

Technology

Building Dynamic Dashboards for BI with Excel

Data transformation into real-world business value.

\$950 /2 Days

Delivery
In-Person

Level
Advanced

About the 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. The essential features of a BI dashboard product include a customizable interface and the ability to pull real-time data from multiple sources.

So are you tired of static reports that bury key information? This practical, case-study-based course empowers you to create dynamic, interactive dashboards in Excel, transforming data into actionable insights.

This is an **Advanced-level** course. Participants must have some Excel knowledge, especially PivotTable and PivotChart, IF, SUMIFS, COUNTIFS, VLOOKUP, INDEX, MATCH functions. A pre-requisite questionnaire will be provided to you to ensure the suitability and level is right for you.

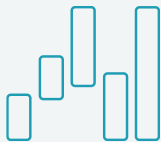
3 Takeaways



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



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



Create Advanced Chart: -Waterfall chart, Histogram, Combo charts, Slicers, Sparklines, Data Bar, Trendlines and more.

Who is this course for?

Anyone who must analyse data of any sort and create reports for the organization.

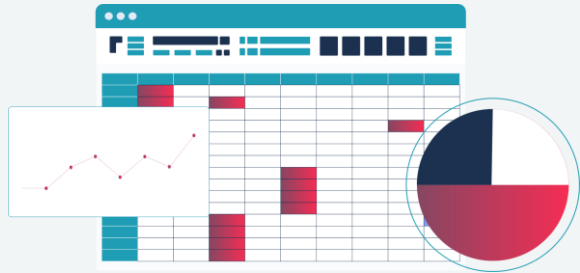
Gain valuable skills to::

- ✓ Build data-driven dashboards: From connecting with external databases to managing efficient data models, learn to bring your data together seamlessly
- ✓ Craft compelling visuals: Utilize advanced Excel functions and reporting features to create engaging charts and graphs.
- ✓ Boost interactivity: Use macros to automate tasks and make your dashboards dynamic and responsive.
- ✓ Present with impact: Impress stakeholders with professionally designed data-rich reports.



Day 1

Here's what you get to learn in this course



Understanding Excel Dashboards

Using Advanced Charting Techniques

Creating Slicer Driven Dashboard (Case Study)

Presenting Your Dashboards

Topic 1

Understanding Excel Dashboards

This session equips you with the knowledge and skills to build impactful business dashboards. Whether you're a seasoned leader or just starting out, learn to leverage the power of visuals to gain real-time insights and drive strategic action.

- Understand core principles and purpose of data dashboards.
- Master the fundamentals of building effective dashboards.
- Get a clear roadmap for outlining a dashboard's structure
- Unlock the secrets of designing an informative dashboard layout using frames.

Topic 4

Presenting Your Dashboards

Forget cramming complex dashboards onto single slides. This session teaches you how to seamlessly partner Excel and PowerPoint to create engaging, big-screen presentations that captivate your audience.

- Understand the best methods for connecting Excel to PowerPoint.
- Turn Excel charts into high-quality pictures for optimal display.
- specific chart areas with precision.
- Take live snapshots of dynamic Excel data.
- Keep your data synchronized across presentations.

Topic 2

Creating Slicer Driven Dashboard (Case Study)

Equips yourself with the skills to build dynamic dashboards using Excel slicers. Learn how to filter data effortlessly, navigate complex views with ease, and impress your audience with visually stunning interfaces including:

- Slicers that seamlessly refine visualizations in real-time.
- Multi-table connections unlocking deeper insights within your data.
- Interactive timelines visualizing trends across different periods.
- Combo charts showcasing diverse data perspectives in a single view.
- Customized slicer styles reflecting your unique branding.

Topic 3

Using Advanced Charting Techniques

Dive into advanced Excel charts and bring your data to life! This session empowers you to create engaging visualizations that focus attention on key trends, comparisons, and exceptions.

- Waterfall charts illustrating the flow of value through your business.
- Histograms revealing the distribution of your data for deeper analysis.
- Trendlines predicting future performance and identifying potential risks.
- Target comparison charts highlighting progress towards goals.
- In-cell data bars and icon sets for instant data comparisons within cells.
- Sparklines offering quick visual summaries directly within your data.

Day 2

Here's what you get to learn in this course



Adding Interactive Controls to Dashboard

Creating Analytical Dashboards

Using Macro Buttons to Control Dashboard

Topic 1

Adding Interactive Controls to Dashboard

Excel isn't just for static data anymore! Imagine dashboards that come alive with user interaction, enabling viewers to explore data deeper and gain clearer insights. This session equips you to harness the power of Excel form controls, transforming your dashboards into engaging, dynamic experiences.

We'll guide you through:

- Form control mastery: Master their properties and functionality.
- Interactive toolbox: Utilize buttons, combo boxes, checkboxes, and more.
- Dynamic data ranges: Define flexible ranges for seamless manipulation.
- Summary table magic: Create informative summaries with powerful functions.
- Chart naming secrets: Name your charts for enhanced control and flexibility.
- Data validation wizardry: Control chart series with user-friendly dropdowns.

Topic 2

Creating Analytical Dashboards

Build compelling analytical dashboards that guide critical decision-making for executives and leaders. Learn how to translate historical data into actionable intelligence, enabling you to set measurable goals, identify opportunities, and track progress effectively.

- Build a strong foundation with named ranges and Excel Tables.
- Use CHOOSE, SUMIFS, and other functions to create dynamic tables.
- Generate dynamic chart labels that update automatically.
- Leverage slicers for effortless data exploration and filtering.
- Format and customize slicers for optimal usability and visual appeal.

Topic 3

Using Macro Buttons to Control Dashboard

The power of Excel macros to automate your dashboards, saving you time and ensuring consistency. Learn to harness the Macro Recorder tool, even without prior VBA knowledge, and take your dashboard efficiency to the next level.

- Utilize the Macro Recorder to automate tasks visually.
- Understand the essential code behind your recorded macros.
- Assign macros to buttons for convenient dashboard control.
- Add frequently used macros for instant access.
- Automate routine data manipulation on your dashboard.

Meet Our Trainer

Valene Ang

“ Very engaging Trainer and knowledgeable in this field, Training was well-structured and many useful tips shared.

Abigail Lee , Manager

“ Great! Clear Explanation with detailed lesson

Mohamad Rostam , Executive



Valene Ang is a Certified Microsoft Training Specialist who has more than 19 years of training experience and working with companies to improve their data processes

Her qualifications include a Bachelor's in Business Computing, Microsoft Certified Trainer (MCT), Certified Instructor of Microsoft Certified Application Specialist (MCAS), and Master Instructor of Microsoft Office Specialist (MOS). Valene also holds an Advanced Certificate in Training and Assessment (ACTA)

She has trained different levels of management executives from small-medium size organisations, government offices and multinational companies such as PSA International, Rio Tinto, SingTel, DFS Galleria Singapore, Canon Singapore, HP Singapore, CPF Board, MOE, HPB, HDB, National Environment Agency (NEA), Public Utility Board (PUB), Inland Revenue Authority of Singapore (IRAS), SPRING Singapore, Temasek Polytechnic, Republic Polytechnic, Nanyang Polytechnic, Singapore Expo, Changi Airport Group, DHL, Barclays Capital, Far East Organizations, Intrack Market Service (Malaysia), DENZA (ShenZhen) and many more.

She has also conducted customized training and one-to one coaching sessions for many companies' executives on Microsoft Office applications. She is a much-sought-after trainer, judging by the very good evaluation she received from her past participants.

For More Information:

Find us at


Impres Training Pte Ltd.

8 Burn Road,
#04-11/12, Trivex,
Singapore 369977

Contact us at

 (+65) 6636 9772

 mail@impresstraining.com

 (+65) 9850 9058

 www.impresstraining.com



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