



## Your Expert Trainer

**Alvin Yong**  
Founder and CEO  
Olygen

### Methodologies:

Clear explanation of theories coupled with hands-on exercises for a firm grasp of Excel Dashboards through:

- Practical Examples
- Case Studies
- Short Exercises
- Group Discussions

### Software Used:

The course is demonstrated using Microsoft Excel 2016, but participants can use Excel 2010 or 2013 if they prefer.

# Creating Dashboards with Excel Masterclass: Data Visualisation for Business Reporting

15<sup>th</sup> – 18<sup>th</sup> October 2018 | Dubai

## Biography of Alvin Yong, MSc, FCCA

Alvin Yong is a UK-registered Fellow Chartered and Certified Accountant (FCCA). He obtained his Master of Science in Professional Accountancy (Merit) in 2017 from the University of London.

Alvin started his career with KPMG Singapore as an auditor in 1999, where he was involved in the audit, due diligence and tax of multinational corporations in various industries, including shipping and logistics, industrial manufacturing, medical and healthcare, construction consultancy and investment holdings.

With strong business acumen, Alvin went on to co-found several companies and has been an entrepreneur for more than 12 years. His companies have served clients across the globe, from US, Europe, Middle East, Africa, Asia to Australia. His current passion is data literacy training as well as innovation and growth consultancy. Alvin enjoys helping his clients understand the stories that their data tells about their business, thus enabling them to make informed, data-driven decisions.

## Testimonials

**CEO, Felda Prodata Systems:** "Alvin is a very people person. Sound knowledge in his area of expertise. He carried out the programme well."

**VP of Finance - APAC, Middle East & Africa, FIS Global:** "Alvin was well prepared, knowledgeable and easy to follow. Level of detail was where it needed to be and the documentation was very thorough. The course went quickly which was always a good sign."

**Financial Controller, BeMobile Ltd:** "Exceeded my expectations! I realised how dynamic Excel can be. Understanding the basic formulas is just so important for creating dynamic and interactive dashboards."

**Manager, Global Credit Policy and Portfolio Risk, Standard Chartered Bank:** "Fantastic trainer in terms of knowledge and skills. Extremely friendly, helpful and patient."

**AVP, Investor Solutions, i2M Ventures:** "Alvin is very knowledgeable in this field. I would recommend this training to others."

**Manager, CIMB Bank:** "Very experienced and good trainer."

**Learning & Development Specialist, Micron Semiconductor:** "Good understanding and knowledge of the subject. Attentive and responsive to participants' queries. Presented the subject very clearly."

**Manager - Human Capital, PNG Air Services:** "The training would be quite intense for someone who has very basic knowledge in Excel. Otherwise, Alvin made it easy for us to understand and took time to assist those that needed help. I have learnt a lot these last two days."

**Regional Component Planner, Komatsu Australia:** "Very informative. Gave an excellent count of how-to's."

**MUST BRING!**

Laptop with  
Excel installed

# Creating Dashboards with Excel Masterclass: Data Visualisation for Business Reporting

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## Workshop Overview

There is valuable information hidden in the sea of data. A picture is worth a thousand words - use Excel dashboard to present information visually and beautifully within a single page that allows users to understand what is going on and make business decisions. Excel dashboard reports allow managers to have high-level overview of the business and help them make decisions. Excel is an excellent tool to make powerful dashboards that can provide analysis, insights and alert managers in a timely manner.

A good Excel dashboard is:

- visually appealing for decision makers to understand key information clearly
- highly dynamic, allowing managers to easily dig into your data
- easy to update

## Key Takeaways

By the end of the course, participants will:

- Understand Excel dashboard design principles and fundamentals
- Create dynamic interactive charts
- Gain visualisation tips and tricks
- Learn how to build stunning and informative Excel dashboards.
- Learn various advanced features in Excel to save time.
- Display key trends, comparisons and data graphically for greater clarity and faster insights
- Learn different chart types to display data in the most meaningful way.
- Learn smart techniques that make charting work fun and productive.
- Create interactive controls that enable users to customise their view

## Prerequisites

Participants should be comfortable with basic Excel tools and functions. At a minimum, participants should know how to navigate confidently in Excel, create and use simple formulas and link between workbooks

## Who Should Attend

This workshop is crucial for analysts, managers, reporting professionals, business owners, executives, and anyone responsible for preparing Excel based dashboards, scorecards or KPI reports. This training is highly recommended for:

- Directors
- General Managers
- Chief Financial Officers
- Finance Managers
- Accountants
- Marketing Managers
- Sales Managers
- HR Managers
- Business Owners
- Anyone who deals with business, management and financial reporting

### Customisation:

The programme will be further customised to fit your priorities through the pre-course questionnaire (PCQ).

### Internal Training:

This programme is available as an internal training. Email us to find out more at: [alvin.yong@olygen.com](mailto:alvin.yong@olygen.com)

### Estimated Time Schedule

0830 – 0900	Registration
0900 – 1030	First Morning Half
1030 – 1045	Morning Break
1045 – 1230	Second Morning Half
1230 – 1330	Lunch
1330 – 1500	First Afternoon Half
1500 – 1515	Afternoon Break
1515 – 1700	Second Afternoon Half

# Creating Dashboards with Excel Masterclass:

## Data Visualisation for Business Reporting

15<sup>th</sup> – 18<sup>th</sup> October 2018 | Dubai

### Programme Agenda

#### **MODULE A: DASHBOARD EXCELLENCE: CREATING BUSINESS-DRIVEN AND IMPACTFUL DASHBOARDS**

##### **Session 1: DASHBOARD DESIGN PRINCIPLES**

- What is a dashboard?
- Purpose and benefits of dashboards
- Understanding dashboard design principles
- Layout, colour and display
- Common mistakes when building dashboards

##### **Session 2: DATA VISUALISATION – PICKING THE RIGHT DISPLAY**

- The anatomy of an Excel chart
- Choosing the right data visualisation to communicate information effectively
- Displaying trends with charts
- When to use a secondary axis
- Combining two chart types
- Formatting tricks
- Adding icons and images to dashboards

##### **Session 3: USING SPARKLINES & CONDITIONAL FORMATTING**

- Creating sparklines – line, column and win/loss
- Sparkline formatting and options
- Sparkline tips and tricks
- Applying conditional formatting
- Data bars, colour scales and icon sets
- Conditional formatting options
- Using symbols to enhance reporting

##### **Session 4: ADVANCED CHARTING TECHNIQUES**

- In-cell charts
- Step charts
- Actual vs budget (target) charts – Floating Markers,
- Band chart - show performance against target range
- Conditional colours in column chart
- Frequency distribution
- Panel charts
- Speedometers
- Bullet graphs
- Waterfall chart
- Pyramid chart and funnel chart

#### **MODULE B: USING PIVOTTABLE AND PIVOTCHART FOR DATA ANALYSIS**

##### **Session 5: NAMED RANGES AND EXCEL TABLE**

- Naming cells and ranges
- Tabular Format
- Creating Excel tables
- Applying table names and formatting
- Using structured references in formula
- Refreshing tables with new data

##### **Session 6: PIVOTTABLE**

- Inserting PivotTables
- Field list and areas
- Drill down to audit
- Sort fields from A to Z
- Double clicking to see more fields
- Changing SUM to COUNT
- Number formatting
- Fields name formatting
- Predetermine number formatting
- Changing the report filter layout
- Format errors in PivotTables

##### **Session 7: PIVOTTABLE: TOTALS, GROUPING AND SORTING**

- Creating multiple Grand Totals
- Percentage of the Grand Total
- Percentage of the Column Total
- Percentage of the Row Total
- Running Totals
- Grouping by Date, Months, Quarters and Years
- Grouping by Time
- Grouping by Text Fields
- Grouping by ranges
- Sorting by Largest to Smallest
- Sorting Row Items (Left to Right)

##### **Session 8: FILTER DATA IN PIVOTTABLE**

- Filter by Date
- Filter by Labels
- Filter by Values
- Filter by Report Filter
- Filter – Hide and Unhide Selections

##### **Session 9: FILTER DATA USING SLICERS**

- Slicers
- Slicers Tool Options
- Slicers Connection with Multiple Pivot Tables

##### **Session 10: ANALYSE DATA USING CALCULATED FIELDS AND CALCULATED ITEMS**

- Creating Calculated Fields (Virtual Fields)
- Using existing Calculated Fields in a new calculations
- Delete and modify Calculated Field
- Creating a new Calculated Item to build a formula
- Use Excel functions within a calculated fields
- Using Calculated Items within a column label
- List Calculated Fields and Items
- Order of operation (calculation)
- Using PivotTable and SUMPRODUCT function exercise

##### **Session 11: PIVOTCHART**

- Inserting a PivotChart
- Inserting a Slicer with PivotChart
- PivotChart ribbons
- Inserting PivotChart straight from the data source

##### **Session 12: CASE STUDY: BUILDING DASHBOARD WITH PIVOTTABLE AND PIVOTCHART**

# Creating Dashboards with Excel Masterclass: Data Visualisation for Business Reporting

15<sup>th</sup> – 18<sup>th</sup> October 2018 | Dubai

## Programme Agenda

### MODULE C: ADVANCED DASHBOARD MASTERCLASS: BUILDING INTERACTIVE AND AUTOMATED DASHBOARDS

*Leave the mundane world of static Excel charts! Impress your boss with "live" dashboards. Learn advanced techniques that give your dashboard users the power to interact with the data. They can compare by time frames, departments and product lines as well as compare multiple sets of data. Now, get dynamic with your Excel dashboards!*

#### Session 13: PREPARING DASHBOARD DATA

- Understanding your data
- Organising data
- Data smoothing
- Tools and tricks to clean data before using it to build a report or dashboard

#### Session 14: AUTOMATING DASHBOARDS WITH FUNCTIONS

- Learn to nest functions together to create robust formulas
- Use IF, Nested IFs and IFS (Excel 2016) for logical test with single or multiple conditions
- Embed AND or OR function in IF for robust logical tests
- Trap and handle errors produced by other formulas or functions with IFERROR
- Use CHOOSE to return a value from an array based on index number
- Aggregate data with single criterion using SUMIF, COUNTIF, AVERAGEIF
- Tabulating information using multiple criteria with SUMIFS, COUNTIFS, AVERAGEIFS
- Lookup and retrieve data from a specific column in table using VLOOKUP
- Use MATCH to find the relative numeric position of an item in a range
- Use INDEX to extract a value from a table (or range)
- INDEX and MATCH - powerful combo that has more flexibility and speed
- Why INDEX MATCH is better than VLOOKUP
- Using ROW(S) and COLUMN(S) for indexing
- Rank and sort your data using RANK, LARGE and SMALL
- Use 'database functions' DSUM, DCOUNT and DAVERAGE to filter information in a list or database based on set criteria
- Using TEXT and CONCATENATE to string numbers and text together to show in a dashboard or chart.

#### Session 15: BUILDING INTERACTIVE CHARTS AND DASHBOARDS CONTROLS

- Using form controls: Button, Combo Box, Check Box, Spin Button, List Box, Option Button, Scroll Bar, Label and Group Box
- Set up dynamic data validation list
- Creating dynamic named range with OFFSET and COUNTA
- Creating dynamic named range with INDEX
- Using the INDIRECT function

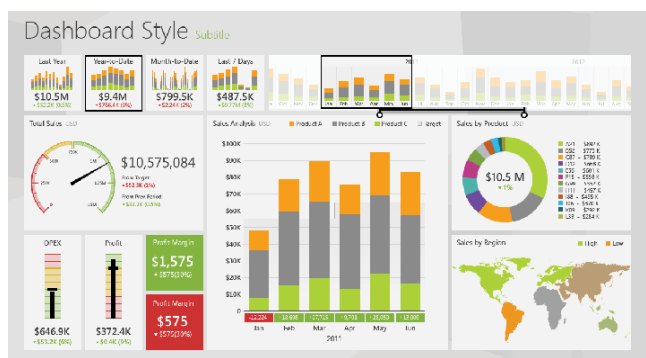
#### Session 16: BUILDING DYNAMIC CHARTS

- Selecting data with a combo box (or data validation list) for dynamic Excel charting
- Using a check box to show or hide data or trend lines
- Scrolling a dynamic excel chart through time
- Using helper columns to manipulate your data
- Linked textbox for dynamic chart titles
- Tricks to avoid crashing lines in line chart
- Linking legends to cell contents

#### FINAL PROJECT: BUILDING INTERACTIVE AND AUTOMATED DASHBOARD

- Create an executive-level interactive dashboard from start to finish
- Learn tricks and tips for building interactive dashboards
- Linking charts to dynamic data
- Automatically refresh your dashboards based on new data

Throughout the workshop, participants will work through practical exercises to enhance their knowledge of the tools available to build Excel dashboards



# REGISTRATION

OLYGEN PTE LTD | TEL: +65 6631 9763

Contact: Alvin Yong

Email: alvin.yong@olygen.com

## Creating Dashboards with Excel Masterclass

EARLY BIRD  
(Book and Pay by 10 Sep 2018)

REGULAR RATE

Dubai • 15-18 October 2018 (1 - 2 delegates)

USD 3,999/pax

USD 4,499/pax

Dubai • 15-18 October 2018 (3 or more delegates)

USD 2,999/pax

USD 3,499/pax

\*Fees include course documentation, luncheon and refreshments. Delegates are responsible for their own accommodation.

Organisation : \_\_\_\_\_  
Invoice Attention To : Mr/Ms/Mrs: \_\_\_\_\_  
Job Title : \_\_\_\_\_  
Email : \_\_\_\_\_  
Address : \_\_\_\_\_  
Telephone : \_\_\_\_\_ Fax: \_\_\_\_\_

### DELEGATES' DETAILS

Name	: Mr/Ms/Mrs: _____	Name	: Mr/Ms/Mrs: _____
Job Title	: _____	Job Title	: _____
Mobile Number	: _____	Mobile Number	: _____
Email	: _____	Email	: _____
Diet Preference	: None/Vegetarian/Halal/Others: _____	Diet Preference	: None/Vegetarian/Halal/Others: _____

Name : Mr/Ms/Mrs: \_\_\_\_\_  
Job Title : \_\_\_\_\_  
Mobile Number : \_\_\_\_\_  
Email : \_\_\_\_\_  
Diet Preference : None/Vegetarian/Halal/Others: \_\_\_\_\_

### PAYMENT BY CREDIT CARD

VISA/MASTER - You will be sent a Payment Link to pay online

Card Type : AMEX  
Card No. : \_\_\_\_\_  
Expiry : \_\_\_\_\_ (MM/YYYY)  
Name : \_\_\_\_\_  
Signature : \_\_\_\_\_

\* 3.5% surcharge applies for credit card payment

### AUTHORISATION

Name : Mr/Ms/Mrs: \_\_\_\_\_  
Title : \_\_\_\_\_  
Signature : \_\_\_\_\_  
Date : \_\_\_\_\_

### PAYMENT BY BANK TRANSFER

#### BANK TRANSFER

Olygen Pte. Ltd.  
United Overseas Bank Limited Singapore  
Bank Address: 80 Raffles Place UOB Plaza Singapore 048624  
USD Account No: 374-901-466-9  
Swift Code: UOVBSGSG

### TERMS & CONDITIONS

Payment Terms: Payment is required within 7 days of invoice date. Olygen reserves the right to refuse admission IF payment is not received before the event date. Transfer: Transfer is allowed upon written notification. Cancellation: Registration carries a 50% cancellation liability, not with standing, full fee is payable when cancellation is less than two (2) weeks before the event. Cancellation has to be done in writing. If Olygen decides to cancel or postpone this event, it is not responsible for covering airfare, hotel, or other travel costs incurred by clients. The fee will not be refunded, but credited to a future event. No Show: No show does not constitute transfer or cancellation and the full fee is payable. Changes: Olygen reserves the right to change event dates, venue, speakers, or omit event features, or merge the event with another event, as it deems necessary without penalty, refunds or alternative offers. Tax: Registration fees exclude tax. For clients outside Singapore, the sum payable is as the listed fees, exclusive of tax. To this sum shall be added any other local tax or withholding tax from client's country of origin, if any. Marketing: Olygen may use your company's logo or business name or otherwise refer to your company in our website, any marketing, promotional or advertising material as a client of our services. Governing law: This Agreement shall be governed and construed in accordance with the law of Singapore and the parties submit to the exclusive jurisdiction of the Singapore Courts in Singapore. Indemnity: Should for any reason outside the control of Olygen, the event be cancelled due to an act of terrorism, extreme weather conditions or industrial action, Olygen shall endeavour to reschedule but the client hereby indemnifies and holds Olygen harmless from and against any and all costs, damages and expenses, including attorney's fees, which are incurred by the client.