

Excel Level 5 - PivotTable and Dashboard Reporting

What Can You Expect?

This course is aimed at learners who need to analyse information utilising PivotTables as the foundation for Dashboard reports. Dashboard reports present business information as a clear, concise picture that is easy to read, understand, and update.

What Is Required From You?

Learners should have successfully completed Excel courses to an intermediate level or possess the equivalent knowledge.

2 Day Course Content

Preparation of Source Data

- Databases - What they are and how they work
- Entering information correctly into Excel
- Setting up a Database Table in Excel
- Custom Formats
- Using FlashFill
- Using Format as Table
- Using Conditional Format
- Creating Sparklines

PivotTables

- Understand the layout of a PivotTable
- Create a PivotTable
- Navigate the PivotTable Field Lists
- Modify Design options of a PivotTable
- Customise a PivotTable
- Create a Formula in a PivotTable

Pivot Charts

- Create and Format Pivot Charts
- Manage and Edit Pivot Charts

Dashboard

- Overview of what a dashboard is
- Create a Dashboard with PivotTables and Charts
- Create a Dashboard with PivotCharts, Slicers and Timelines

Creating & Customising a Chart

- Ways To Select Chart Items
- Chart Labels, Titles And Other Text
- Change The Display:
- Display Or Hide Chart Items
- Delete Chart Items
- Change Colours, Patterns, Lines, Fills And Borders
- Use A Picture In A Chart
- Change Values In A Chart
- Add Data To A Chart

Unit Standard Alignment

SAQA ID: 116943

NQF Level: 4

Credits: 3



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