Microsoft® Office Excel® Dashboards and Reports

Duration: 3 Days
Method: Instructor-Led Training (ILT) | Live Online Training

Course Description

This course is designed to familiarise existing users of Microsoft Excel in the building of dashboards that can be used to create compelling Excel reports. It provides participants with in-depth coverage of the necessary individual functions and tools. It will walk participants through the most effective ways to present and report data as well as cover the fundamental knowledge and skills needed to create dashboards and interactive controls. Through this training, participants will go from reporting data with simple tables full of dull numbers to presenting key information using high-impact, meaningful reports and dashboards that will wow management both visually and substantively.

Target Audience

This course is intended for:

- Anyone who needs to use Microsoft Office Excel to create dashboards for visual and data analysis and to present clear and logical output for decision-makers.

Prerequisites

To attend this course, candidates must have:

- Access to Microsoft Office Excel.
- Completed the *Microsoft Office Excel Part 2 and 3* courses or have the required knowledge and skills such as:
- The ability to build and apply basic formulas in Excel.
- PivotTable and PivotChart knowledge.
- Familiarity with putting together any type of report in Excel.
  NOTE: *Expertise is not required to take this course.*

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Microsoft Partner

Course Objectives

Upon successful completion of this course, attendees will be able to:

- Analyze large amounts of data and report the results in a way that is both visually attractive and effective.
- Use different perspectives to achieve better visibility into data, as well as how to slice data into various views on the fly.
- Create differing pivot charts and alter their make-up to effectively present data.
- Use the features of conditional formatting to highlight changes in data.
- Add interactive controls and create a user interface.
- Automate redundant reporting and analysis processes.
- Create impressive dashboards, eye-catching visualizations, and real-world What-If analyses.

Course Topics

Module 1: Getting Started with Excel Dashboards

- Introducing Dashboards
- Table Design Best Practices
- Using Excel Sparklines
- Chartless Visualization Techniques

Module 2: Introducing Charts into Your Dashboards

- Excel Charting for the Uninitiated
- Working with Chart Series
- Formatting and Customizing Charts
- Components That Show Trending
- Components That Group Data
- Components That Show Performance Against a Target

Module 3: Advanced Dashboarding Concepts

- Developing Your Data Model
- Adding Interactive Controls to Your Dashboard
- Macro-Charged Reporting

Module 4: Pivot Table Driven Dashboards

- Using Pivot Tables
- Using Pivot Charts
- Adding Interactivity with Slicers
- Using the Internal Data Model and Power View

Module 5: Working with the Outside World

- Integrating External Data into Excel Reporting
- Sharing Your Work with the Outside World

ACTIVITIES INCLUDED