Establishing Excel Dashboards

Description: In this webcast, Excel expert David Ringstrom, CPA, introduces participants to Microsoft Excel dashboards. Dashboard techniques empower users to assimilate large amounts of data quickly and easily by way of charts and summary tables. David explains how to bring data into Excel from other sources, outlines different techniques for presenting information in dashboard form, demonstrates how to use Excel's PivotTable feature to condense large amounts of data, and much more.

Objectives of the Presentation:

- Apply a variety of Excel features and worksheet functions-all focused on helping you use Excel far more effectively
- Define how to create "set-and-forget" tools that others can use to monitor financial results
- Identify methods you can use to bring data into Excel from other sources
- Recall how to create a dashboard that looks less like an Excel spreadsheet
- Define the time-saving benefits of Excel dashboards
- Identify how to use the PivotTable feature to condense large amounts of data

Why Should you Attend:

Anyone tasked with summarizing large amounts of data in budget spreadsheets will benefit from attending this webcast.

David teaches from the version of Excel in use by the majority of attendees, but he explains any differences in Excel 2007, 2010, 2013, and 2016. His webcasts are fast-paced, and attendees often are surprised at the amount of ground he covers in a session. He welcomes participants' questions, so come ready to pick his brain. David’s detailed handouts serve as reference tools you can fall back on after participating in one of his webcasts. He also provides an Excel workbook that includes a majority of the examples he uses during each session.

Topic Background:

Excel dashboards provide at-a-glance views into key measurements relevant to a particular objective or business process. Because they're designed for a specific purpose, they inherently contain predefined conclusions that relieve end users from performing their own analysis, thereby saving users time and effort.

Contents:

- Summarizing large amounts of data in Excel spreadsheets
- Creating interactive graphs with Excel's PivotChart feature
- Learning how to use the Slicer feature in Excel 2010 and later
- Using Excel's Custom Views feature to make a set of data serve multiple purposes
- Discovering how to create self-updating links
- Using a simple macro technique to hide or unhide the Ribbon interface
- Implementing the Group and Ungroup feature to expand or collapse rows and/or columns

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