Using Excel in Business Reports and Dashboards

Berlin (Germany)

17 - 21 November 2025

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Using Excel in Business Reports and Dashboards

Introduction

Excel is a powerful tool for preparing business reports and creating dashboards. In this course, we will explore the features and functions of Excel for report creation and dashboard design. We will also delve into the importance of data analysis and visualization in decision-making.

Course Objectives

- Gain a comprehensive understanding of Excel features and functions for report creation and dashboard design.

- Learn best practices for organizing and managing data in Excel.

- Develop skills in advanced data analysis, processing, and visualization using Excel tools.

- Create dynamic and interactive reports and dashboards that effectively convey insights.

- Enhance efficiency and productivity through automation and advanced Excel techniques.

Course Outlines

Day 1

- Introduction to Excel for business reporting and dashboards.
- Navigating the Excel interface and essential functions.
- Formatting and organizing data for effective report preparation.
- Introduction to Excel formulas and functions for data analysis.
- Creating basic charts and visualizations in Excel.

Day 2

- Advanced data processing techniques using Excel functions.
- Working with pivot tables and pivot charts for dynamic analysis.
- Using conditional formatting to highlight key insights.
- Data validation and protection for data integrity.
- Introduction to Excel macros and automation for report creation.

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Day 3

- Advanced data visualization techniques for trend analysis.
- Utilizing sparklines and data bars for effective data presentation.
- Advanced pivot table features for in-depth analysis.
- Data visualization with slicers, timelines, and custom controls.
- Introduction to Power Query for data extraction and transformation.

Day 4

- Creating interactive dashboards using Excel data models.
- Building dynamic reports with formulas and functions.
- Utilizing templates and built-in functions in Excel to enhance reports.
- Integrating external data sources into reports and dashboards.
- Introduction to Power Pivot for advanced data modeling and analysis.

Day 5

- Principles of advanced dashboard design and best practices.
- Incorporating interactive elements like buttons and drop-down menus.
- Creating dynamic charts and visualizations using form controls.
- Sharing and distributing reports and dashboards effectively.
- Course summary and final project presentation.

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