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
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.-**

Live online option	Online delivery is available at €1,850.-.