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MICROSOFT EXCEL ADVANCED REPORTING AND DASHBOARDS

EXCEL
TRICKS
PROFESSIONALS
NEED
TO KNOW

28 months experience

WHAT'S INCLUDED

Expert Facilitator
Training Material
3 Months Support
Certificate

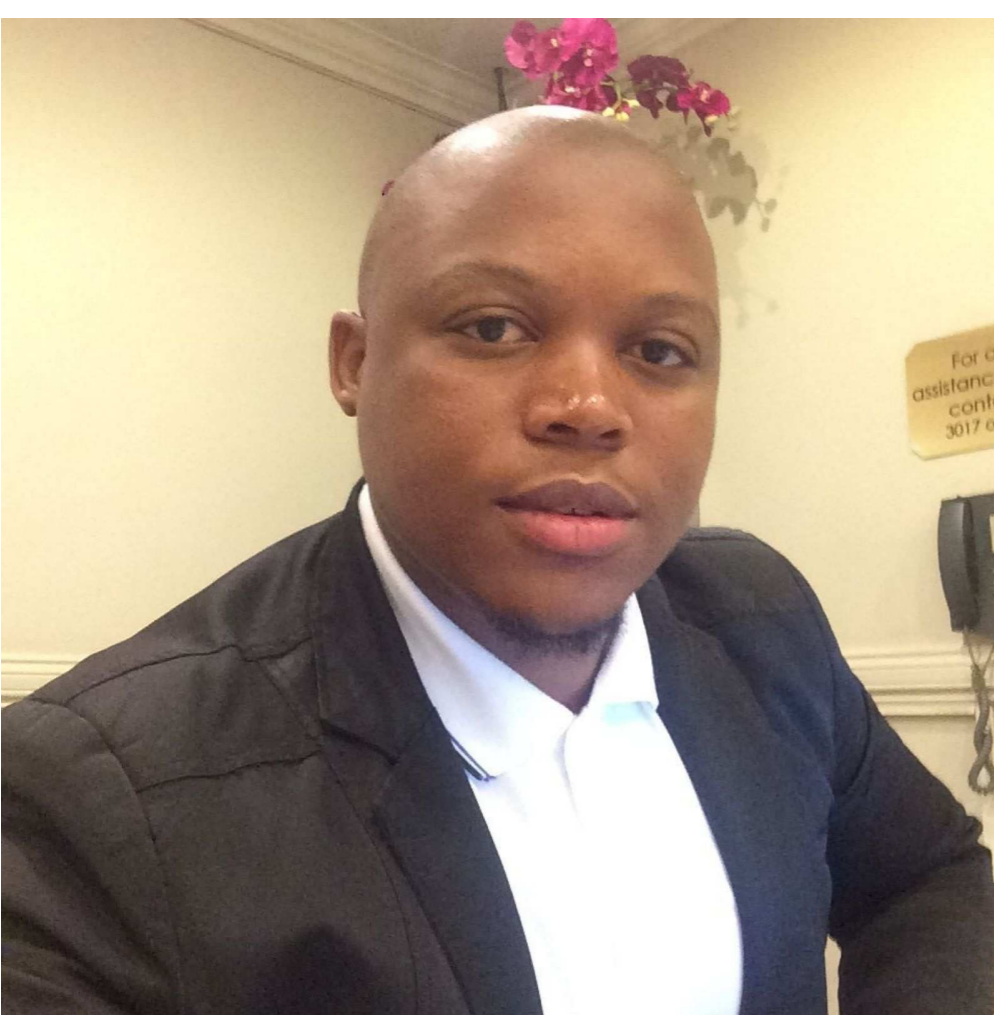
Best
Seller



In-house training available
at client's request.
Minimum of 5 candidates
required in Gauteng
Province, and 10 outside
Gauteng. Travel,
accommodation and
refreshments to be
provided by client.

**PREMIUM
QUALITY**

SATISFACTION
GUARANTEED



WHAT YOU WILL LEARN

- How to approach an Excel dashboard project from idea to delivery
- How to add interactivity to your Excel reports - No VBA required
- Impress management with reports that make the decision-making process faster
- Clever use of Excel core functionality for responsive spreadsheets
- Learn how to create a professional KPI dashboard from scratch
- Create impressive, non-standard Excel charts using smart techniques
- Build Pivot Table-based dashboards for easy interactivity
- Use powerful visual techniques so your content has more effect

This course teaches you to create well-designed Excel dashboards so you and your colleagues can see trends and make quick decisions informed by data.

This Excel Dashboard course comes with templates, tools and checklists that can be applied directly to your Excel reports.

Excel dashboard & Report templates.
Checklists and design guidelines.
Excel workbook to follow along.

DESCRIPTION

Creating an impressive, interactive Excel Dashboard from scratch is not easy!

You used to stare at your empty sheet and wonder where to even start?

You need a structured process in place to go from idea to outcome in a smooth way.

You'll find out all about it in the course. We setup two fully functioning dashboards from scratch.

This course doesn't just teach you a set of functions and features, but how you can use them together to create impressive reports.

It teaches you how to approach a new Dashboard project and how to structure your work so maintaining the dashboard becomes very easy not just for yourself but for anyone else.

WHO SHOULD ATTEND

- Business Professionals who use Excel to create dashboards and reports
- Data analysts
- You currently use Excel and want to improve your skills
- You'd like to learn how to create interactive reports
- You'd like to improve the design of your existing Excel reports



Glen has been in the IT industry for 14 years and five of those spent at one of Microsoft's biggest Gold Certified Partner. He has a background in Microsoft Applications which he has used to facilitate the enablement of Technology in the workplace and is passionate about user adoption and using technology the way it was designed to be used. Over the last 5 years his areas of focus have been around business productivity through technology and he has a strong background in communication and collaboration technologies.

After countless software projects and gaining sufficient applause on the training front, he identified that he is destined for training and there was no looking back from that point onwards.

Glen strongly believes in the maxim that "If you can describe, step by step, how to cross the road without getting killed, you can be an excel guru". During his decade of experience, he has trained many corporate and individuals in computer and behavioural programs. He has also helped many small-scale companies set up and establish their brands. He feels that it is time to redeem and wants to share his experiences and help others build their dreams.

He has helped companies use Excel better to improve their reports by providing customized training sessions, Dashboard Training and Enhanced Visualization Techniques. He also helps improve processes, by designing interfaces and tools with VBA for Excel. Glen is always a willing participant when it comes to sharing Excel tips & tricks based on questions he gets from the Excel training community & professionals at his training sessions.

His passion is teaching and solving difficult Excel problems. He is also addicted to learning and enjoys taking courses on a variety of topics.

WHAT MY STUDENTS SAY

"A-MA-ZING!

I worked with Excel for quite a long time now and in my company I'm a reference in worksheets. The knowledge I have was acquired within about 10 years working with Excel and I believe with this course, Glen managed to cover most of the techniques I use that really differs me from the other employees. I would recommend this course to everyone who is in an intermediate level at Excel and wants to take a step further. Actually I already have! Thank you so much Glen." – Macy Duarte

"Excellent delivery, Expertise, Creative, Intelligent & possesses a Striking Presence! I learnt a lot and continue to use the course as reference. I will take his course anytime." - Howard Loudon

"Despite using Excel for Mac, I have so far been able to follow and do all the exercises without any problem:) – Bridgette Maketla

"The course helped consolidate my existing knowledge of Excel, broadened and updated my skills. The whole course has undoubtedly turned me into a more efficient practitioner and I look forward to the fun of updating all my static formulas into dynamic ones :)
The teaching is well structured and Excel' syntax is clearly explained."
Great!" - Thandi Khumalo

"Absolutely loved this course!! I'm an advanced Excel user and still have learned so much. I'm super excited to apply this new information to all of my data analysis projects in the hopes of making my job faster and more efficient. I highly recommend Glen as an instructor and plan to attend more of his courses." – Donald Mdluli

"I can't find the words to express my gratitude to Glen for this great course. It took me from a novice to an excel expert in few weeks' time.
The course is very well structured, the pace and the sequence of the content can't be better...not to mention his continuous support and prompt replies to Questions asked."- Susan Bekker

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"

DAY ONE

08:00 - 08:30 | - Register and testing connections

08:30 - 10:15 | - Spreadsheet Impact.

- Beyond simple Conditional Formats. Basing conditions on a formula and deciding whether a batsman is out or not, choose currency symbols for a whole sheet by changing a single cell. Getting your rules in the right order and knowing when to stop. Graphical Conditional Formats – the detailed options. Using invisibility to your advantage.
- What makes a good chart – is it really a 6.5 cucumbers? Simple steps to make your charts clearer. Why small can be better than large. Are pie charts evil? Why 3D charts can be 50% worse. Mixed chart types, trendlines and projections. Advanced chart techniques: break-even lines and waterfall charts. Pictures in chart columns.
- In-cell charts – showing 12 times as much information in the same amount of space. Careful with that Axis. The different types of Sparkline: lines, columns and win loss. Sparklines based on a dynamic data range.
- Further graphics tips and techniques. Taking dynamic pictures with the Excel camera. Use the Excel camera to combine areas from multiple sheets on the same sheet of paper. Formatting Excel Camera pictures. Power View – using the Excel 2013 data visualisation add-in including plotting values on maps and ‘playing’ bubble charts. Using 3D Map to create videos of animated visualisations of results by location.

10:15 - 10:30 | Break.

10:30 - 12:30 | Turing Data into Decisions.

- Identify the Get External Tools, understand relational databases in ten minutes to liberate your data, and create relationships within Excel using the Excel 2013 Data Model.
- Use advanced PivotTable techniques to do more with your data, such as Calculated Fields and Calculated items. Use PivotTables as the calculation engine behind management reports, GETPIVOTDATA() and CUBE formulae to create flexible reports, as well as Excel 2016 slicers & timelines. Make your PivotTables more interactive, work with PivotCharts, and build interactive dashboards using PivotTables and Slicers.
- Understand the Pivot add-in and PowerPivot data tools. Calculations in Power Pivot – an introduction to Data Analysis Expressions (DAX). Use DAX in table columns.,DAX to create new measures and calculated fields. Understanding advanced DAX expressions – functions that combine calculations and database technique, and the Time Intelligence DAX functions – why you need a table containing all possible dates.
- Creating powerful reports with PowerPivot: Hierarchies, Perspectives and Sets, adding Key Performance Indicators (KPIs) to a Power Pivot report. Creating CUBE formulae to report on your data in just the way you want to. Use all these techniques to turn millions of rows of data into a dashboard that supports better decisions.

12:30 - 13:30 | Break

13:30 - 14:45 | - Introduction to Excel Formulas and Dashboards.

- A Dashboard Primer
- Concrete Design Tips for Better Excel Reports
- Where is Your Source Data?
- Excel Formulas You'll Need
- Index Match for Complex Lookups - Basics
- Index Match for Complex Lookups - Advanced
- Index for Dynamic List Selection
- Realistic Case: Index for Dependent Drop-down Lists
- SUMIFS, COUNTIFS, AVERAGEIFS to Handle Multiple Criteria
- LARGE and SMALL for Sorting
- ROW(S), COLUMN(S) for Indexing
- ROW as Unique Identifier for Lookups

14:45 - 15:00 | Break

15:00 - 16:00 | Text Function for Formatting

- GetPivotData: Extract data Efficiently from Pivot Tables
- INDIRECT for Flexible References
- Choose & Name Manager for Flexible Ranges (Alternative to Indirect)
- Combo Box - Select From a Drop Down List
- Check Box - Check / Uncheck Option
- Option Button - Choose One Option Only
- List Box - Select From a List of Option
- Scroll Bar - Scroll Through Graphs & Tables
- Chart Overview & When to Use Which Graph
- Chart Basics (for those who need to get familiar with basic features)

16:00 - 17:00 | Info-graphics in Excel: Non-standard but Impressive Bar Chart

- KPI Dashboard Setup
- Setup of Raw Data Sheet
- Setup of Calculation sheet
- KPI Dashboard - Scrolling Table and Bars
- Complex Lookup with Index & Match
- Conditionally-Formatted Data Bars
- Arrows for Deviations
- Show Top 6 Matches with Unique Identifier
- Complex Lookup to Prepare data for Scrolling Chart
- Finalize Profit Comparison Section on Dashboard

16:00 | **End of Day ONE**

DAY TWO

- 08:00 - 08:30** | - Register and testing connections
08:30 - 10:15 | - Restrict Dashboard Area and Format for Printing
- Dashboard Protection, Hyperlinks and Final Touches
 - More Interactivity - Pivot Slicers as Buttons (also without Pivot Tables)
 - Column Chart Controlled by Slicer Buttons
 - Slicer Custom Sorting & Design
 - Check to Ensure Single Slicer Button is Selected
 - Variances in Pivot Table
 - Conditional Formatting in Pivot Table
 - Pivot Table as Part of Dashboard Report
 - Pivot Charts in Dashboards
 - Automatically Refresh Pivot Table with Simple VBA code

10:15 - 10:30 | Break

10:30 - 12:30 | Info Charts: Adding Shapes to (Pivot) Charts

- Info Charts: Overcoming Pivot Chart Limitations
- Enhancing Power BI Section
- Transforming Data with Power BI
- Aggregating Data
- Setting up Power BI Data to work with Excel
- Introduction to Analyze Power BI Data with Excel
- Creating Measures for Excel Analysis
- Additional Measures for Excel
- Column Graphs
- Stacked and 100% Graphs
- Trend Analysis Graphs
- Bubbleplots

12:30 - 13:30 | Break

13:30 - 14:45 | - Info Charts: Overcoming Pivot Chart Limitations

- Enhancing Power BI Section
- Transforming Data with Power BI
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- Introduction to Analyze Power BI Data with Excel
- Creating Measures for Excel Analysis
- Additional Measures for Excel

14:45 - 15:00 | Break

15:00 - 16:00 Creating and Managing Relationships in Power BI

- Using Custom Visualizations in Power BI

16:00 - 17:00 | - Course Plenary

- Revise what you learned

17:00 | **End of Day TWO**

DAY THREE

08:00 - 08:30 | Register and testing connections

08:30 - 10:15 | DATEVALUE

- Date Formatting & Fill Series
- TODAY()/NOW()
- YEAR/MONTH/DAY & HOUR/MINUTE/SECOND
- The EOMONTH Function
- The YEARFRAC Function
- WEEKDAY, WORKDAY & NETWORKDAYS
- The DATEDIF Function
- Designing a Budget Pacing Tool
- Formatting Cells Based on the Value of Another Cell
- Highlighting Every Other Row Using the MOD function
- Pros & Cons of Array Functions
- Vertical, Horizontal, and 2-Dimensional Array Constants
- Using Array Constants in Formulas
- The Transpose Function
- Linking Data Between Sheets: Array vs. Non-Array Comparison
- Returning the "X" Largest Values in a Range
- "MAX IF" with Multiple Criteria
- The INDIRECT Function

10:15 - 10:30 | Break

10:30 - 12:30 | Real-Time Data with WEBSERVICE & FILTERXML

- Math Functions - SUBTOTAL, AGGREGATE and SUMPRODUCT
- Find and Unmerge Merged Cells with VBA
- Web Scraping - Filling in Forms
- Find and Unmerge Merged Cells with VBA
- Static Variables in VBA
- Scheduling Macros in Excel With Application.OnTime
- RegEx (Regular Expressions) in Excel
- VBA Like Operator
- Play Audio and Video in Excel
- Save Chart as Image
- Quickly Formatting Markers for Dot Plots
- Web Scraping Multiple Pages from Websites
- Web Scraping With VBA
- Remove Formatting from a Table
- Listing and Deleting Custom Styles

12:30 - 13:30 | Break

13:30 - 14:45 | Timer or Stopwatch in Excel VBA

- Volatile User Defined Functions
- Excel 4.0 Macro Functions
- VBA SELECT CASE and VBA IF THEN ELSE

14:45 - 15:00 | Break

15:00 - 16:00 | List Files in a Folder Using FILES XL Macro (XLM)

16:00 **End of TRAINING**