

Data Visualization and Excel Dashboard Reporting Training

Duration: 2 Days

Description

This course teaches participants to visualize and interpret large data series in Excel for strategic planning and reporting. It covers creating interactive reports for end users, supporting decision-making and using tools for performance monitoring and review.

Who Should Attend?

- Excel users who prepare reports
- Those who want to use Excel more effectively
- Professionals working in finance, analysis and reporting

Outline

Introduction

- What is reporting in Excel?
- Excel features for preparing reports

Frequently Used Excel Functions

- Working with data validation rules
- IF, AND, OR, VLOOKUP, IFERROR, INDEX, MATCH and OFFSET

Advanced Conditional Formatting

- Conditional formatting settings
- Using formulas and icons
- Applying conditional formatting to an entire table
- Parameter-driven conditional formatting

Data Validation and Conditional Formatting

- Using data validation and conditional formatting together

Sparklines for Data Visualization

- Creating in-cell charts at the ends of data series
- Tracking maximum and minimum values
- Changing sparkline types

Charts and Advanced Chart Features

- Creating pie, column, line, scatter and waterfall charts
- Combining two chart types
- Measuring trends in data with charts

PivotTables and Advanced Uses

- Understanding PivotTable logic
- Creating formulas with calculated fields
- Comparing values to support decisions
- Analyzing performance by region and product
- Using grouping features effectively
- PivotCharts
- Slicers and advanced slicer features
- Timelines
- Using slicers and timelines with charts

Building Dashboards

- Integrating multiple PivotTables and charts into a dashboard
- Working with slicers
- Connecting slicers to multiple PivotTables
- Conditional formatting in dashboard PivotTables

Creating Buttons with Form Controls

- Displaying the Developer tab
- Combo boxes, list boxes, option buttons and checkboxes
- Making functions dynamic with form controls
- Making charts interactive with form controls

Prerequisites

Participants are expected to have advanced Excel knowledge.