



Contact us:

010 100 3127
info@nextgen.co.za
www.nextgen.co.za

Excel Dashboards and Reports

Course Overview

No matter what business you're in, reports have become a staple of the workplace, but what good is a report if no one reads it, or even worse, understands it. This all new edition of Excel Dashboards & Reports is here to help you make meaning of all your data and turn it into clear and actionable visualizations. Fully updated for the latest business intelligence and spreadsheet tools in Excel 2013, this book shows you how to analyze large amounts of data, quickly slice data into various views on the fly, automate redundant reporting, create eye-catching visualizations, and more.

Helps you move beyond reporting data with simple tables, rows, and columns to designing high-impact reports, dashboards, and visuals.

Walks you through a wide array of technical and analytical concepts to give you the background you need to select the right tool for interpreting and displaying data. Covers how to build a chart, work with pivot tables, group and bucket your data, represent trends, create What-If analyses, and increase the value of your reports.

Target Audience

Anyone that analyzes and compiles reports using Excel Data

Prerequisite

Excel Level 3

Duration

2 Days

Course Outline

Module 1: Getting started with Excel dashboards and reports

Part 1: Getting in the dashboard state of mind

- Defining dashboards and reports
- Preparing for greatness
- A quick look at dashboard design principles



Part 2: Building a super model

- Data modelling best practices
- Excel functions that really deliver
- Using smart tables that expand with data

Module 2: Building basic dashboard components

Part 1: Dressing up your data tables

- Table design principles
- Getting fancy with custom number formatting

Part 2: Sparking inspiration with sparklines

- Introducing sparklines
- Understanding sparklines
- Customizing sparklines

Part 3: Formatting our way to visualizations

- Enhancing reports with conditional formatting
- Using symbols to enhance reporting
- The magical camera tool

Part 4: The pivotal pivot table

- An introduction to the pivot table
- The four areas of a pivot table
- Creating your first pivot table
- Customizing your pivot table reports
- Creating useful pivot-driven views

Module 3: Building advanced dashboard components

Part 1: Charts that show trending

- Trending do's and don'ts
- Comparative trending
- Emphasizing periods of time
- Other trending techniques

Part 2: Grouping and bucketing data

- Creating top and bottom displays
- Using histograms to track relationships and frequency
- Emphasizing top values in charts

Part 3: Displaying performance against a target

- Showing performance with variances
- Showing performance against organizational trends
- Using a thermometer-style chart
- Using a bullet graph
- Showing performance against a target range



Module 4: Advanced reporting techniques

Part 1 : Macro-charged dashboarding

- Why use a macro
- Recording your first macro
- Running your macro
- Enabling and trusting macros
- Excel macro examples

Part 2 : Giving users an interactive interface

- Getting started with form controls
- Using the button control
- Using the check box control
- Using the options button control
- Option button examples
- Using the combo box control
- Combo box examples
- Using the list box control
- List box examples

Part 3 : Adding interactivity with pivot slicers

- Understanding slicers
- Creating a standard slicer
- Formatting slicers
- Controlling multiple pivot tables with one slicer
- Creating a timeline slicer
- Using slicers as form controls

Module 5: Working with the outside world

Part 1: Using external data for your dashboards and reports

- Importing data from Microsoft Access
- Importing data from SQL Server

Part 2: Sharing your workbook with the outside world

- Protecting your dashboards and reports
- Linking your Excel dashboards to PowerPoint
- Distributing your dashboards via PDF
- Distributing your dashboards to skydrive
- Limitations when publishing to the web

Module 6: Working with the outside world

Part 1: Ten charts design principles

- Avoid fancy formatting
- Skip the unnecessary chart junk
- Format large numbers where possible
- Use data tables instead of data labels
- Make effective use of chart titles
- Sort your data before charting
- Limit the use of pile charts



- Don't be afraid to parse data into separate charts
- Maintain appropriate aspect ratios
- Don't be afraid to use something other than a chart

Part 2: Ten questions to ask before distributing your dashboard

