Preparing Dashboard and Report with Microsoft Excel Course Overview

Course Duration:
6 Hours

Training Contents:
1. Introducing Dashboards
   - What are Dashboards and Reports?
   - Establish the User Requirements
   - A quick look at Dashboard Design Principles
   - Key Questions to Ask Before Distributing your Dashboard
2. Table Design Best Practices
   - Table Design Principles
   - Enhancing Reporting with Custom Number Formatting
3. Using Excel Sparklines
   - Understanding Sparklines
   - Applying Sparklines
   - Creating Sparklines
   - Customizing Sparklines
4. Excel Charting for the Uninitiated
   - What is a Chart?
   - How Excel Handles Charts
   - Parts of a Chart
   - Basic Steps for Creating a Chart
   - Working with Charts
5. Working with Chart Series
   - Specifying the Data for your Chart
   - Adding a New Series to a Chart
   - Deleting a Chart Series
   - Modifying the Data Range for a Chart Series
   - Understanding Series Names
   - Adjusting the Series Plot Order
   - Charting a Non-contiguous Range
   - Using Series on Different Sheets
   - Handling Missing Data
   - Controlling a Data Series by Hiding Data
   - Unlinking a Chart Series from its Data Range
   - Working with Multiple Axes
6. Components that Show Trending
   - Trending Dos and Don’ts
   - Comparative Trending
   - Emphasizing Periods of Time
   - Other Trending Techniques
7. Components that Group Data
   - Listing Top and Bottom Values
   - Using Histograms to Track Relationships and Frequency
   - Emphasizing Top Values in Charts
8. Components that Show Performance Against a Target
   - Showing Performance with Variances
   - Showing Performance against Organizational Trends
   - Using a Thermometer-Style Chart
   - Using a Bullet Graph
9. Developing your Data Model
   - Building a Data Model
   - Data Model Best Practices
   - Excel Functions for your Data Model
   - Working with Excel Tables
10. Using Pivot Tables
    - Introducing the Pivot Table
    - Customizing your Pivot Table
    - Examples of Filtering your Data
11. Using Pivot Charts
    - Getting Started with Pivot Charts
    - Alternatives to Pivot Charts
12. Adding Interactivity with Slicers
    - Understanding Slicers
    - Creating a Standard Slicer
    - Creating a Timeline Slicer
    - Using Slicers as Form Controls
13. Using the Internal Data Model and Power View
    - Understanding the Internal Data Model
    - Creating a Power View Dashboard