



DASHBOARDS & Business Reports Using Excel

Course Introduction:

All business professionals are required to prepare some kind of a scorecard or a dashboard. Attending this course will help you reach advanced levels in Excel which you will need to produce such an important tool.. The course starts with pivot tables, the most important tool ever created to perform data reporting, analysis and reconciliation. It then continues with high level modeling techniques, integration and report visualization, and it ends with automation. You will take away practical tools that are guaranteed to add value to your daily and periodic tasks.

Course Objectives:

By the end of the course, participants will be able to:

- Boost Excel expertise in data slicing and dicing, data massaging, and data aggregation, and data integration with Access, web, text, SQL, and other databases using pivot tables
- Perform advanced and dynamic data validations and master level formatting techniques
- Design outstanding visualization charts, dashboards, scorecards, and flash reports
- Develop master level report solutions using advanced form controls and buttons
- Record, write and edit powerful macros that will perform routine tasks in no time

Who Should Attend?

Accountants, finance analysts, senior and junior accountants, business analysts, accounting and finance professionals, research professionals, marketing and sales, administrative staff, supervisors, general business professionals and staff from any function who need to learn and apply state-of-the-art techniques to their daily business reporting, reconciliations, and analysis.

International Centre For Training & Development

Course Outline:

ESSENTIAL REPORTING REQUIREMENT SKILLS

- The 19 rules of pivot tables and pivot charts
- Advanced pivot charts techniques
- Multiple consolidation ranges
- Retrieving external data using Microsoft query
- Importing text files using MS query
- Connecting to access databases
- Connecting to SQL databases
- Importing from data connection wizard
- Importing from Microsoft query
- Customizing connections properties
- Advanced data structuring techniques

- Custom and advanced data validation
- Creating and managing innovative conditional formatting

CHARTING AND VISUALIZATION TECHNIQUES

- Creating dynamic labels
- Using the camera tool
- Working with formula-driven visualizations
- Using fancy fonts
- Leveraging symbols in formulas
- Working with spark lines
- Creating unconventional style charts
- Fancy thermometer charts
- Colored chart bars

BUILDING REPORT SOLUTIONS

- Conceptualizing and understanding report solutions
- Developing a report solution
- Configuring spreadsheet report data options
- Enabling background refresh
- Refreshing data when opening the file
- Combo-box data modeling tool
- List-box data modeling tool
- Form controls data modeling tools
- Option-button modeling
- Check-box data models
- Combo and group-box

MACRO CHARGED REPORTING

- Recording, editing, testing VBA macros
- Working with standard VBA code for report design and management
- Building a macro driven reconciliation program
- Building budget variance reporting program
- Building an email based report distribution program
- Building a macro based report printing system
- Building a financial statement preparation system
- Building a vendor and invoice analysis report

Course Certificate:

International Center for Training & Development (ICTD) will award an internationally recognized certificate(s) for each delegate on completion of training.

Course Methodology:

A variety of methodologies will be used during the course that includes:

- (30%) Based on Case Studies
- (30%) Techniques
- (30%) Role Play
- (10%) Concepts
- Pre-test and Post-test
- Variety of Learning Methods
- Lectures
- Case Studies and Self Questionnaires
- Group Work
- Discussion
- Presentation

Course Fees:

To be advised as per the course location. This rate includes participant's manual, and-Outs, buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Course Timings:

Daily Course Timings:

08:00 - 08:20	Morning Coffee / Tea
08:20 - 10:00	First Session
10:00 - 10:20	Coffee / Tea / Snacks
10:20 - 12:20	Second Session
12:20 - 13:30	Lunch Break & Prayer Break
13:30 - 15:00	Last Session