![MAICSA - The Governance Institute]

Smart Dashboards & Interactive Reports for Secretarial Efficiency

15 April & 16 April 2025,
Tuesday & Wednesday
9.00am – 5.00pm
Speaker: MR LOGEENIS RAGHU
Virtual
Course code IT150425W2
Closing date: 14 April 2025

16 CPD HOURS

Overview

This is a 2-days Excel Dashboard & Interactive Reports training for those who want to dive into company's large data and look at the company's KPIs for decision making purposes. If you have the basic knowledge of Excel charts, pivot tables, functions and formulas, you can proceed to this course to learn how to create dashboard out of your, example sales data, that allows you to interactively slice-and-dice within the data and gain greater insights out of your company's business performance.

Target Audience

- Secretarial personnel
- Administrative assistants
- Office managers

Course outlines

Module 1: INTRODUCTION

• Overview of training aim, objectives and agenda

Module 2: DASHBOARD DESIGN PRINCIPLES

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

Module 3: PREPARING DASHBOARD DATA

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

Module 4: DATA VISUALIZATION – PICKING THE RIGHT DISPLAY

• The anatomy of an Excel chart
• Choosing the right data visualization 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

Module 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, color scales and icon sets
• Conditional formatting options
• Using symbols to enhance reporting

Module 6: ADVANCED CHARTING TECHNIQUES

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

Module 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

Module 8: AUTOMATING DASHBOARDS WITH FUNCTIONS

• Learn to nest functions together to create robust formulas
• Use IF, Nested IFs and IFS (Excel 2010) 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.

Module 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

Module 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 window
• 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

Module 11: PUTTING IT TOGETHER

• Creating your dashboard

About the trainer: Mr Logeenis Raghu

Logeenis Raghu is a skilled IT Trainer with a strong academic background in Artificial Intelligence and Information Technology. He holds a Bachelor's degree in IT (AI) from Multimedia University and has experience delivering corporate training in data analytics, IT solutions, Artificial Intelligence (AI) and digital tools. Currently serving as a Trainer & Consultant at Knowledgecom Corporation, he specializes in conducting IT and data-related training, performing training needs analysis, and customizing courses to meet corporate requirements. His expertise includes programming (Python, SAS), data analysis (Power BI), Artificial Intelligence (AI) and various digital tools. Logeenis is also an HRD Corp Accredited Trainer and a Microsoft Certified Power BI Data Analyst.

WEBINAR FEE

Category	Normal Fee per person (RM)
MAICSA Member/ Affiliate/Graduate/Student	1296
Non member	1446

Fee includes course materials in digital form and e-certificate

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Email: **training@maicsa.org.my**
Tel: **03-2282 9276 (ext 804)**
Attention: Ms Nor Falati

• Fee is payable to **MAICSA**

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