

Course Outline

Session 1: Overview of Excel Dashboards

- ✓ *What is it? What value do you gain from Dashboards?*
- ✓ *Dashboard Design Principles -what do you need to know?*
- ✓ *Components of a Dashboard*
- ✓ *Excel Dashboards Product Demo*

Session 2: Prepping your data for analysis

- ✓ *Cleaning your data -how do you fill blanks? Check your data for duplicates*
- ✓ *Applying DATE & TEXT functions to generate extra columns for analysis*
- ✓ *Incorporate new data automatically -Excel Tables*
- ✓ *Combining MATCH function with VLOOKUP and INDEX functions for dynamic advanced lookups. Combine data from various sources in style*

Session 3: Data Analysis -Part 1

- ✓ *Build robust formulas -correctly apply \$ sign to lock formulas*
- ✓ *SUMIFS & COUNTIFS -your friends for dynamic analytics*
- ✓ *Top / Bottom views -combine RANK, SMALL, LARGE, IF and Option Buttons or Slicers to swap between top and bottom*
- ✓ *Named Ranges & Data Validation*
- ✓ *Conditional Formatting -predefined & formula-based rules*
- ✓ *Custom number formats -display "3,873,452 as 3.87 Million"*

Session 4: Data Analysis -Part 2: Maximizing on Pivot Tables

- ✓ *Converting to Percentages*
- ✓ *Grouping data fields (Dates)*

- ✓ *Viewing Top/Bottom items (or Top/Bottom 10%)*
- ✓ *Connecting different reports to a single slicer -make interactive dashboards*
- ✓ *How do you make a slicer static? We'll show you*

Session 5: Advanced Charting Techniques

- ✓ *How to select the right chart for your data*
- ✓ *Editing and customizing chart elements e.g. show vertical axis in millions*
- ✓ *Combination (dual axis) charts*
- ✓ *Charting with dynamic ranges*
- ✓ *Linking title text to a cell*
- ✓ *Analytical charts -Pareto chart, Gauge chart, etc.*
- ✓ *Scrolling charts -show 6 or 12 items / data points at a go*

Session 6: Adding Interactivity (Making Dashboards Dynamic)

- ✓ *Drop-down (Pick) lists with charts*
- ✓ *Adding Interactivity with Form Controls (Option buttons, Combo boxes, Scroll bars, Spin Buttons)*
- ✓ *Building Navigation Buttons -hyperlinks*
- ✓ *Excel Camera tool / Picture Links*
- ✓ *Using shapes for stylish dashboards -linking shapes to your analysis*

Session 7: Final Project

- At this stage we have done the analytics; We need to knit this in one pager:*
- ✓ *Setting up the dashboard layout*
 - ✓ *Assembling a complete management dashboard (e.g. Sales)*