



Business Intelligence with Microsoft Excel 2010 / 2007

Course Duration:

7 Hours / 1 Day

1 Introduction to Business Intelligence

- What is Business Intelligence?
- Excel as a BI Tool
- Defining reports
- Defining dashboards

2 Preparing for the Dashboard

- Establish the audience and purpose for the dashboard
- Delineate the measures for the dashboard
- Catalog the required data sources
- Define the dimensions and filters for the dashboard
- Determine the need for drill-down features
- Establish the refresh schedule

3 Building Data Model

- Data Modeling Best Practices
- Separating data, analysis, and presentation

4 Common Excel Functions

- The VLOOKUP function
- Using data validation drop-down lists in your data model
- The HLOOKUP function
- The SUMPRODUCT function
- The CHOOSE function

5 Building Basic Dashboard

Components

- The Pivotal PivotTable
- The Four Areas of a PivotTable
- Creating Your First PivotTable
- Customizing field names
- Applying numeric formats to data fields
- Changing summary calculations
- Creating Useful Pivot-Driven Views
- Creating views by month, quarter, and year
- Creating a percent distribution view
- Creating a YTD totals view
- Creating a month-over-month variance view

6 Building Advanced Dashboard Components

- Components That Show Trending
- Comparative Trending
- Highlighting Periods of Time
- Other Trending Techniques

7 Components That Group and Bucket Data

- Creating Top and Bottom Displays
- Using Histograms to Track Relationships and Frequency
- Highlighting Top Values in Charts

8 Components That Display Performance against a Target

- Showing Performance with Variances
- Showing Performance against Organizational Trends
- Using Thermometer-Style Charts to Display Performance

- An Introduction to the Bullet Graph
- Showing Performance against a Target Range

9 Giving Users an Interactive Interface

- Introducing Form Controls
- Adding and Configuring Controls
- Check Box Example: Toggling a Chart Series On and Off
- Option Button Example: Showing Many Views through One Chart
- Combo Box Example: Controlling Multiple PivotTables with One Combo Box
- List Box Example: Controlling Multiple Charts with One Selector