



In-Class

Building Dynamic Dashboards For Business Intelligence with EXCEL

Price
\$750

Duration
2-Days

Level
Advanced+



→ About this Course

A business intelligence dashboard is a data visualization tool that displays the current status of metrics and key performance indicators for an enterprise. Dashboards consolidate and arrange numbers, metrics and sometimes performance scorecards on a single screen. They may be tailored for a specific role and display metrics targeted for a single point of view or department. The essential features of a BI dashboard product include a customizable interface and the ability to pull real-time data from multiple sources.

This course is customized for corporate managers and executives who are required to prepare various types of impressive executive management reports and business key performance reports. The main objective of this course is to provide the participants invaluable insights and equip them with advanced charting and reporting skills to professionally present their reports.

What are the key takeaways I can readily apply?



Create Training Statistic Dashboard using Data Model, PivotTables, Pivot Charts, Slicer and Timeline.



Create Analytical Dashboards containing dynamic data tables, dynamic data labels.



Add interactive controls such as check box, combo box, option button, scroll bar and spin button to dynamic dashboards.



Create Waterfall chart, Histogram, Combo charts, Slicers, Sparklines, Data Bar, Trendlines and more.

...and more.

→ Who is this course for

This is a fast-paced Advanced course aimed at frequent Excel users who must prepare interactive, informative and maintenance-free reports for management.

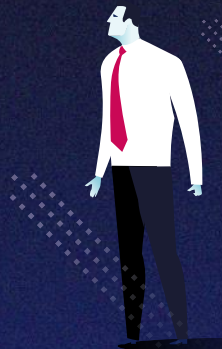


Valene Ang

A Certified Microsoft Training Specialist who has more than 19 years of training experience and working with companies to improve their data processes.

She has trained different levels of management from small-medium size organisations, government offices and multinational companies such as Rio Tinto, SingTel, Canon Singapore, HP Singapore, CPF Board, Changi Airport Group, DHL, Barclays Capital, Far East Organizations, and many more.

Download Profile



→ Day 1 (of 2)

Understanding Excel Dashboards

A business dashboard gives business leaders valuable information and provides a quick outlook of all the most valuable numbers, which allows them to perform an accurate business analysis and make actionable decisions.

- Dashboard definition and design principles.
- Fundamentals on Excel Dashboard building.
- Outline the structure of a dashboard.
- Design dashboard layout using frames.

Creating Slicer Driven Dashboard

Slicers are an easy-to-use filtering component that give you the ability to quickly filter your Dashboard and its respective views as well as add an attractive and interactive user interface to your dashboards.

- Prepare dynamic data source using Excel Table.
- Create relationship between two table.
- Create PivotTables using Data Model.
- Create and customize PivotChart.
- Create slicer and Timeline, connect Slicer and Timeline to multiple PivotTable.
- Create Combo chart and create new Slicer style.

Using Advanced Charting Techniques

The benefit of using advanced charts in Excel is they enable you focus on a specific data and make it easily understandable. You can use them in your dashboards to provide visualizations that help focus attention on key trends, comparisons, and exceptions.

- Create Waterfall chart, Histogram and Pie of Pie charts.
- Show forecasting trend with Trendline.
- Compare different targets with chart.
- Create in-cell data bar and icon sets.
- Insert in-cell line Sparklines, column Sparklines and Win/Loss Sparklines.

Presenting Your Dashboards

Excel and PowerPoint are perfect partners for presenting dashboard on big screen. Simple dashboard on multiple slides will work better than one complex dashboard on a single slide.

- Create an embedded Excel dashboard in PowerPoint slide.
- Create a linked Excel dashboard in PowerPoint slide.
- Convert chart into picture.
- Capture a snapshot of chart with Screenshot.
- Use Camera tool and Linked Picture option to take live picture of a cell range.

→ Method of learning

- 100% Practical with EXCEL exercises

→ Any Prerequisites?

Yes, so please read:

- This will be using the **Office 365 (subscription) version.**
- This is an **Advanced** Level course.
- Taught based on the PC version and not the Mac version. There are differences.
- All Laptops and materials will be provided

*You should be a confident Excel user with experience in using and maintaining Excel reports and are able to create Excel table-driven reports and charts.

*A pre-requisite questionnaire will be provided to you to ensure the suitability and level is right for you.

→ Day 2 (of 2)

Adding Interactive Controls to Dashboard

Excel offers a set of Form controls such as option buttons, combo boxes and checkboxes that allow you to add interactivity to your dashboard and make it easier for users to interact with the charts and tables on dashboard.

- Set form controls properties.
- Use various form controls such as button, combo box, check box, scroll bar, spin button, group box and option button to manipulate charts.
- Define dynamic range names.
- Create summary tables using OFFSET, INDEX and MATCH functions.
- Create charts using names.
- Control chart series using data validation drop-down list.

Using Macro Buttons to Control Dashboard

Dashboard automation in Excel can be achieved using macro buttons. Macro Recorder is a handy tool for a beginner who is unable to write the VBA (Visual Basic for Applications) code by hand to create macros.

- Record macro using Macro Recorder and edit macro using VBA (Microsoft Visual Basic for Application)
- Assign macro to a button on a worksheet and to a command button on the Quick Access Toolbar
- Record macro to sort and filter tables and charts on a dashboard.

Creating Analytical Dashboards

Analytical dashboards are designed to help decision makers, executives and senior leaders, establish targets based on insights into historical data, set goals and understand what and why something happened so that appropriate changes can be implemented. For example, a Sales dashboard enable you to monitor and investigate different aspects of sales process from the beginning until the end of its lifecycle and it's useful to showcase sales data during annual meetings or quarterly meetings.

- Prepare dynamic data source using defined name and Table
- Create dynamic table in dashboard using CHOOSE, SUMIFS and other functions
- Create dynamic chart labels
- Use slicer to control data labels
- Create slicer and format slicer

Case Study

Participants will have chance to design a user-friendly dynamic dashboard. The case study helps participant to apply the skills and functions they learned from the training so that they know exactly how to build interactive and informative dashboards in their work.

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We look forward to hearing from you.

Register



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This course was very effective in bringing across the various uses of Excel as an analytical tool. Important point was the need to plan ahead and to create the staging area on 'Data Models' to facilitate generation of dashboards for reporting



Sigit Gunawan, Director, Agri-Food & Veterinary Authority



Excellent! I will recommend my colleague to attend!

Phong Joo Tin, Marketing Manager, Singtel

