



All delegates are required to bring a laptop with Microsoft Office 2013 or later

Excel Dashboard Training for Management Reporting

03 – 05 July 2019

Venue: Mzingeli Training Centre - Roodepoort
Johannesburg, RSA

The biggest problem managers have is preparing monthly reports that assist in making better decisions.

Programme objective

The course has been designed to give accountants, managers and persons who have a monthly reporting responsibility, the ability to develop professional reports that will assist in better decision making.

Programme outcomes

- Understanding the taxonomy of how good decisions are made
- How to determine the correct objects (which include Tables, Graphs and Text) in structuring a good report
- How to develop an Excel GUI (Graphic User Interface)
- How to analyse large data sets using Pivot Tables
- How to develop a Dashboard using Excel

Who should attend?

- Office Administrators
- Management Accountants
- Accountants
- Operational and Sales Managers

Day 1: Dashboard Architecture

1. Understanding Decision Support Systems

- 1.1 Understanding what is the taxonomy of a good decision
- 1.2 Understanding the principles of good dashboard design
- 1.3 Designing a report that will lead to a good decision
- 1.4 Examine the pitfalls of dashboards

2. Developing the Data Model for better Decisions

- 2.1 Building your Data Model and the Excel Import functionality
- 2.2 Cleaning Data
- 2.3 Data Model Best Practice

3. Introducing Visualisation

- 3.1 Understanding Custom Formatting
- 3.2 Clearing Chart Junk
- 3.3 Building Dynamic Text Statements
- 3.4 Using Conditional Formatting to enhance analysis
- 3.5 Introducing the "CAMERA" tool

4. Working with Pivot Tables

- 4.1 Introduction to Pivot Tables and its functionality
- 4.2 Formatting the Pivot Table
- 4.3 Advanced features of Pivot Table

Day 2: Developing the Analytics Engine

1. Developing Chart Objects

- 1.1 Understanding Excel Chart Object
- 1.2 Introducing Advanced features of Charting
- 1.3 Choosing the right charts to assist in decisions

2. Creating Forms Control Objects and Dynamic Charting

- 2.1 The Scroll Bar
- 2.2 The Check Box
- 2.3 The Option Button
- 2.4 The Combo Box
- 2.5 Introducing MATCH and INDEX functions
- 2.6 The CHOOSE function

3. Additional Visualisation Techniques

- 3.1 Chart Banding
- 3.2 Dynamic Object placement (Traffic Lights)
- 3.3 Dynamic Labelling
- 3.4 Advanced Conditional Formatting
- 3.5 Enhancing Dashboard Interfaces
- 3.6 Using SPARKLINES

Day 3: Constructing the Dashboard

1. Developing the Dashboard Layout

- 1.1 Developing the Dashboard User Interface

2. Populating the Dashboard

- 2.1 Understanding how to use Pivot Tables in Dashboards
- 2.2 Developing Dynamic charts using Pivot Charts
- 2.3 Introducing "SLICERS" to customize filters
- 2.4 Placing Chart and other Object in the Dashboard
- 2.5 Developing MACROS to automate certain function

TIME SCHEDULE:

- 08:00 – Registration & Morning tea/coffee
- 08:30 – Start of First Session
- 10:00 – 10:20 - Tea/Coffee Break
- 12:30 – 13:30 Lunch Break
- 15:00 – 15:15 Afternoon Snack Break
- 16:30 - End

REGISTRATION FORM

Investment: R 8,490.00
(Per delegate excluding VAT.)

Authorising Person:

Name:

Email:

Telephone:

Job Title:

Organisation:

Address:

Country:

Postal Code:

Signature:

TERMS AND CONDITIONS

The following terms and conditions will apply:

Payment is required in full 5 days from date of invoice

All payments to be made directly to Mzingeli Trading and Skills Development Account.

No seats will be reserved, unless Mzingeli Trading and Skills Development receives a signed registration form.

Mzingeli Trading and Skills Development reserves the right, due to circumstances beyond our control, to change speakers, program content, date & venue

In the event of Mzingeli Trading and Skills Development having to cancel or postpone an event due to circumstances beyond our control, delegates will be issued with a credit voucher, which may be used at our next scheduled event.

The signed registration form is a legally binding contract.

SUBSTITUTIONS

Delegates must inform Mzingeli Trading and Skills Development in writing of any substitutions.

There is no charge for substitutions.

Mzingeli Trading and Skills Development will not be held liable for incorrect delegate details on Certificates in the event of substitutions being made on the day of the conference.

CANCELLATIONS

All cancellations will be subject to approval by the management of Mzingeli Trading and Skills Development.

All cancellations made seven (7) working days prior to date of the above-mentioned event will be subject to a 50% cancellation fee.

Cancellations made within seven (7) working days of date of the above-mentioned event, will be subject to a 100% cancellation fee.

There will be no refunds or credit vouchers for no shows

Delegate Details:

Delegate Name & Surname	Position	Email	Cellphone Number

PAYMENT

Electronic Transfer or Direct Deposit into our bank account, validated by fax or emailed copy of transaction slip.

Make Payment to:

Bank Name: First National Bank

(FNB) Branch Name: Westgate

Branch Code 250841

Account Name: Mzingeli Trading and Skills Development

Account Number: 62412926761

PLEASE NOTE: Payment is required in full 5 days from date of invoice.

DATES & INVESTMENT

The registration fee includes all training materials, lunch, refreshments, and parking but **excludes** Travel & Accommodation. Please type or print clearly and submit by fax or email.

EXCEL DASHBOARD TRAINING FOR MANAGEMENT REPORTING

Date: 03th – 05th July 2019

Venue: Mzingeli Training Centre - Roodepoort, JHB

Investment: R8 490 excl VAT