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11 & 12 March 2026 (Wed & Thu)

Remote Online Training (Zoom) &

Wyndham Grand Bangsar Kuala Lumpur Hotel (Physical)

** Choose either Zoom OR Physical Session

14 hours ZOOM & PHYSICAL Program

EXCEL DASHBOARDS AND REPORTS

OVERVIEW:

What's the use of putting out reports that no one reads? Properly created dashboards are graphical representations that put data in a context for your audience, and they look really cool! How cool? You'll find out when you see the dazzling examples in Excel Dashboards & Reports. And, before long, everyone's eyes will be riveted to your dashboards and reports too!

This revolutionary guide shows you how to turn Excel into your own personal Business Intelligence tool. You'll learn the fundamentals of using Excel to go beyond simple tables to creating dashboard-studded reports that wow management. Get ready to catch dashboard fever as you find out how to use basic analysis techniques, build advanced dashboard components, implement advanced reporting techniques, and import external date into your Excel reports. Discover how to:

– Unleash the power of Excel as a business intelligence tool
– Create dashboards that communicate and get noticed
– Think about your data in a new way
– Present data more effectively and increase the value of your reports
– Create dynamic labels that support visualization
– Represent time and seasonal trending
– Group and bucket data
– Display and measure values versus goals
– Implement macro-charged reporting

NOT FOR BEGINNERS

This course is not for Excel beginners, because the fast pace could be overwhelming. Lots of material is covered, very quickly. It is designed for Excel users who are beyond the basics, and who enjoy learning by seeing a demo, then practising the new skills.

Part I Making the Move to Dashboards

Is all about helping you think about your data in terms of creating effective dashboards and reports.

- **Chapter 1 Getting in the Dashboard State of Mind**
  - ⇒ Introduces you to the topic of dashboards and reports, giving you some of the fundamentals and basic ground rules for creating effective dashboards and reports.
- **Chapter 2 Building a Super Model**
  - ⇒ Shows you a few concepts around data structure and layout. In this chapter, will demonstrate the impact of a poorly planned data set and show you the best practices for setting up the source data for your dashboards and reports.

Part II Building Basic Dashboard Components

You take an in-depth look at some of the basic dashboard components you can create using Excel.

- **Chapter 3 The Pivotal Pivot Table**
  - ⇒ Introduce you to pivot tables and discuss how a pivot table can play an integral role in Excel-based dashboards.
- **Chapter 4 Excel Charts for the Uninitiated**
  - ⇒ Provides a primer on building charts in Excel, giving beginners a solid understanding of how Excel charts work.
- **Chapter 5 The New World of Conditional Formatting**
  - ⇒ Introduces you to the new and improved conditional formatting functionality found in Excel. In this chapter, will present several ideas for using the new conditional formatting tools in dashboards and reports.
- **Chapter 6 The Art of Dynamic Labeling**
  - ⇒ You explore the various techniques that can be used to create dynamic labels, allowing for the creation of a whole new layer of visualization.

Part III Building Advanced Dashboard Components

You go beyond the basics to look at some of the advanced components you can create with Excel. This part consists of three chapters.

- **Chapter 7 Components That Show Trending**
  - ⇒ In which will demonstrate how to represent time trending, seasonal trending, moving averages, and other types of trending in dashboards. You are also introduced to Sparklines in this chapter.
- **Chapter 8 Components That Group and Bucket Data**
  - ⇒ You explore the many methods used to bucket data or put data into groups for reporting.
- **Chapter 9 Components That Display Performance against a Target**
  - ⇒ Demonstrates some of charting techniques that help you display and measure values versus goals.

Part IV Advanced Reporting Techniques

Focuses on techniques that help you automate your reporting processes and give your users an interactive user interface.

- **Chapter 10 Macro-Charged Reporting**
    - ⇒ Provides a clear understanding of how macros can be leveraged to supercharge and automate your reporting systems.

- **Chapter 11 Giving Users an Interactive Interface**
    - ⇒ Illustrates how you can provide your clients with a simple interface, allowing them to easily navigate through and interact with their reporting systems.

Part V Working with the Outside World

Is importing and exporting information to and from Excel.

- **Chapter 12 Using External Data for Your Dashboards and Reports**
    - ⇒ Explores some of the ways to incorporate data that does not originate in Excel. In this chapter, will show you how to import data from external sources as well as how to create systems that allow for dynamic refreshing of external data sources.

- **Chapter 13 Sharing Your Work with the Outside World**
    - ⇒ Wraps up this look on Excel dashboards and reports by showing you the various ways to distribute and present your work.

Part VI The Part of Tens

Is the classic Part of Tens section. The chapters found here each present ten or more pearls of wisdom, delivered in bite-sized pieces.

- **Chapter 14 Ten Chart Design Principles**
    - ⇒ Ten or so chart-building best practices, helping you design more effective charts.

- **Chapter 15 Ten Questions to Ask Before Distributing Your Dashboard**
    - ⇒ Checklist of questions you should ask yourself before sharing your Excel dashboards and reports.