

Course : Excel, reporting and dashboards

optional remote TOSA® certification

Practical course - 3d - 21h00 - Ref. ERR

Price : 1350 CHF E.T.

★★★★☆ 4,5 / 5

BEST

This training course will teach you how to model your reporting and dashboards in Excel. It covers importing, querying and linking external data, as well as creating interactive charts.

Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Select and prepare data for analysis
- ✓ Implement techniques for cross-referencing several data tables
- ✓ Use Excel's conditional and advanced functions
- ✓ Create reporting based on pivot tables and segments
- ✓ Use powerful graphics

Intended audience

Anyone wishing to analyze data efficiently.

Prerequisites

Good knowledge of Excel.

Practical details

Hands-on work

Discussions, experience sharing, demonstrations, tutorials and case studies.

Teaching methods

Active pedagogy based on examples, demonstrations, experience sharing, case studies and assessment of learning throughout the course.

Course schedule

PARTICIPANTS

Anyone wishing to analyze data efficiently.

PREREQUISITES

Good knowledge of Excel.

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more. Participants also complete a placement test before and after the course to measure the skills they've developed.

TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

1 Working with external data

- Import, retrieve and transform external data.
- Discover PowerQuery.
- Combine and merge queries.
- Consolidate multiple tables.

Hands-on work

Import or connect data in Excel. Use queries.

2 Working with pivot tables

- Choose the axes of analysis and the calculations to be performed (deviations, progression or calculated elements).
- Create chronological groupings and value ranges.
- Create a DCT based on several ranges of data.
- Connect several TCDs with segments.

Hands-on work

Use DCTs to extract and analyze key elements in a database.

3 Structuring an analysis workbook

- Organize tabs by task: data, settings, documentation...
- Standardize formatting and colors.
- Create dynamic named ranges and validation lists.
- Use conditional formatting, icon sets and indicators.

Demonstration

Demonstration of several reporting tables and dashboards.

4 Using advanced functions

- Practice conditional functions.
- Master statistical functions.
- Complete data in one table with data from another table.
- Improve recalculation times for large volumes of data.

Hands-on work

Build a report. Compare Year-To-Date results.

5 Understanding decision-support tools

- Run simulations using the Scenario tool.
- Quantify the factors involved in achieving an objective with Target/Solver.
- Use the Forecast sheet (Excel 2016).

Hands-on work

Set up simulations. Use Target and Solver tools.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

6 Graphical representation of data

- Select the appropriate graphic.
- Understand the advantages and disadvantages of pivot charts.
- Learn about specific dashboard graphics: tachometer, thermometer, radar...
- Create two-axis graphs, trend curves, waterfall graphs...

Hands-on work

Create an interactive graphic based on a drop-down list or segment.

Options

Certification : 80€ HT

TOSA® certification certifies the learner's skills on a 1,000-point scale for a period of 3 years. The TOSA® diploma is issued if the learner's score exceeds 351 points. The program targets advanced to expert levels (score from 726 to 1,000). Once the exam has been taken, learners can consult their results live, and receive an e-mail with a certificate, a detailed summary of their skills and their diploma within 5 days. The exam lasts 1 H 00 and consists of 35 exercises alternating between manipulations on the software and multiple-choice questions, the difficulty of which varies according to the learner's answers. Unless specifically requested, the course is given by default in French and on the most recent software version. Monitoring is carried out by software and recorded for compliance control purposes.

The certification option comes in the form of a voucher or invitation that will allow you to take the exam at the end of the training course.

Dates and locations

REMOTE CLASS

2026 : 18 May, 18 May, 22 June, 7 Sep., 5 Oct.,
25 Nov., 16 Dec.