

# Gearing You For Growth

Bursaries | Business Skills | Coaching and Mentoring | **Computer Skills** | E-Learning | Learnerships | Skills Development | Virtual Training

## Excel Dashboards And Reports

### Course Overview

No matter what business you are in, reports have become a staple of the workplace, but what good is a report if no reads it, or even worse, understands it.

This all new edition of Excel Dashboards and Reports is here to help delegates make meaning of all data and turn it into clear and actionable visualisations.

Fully updated for the latest business intelligence and spreadsheet tools in Excel, this course shows delegates how to analyse large amounts of data, quickly slice data into various views on the fly, automate redundant reporting, create eye-catching visualisations and more.

The course also helps delegates to move beyond reporting data with simple tables, rows, columns to designing high-impact reports, dashboards, and visuals.

The course walks delegates through a wide array of technical, analytical concepts to give the background delegates need to select the right tool for interpreting and displaying data.

As part of the course, delegates are taught how to build a chart, work with pivot tables, group and bucket data, represent trends, create What-If analyses and increase the value of reports.

### Target Audience

Delegates who analyze and compile reports using Excel Data.

### Prerequisite

Microsoft 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 visualisations

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

#### 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.
- Do not be afraid to parse data into separate charts.
- Maintain appropriate aspect ratios.
- Do not be afraid to use something other than a chart.

### Part 2: Ten questions to ask before distributing your dashboard a macro.