Contents Overview – 1 day course

Our Excel Analysis and Dashboards course requires you to get your hands dirty. We work through multiple exercises so you can learn to master the tools of data modelling, analysis and building visuals for effective Dashboards. We complete the course by working through a Case Study pulling all the aspects we teach on the day together so you have a fully worked example to take back to the office.

- **Business Case Study** – You will start with raw sales data for a Comedy Roadshow. We model the data using PowerPivot, creating relationships and the necessary calculations to build our interactive Dashboard for assessing Sales performance and profitability across various cities.

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**Data Modelling**
- Starting a dataset in Excel
- Multiple Tables
- Data Modelling

**Get & Transform**
- Using Get & Transform
- Why Use Get & Transform
- Understanding the Navigator Pane
- Creating a New Query from a File
- Creating a New Query from the Web
- Understanding the Query Editor
- Displaying the Query Editor
- Managing Data Columns
- Reducing Data Rows
- Adding A Data Column
- Transforming Data
- Editing Query Steps
- Merging Queries
- Working with Merged Queries
- Saving and Sharing Queries
- The Advanced Editor

**Power Pivot**
- Lists, Tables, and Relational Databases
- The Excel Data Model
- Power Pivot and The Data Model
- Understanding Relational Data
- Common Sense Data Modelling
- Enabling Power Pivot
- Connecting to a Data Source
- Working with The Data Model
- Working with Data Model Fields
- Changing A Power Pivot View
- Creating A Data Model PivotTable
- Using Related Power Pivot Fields
- Creating A Calculated Field
- Creating A Concatenated Field
- Formatting Data Model Fields
- Using Calculated Fields
- Creating A Timeline
- Adding Slicers

**Data Validation**
- Validation Criteria
- Input Messages & Error Messages
- Drop-Down Lists
- Formulas
- Customised Validation Criteria
- Creating a Number Range
- Validation
- Testing a Validation
- Creating an Error Message
- Creating a Drop Down List
- Using Formulas as Validation Criteria
- Circling Invalid Data
- Removing Invalid Circles

**Great functions for Analysis**
- Understanding Data Lookup Functions
- Data Area

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Analysis and Dashboards

**Controls**
- Understanding Types of Controls
- Understanding How Controls Work
- Preparing a Worksheet for Controls
- Adding a Combo Box Control
- Changing Control Properties
- Using the Cell Link to Display the Selection
- Adding a List Box Control
- Adding a Scroll Bar Control
- Adding a Spin Button Control
- Adding Option Button Controls
- Adding a Group Box Control
- Adding a Check Box Control
- Protecting a Worksheet with Controls

**Using Sparklines to show trends**
- What is a Sparkline?
- Types of Sparklines
- Showing Sparklines only
- Specifying a Date Axis
- Hidden Data and Sparklines
- Sparklines and Targets

**Using Conditional formatting**
- Using Conditional Formatting with a Dashboard
- Top 10 & Custom Formatting
- Data Bars
- Show data bars outside the data cell
- Colour Scales
- Icon Sets
- Creating Rules Based Icon Set
- Removing unnecessary icons
- Using Symbols in Reporting
- Using the Camera Tool

**Pivot Tables**
- Structure of Pivot Tables
- Using Compound Fields
- Counting in A PivotTable
- Formatting PivotTable Values
- Working with Grand Total
- Working with PivotTable Subtotals
- Finding the Percentage of Total
- Finding the Difference From Grouping in PivotTable Reports
- Creating Running Totals
- Creating Calculated Fields
- Providing Custom Names
- Creating Calculated Items
- PivotTable Options
- Sorting in a PivotTable
- Top and Bottom Views
- Date Grouping Options
- Hiding or Showing Data Items
- Conditional Formatting and Sparklines in Pivot Tables
- Pivot Caches and File Size

**Pivot Charts**
- Inserting A PivotChart
- Defining the PivotChart Structure
- Changing the PivotChart Type
- Using the PivotChart Filter Field Buttons
- Moving PivotCharts to Chart Sheets

**Slicers in Reports**
- What are Slicers?
- Creating Slicers
- Timeline Slicer
- Renaming Pivot Tables
- Using a Slicer on Multiple Pivot Tables

**Trending Charts**
- Why do we use Trending Charts?
- Appropriate Chart Types for Trending
- Vertical or Y-Axis Scales
- Chart Titles linking to a Cell Comparative Trending

**Labelling**
- Using a Secondary Axis
- Formatting Key Data Points
- How to display Actuals and Forecasts
- Averages and Data Smoothing

**Other Report Charts**
- Top and Bottom Charts
- How to show Top or Bottom Values in Data Labels
- Waterfall Charts

**Histograms**
- Creating Histograms using Formulas
- Creating Histograms using Pivot Tables
- Creating Histograms using Excel’s Statistical Charts

**Charting performance against a target**
- Performance against Targets
- Creating Thermometer Charts
- Bullet Graph

**Defining Dashboards**
- Purpose of a Dashboard
- Working out what is needed
- What are the data sources
- Will the audience need further data to drill-down to?
- How often will/can the data refresh?
- Does it need to be maintained?
- How easy will it be to maintain?

**Dashboard Design Principles**
- Thirteen common mistakes in dashboard design
Analysis and Dashboards

Making an Interface
- Using Macros with Dashboards
- Recording a Macro
- Navigation using Macros
- Macros to Change Chart types
- Macros and Pivots
- Form Controls with Dashboards

Pulling it all together
Case Study – Build a Dashboard from raw data to finished product.