

# Creating interactive dashboards with Microsoft Excel («ME7»)

Learn how to create interactive dashboards using Excel, Power Query, and Power Pivot. Use pivot tables, charts, images, controls, and a little creativity to work with your data dynamically and efficiently.

**Duration:** 2 days

**Price:** 1'290.–

**Course documents:** Digital courseware

## Content

1. Introduction to Dashboards
  - o What are dashboards?
  - o What needs to be considered to make them look professional?
2. PivotTables
  - o Static and dynamic areas
  - o Creating a PivotTable report
  - o Using data slices and timelines
  - o Creating functions and formulas
  - o Sorting and grouping data
  - o Customizing and formatting layouts
  - o Updating data
3. Power Query
  - o Importing data from a variety of sources and locations
  - o Clean up or prepare data
  - o View and combine queries
  - o Visualize data with pivot tables and charts
4. Power Pivot
  - o Import data from multiple data sources
  - o Create and apply relationships between tables
  - o Calculate with PowerPivot (DAX functions)
5. Visual representations
  - o Create charts
  - o Special representations with icons, symbols, images
  - o Formatting
6. Control elements
  - o Size, position, and formatting
  - o Protecting controls
7. Key Performance Indicators (KPIs)
  - o Introduction to KPIs
  - o Examples of KPIs
8. Creating professional dashboards
  - o Define target group, period, level of detail, and time frame
  - o Selecting and defining KPIs
  - o Visuals
  - o Protection and printing

## Key Learnings

- Preparing data from different formats or sources and merging the data with Power Query and Power Pivot
- In-depth knowledge of presenting data in a dashboard with pivot tables, charts, and special themes
- Familiarizing with controls and formula-based techniques for user-friendly and interactive features

## Target audience

- Advanced users who want to display the company's key figures analytically and visually by using dashboards
- People with a basic understanding of business administration who want to keep an eye on the performance of the company
- People that are responsible for having an eye on Key Performance Indicators

## Requirements

You already have some experience with Power Query and Power Pivot. Completion of the following courses or equivalent knowledge is required:

- [Power Query and Power Pivot for data analysis in Excel \(«MEPQPP»\)](#)
- [PivotTables and Data Analysis with Excel \(«MEPT»\)](#)

## Further courses

- [Microsoft Excel for Controllers \(«EBX»\)](#)

## Any questions?

We are happy to advise you on +41 44 447 21 21 or [info@digicomp.ch](mailto:info@digicomp.ch). You can find detailed information about dates on [www.digicomp.ch/courses-microsoft-office/microsoft-office-apps/microsoft-excel/course-creating-interactive-dashboards-with-microsoft-excel](http://www.digicomp.ch/courses-microsoft-office/microsoft-office-apps/microsoft-excel/course-creating-interactive-dashboards-with-microsoft-excel)