

Advanced Microsoft Excel Skills And Dashboards Training Course 2019

6-7 May,
Holiday Inn Express, Sunnypark, Pretoria



WORKSHOP OVERVIEW:

This course would also suit anyone looking to extend their knowledge of Excel to understand some of the more advanced features and how they can be used to work together. At the end of this course you will understand what makes a dashboard.

You will learn how to build some of the most useful components when constructing your own dashboard reports. During the course you will build three complete dashboard projects to give you inspiration for your own solutions.

Excel dashboards are a powerful way to leverage Excel functionality, build and manage better presentations and improve your Excel and data visualization skills. In this course we will show you how you can turn Excel into your own, personal Business Intelligence tool and create Interactive Charts and awesome Dashboards in Microsoft Excel.

PROGRAMME REQUIREMENTS:

This is a Research-Based Training Course: - the course curriculum has been developed and designed from research with actual industry practitioners and will in just 2 days give you all the tools and techniques needed to design models to suit a wide range of purposes.

The course is practical and focused: - each of the modules presented will include step-by-step explanations and hands-on examples. A comprehensive Course Reference Manual will be provided packed with ideas-techniques, graphics, flow-charts and advanced Excel tools. The manual contains key steps for the exercises.

Laptop computer. This workshop requires the use of a laptop which should have either Windows 7 or later installed as well as a full installation of Excel 2010 or later

TEACHING METHODOLOGY:

All professional persons using Excel spreadsheets. Professions that have attended include Pas, Secretaries, accountants, actuaries, auditors, business analysts, chartered accountants, civil engineers, construction, consulting, corporate finance, farming, finance, hr function, landlords, lawyers, quantity surveyors, research analysts, retail, scientists and engineers, Directors of all divisions and all employees interested in learning Microsoft Excel Skills.

Receive a new laptop for the course Price: R9 999.00

or

Attend with your own laptop Price: R6 999.00

Presented to you by: Preeminent Consulting; Tel : + 27 (0) 12 321 0319



COURSE OUTLINE

PIVOT TABLES

- How to (quickly) convert non-compliant data into pivot friendly data
- Pivot Tables – Step by Step
- Manipulating the Data Portion of a Pivot Table
- Manipulating the Rows of a Pivot Table
- Manipulating the columns in a pivot table
- Combining rows and columns to create meaningful Pivots
- Report Filter
- Grouping Data in the rows and columns
- Manual
- Dates
- Numbers
- Simple Pivot Charting
- Creating Calculated Fields within a pivot table
- Creating Calculated Item within a pivot table
- GETPIVOTDATA function
- Multiple Consolidation ranges in Pivot Tables
- Conditional Formatting on Pivot Tables (Excel 2007 and higher)
- Linking to an external database via Pivot Tables

ADVANCED EXCEL

- Advanced Excel Techniques for use in modelling
- How errors happen in models and how to avoid them
- Financial Model and spreadsheet design principals
- Essential Excel Knowledge
- Importing data into a model
- Data Cleanup using the Data Auto-filter and the advanced Filter
- GOTO Special tool for working with cells
- Using the text to column tool
- Common pitfalls / problems at this stage

COMPLETION OF ADVANCED EXCEL

- Analyzing Results
- Data Filter
- Speech to Text
- Database Functions
- Reporting results
- Conditional Formatting
- Cell formatting
- Data Protection

WORKING WITH DATA

- Working with imported text data
- CLEAN, CONCATENATE, DOLLAR, EXACT, FIND/SEARCH, LEFT/RIGHT/MID, LEN, LOWER/UPPER/ PROPER, REPLACE, T, TEXT, TRIM, VALUE
- Handling Dates in your models
- EOMONTH, DATE, DATEVALUE, DAY, EDATE, MONTH, NETWORKING DAYS, WEEKDAY, WORKDAY, YEAR
- Manipulating the data
- (SUMIF, COUNTIF, SUMIFS, COUNTIFS, VLOOKUP)
- Ranking Results
- Error checks and spreadsheet integrity

DATA VISUALISATION

- Getting the Data right for Graphing
- Understanding Excel graphs and incorporating them into your model
- Adding another series to a graph
- Creating a secondary axis in a chart
- Changing default coloring to match corporate colours
- Create a chart template for consistent use
- Different Chart Types
- Column Charts
- Bar Charts
- Pie Charts
- Area Charts
- Radar
- Waterfall graphs
- Combination Charts
- Trendlines in models
- Goal seeking straight off the graph
- Linking your Word documents directly to the Excel graph
- Conditional Formatting Graphs
- Using a custom picture for your graphs
- Creating flexible graphs

COURSE OUTLINE

What is a dashboard?

Common features of a dashboard
Why use Excel?
Dashboard Do's and Don'ts
Data Layout Creating Dynamic Dashboards
Merging and Consolidating Data Using Shapes to make Charts more attractive
Using Alerts to draw attention to dashboards

PivotTables and Pivot Charts

Creating PivotTables
Formatting a PivotTable
Refreshing a PivotTable
Grouping fields
Pivot Charts
Slicers and Timelines

Useful functions

Nested IFs
COUNTIFS & SUMIFS
EDATE
INDEX & MATCH
OFFSET CHOOSE

Conditional Formatting

Formatting values
Colour Scales to show heatmaps
Icon Sets to show at a glance performance

Form Controls

Understanding the different controls
Using them on a dashboard

Workbooks

Working with workbooks
Sharing Workbooks
Protecting Sheets and Workbooks

Conditional Formatting

Create dashboard heat maps
Highlight top and bottom products/ people etc
Highlight missed budgets and forecasts

Summarising / calculating / organising

Arranging the data that's conducive for a high-level view
Dynamic named ranges
Expandable calculations

Working with your Data

Working with imported text data
Understanding Data Quality issues
Gathering data from different sources
Linking Data
Merging and Consolidating Data
Excel Hint\ Tips when working with data

Working with Charts

Creating charts
Formatting charts
Secondary Axes
Combination charts
Creating chart templates

Working with Sparklines

Creating & modifying Sparklines
Customizing Sparklines

Design & Layout

Gridlines & outlines
Lining up Excel objects
Theming a dashboard

Sample Dashboard Projects

Worldwide Salary Index
Sales Performance Analysis
Helpdesk Efficiency