



Microsoft Excel Dashboards & Reports 2010

Course Duration:

14 Hours / 2 Days

1 Introducing Dashboards

- Defining reports
- Defining dashboards
- Establish the audience
- Defining the performance measures (KPI)
- Defining required data sources
- Establish the update schedule
- Dashboard Examples

2 Developing Data Model

- Building a Data Model
- Excel Functions used to build the Data Model
- Working with Excel Tables

3 Working with Charts

- Creating the chart
- Choosing a chart type
- Working with Chart Series
- Creating chart that show trending
- Creating Chart that group and Bucket Data
- Creating Chart that display performance against a target

4 Working with 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
- Creating a PivotChart

5 Using Excel Sparklines

- Introducing Sparklines
- Creating Sparklines
- Customizing Sparklines

6 Advanced Visualization technique

- Dynamic labels
- Linking Formulas to text Boxes
- Formula-Driven labels

7 Finalizing Excel Dashboard

- Adding components that show trending
- Adding components that group data
- Adding components that show performance against a target

8 Automating Your Dashboards

- Introducing the macro Recorder
- Excel Macro Example
- Adding interactive controls to your dashboard