

# aractech

Global Learning for Operational Leaders



ACCOUNTING AND FINANCE

## 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.

## Course Methodology

- 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.

## Course 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

## Target Audience

- 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.

- Target Competencies
- Reporting, analyzing, and reconciling
- Data modeling

# Course outline

## Detailed course outline

Module-by-module outline for Dynamic Business Reports and Dashboards Using Excel.

### Module 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

### Module 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

### Module 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

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Module-by-module outline for Dynamic Business Reports and Dashboards Using Excel.

### Module 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

### Module 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

## 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
15 - 19 June 2026	Frankfurt	Classroom	€2,275
20 - 24 July 2026	Rome	Classroom	€2,975
3 - 7 August 2026	Kuala lumpur	Classroom	€1,575
7 - 11 September 2026	Barcelona	Classroom	€2,695
12 - 16 October 2026	London	Classroom	€2,940
9 - 13 November 2026	Munich	Classroom	€2,415
14 - 18 December 2026	Kuala lumpur	Classroom	€1,575

**Live online option**

Online delivery is available at €1,250.