



## 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

5<sup>th</sup> – 6<sup>th</sup> December 2018 | Kuala Lumpur  
10<sup>th</sup> – 11<sup>th</sup> December 2018 | Kuching  
13<sup>th</sup> – 14<sup>th</sup> December 2018 | Penang

## Biography of Alvin Yong, MSc, FCCA, UK

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

5–6 December (Kuala Lumpur) | 10–11 December (Kuching) | 13–14 December (Penang)

## 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
- Understand advanced Pivot Tables and Pivot 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

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## Programme Agenda

### Session 1: INTRODUCTION

- Overview of training aim, objectives and agenda

### Session 2: 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 3: PREPARING DASHBOARD DATA

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

### Session 4: 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 5: 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 6: 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

### Session 7: NAMED RANGES AND EXCEL TABLE

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

### Session 8: 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 9: 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 10: 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

### Session 11: PUTTING IT TOGETHER

- Creating your dashboard

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



# REGISTRATION

OLYGEN SDN BHD | TEL: +65 6631 9763

Contact: Alvin Yong

Email: [alvin.yong@olygen.com](mailto:alvin.yong@olygen.com)

## Creating Dashboards with Excel Masterclass

REGULAR RATE

Kuala Lumpur • 5-6 December 2018

RM 3,999

Kuching • 10-11 December 2018

RM 3,999

Penang • 13-14 December 2018

RM 3,999

\*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 Sdn Bhd**  
Malayan Banking Berhad  
Bank Address: Level 1, Tower A, Dataran Maybank, 59000 Kuala Lumpur, Malaysia  
MYR Account No: 514253-508779  
Swift Code: MBBEMYKL

### 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, notwithstanding, 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 Malaysia, 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 Malaysia and the parties submit to the exclusive jurisdiction of the Malaysian Courts in Malaysia. 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.