



## TAN DUC INFORMATION TECHNOLOGY SCHOOL JSC

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## Excel Dashboard and Reports Advanced Skills

**Duration:** 02 days

In this course, we offer an in-depth look at some of the key dashboarding concepts you can leverage to create a cutting-edge dashboard presentation. Shows you how to build an effective data model that provides the foundation upon which your dashboard or report is built and you discover the impact of poorly organized data and how to set up the source data for the most positive outcome. Illustrates how interactive controls can provide your clients with a simple interface, allowing them to easily navigate through and interact with your dashboard or report. And also provides a clear understanding of how you can leverage macros to automate your reporting systems.

Besides, you find out how pivot tables can enhance your analytical and reporting capabilities, as well as your dashboards. This course introduces you to pivot tables and explore how this Excel feature can play an integral role in Excel-based presentations. Provides a primer on building pivot charts, giving you a solid understanding of how Excel pivot charts work with pivot tables. Shows you how pivot slicers can add interactive filtering capabilities to your pivot reporting. Finally, introduces you to the new internal Data Model and Power View features of Excel 2016.

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## PREREQUISITES

To ensure your success, it is recommended you have completed Microsoft® Excel Expert or possess equivalent knowledge.

## WHAT YOU NEED TO HAVE

The ideal candidate for this course will have the following:

- Some experience working with data and familiarity with the basic concepts of data analysis such as working with tables, aggregating data, and performing calculations
- Experience using Excel with a strong grasp of concepts such as table structures, filtering, sorting, and using formulas.

## COURSE OUTLINE

### PART I: GETTING STARTED WITH EXCEL DASHBOARDS

#### Chapter 1: Introducing Dashboards

##### Module 1: What Are Dashboards and Reports?

- Defining reports
- Defining dashboards

#### Chapter 2: Using Excel Sparklines

##### Module 1: Understanding Sparklines

##### Module 2: Applying Sparklines

##### Module 3: Creating Sparklines

##### Module 4: Customizing Sparklines

- Sizing and merging sparkline cells
- Handling hidden or missing data
- Changing the sparkline type
- Changing sparkline colors and line width
- Using color to emphasize key data points
- Adjusting sparkline axis scaling
- Faking a reference line
- Specifying a date axis
- Auto-updating sparkline ranges

#### Chapter 3: Chartless Visualization Techniques

##### Module 1: Using Symbols to Enhance Reporting

## **PART II: INTRODUCING CHARTS INTO YOUR DASHBOARDS**

### **Chapter 4: Excel Charting for the Uninitiated**

#### **Module 1: What Is a Chart?**

#### **Module 2: How Excel Handles Charts**

- Embedded charts
- Chart sheets

#### **Module 3: Parts of a Chart**

#### **Module 4: Basic Steps for Creating a Chart**

- Creating the chart
- Switching the row and column orientation
- Changing the chart type
- Applying chart styles
- Applying a chart style
- Adding and deleting chart elements
- Moving and deleting chart elements
- Formatting chart elements

#### **Module 5: Working with Charts**

- Moving and resizing a chart
- Converting an embedded chart to a chart sheet
- Copying a chart
- Deleting a chart
- Copying a chart's formatting
- Renaming a chart
- Printing charts

### **Chapter 5: Working with Chart Series**

#### **Module 1: Specifying the Data for Your Chart**

#### **Module 2: Understanding Series Names**

- Changing a series name
- Deleting a series name

#### **Module 3: Adjusting the Series Plot Order**

#### **Module 4: Charting a Noncontiguous Range**

**Module 5: Using Series on Different Sheets**

**Module 6: Handling Missing Data**

**Module 7: Controlling a Data Series by Hiding Data**

**Module 8: Unlinking a Chart Series from Its Data Range**

- Converting a chart to a picture
- Converting a range reference to arrays

**Module 9: Working with Multiple Axes**

- Creating a secondary value axis
- Creating a chart with four axes

**Chapter 6: Formatting and Customizing Charts**

**Module 1: Chart Formatting Overview**

- Selecting chart elements
- Common chart elements
- UI choices for formatting

**Module 2: Adjusting Fills and Borders: General Procedures**

- About the Fill tab
- Formatting borders

**Module 3: Formatting Chart Background Elements**

- Working with the chart area
- Working with the plot area

**Module 4: Formatting Chart Series**

- Basic series formatting
- Using pictures and graphics for series formatting
- Additional series options

**Module 5: Working with Chart Titles**

- Adding titles to a chart
- Changing title text
- Formatting title text
- Linking title text to a cell

**Module 6: Working with a Chart's Legend**

- Adding or removing a legend

- Moving or resizing a legend
- Formatting a legend
- Changing the legend text
- Deleting a legend entry
- Identifying series without using a legend

#### **Module 7: Working with Chart Axes**

- Value axis versus category axis
- Value axis scales
- Using time-scale axes
- Creating a multiline category axis
- Removing axes
- Axis number formats

#### **Module 8: Working with Gridlines**

- Adding or removing gridlines

#### **Module 9: Working with Data Labels**

- Adding or removing data labels
- Editing data labels
- Problems and limitations with data labels

#### **Module 10: Working with a Chart Data Table**

- Adding and removing a data table
- Problems and limitations with data tables

### **Chapter 7: Components That Show Trending**

#### **Module 1: Trending Dos and Don'ts**

- Using chart types appropriate for trending
- Starting the vertical scale at zero
- Leveraging Excel's logarithmic scale
- Applying creative label management

#### **Module 2: Comparative Trending**

- Creating side-by-side time comparisons
- Creating stacked time comparisons
- Trending with a secondary axis

### **Module 3: Emphasizing Periods of Time**

- Formatting specific periods
- Using dividers to mark significant events
- Representing forecasts in your trending components

## **Chapter 8: Components That Group Data**

### **Module 1: Listing Top and Bottom Values**

- Organizing source data
- Using pivot tables to get top and bottom views
- Using Histograms to Track Relationships and Frequency
- Adding formulas to group data
- Adding a cumulative percent

### **Module 2: Using a pivot table to create a histogram**

### **Module 3: Emphasizing Top Values in Charts**

## **PART III: ADVANCED DASHBOARDING CONCEPTS**

## **Chapter 9: Developing Your Data Model**

### **Module 1: Building a Data Model**

- Separating the data, analysis, and presentation layers

### **Module 2: Data Model Best Practices**

- Avoid storing excess data
- Use tabs to document and organize your data model
- Test your data model before building presentation components

### **Module 3: Excel Functions for Your Data Model**

- Understanding lookup tables
- The VLOOKUP function
- The HLookup function
- The SUMPRODUCT function
- The Choose function

### **Module 4: Working with Excel Tables**

- Converting a range to an Excel table
- Converting an Excel table back to a range

## Chapter 10: Adding Interactive Controls to Your Dashboard

### Module 1: Getting Started with Form Controls

- Finding Form controls
- Adding a control to a worksheet

### Module 2: Using the Button Control

### Module 3: Using the Check Box Control

- Check box example: Toggling a chart series on and off

### Module 4: Using the Option Button Control

- Option button example: Showing many views through one chart

### Module 5: Using the Combo Box Control

- Combo box example: Changing chart data with a drop-down selector

### Module 6: Using the List Box Control

- List box example: Controlling multiple charts with one selector

## Chapter 11: Macro-Charged Reporting

### Module 1: Why Use a Macro?

- Recording Your First Macro
- Running your macros
- Assigning a macro to a button

### Module 2: Enabling Macros in Excel 2013

- Viewing the new Excel security message
- Setting up trusted locations

### Module 3: Excel Macro Examples

- Building navigation buttons
- Dynamically rearranging pivot table data
- Offering one-touch reporting options

## PART IV: PIVOT TABLE DRIVEN DASHBOARDS

## Chapter 12: Using Pivot Tables

### Module 1: Introducing the Pivot Table

- Anatomy of a pivot table
- Creating the basic pivot table

## **Module 2: Customizing Your Pivot Table**

- Changing the pivot table layout
- Renaming the fields
- Formatting numbers
- Changing summary calculations
- Suppressing subtotals
- Removing all subtotals at one time
- Removing the subtotals for only one field
- Removing grand totals
- Hiding and showing data items
- Hiding or showing items without data
- Sorting your pivot table

## **Module 3: Examples of Filtering Your Data**

- Producing top and bottom 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

## **Chapter 13: Using Pivot Charts**

### **Module 1: Getting Started with Pivot Charts**

- Creating a pivot chart
- Understanding the link between pivot charts and pivot tables
- Limitations of pivot charts
- Using conditional formatting with pivot tables
- Customizing conditional formatting

### **Module 2: Alternatives to Pivot Charts**

- Disconnecting charts from pivot tables
- Create standalone charts that are connected to your pivot table

## **Chapter 14: Adding Interactivity with Slicers**

### **Module 1: Understanding Slicers**



**Module 2: Creating a Standard Slicer**

- Formatting slicers
- Controlling multiple pivot tables

**Module 3: Creating a Timeline Slicer**

**Module 4: Using Slicers as Form Controls**