

Data Analysis & Dashboard Reporting in Excel

Discover how to "tame" your data and make it work for you! With the huge amount of data available to us every day, a well-built and designed dashboard reports is one of the best ways to interpret and communicate large quantities of information. Learn how to synthesise information into a logical framework, summarise it into a meaningful format, and then display the summary into easy-to-read tables and graphs.

Learning Objectives

Many of us struggle to make sense of all the data that is available in this information age. With such a deluge of reports and statistics which don't mean anything or can't be made sense of, it's no wonder that data is often misinterpreted or not communicated at all. Learn how to synthesise information into a logical framework, summarise it into a meaningful format, and then display the summary into easy-to-read tables and graphs. Covering dashboard reporting, balanced scorecards, visual design of charts and tables, we will also discuss the new charting and analysis features of Excel 2013 and 2016.

This course is very hands-on and practical. Each participant will be expected to create their own reports, charts and models utilising the tools and techniques covered during the course.

By the end of the day, participants will:

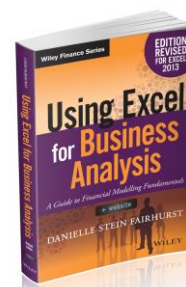
Understand the principles of data analysis

- Learn to synthesise and summarise information into a logical framework.
- Consider when to use a chart or a table
- Know how to use visual effects to improve their reports and presentations
- Explore how to summarise, present and communicate data clearly and concisely
- Learn the principles of good dashboard design and presenting data graphically
- Discover the tools to analyse data & build reports using your existing Excel tools and skills (and perhaps a few you didn't know you had!)

Public courses running in Sydney, Melbourne and Brisbane

See the [schedule](#) for course dates.

Sign up and receive a revised edition of '[Using Excel for Business Analysis](#)' by Danielle Stein Fairhurst.



W: www.plumsolutions.com.au/schedule

E: info@plumsolutions.com.au T: 1300 852 215

Who should attend this course?

This course is aimed at managers and other professionals who need to create dashboards and other reports in order to analyse interpret and present information. It is expected that students should have had some exposure to business, finance and reporting principles. This course builds on students' **existing knowledge of Excel** tools and functions and incorporates these into complex and dynamic reports and dashboards.

Delivery Format

This course is available as a one-day [public workshop](#) in Sydney, Melbourne or Brisbane, or [in-house](#). Each participant receives a copy of **Using Excel for Business Analysis** as a reference for all the tools and techniques covered in the course.

At each step during the course, participants build and practice each formula, tool and technique.

Prerequisites

The course material includes extensive use of Excel and participants will gain the maximum benefit from this course if they are already competent spreadsheet users. It is designed for users who do use Excel on a regular basis, and are comfortable with using its tools and functions.

At minimum, it is assumed that participants will know how to:

- Navigate confidently in Excel
- Use absolute cell references (e.g. =\$A\$1)
- Create and use advanced Excel tools and functions on a regular basis

Course Agenda

Data Analysis Tools

- **Tool selection**
Evaluation of Excel vs. other BI alternatives, including Power Pivot in terms of speed, usability and cost
- **What's new in Office 2016**
Technical differences between versions. Considerations when building data models for users of different versions.
- **Shortcuts**
Speed up your data manipulation in Excel with the use of shortcuts

**Now updated
for Excel 2016!**

**Learn how to 'tame' your data
and make it work for you in this
intensive one-day workshop for
only **\$900 + GST**.**

W: www.plumsolutions.com.au/schedule

E: info@plumsolutions.com.au T: 1300 852 215

- **Tables & PivotTables**
Analysing data more quickly and efficiently using structured reference table and summarise using PivotTables
- **Power Pivot**
Demonstration of the Microsoft add-in to Excel, PowerPivot

Using Excel as a Data Analysis Tool

- **Essential Excel tools & functions**
Overview of must-know tools and functions for data analysis such as LOOKUPS, logical and aggregation functions
- **Creating a robust formula**
Nest functions together to create succinct and robust formulas
- **Working with text**
Using text and concatenation functions to string numbers and text together to show in a dashboard or chart.
- **Cleaning your data**
Tools and tricks to clean data before using it to build a report or dashboard

Charting in Excel

- **Working with charts in Excel 2016**
Overview of new charting features of Excel
- **Creating a Combo or Bubble chart**
Show correlations by charting on different axes and chart types or bubble charts
- **Waterfall charts**
Comparison of different methods of waterfall charts, create your own template for future use.
- **Charting with dynamic ranges**
Explore various methods for dealing with varying data ranges in chart data sources

Chart and Table Design

- **Tables vs. Charts/Graphs**
Deciding the best method for visual display
- **Visual Design**
Design principles for effective graphic data presentation
- **Which chart?**
Choosing the correct chart to use to display different data and messages from your findings
- **Charting dos and don'ts**
Tips and tricks for a quicker chart build and was to making charts more robust and automated

Dashboard Reporting

- **What is a dashboard?**
History and definition of dashboard reports

**Got a few participants?
Run this course in-house!**

What past students have to say about this course:

- *Course was well balanced with practice and theory. Presenter was very knowledgeable and topics were easy to understand.*
- *The content is packed but presented in a simple, informative and effective way.*
- *"A very comprehensive course delivered in a light-hearted manner. This course is suitable for all. The instructor was very professional."*

W: www.plumsolutions.com.au/schedule

E: info@plumsolutions.com.au T: 1300 852 215

- **Purpose and benefits of Dashboards**
Why dashboards are so popular
- **Common mistakes when building a Dashboard**
Critique of poorly built dashboards
- **Creating a Dashboard in Excel**
Using provided data, create your own dashboard in Excel

Dashboard Design

- **Principles of dashboard design best practice**
Dashboard layout, colour choice and display principles
- **Selecting the correct chart to display data**
Getting your message across most effectively by choosing the correct medium of display
- **Adding icons and images to dashboards**
Quick and easy ways to add automated colour and icons to your reports
- **Effective use of colour and logos**
Ways to make an impact with colour
- **Making dashboards dynamic**
Save time by using clever formulas which automatically update information on the dashboard

Practical exercise: Using your own data, or examples provided, create a dynamic dashboard template incorporating the tools and techniques discussed during the course.

Prerequisites

The course material includes extensive use of Excel and participants will gain the maximum benefit from this course if they are already competent spreadsheet users. It is designed for users who do use Excel on a regular basis, and are comfortable with using its tools and functions.

At minimum, it is assumed that participants will know how to:

- Navigate confidently in Excel
- Use absolute cell references (e.g. =\$A\$1)
- Create and use advanced Excel tools and functions on a regular basis

Software used

Public courses are run in a computer laboratory with workstations provided. Participants may bring their own laptops if they prefer. The course is demonstrated using Microsoft Excel 2016, but participants can use any version of Excel if they prefer. Course materials contain instructions for different versions, and Excel 2011 for Mac users are also catered for. Those who would like to use a Mac are most welcome to bring their own laptops.

Meet your facilitator, [Danielle Stein Fairhurst](#), financial modelling specialist and author of '[Using Excel for Business Analysis](#)'



Payments can be made by credit card, cheque or bank deposit and must be received two weeks prior to the training course. Cancellations or transfers can only be accepted prior to this date. If you are unable to attend a course, a substitute attendee is welcome in your place at any time.

W: www.plumsolutions.com.au/schedule

E: info@plumsolutions.com.au T: 1300 852 215