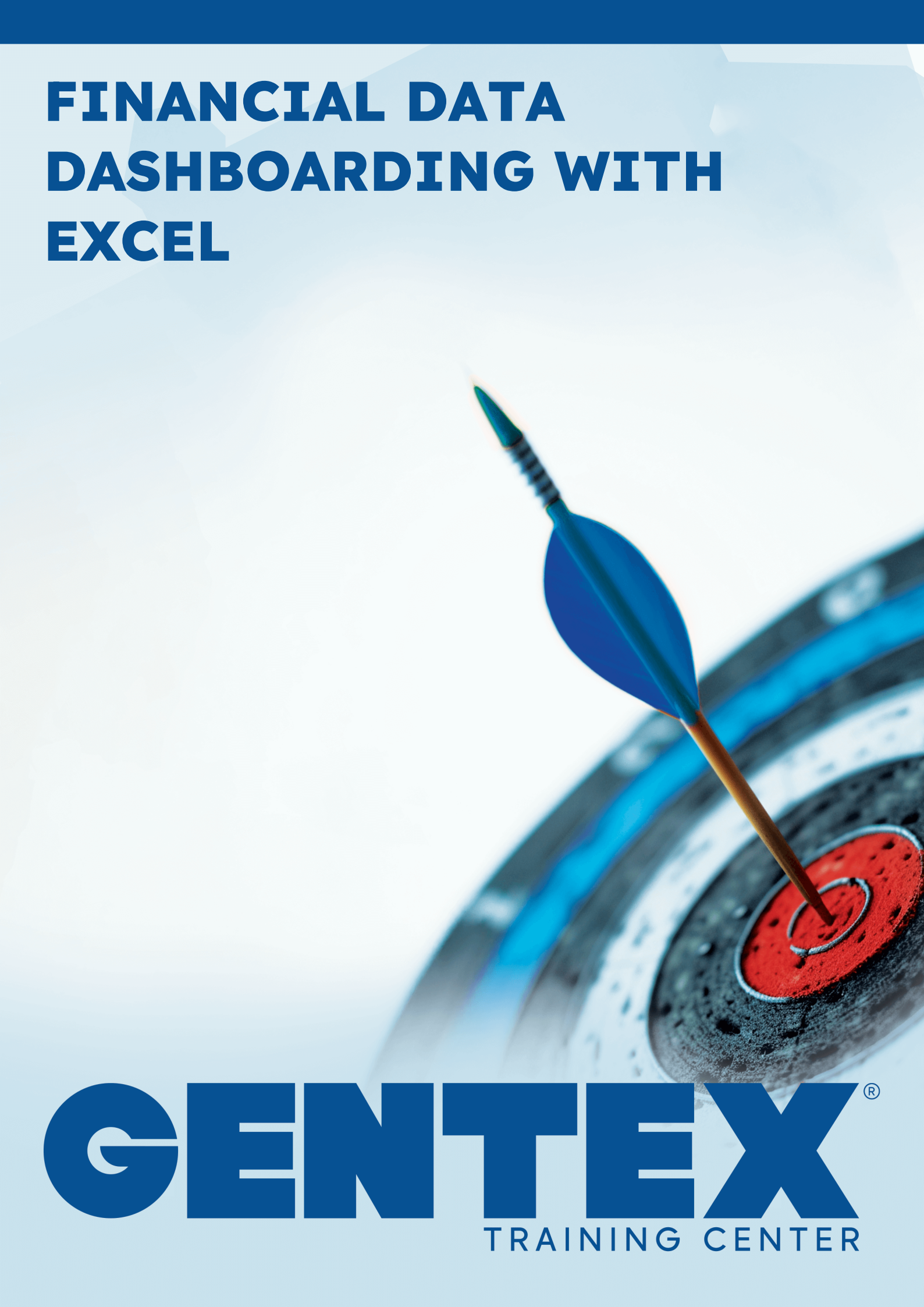
FINANCIAL DATA DASHBOARDING WITH EXCEL



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Introduction

Financial Data Dashboarding with Excel Training Course builds the dashboard design and automation capability that finance professionals, analysts, and reporting officers need to present financial data clearly and keep it current. A dashboard earns its place when a reader can see the position in seconds and know what to act on. That requires structured data, clean formulas, and deliberate visual design. Weak dashboards show everything and communicate nothing. This course develops the skill that prevents that. It covers data structuring, dynamic formulas, and interactive controls. Furthermore, it applies PivotTables, Power Query, and Power Pivot for scalable reporting. In addition, it develops chart design, KPI visualisation, and refresh automation. As a result, participants build dashboards that decision-makers actually use.

Financial Data Dashboarding with Excel Course Objectives

- Structure source data for reliable dashboard reporting.
- Apply dynamic formulas including INDEX, MATCH, and SUMIFS.
- Apply tables, named ranges, and structured references.
- Build interactive PivotTables and PivotCharts for analysis.
- Use slicers, timelines, and form controls for interactivity.
- Apply Power Query for data extraction and transformation.
- Apply Power Pivot and the data model for multi-source reporting.
- Design charts and KPI visuals with clear hierarchy.
- Apply conditional formatting and dashboard layout principles.
- Automate refresh, validation, and workbook distribution routines.

Course Methodology

- Interactive lectures with real financial dashboard builds.
- Data structuring and dynamic formula workshops.
- PivotTable, Power Query, and data model exercises.
- Chart design, KPI visualisation, and automation practice.
- Structured peer review with facilitator feedback on dashboard builds.

Who Should Take This Course

- Financial analysts and FP&A professionals.
- Management accountants and controllers.
- Budgeting and reporting officers.
- Treasury and risk reporting staff.
- Business intelligence analysts using Excel.
- Consultants building financial reporting solutions.

Financial Data Dashboarding with Excel Course Outlines

Day 1: Dashboard Foundations and Data Structuring

- Dashboard purpose, audience, and design questions.
- Source data structures and the flat table principle.
- Data cleaning and preparation for dashboard use.
- Tables, named ranges, and structured references.
- Data validation and input control design.
- Dashboard layout, zones, and navigation planning.
- Case study: reviewing a financial dashboard and its weaknesses.

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Day 2: Dynamic Formulas and Interactive Analysis

- INDEX, MATCH, and XLOOKUP for flexible lookups.
- SUMIFS, COUNTIFS, and AVERAGEIFS for conditional reporting.
- Dynamic arrays and spill formulas for expanding data.
- CHOOSE and SWITCH for scenario switching.
- Error handling with IFERROR and data validation checks.
- Cascading dropdown lists with dependent validation.
- Workshop: building a dynamic summary sheet.

Day 3: PivotTables, Power Query, and the Data Model

- PivotTable construction and field layout decisions.
- Calculated fields and calculated items in PivotTables.
- Slicers, timelines, and report connections.
- Power Query for extraction, transformation, and loading.
- Appending and merging multi-source queries.
- Power Pivot and the data model for relational reporting.
- Workshop: building a multi-source reporting model.

Day 4: Chart Design and KPI Visualisation

- Chart selection: trend, comparison, composition, distribution.
- Combination charts and secondary axis decisions.
- Sparklines, bullet charts, and data bars.
- Conditional formatting rules and colour scales.
- KPI cards, variance indicators, and RAG status design.

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- Dashboard visual hierarchy and readability principles.
- Workshop: designing a financial KPI dashboard page.

Day 5: Automation, Validation, and Distribution

- Refresh routines and query parameter design.
- Workbook protection and sheet access control.
- Error checking, integrity tests, and reconciliation panels.
- Workbook size, performance, and calculation optimisation.
- Export routines and distribution to stakeholders.
- Documentation, versioning, and handover practice.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Financial Data Dashboarding with Excel, participants will gain a thorough understanding of dashboard foundations and data structuring, dynamic formulas and interactive analysis, PivotTables, Power Query and the data model, chart design and KPI visualisation, and automation, validation and distribution. They will also acquire practical skills in financial data structuring and dashboard layout design, dynamic formula and lookup technique, PivotTable, Power Query and data model reporting, and chart design, KPI visualisation and dashboard automation. In addition, the course prepares them to build dashboards that present financial position clearly and stay current with minimal effort. Gentex Training Center delivers this programme with a strong focus on applied dashboard building and decision-ready financial reporting.

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FAQs for Financial Data Dashboarding with Excel course

Q1 What is the "Financial Data Dashboarding with Excel" course about?

It is a five-day programme on building financial dashboards in Excel. It covers dashboard foundations and data structuring, dynamic formulas and interactive analysis, PivotTables, Power Query and the data model, chart design and KPI visualisation, and automation, validation and distribution.

Q2 What are the key benefits of the "Financial Data Dashboarding with Excel" course?

Participants present financial position clearly and keep reporting current with minimal effort. The course improves data structuring and validation, sharpens dynamic formula and lookup technique, strengthens PivotTable, Power Query and data model work, improves chart and KPI visual design, and raises automation and distribution reliability.

Q3 What skills will I gain from the "Financial Data Dashboarding with Excel" course?

Participants gain financial data structuring and dashboard layout design, dynamic formula and lookup technique, PivotTable, Power Query and data model reporting, and chart design, KPI visualisation and dashboard automation. These four skills cover the practical core of financial dashboard building.

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Q4 What tools, methods, or standards are covered in the "Financial Data Dashboarding with Excel" course?

The course covers dashboard purpose and audience analysis, flat table source data structuring, data cleaning and preparation, Excel Tables, named ranges and structured references, data validation and input control design, dashboard layout and zone planning, INDEX, MATCH and XLOOKUP lookups, SUMIFS, COUNTIFS and AVERAGEIFS conditional reporting, dynamic arrays and spill formulas, CHOOSE and SWITCH scenario switching, IFERROR handling, cascading dependent dropdown lists, PivotTable construction and field layout, calculated fields and items, slicers and timelines with report connections, Power Query extraction, transformation and loading, query appending and merging, Power Pivot and the data model, chart selection across trend, comparison, composition and distribution, combination charts and secondary axes, sparklines, bullet charts and data bars, conditional formatting rules and colour scales, KPI cards and RAG status design, dashboard visual hierarchy, refresh routines and query parameters, workbook protection and sheet access control, error checking and reconciliation panels, workbook performance optimisation, export and distribution routines, and documentation and versioning practice.

Q5 How is the "Financial Data Dashboarding with Excel" course applied in real-world practice?

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Participants apply the methods to real financial reporting needs. They structure source data into flat tables with validation, build dynamic summary sheets using INDEX-MATCH, SUMIFS and dynamic arrays, create cascading dropdown controls, build interactive PivotTables with slicers and timelines, use Power Query to extract and transform multi-source data, build a data model in Power Pivot, design combination charts, sparklines and KPI cards with conditional formatting, apply visual hierarchy and readability rules, automate refresh routines, protect and validate workbooks, and prepare distribution and documentation. Many leave with a dashboard template workbook, a Power Query transformation pack, and a KPI visual library ready to use.