

# ADVANCED EXCEL AND DASHBOARD MASTERCLASS



**Learn the Best Tricks to Transform Data into Information, and Become an Excel Guru**

## Course overview

Excel Dashboards are used to convey vital business information to senior management, partners and customers. In our three-day Masterclass, learn how to create stunning, world-class Excel dashboards. Along the way, you will learn how to use various advanced features in Excel so that you can save time and look good in front of your bosses and colleagues. It will also focus on Data Analysis, latest on Pivot Tables etc.... This is a unique and practical hands-on master class designed to improve the reporting and presentation of key performance and financial information in reports, including dashboards. It also appeals to those in finance or management who need to increase the effectiveness and accuracy of the reports they generate and reduce the amount of effort required to generate them.

## What should you have?

### Suggested Skill Level

To benefit the most from this workshop, you need to have intermediate level working knowledge of MS Excel.

Understanding of basic business terminology and reporting situations.

### SOFTWARE

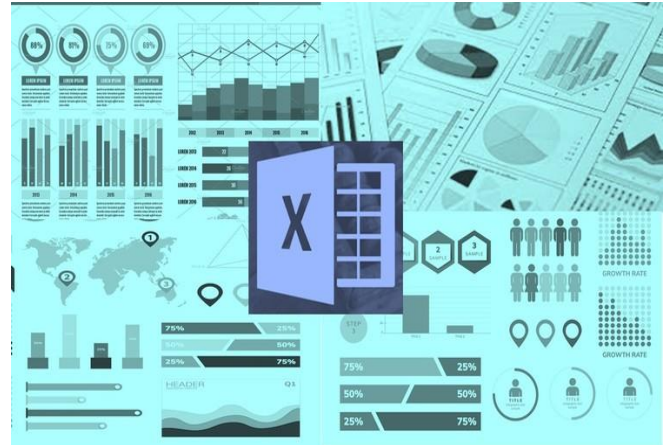
This Masterclass is run in a specialist training venue with workstations provided. This course is demonstrated using Microsoft Excel 2013, 2016, Office 365 but students can use older versions if they prefer. Delegates may also bring their own laptops.

**Pretoria Manhattan Hotel: 26 – 28 June 2019**

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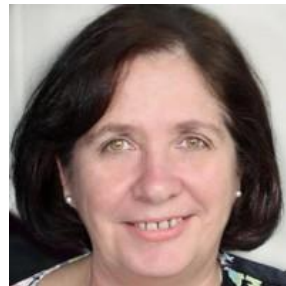
## Benefits of attending

- Exposure to best-in-class dashboard techniques, design ideas and practical tips
- Tips and ideas on using Excel better
- USB stick with Example workbooks, PDF guides and videos
- Access to selected videos and material
- Networking opportunities with fellow professionals and the course facilitator
- Email support for your Excel questions for three months



## Who should attend?

- Managers, Systems and Reporting Analysts
- Business Analysts
- Data Analysts
- Records Officers
- Project Coordinators
- Office Managers/HR Officers
- Personal Assistants, Administrators
- Business Intelligence Professionals
- Officers in: Sales, Finance, Marketing or Customer Service



## Facilitator: Dawn Williams

Teaching office professionals to be organised and productive by maximising the use of MS Office and applying soft skills. Teaching delegates how to stress less, get the job done, save time and money!

Dawn believes that one of the biggest “time wasters” in the office is not knowing what your software can do for you. People spend unnecessary time doing routine jobs manually when they can be automated, or spend hours editing documents when it should take minutes. By combining soft skills with technology - office professionals can make an IMPACT!



# ADVANCED EXCEL AND DASHBOARD MASTERCLASS

## Day One

### Creating charts

- Creating a chart sheet and embedded chart
- Working with embedded charts
- Repositioning Charts
- Useful keyboard shortcuts for editing charts
- Understanding the chart modes of operation and chart drag and drop

### Understanding Management Dashboards

- What is a dashboard?
- Principles of great dashboard design

### Advanced Power Charting Techniques

- Thermometer Chart
- Doughnut Chart and Pareto Chart
- Versatile management dashboards

### Excel Charting Principles and Advice

- Overview of different chart types
- Editing and formatting your charts

## Day Two

### Dashboard Macros

- Simple and Complex Macros
- Dynamic Dashboards using Macros

### Excel formulas for analysis and dashboards

- Structural references & Tables
- Summing and finding data based on conditions
- Using lookups to drive dashboards

### Creating your Excel Dashboards

- Dashboards Do's and Don'ts
- Merging and Consolidating Data Using Shapes to make Charts more attractive
- Data Layout, Creating Dynamic Dashboards
- Using Alerts to draw attention to dashboards

### Working with your Data

- Understanding Data Quality issues
- Gathering data from different sources
- Linking Data
- Merging and Consolidating Data
- Excel Hints and Tips when working with data

### Building our first dashboard – Hands on exercise

- Defining goals
- Preparing a sketch and Designing the data sheet
- Building the calculations sheet
- Setting up the dashboard

## Day Three

### Analysing Data

- Using dashboards with Excel Pivot Tables
- Using external data sources such as The Web
- Dashboarding with Microsoft Access information.

### Practical Dashboard Creation: Hands-on Dashboard Creation

- Creating a Sales Dashboard
- Creating a Services Dashboard
- Creating an HR Dashboard

### More Dashboarding

- Creating KPI Dashboards
- Project Management
- Dashboards Publishing Excel Dashboards to the Web

### Tips to improve your Excel Dashboard

- Go to the point, solve a business need
- Don't use formulas
- Abuse Pivot Tables
- Use named ranges
- Use as many sheets as you need, or more
- Use Auto Shaped as placeholders
- Get rid of junk
- Implement some level of interaction
- Document your work
- Bonus tip: there is always something missing...

### Advanced charting techniques

- Budget vs. Actual comparison charts
- Secondary axis & combination charts
- Waterfall chart
- Highlighting chart data as needed

# Registration Form

## Authorisation and company details:

The signatory must be authorized to sign on behalf of the stated company. I acknowledge that I have read and understood all the Payment Methods, Policies and Terms & Conditions.

**Company:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**VAT#:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Designation:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Booking Date:** \_\_\_\_\_

## Registration details:

Delegate 1 Details:

**Name:** \_\_\_\_\_

**Designation:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Contact #:** \_\_\_\_\_

Delegate 2 Details:

**Name:** \_\_\_\_\_

**Designation:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Contact #:** \_\_\_\_\_

Delegate 3 Details:

**Name:** \_\_\_\_\_

**Designation:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Contact #:** \_\_\_\_\_

## Company Details

Centre for Certified Professional Qualifications (Pty)

Ltd Company Registration: 2017/092131/07

Bank: First National Bank

Branch: Killarney

Branch Code: 256205

Account Number: 62680934520

CSD Supplier Number: MAAA0462533

Price Per Delegate: R8999.00 (excluding vat)

### TERMS AND CONDITIONS

Accepted applications to attend the Envision Int. Conference or Training Course("Event") are in every case subject to these terms and conditions.

**PAYMENT TERMS** – To secure your registration, payment must be made in full upon receipt of invoice. **CONFIRMATION OF REGISTRATION**– Application of registration is binding upon signature by the authorized company signatory, however, CCPQ, reserves the right to reject/refuse or accept/confirm applications to the event, should payment not be received (further to the aforesaid, applications may be treated by CCPQ as having lapsed should payment not be received within 10 (ten) days of invoice date. **RIGHT OF ADMISSION**– CCPQ reserves the right to refuse admission to the Event where evidence of full payment cannot be produced. Included in conference/course fee are lunch, refreshments provided by CCPQ and detailed conference/course material as CCPQ deems appropriate. Views of Speakers at any Conference or Training Course are their own and do not reflect the views of ENVISIONINT., it's employees, agents or contractors. **DELEGATE SUBSTITUTIONS** – maybe made at any time without incurring additional charges to be notified in writing of any such changes. **DELEGATE CANCELLATION** – Must be received by CCPQ in writing and cancellations received within 15 working days before event start-date, entitle the cancelling delegate to a full credit of amounts paid to date of cancellation which may only be redeemed against the cost of any future CCPQ Event, within one year from such date of cancellation, irrespective of the date of signature of the registration contract, any cancellations received less than 15 working days before the Event start date, do not entitle the cancelling delegate to any refund or credit note and the full fee must be paid; Nonattendance without cancellation notice is treated as a cancellation with no entitlement to any refund or credit. **CCPQ SUBSTITUTIONS AND CANCELLATIONS** Speakers and Topics are confirmed at the time of publishing of the program, but CCPQ reserves the right to substitute, alter or cancel advertised Speakers and / or topics in appropriate circumstances. Should CCPQ Cancel an Event, delegate payments as the date of cancellation will be credited to a future CCPQ Event (such credit is available for up to one year from the date of cancellation) Should CCPQ Postpone an Event, such payments at the postponement date will be credited towards the rescheduled Event, if the delegate is unable to attend the rescheduled Event, the delegate will receive a full credit of amounts paid up to the date of postponement which may only be redeemed against the cost of any future CCPQ Event (and such credit will be available for one year from the date of postponement). No cash refunds whatsoever are available for cancellations or postponements. **INDEMNITY** – CCPQ is absorbed from and indemnified against any loss or damage as a result of substitution, alteration or cancellation/postponement of an Event arising from any cause whatsoever, including, without limitation, any fortuitous event, Act of GOD, unforeseen occurrence or any other event that renders performance of the Event impracticable or impossible. A "fortuitous event" includes, but is not limited to, war, fire, flood, riot, industrial action, extreme weather or another emergency. **WARRANTY OF AUTHORITY**– The authorizing company approved signatory warrants that he/she has the authority to sign this application and agrees to be personally liable to CCPQ for payments falling due pursuant there to should such warranty be breached.

