

# Excel Level 5 – PivotTable and Dashboard Reporting

## What Can You Expect?

This course is aimed at learners who need to analyse information utilising PivotTables as the foundation for Dashboard reports. Dashboard reports present business information as a clear, concise picture that is easy to read, understand, and update.

A variety of results can be condensed into a single page for comparison purposes, simplifying and reducing the time taken to report on organisational performance.

## What Is Required From You?

Learners should have successfully completed Excel courses to an intermediate level or possess the equivalent knowledge. They should also have the ability to create mathematical formulas and formulas using basic functions (SUM, AVERAGE, COUNT, MAX, MIN). It is important that the learner is working on Microsoft Office 2013 or higher.

## 2 Day Course Content

### Preparation of Source Data

- Databases - What they are and how they work
- Entering information correctly into Excel
- Setting up a Database Table in Excel
- Custom Formats
- Using FlashFill
- Using Format as Table
- Using Conditional Format
- Creating Sparklines

### PivotTables

- Understand the layout of a PivotTable
- Create a PivotTable
- Navigate the PivotTable Field Lists
- Modify Design options of a PivotTable
- Using Analysis Tools to analyse the information in different ways
- Customise a PivotTable
- Create a Formula in a PivotTable
- Using Slicers

### PivotCharts

- Create PivotCharts
- Format PivotCharts
- Edit PivotCharts
- Move and Size PivotCharts
- Using chart options to change the design and layout of the Chart

### Dashboard

- Overview of what a dashboard is
- Create a Dashboard with PivotTables and Charts
- Create a Dashboard with PivotCharts Slicers and Timelines
- Using PowerView to display Charts
- An Introduction into using PowerPivots

## What Will I Take Back To Work With Me?

You will be able to work efficiently and effectively within databases and you will be able to produce instant results using your newly founded PivotTable skills and professional dashboards.

