



Preparing Dashboard and Report with Microsoft Excel

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
- Showing Performance against a Target Range
- 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