informatech

ACCOUNTING AND FINANCE | COURSE

# Dynamic Business Reports and Dashboards Using Excel

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# Course content

## Why Attend

Business professionals are frequently required to prepare management reports, scorecards, and dashboards. Attending this course will help you reach advanced Excel levels allowing you to produce such important reports. The course starts with pivot tables, the most important tool ever created to perform data reporting, analysis and reconciliation. It then continues with high level modeling techniques, integration and report visualization, and it ends with automation. Your take-away is guaranteed to add value to your daily and periodic tasks. This course is a must for every intermediate-level Excel user.

15% of the course is theory based. 85% uses MS Excel as a powerful tool to design and prepare dynamic business reports, dashboards, and scorecards. Groups and individuals will be required to complete exercises, case studies and projects on a daily basis.

By the end of the course, participants will be able to:

• Use their Excel expertise in data slicing and dicing, data massaging, data aggregation, data integration with Access, web, text, SQL, and other databases using pivot tables

• Perform advanced and dynamic data validations

• Design outstanding visualization charts, dashboards, scorecards, and flash reports

• Develop master-level report solutions using advanced form controls and buttons

• Record, write and edit powerful macros that will perform routine tasks in no-time

Business professionals, accountants, finance analysts, senior and junior accountants, business analysts, accounting and finance professionals, research professionals, marketing and sales, administrative staff, supervisors, general staff from any function who need to learn and apply state-of-the-art techniques to their daily business reporting, reconciliations, and analysis. Pre-requisite: Intermediate-level Excel knowledge or attendance of Meirc's Next Generation Excel course.

• Reporting, analyzing, and reconciling

• Data modeling

• Integration with external data sources

• Report structuring techniques

• Automation and macros

# Course content

## Why Attend

• Charting and visualization techniques

## Course outline

### Essential reporting requirement skills

• The 20 rules of pivot tables and pivot charts

• Slicer techniques

• Advanced pivot charts techniques

• Multiple consolidation ranges

• Importing text files

• Connecting to access databases

• Connecting to SQL databases

• Customizing connections properties

### Advanced data structuring techniques

• Custom and advanced data validation

• Creating and managing innovative conditional formatting

• Dependent drop down list

• Data validation with conditional formatting

• Data entry form

### Charting and visualization techniques

• Creating dynamic labels

• Using the camera tool

# Course content

## Course outline

- Working with formula-driven visualizations
- Using fancy fonts
- Working with sparklines
- Fancy thermometer charts
- Thermometer chart
- Performance against chart range

### Building report solutions

- Conceptualizing and understanding report solutions
- Developing a report solution
- Configuring spreadsheet report data options
- Enabling background refresh
- Refreshing data when opening the file
- Combo-box modeling
- List-box modeling
- Spinner
- Option-button modeling
- Check-box data models
- Combo box modeling

### Macro charged reporting

- Recording, editing, testing VBA macros
- Building a macro driven reconciliation program
- Building budget variance reporting program

# Course content

## Course outline

• Building a vendor and invoice analysis report

# Seminar dates

## Available seminar dates

Live dates and pricing for Dynamic Business Reports and Dashboards Using Excel generated from the course details page.

| Date | Location | Format | Fee |
|---|---|---|---|
| 7 - 11 September 2026 | Barcelona - Spain | Classroom | **€3,080.-** |
| 12 - 16 October 2026 | London - U.K | Classroom | **€3,360.-** |
| 9 - 13 November 2026 | Munich - Germany | Classroom | **€2,760.-** |
| 14 - 18 December 2026 | Kuala lumpur - Malaysia | Classroom | **€1,800.-** |
| 18 - 22 January 2027 | Frankfurt - Germany | Classroom | **€2,600.-** |
| 15 - 19 February 2027 | Rome - Italy | Classroom | **€3,400.-** |
| 15 - 19 March 2027 | Kuala lumpur - Malaysia | Classroom | **€1,800.-** |
| 19 - 23 April 2027 | Barcelona - Spain | Classroom | **€3,080.-** |
| 17 - 21 May 2027 | London - U.K | Classroom | **€3,360.-** |
| 21 - 25 June 2027 | Munich - Germany | Classroom | **€3,400.-** |
| 19 - 23 July 2027 | Kuala lumpur - Malaysia | Classroom | **€1,800.-** |
| 16 - 20 August 2027 | Frankfurt - Germany | Classroom | **€2,600.-** |
| 20 - 24 September 2027 | Rome - Italy | Classroom | **€3,400.-** |
| 18 - 22 October 2027 | Kuala lumpur - Malaysia | Classroom | **€1,800.-** |
| 15 - 19 November 2027 | Barcelona - Spain | Classroom | **€3,080.-** |
| 20 - 24 December 2027 | London - U.K | Classroom | **€3,360.-** |