



PST TRAINING (PTY) LTD

PST Training (Pty) Ltd

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MS Excel Dashboard Report Design

Overview

This one day course teaches delegates how to design and build interactive dashboards in Excel that communicate complex information clearly. Participants will explore dashboard design principles, learn how to model data effectively, and harness advanced functions such as VLOOKUP, HLOOKUP, SUMIF, SUMPRODUCT and CHOOSE. The course covers building PivotTables, creating a variety of charts, using drop down lists and Sparklines, and incorporating form controls to filter data. Learners will leave with the ability to create professional dashboards that support fast, informed decision making.

Objectives

- Master dashboard design principles and data modelling best practices.
- Use functions (VLOOKUP, HLOOKUP, SUMIF, SUMPRODUCT, CHOOSE) to prepare data for analysis.
- Create and customise PivotTables that feed the dashboard.
- Design charts, including dual axis charts and advanced chart types.
- Develop dynamic drop down lists and dependent lists.
- Add Sparklines to display trends within cells.
- Apply conditional formatting to create data alerts.
- Use form controls (combo boxes, list boxes, checkboxes) to allow user interaction.
- Secure your dashboards by protecting worksheets and workbooks.

Course Prerequisite

Intermediate knowledge of Excel; no prior experience with PivotTables is necessary.

Language of Delivery

English

Delivery Methods

Facilitated by a competent and experienced subject matter trainer using interactive, experiential techniques such as questions, discussions, demonstrations, exercises, and assessments.

Who should attend?

Ideal for managers and professionals who need to design and present data visually, such as:

- Finance Managers and Analysts
- Marketing and Sales Managers
- Operations Managers and Project Managers
- Business and Data Analysts
- Senior Administrators and Report Developers
- Professionals handling large datasets or complex calculations

Course Outline

This course consists of the following 7 modules	
Module 1	Introduction to Dashboards • Purpose and benefits of dashboards • Establishing user requirements and data sources • Dashboard design principles • Developing your data model and best practices
Module 2	Functions and Data Models • Using VLOOKUP, HLOOKUP, SUMIF, SUMPRODUCT and CHOOSE functions • Applying these functions within a data model • Creating drop down lists and dependent lists • Converting ranges to Excel tables and using smart tables
Module 3	PivotTables for Dashboards • Creating PivotTables and exploring summary functions • Adding calculated fields and items • Editing and deleting calculated fields and items • Renaming fields and using GetPivotData
Module 4	Charting Fundamentals • Selecting appropriate chart types • Changing colours, borders and number formats • Customising axes and using advanced chart features • Designing dual axis charts • Removing unnecessary chart elements

Module 5	Advanced Charting • Charting non contiguous ranges • Charting data from different sheets • Working with multiple axes
Module 6	Validation, Lists and Sparklines • Using the CHOOSE function with data validation • Creating and testing dependent drop down lists • Creating lists from a series of numbers • Building and formatting Sparklines • Applying conditional formatting to create alerts
Module 7	Form Controls and Security • Using form controls (combo boxes, list boxes, checkboxes) • Employing the INDEX function to drive controls • Renaming controls and sharing dashboards externally • Limiting access to specific worksheet ranges • Protecting the workbook structure

Additional Information

Duration	1 Day	
Includes	• Comprehensive Manual • Lunch & Refreshments (not applicable to on-site / online training)	• Electronic Certificate (on successful completion of the course) • Electronic Delegate Feedback Questionnaire