



Dynamic Excel Business Reports and Dashboards Training Course

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Overview

Dynamic Excel Business Reports and Dashboards Training Course is a two-week intermediate course for analysts, reporting functions, finance and operations professionals, managers, and Excel users who leave with an Excel Reporting and Dashboard Portfolio. Participants build structured data sources, repeatable Power Query transformations, formulas, PivotTables, PivotCharts, data models, KPI views, slicers, validation checks, refresh controls, and governed workbooks. Agile Leaders Training Center develops dynamic Excel reporting and dashboard capabilities.

Who Should Attend

- Reporting functions responsible for recurring management reports, metrics, and commentary
- Business analysis functions responsible for preparing data, identifying trends, and explaining results
- Finance functions responsible for budgets, performance measures, variance views, and controls
- Operations functions responsible for service, productivity, quality, inventory, and capacity reporting
- Management functions responsible for reviewing indicators and making evidence-based decisions
- Excel users responsible for maintaining workbooks, refresh cycles, and shared dashboard outputs

The course assumes participants can navigate Excel and use basic formulas, and leaves out VBA application development, database administration, Power BI development, and certification.

Departments and Industries

The course supports departments and industries that need repeatable business reporting from structured operational and management data.

- Finance, planning, operations, sales, marketing, and customer experience
- Data offices, reporting teams, project controls, quality, and internal audit
- Financial services, insurance, retail, hospitality, and professional services
- Manufacturing, logistics, transport, construction, utilities, and property management
- Healthcare, education, technology, telecommunications, and nonprofit organizations

Learning Objectives

By the end of this course, participants will be able to:



- Apply reporting requirements and source-data design methods
- Build repeatable Power Query preparation and refresh flows
- Analyze data with formulas, PivotTables, PivotCharts, and data models
- Design KPI layouts, charts, slicers, timelines, and navigation controls
- Evaluate accuracy, usability, performance, protection, and governance
- Build an Excel Reporting and Dashboard Portfolio

Course Agenda

Day 1: Define Reporting Requirements

- Report Audience and Decision Canvas
- KPI Definition and Ownership Sheet
- Dashboard Question and Scope Matrix
- Reporting Frequency and Refresh Map
- Workbook Output Acceptance Checklist

Day 2: Structure Excel Source Data

- Excel Table Design Rules
- Structured Reference Formula Pattern
- Data Type and Field Dictionary
- Source-System Mapping Template
- Input Validation and Exception Log

Day 3: Prepare Data with Power Query

- Power Query Connection Inventory
- Column Profiling and Quality Review
- Data Type, Split, Merge, and Replace Steps
- Append and Combine Files Pattern
- Query Dependency and Load Plan

Day 4: Build Dynamic Formula Reports

- SUMIFS and COUNTIFS Reporting Pattern
- XLOOKUP and INDEX-MATCH Retrieval Matrix
- Dynamic Array Filter and Sort Model
- Date and Period Calculation Sheet
- Error Handling and Formula Audit Checklist



Day 5: Analyze with PivotTables

- PivotTable Field and Layout Design
- Grouping and Date Hierarchy Method
- Calculated Field Decision Guide
- Value Display and Comparison Options
- PivotTable Refresh and Cache Control

Day 6: Visualize with PivotCharts

- Chart Selection by Business Question
- PivotChart Series and Category Design
- Variance and Target Comparison View
- Conditional Formatting Indicator Rules
- Chart Label and Annotation Checklist

Day 7: Add Interactive Controls

- Slicer Field and Style Plan
- Slicer Report Connections Map
- Timeline Period Control Design
- Dashboard Navigation and Selection Controls
- Filter State and Reset Method

Day 8: Build Data Models and KPIs

- Table Relationship Diagram
- Fact and Dimension Structure
- Data Model Measure Definition Sheet
- KPI Status and Threshold Matrix
- Cross-Table Reporting Test

Day 9: Govern and Deliver Workbooks

- Dashboard Layout and Visual Hierarchy Grid
- Refresh Sequence and Failure Checklist
- Workbook Protection and Access Matrix
- Performance and File-Size Review
- Version, Change, and Handover Register



Day 10: Practice Dashboard Delivery

- Exercise: Diagnose a Reporting Requirement and Data Source
- Exercise: Build a Repeatable Power Query Flow
- Exercise: Assemble PivotTables, Charts, and Interactive Controls
- Exercise: Test Accuracy, Refresh, Usability, and Protection
- Capstone: Excel Reporting and Dashboard Portfolio

Practical Exercises

The course uses suggested activities based on sales, budgets, service levels, inventory, project delivery, workforce, and customer data.

- Suggested activity: define reporting questions, measures, owners, data fields, refresh needs, and acceptance checks.
- Suggested activity: clean and combine source files with Power Query, then validate records and query dependencies.
- Suggested activity: build formula reports, PivotTables, PivotCharts, slicers, timelines, relationships, and KPI views.
- Suggested activity: test calculation accuracy, filter behavior, refresh controls, performance, protection, and handover records.

FAQs

Who suits dynamic Excel business reports and dashboards, and what does the course assume?

Analysts, reporting functions, finance and operations professionals, managers, and workbook owners suit the course; it assumes basic Excel navigation and formula use.

How do Excel business reports and dashboards differ from Power BI development?

Excel reporting centers on workbook-based data preparation, formulas, PivotTables, charts, controls, and sharing. Power BI development centers on a separate platform for semantic models, reports, services, workspaces, and broader distribution.

How should source data be structured for dynamic Excel dashboards?

Source data should use consistent field names, data types, one record per row, stable identifiers, defined missing-value rules, controlled inputs, traceable sources, and Excel tables or repeatable queries.



What makes an Excel dashboard dynamic and refreshable?

A dynamic Excel dashboard uses expandable tables, repeatable Power Query steps, linked PivotTables and PivotCharts, connected slicers or timelines, controlled formulas, defined refresh order, and validation checks.

How should Excel dashboard quality be tested before delivery?

Dashboard quality should be tested for source completeness, calculation accuracy, filter behavior, label clarity, visual hierarchy, refresh reliability, file performance, protection, accessibility, version control, and handover readiness.

Conclusion

Participants take back an Excel Reporting and Dashboard Portfolio containing requirement canvases, structured sources, queries, formula reports, pivots, charts, controls, data models, KPI layouts, validation checks, refresh plans, and governance records. It changes recurring reporting from manual rebuilding to a controlled refreshable workflow. The portfolio supports clearer analysis, faster review, and accountable workbook maintenance.



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