



Microsoft Excel Dashboards

McGovernConsultancy.com

Duration 1 Day

Format Instructor Led

Overview

The Excel Dashboards 1 day course is an introduction to building sophisticated interactive dashboards which allow users of the reports a high level of interactivity with the data - allowing them the facility of choosing different types of reports and combinations of reports. The course looks at a number of methods including a formula driven dashboard which makes use of drop downs to recalculate and regenerate charts. Also covered is a slicer method of dashboard generation and using charting tools to create KPI dials.

Objectives

On completion of this course, participants will be able to do the following:

Dashboard Reports

- Research Your Dashboard
- Do A Mock up
- Create 3 sheets
 - o Raw Data
 - o Analysis
 - o Dashboard
- Analyse Your Data
- Excel Formulas
 - o Pivot Tables
- Data Validation
 - o Conditional Formatting

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- Form Controls
- Key Feature of Dashboard is Interactive

Plan

- Recap on Formulas & Some New Ones
- Build Formula Driven Dashboard
- Interactive Charts
 - Slicer Method
 - CHOOSE fn
- Excel Formulas
 - IF RELATED
 - IF, NESTED IF
 - AND & OR
 - SUMIF & SUMIFS
- DSUM, DAVERAGE, DMAX etc
- LOOKUP
 - VLOOKUP
 - HLOOKUP
 - INDEX & MATCH
- COUNT, COUNTA, COUNTIF, COUNTIFS
- SUMPRODUCT
- OFFSET, INDIRECT
- CHOOSE
- GETPIVOTDATA

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Excel Dashboards

- Using Data Validation
 - o Drop Downs
 - o Charts
 - o Sumif/Sumifs
 - o Countif/Countifs
- Charts
 - o Slicers
 - o Using Pivot Tables
- Using Formulas
- Creating dials for KPI

Visual Basic for Applications

- Developer Tool Bar
- Creating Macros
 - o Assigning Command Buttons
 - o Assigning Macros to Shapes
 - o Place on Ribbon/QAT
 - o Creating Modules
 - o VB Editor & Layout

Form Controls

- Command Buttons
- Check Boxes
- Radio Buttons

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- Dropdown boxes
- Scroll Bars
 - o Used with OFFSET

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