

Dynamic Business Reports and Dashboards Using Excel

Professional training programme



SPARK TRAINING

Professional training courses for leaders, specialists, and organizations seeking practical capability development.

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— Workshop Overview

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.

Why Attend

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.

Who Should Attend

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

— Learning Objectives

- 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

Course Outline

DAY
1

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

DAY
2

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

DAY
3

Charting and visualization techniques

- Creating dynamic labels
- Using the camera tool
- Working with formula-driven visualizations
- Using fancy fonts
- Working with sparklines
- Fancy thermometer charts
- Thermometer chart
- Performance against chart range

DAY
4

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

DAY
5

Macro charged reporting

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

- Building budget variance reporting program
- Building a vendor and invoice analysis report

— Upcoming Classroom Dates

DATE	LOCATION	FEE
12 - 16 October 2026	London - United Kingdom	€2,100
9 - 13 November 2026	Munich - Germany	€1,725
14 - 18 December 2026	Kuala Lumpur - Malaysia	€1,400
18 - 22 January 2027	Frankfurt - Germany	€1,625
15 - 19 February 2027	Rome - Italy	€2,125
15 - 19 March 2027	Kuala Lumpur - Malaysia	€1,400
19 - 23 April 2027	Barcelona - Spain	€1,925
17 - 21 May 2027	London - United Kingdom	€2,100

— Certificate and Registration

Participants who attend and complete the full programme receive a SPARK Training Certificate of Completion. For registration, in-house delivery, or availability questions, contact info@sparktraining.eu or +31 85 115 0004.