

**MS EXCEL DASHBOARDS**  
**(Microsoft Exam ELK91 – 076\_rev1.0 optional)**  
**2 Days**

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## 1. UNIT STANDARDS

### **Use a Graphical User Interface (GUI)-based spreadsheet application to solve a given problem**

Unit Standard:	116940
NQF Level:	3
Credits:	6

## 2. PROGRAMME OVERVIEW

Whether you need to crunch numbers for sales, inventory, information technology, human resources, or other organizational purposes and departments, the ability to get the right information to the right people at the right time can create a powerful competitive advantage. After all, the world runs on data more than ever before and that's a trend not likely to change, or even slow down, any time soon. But with so much data available and being created on a nearly constant basis, the ability to make sense of that data becomes more critical and challenging with every passing day.

You already know how to get Excel to perform simple calculations and how to modify your workbooks and worksheets to make them easier to read, interpret, and present to others. But Excel is capable of doing so much more. To gain a truly competitive edge, you need to be able to extract actionable organizational intelligence from your raw data and present it in a visual format that enables decision makers to view key trends and conclusions at a glance. And that's exactly what this course aims to help you do.

This course builds upon the foundational knowledge presented in the Microsoft Office Excel 2010 and will help start you down the road to creating advanced workbooks and worksheets that you can use to create dashboards. The ability to analyze massive amounts of data, extract actionable intelligence from it, and present that information to decision makers is the cornerstone of driving a successful organization that is able to compete at a high level.

You will learn how to create well-designed Excel dashboards enabling you to view key KPI's or metric's and make quick decisions informed by data.

## 3. TARGET AUDIENCE

This programme has been compiled specifically for;

- Business Professionals who use Excel to create dashboards and reports
- Data analysts
- Students who wish to begin taking advantage of some of the higher-level functionality in Excel to summarize table data in Excel by using functions, charts, and pivot tables and display those elements in a dashboard format.

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MICT, MerSeta, BankSeta, ICB (Fasset), W&R, ETDP, Services Seta, LGSeta & Growing...*

## 4. PROGRAMME OBJECTIVE

This Microsoft Excel Dashboard course comes with templates, tools and checklists that can be applied directly to your Excel reports.

### You will Learn

- Creating advanced formulas.
- Automating workbook functionality.
- Applying conditional logic.
- Visualizing data by using basic charts.
- Implementing advanced charting techniques.
- Analyzing data by using PivotTables, slicers, and PivotCharts.
- Excel dashboard & Report templates
- Checklists and design guidelines
- Excel workbook to follow along

## 5. PRE-REQUISITES

- Excel Pre-Assessment
- Familiarity with Excel to Intermediate level
- You are able to write basic formulas and are familiar with the Excel spreadsheet environment

## 6. PROGRAMME OUTLINE

### OVERVIEW OF EXCEL

Module 1: Dashboard Architecture	Module 2: Developing Chart Techniques
Introduction A Dashboard Primer Create a Mockup (Wireframe) in Excel Useful Excel Keyboard Shortcuts 4 Time-Saving Tips for Excel Proper Spreadsheet Architecture & Workflow	Chart Overview Add Total Values to Stacked Column Charts Add Series Labels Inside Chart Error Bars for Additional Control Changing Chart Ranges Infographics in Excel Dynamic Map Chart with Drop-down
Module 3: Dashboard Source Data, Formats & Formula	Module 4: Form Controls for Interactive Dashboards
Locating your source data Source: Text/Data/CSV File Source: Excel Add-ins	Introduction to Form Controls – Active X vs. Form Controls Combo Box Check Box Spin Button Option Button List Box Scroll Bar (Scroll through Graphs & Tables)

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<p>Module 5: Report Design</p>	<p>Module 6: Data analysis with Power Pivot and Slicers</p>
<p>Layout – Best Practice          Colour – Best Practice          10 Concrete Design Tips for Better Excel Reports</p>	<p>Variances in Pivot Table          Conditional Formatting in Pivot Table          Pivot Table as Part of Dashboard Report          Pivot Charts in Dashboards          Automatically Refresh Pivot Table with Simple VBA code          Pivot Slicers as Buttons (also without Pivot Tables)          Column Chart Controlled by Slicer Buttons          Slicer Custom Sorting &amp; Design          Dynamic Comments with Slicer Selection          Adding Shapes to (Pivot) Charts          Overcoming Pivot Chart Limitations          Introduction to the Camera Tool          Advanced Camera - Lookups on Pictures          Dashboard Complete          Final Touches</p>
<p>Module 7: Dashboard Formula Toolbox</p>	<p>Module 8: KPI Dashboard</p>
<p>Excel Formulas          Index Match for Complex Lookups          Index for Dynamic List Selection          Drop-down Lists          Conditional formatting          Text function for Formatting          Extract Data Efficiently from Pivot Tables          Indirect for Flexible References          Choose &amp; Name Manager for Flexible Ranges</p>	<p>KPI Dashboard Overview          Dashboard Wireframe          Spreadsheet Setup          Setup of Raw Data Sheet          Setup of Calculation sheet          Scrolling Table &amp; Bars         <ul style="list-style-type: none"> <li>• Setup a Combo Box to Ease Selection</li> <li>• Complex Lookup with Index &amp; Match</li> <li>• Scrolling Data Table</li> <li>• Conditionally Formatted Data Bars</li> <li>• Arrows for Deviations</li> <li>• Formatting of Scrolling Data Table</li> <li>• Dynamic Headers</li> <li>• Conditional Comments in Header</li> <li>• Adding Shapes &amp; Text boxes</li> </ul>         Top/Bottom KPI Based on Selection         <ul style="list-style-type: none"> <li>• Show Top 6 Matches with Unique Identifier</li> <li>• List Box to Select KPI for Top 6 Matches</li> <li>• Option Button to Toggle Between Top OR Bottom 6</li> <li>• Actual to Budget Comparison - Sorted Bars with Error Bar Technique</li> <li>• Finalize Top / Bottom Report on Dashboard</li> <li>• Scrolling Line Chart with Check Boxes</li> <li>• Complex Lookup to Prepare data for Scrolling Chart</li> <li>• Scroll-able Line Chart</li> <li>• Trick to Avoid Crashing Lines in Line Chart</li> <li>• Check Box to Control Series Visibility (Hide or Show)</li> <li>• Line Series Tweaks for Better Readability</li> <li>• Finalize Profit Comparison Section on Dashboard</li> </ul>         Final Touches         <ul style="list-style-type: none"> <li>• Restrict Dashboard Area and Format for Printing</li> <li>• Dashboard Protection, Hyperlinks and Final Touches</li> </ul> </p>

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