.INTL, NOW

Module 7: Drop-Down Boxes

- Creating drop-downs with Data Validation List

Module 8: Lookup-Related Functions

- VLOOKUP
- HLOOKUP
- XLOOKUP
- TRANPOSE
- UNIQUE
- FILTER
- SORT
- Working functions with Form Controls

Module 9: Other Import Tools on Formulas

- Formula Auditing
- Displaying Formulas
- Error Checking and tracing errors
- Evaluating formulas
- Calculation options
- Copying and pasting formulas
- Comparing conditional sum, count functions with database functions

Module 10: Quick Summation Methods

- Using shortcut keys and AutoSum

Module 11: Customizing Number Formats

- Examining number formats and changing them
- Customizing number formats with advanced methods

Module 12: Excel Reporting in action with Manual Formulas and Copilot

- Complete a mini-reporting project with manual Excel skills and Copilot

When & Where

2 & 3 December 2026
(Wed & Thurs)
9.00 am to 5.00 pm

Remote Online Training – Zoom

Who Should Attend

This workshop is suitable for participants holding roles in the following areas: Accounting, Office Administration, Finance, Data Analysts, Project Management, Revenue Management, and other Excel users keen to update their spreadsheet knowledge

Training Investment

RM 1,500 per participant (inclusive of Service Tax, Online Course Materials, E-Certificate of Attendance)

🔥 **Group Promo: Save 15%**
Register min. 3 pax for **RM 1,275** per pax (Normal Rate: RM 1500)

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Trainer's Profile

Vincent Chin

Vincent has held financial, continuous improvement and I.T. positions in the banking, shared services, and hospitality industry. He is an FCCA, CA, Certified Six Sigma Black Belt, Microsoft Certified Trainer, Microsoft Office Specialist and a PSMB-accredited trainer. His previous roles include being an internal change consultant of a global team, a financial shared-services local head and a finance regional head.

Vincent's experience in the continuous improvement sphere of the financial industry includes projects in process automation & robotics, productivity management, end-to- end reviews and streamlining. He also trained yellow belts and green belts in DMAIC (the acronym for Define, Measure, Analyze, Improve & Control; a problem-solving methodology in Six Sigma) for other

various companies. Vincent codes in VBA and has developed complex Excel applications in the companies he worked for.

He currently trains professionals in Excel, Power BI and Lean Six Sigma covering topics related to finance, business intelligence tools, pivot tables, dashboards, VBA and process improvement. Vincent also assists companies in automating Excel tasks, end-to- end process reviews, developing process target operating models and other areas of process continuous improvement.

Qualifications

- Microsoft Certified Trainer | MICROSOFT | 2020
- Microsoft Office Specialist Expert | MICROSOFT | 2020
- Microsoft BI Reporting in Excel | MICROSOFT | 2019
- Microsoft Office Specialist | MICROSOFT | 2017
- Certified Trainer | PSMB | 2013
- Certified Six Sigma Black Belt | ASQ | 2011
- FCCA | 2003
- MIA | 1999
- ACCA | 1998

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