



PST TRAINING (PTY) LTD

PST Training (Pty) Ltd

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MS Excel Dashboard Report Design

Overview

Use Dashboards to communicate more information, more accurately and faster. Learn to build and distribute Dashboard reports from the ground up.

Objectives

- Introduction to Dashboard Design Principles
- Using VLOOKUP, HLOOKUP, SUMIF, SUMPRODUCT and CHOOSE functions to prepare the Data Analysis
- Creating PivotTables to feed the dashboard report
- Creating and customising Charts, and using Advanced charting options
- Create drop-down and data-dependant drop-down Lists
- Using Sparklines
- Using Conditional Formatting to create Alerts
- Using Form Controls to filter information
- Protecting worksheets and workbooks

Course Prerequisite

The student must have Intermediate knowledge of Excel. No previous experience in PivotTables required.

Language of Delivery

English

Delivery Methods

Course is facilitated by a competent & experienced subject matter trainer, who utilises the following techniques to ensure that the session is practical and experiential: Questions, Discussions, Exercises & Assessments.

Who should attend?

This course is aimed at managers and other professionals who need to create dashboards and other reports in order to analyse interpret and present information.

Course Outline

This course consists of the following 7 modules	
Module 1	Introduction to Dashboards/Dashboards/Establish The User Requirements/List The Required Data Sources/Dashboard Design Principles/Developing Your Data Model/Data Model Best Practices.
Module 2	The VLOOKUP Function/Using VLOOKUP Formulas in a Data Model/Using Drop-Down Lists in the Data Model/Creating the Drop-Down List/The HLOOKUP Function/The SUMIF Function/The SUMPRODUCT Function/The CHOOSE Function/Using Smart Tables/Converting a Range to an Excel Table.
Module 3	PivotTables/Create a Pivot Table/Summary Functions in Value Fields/Creating Formulas/Create Calculated Fields/Add a Complex Calculated Field/Calculated Items/Edit a Calculated Field Formula/Edit a Single Formula for a Calculated Item/Delete a Calculated Field/Delete a Calculated Item/Renaming Fields in a Pivot Table/GetPivotData Option.
Module 4	Charts/Chart Types/Changing Object Colours and Borders/Formatting Numbers/Formatting a Data Series/Scaling and Customizing an Axis/Use Advanced Chart Features/Dual - Axis Charts/Create a Dual-Axis Chart/Format Numbers Effectively/Remove Gridlines/Remove Borders/Remove Data Labels/Remove the Legend/Remove the Axis.
Module 5	Advanced Charting/Charting Non-Contiguous Ranges/Charting Ranges from Different Sheets/Working with Multiple Axes.
Module 6	The CHOOSE Function/Using Validation?/Create a Drop Down List in a Cell/Creating Dependent Drop-Down Lists/Apply Data Validation/Create the Dependent Data Validation/Test the Dependent Data Validation/Create a Drop-Down List from a List of Numbers/Apply Data Validation/Working with Sparklines/Formatting Sparklines/Using Conditional Formatting to Create Alerts.
Module 7	Using Form Controls/Forcing Users to Choose from a List/Creating a Combo Box/Creating a List Box/Why is the INDEX Formula so Useful?/Create a Checkbox/Rename the Checkbox/Sharing your work with the outside World/Limiting Access to Specific Worksheet Ranges/Protecting the Workbook Structure.

Additional Information

Duration	1 Day	
Includes	<ul style="list-style-type: none"> • Comprehensive Manual • Lunch & Refreshments (not applicable to on-site training) • Electronic Certificate (on successful completion of the course) 	<ul style="list-style-type: none"> • Electronic Trainer Feedback Report • Electronic Delegate Feedback Questionnaire