



# DATA VISUALISATION FOR REPORTING USING MICROSOFT EXCEL DASHBOARD

**7 & 8 August 2023 (Monday & Tuesday)**  
**Pullman Kuala Lumpur Bangsar**

An Excel Dashboard is a very powerful tool, that can be designed fairly easily, to create an impact on the visualisation of data presented. The Dashboard usually fits on one page; displays key trends, comparisons and data graphically or in small tables; employs best practices that enable the report to be updated quickly and easily; and is interactive, allowing the user to filter data and switch views themselves.

Dashboards enable a reader to quickly make sense of the raw number, by presenting them in visually colourful charts and tables. It also gives valuable insights into the key performance indicators (KPIs) of the business.

## WHO SHOULD ATTEND

Anyone with a good knowledge on the workings within Excel, and who needs to make formal presentations of raw data by using interactive charts to highlight their company's KPIs.

## METHODOLOGY

Lectures accompanied by practical examples and mini cases.  
*Pre-requisite: Participants should have working knowledge of basic Excel functions, formulas, and number formatting techniques.*

Participants are required to bring their own laptop installed with Microsoft Excel and PowerPoint 2010/2013/2016.



## REQUIREMENTS FOR DIGITAL BADGE



Digital badge will be awarded after completion of the programme and fulfillment of the criteria set such as submission of assignments, projects, and assessments.

## OBJECTIVES

This programme seeks to help you:

- Design dashboard reports
- Learn how to apply Excel functions
- Learn how to bring data into the spreadsheet
- Understand where the data comes from and how often it will be updated
- Manage data and link it to the dashboard objects, such as charts and tables

## PROGRAMME OUTLINE

### 1. BUILDING THE LOGIC REQUIRED FOR USE IN DASHBOARDS

- Working with relational operators within the logical functions like IF, AND, and OR statements
- Summarising data using functions like MAX, MIN, RANK, SMALL, LARGE, COUNTIF, COUNTIFS, SUMIF, SUMIFS, AVERAGEIF, and AVERAGEIFS
- Integrating data using INDEX and MATCH
- Looking up specific results using VLOOKUP and HLOOKUP
- Formatting raw data using Text functions like LEFT, RIGHT, MID, SUBSTITUTE, REPLACE, LEN, TRIM, and EXACT
- Dealing with dates and time using YEAR, MONTH, DAY, NETWORKDAYS, TODAY, and NOW
- Case study

### 2. CONTROLLING DASHBOARD ENTRIES USING DATA VALIDATION

- Why use Data Validation?
- Creating a list using Data Validation
- Applying formulas using Data Validation
- Case study

### 3. USING CONDITIONAL FORMATTING TO COLOUR EXCEL DASHBOARD CELLS

- Changing the look of worksheet cells using Conditional Formatting
- Setting up logical formulas using Conditional Formatting
- Managing Conditional Formatting rules
- Key Conditional Formatting rules that will help with Excel dashboards
- Case study

### 4. UNDERSTANDING VARIOUS CHART TYPES

- Conveying a Message with a Chart
- Choosing the right Chart Type
- Analysing various types of Charts
- Importance of looking good
- Changing Chart Elements
- Fine tuning the Chart
- Case study

### 5. COMPONENTS SHOWING PERFORMANCE AGAINST A TARGET

- Showing performance with variances
- Showing performance against organisational trends
- Using a Thermometer chart
- Using a Bullet chart
- Case study

### 6. ADDING INTERACTIVE CONTROLS TO THE DASHBOARD

- Understanding Form Controls
- Adding a control to a worksheet
- Using the various Form Control buttons (Combo Box; List Box; Spin Button) by incorporating Excel functions
- Controlling multiple charts with one selector
- Case study

### 7. PIVOT TABLE DRIVEN DASHBOARDS

- Customising the Pivot Table
- Filtering your data
- Various views within the Pivot Table
- Applying Conditional Formatting within Pivot Table
- Various aspects of Pivot Charts
- Case study

### 8. ADDING INTERACTIVITY WITH SLICERS & TIMELINES

- Understanding Slicers
- Creating and formatting a slicer
- Using Slicers as Form Control
- Applying Timelines for Dates
- Modifying reports with Timelines
- Case study

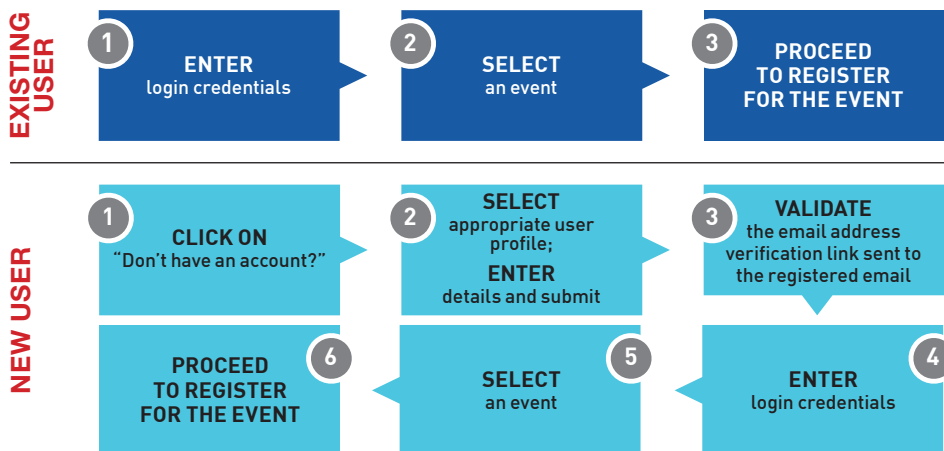
# Data Visualisation for Reporting Using Microsoft Excel Dashboard

With immediate effect, enrolment for all  
CPE programmes will be

**STRICTLY VIA ONLINE REGISTRATION ONLY**

## REGISTRATION PROCESS

- To view more events and download the full brochure, please visit: [pd.mia.org.my](http://pd.mia.org.my)
- Search and select the event
- Click 'Register' to experience the new system by continuing with the respective steps below:



For any assistance, please call (8.45am-5.30pm, Monday-Friday)

**MIA Help Desk @ 603-2722 9000**

## TERMS & CONDITIONS

### PROGRAMME FEE

- Fee is payable to MALAYSIAN INSTITUTE OF ACCOUNTANTS
- Depending on the event, the fee includes course materials and/or lunch and/or tea breaks.
  - **Individual Registration:** Full payment shall be made at the point of online registration.
  - **Corporate Registration:** Full payment shall be made within thirty (30) days from the date of the Invoice or 1 day before the programme, whichever earlier.
- Admittance to the programme shall be granted only upon full payment as per the above requirement.

### PAYMENT MODE

- Payment must be made through the **electronic channels i.e. online payment via the MIA member service portal and electronic fund transfer (EFT).**
- Payment by **cash and cheque is NOT ACCEPTABLE** effective from 1 January 2022.

### HRD CORP (FOR CLAIMABLE EVENTS ONLY)

- MIA is an approved Training Provider registered under 'Institut Akauntan Malaysia' (MyCoID: 631967).
- Employer's Obligations**
  - To ensure grant approval is obtained prior to event registration and to provide the Grant ID notification upon event registration.
  - To make full payment to MIA as per the issued Invoice within 14 working days upon receipt of MIA's notification in the event the approved training fee is cancelled by HRDC due to non-compliance on the part of the participant or his/her employer or any valid reasons stipulated by HRDC.
  - To settle the balance payment to MIA within 14 working days upon receipt of MIA's notification in the event only partial claim is approved by HRDC. MIA will provide copy of the original invoice and will not issue a new invoice for the balance amount.
  - If employer has made payment prior to grant approval, a refund will be made to employer subject to reimbursement received from HRDC. Refund will be made upon receipt of duly completed employer's EFT Form.
  - To provide required information and/or documents after completion of event for the purpose of HRDC Claim within 7 working days upon receipt of MIA's notification.

### CANCELLATION

Should the participant decide to cancel his/her enrolment, a cancellation policy shall be applied as follows:

- For written cancellation received with minimum seven (7) days' notice from the date of the programme, no penalties will be imposed and full refund will be made to participants who have paid.
- For written cancellation received less than seven (7) days from the date of the programme, an administrative charge of 20% of the registration fee will be imposed. Unpaid registrations will also be liable for a 20% administrative charge.
- No refunds will be made for written cancellations received on the day of the programme or for participants who failed to join the programme. Unpaid registrations will also be liable for full payment of the registration fee.
- Replacing registered participants is not allowed.
- Paid registration that is cancelled can opt to transfer the paid amount to future event(s) after deducting any applicable administrative charges.
- The transfer request to future event(s) should be confirmed by Corporate/Individual within three (3) days after cancellation otherwise the cancellation will be confirmed with refund action. Transfer request will not be entertained after the refund is processed.

- Corporate/Individual is required to top-up the balance amount if the amount to be transferred to the future event is insufficient.
- Any excess amount after transfer will be refunded to the Corporate/Individual's bank account as provided in the EFT form.
- Corporate/Individual is required to provide the EFT form each time when a refund is requested.

### PARTICIPANT'S CLASSIFICATION AND INFORMATION

Category: Corporate/Individual

- Please select the participant classification carefully as it determines the fee payable. No alteration will be allowed upon registration.
- The information on Corporate/Individual provided shall be deemed true and correct. No alteration will be allowed upon registration.

### VERIFICATION OF ATTENDANCE

- All participants are required to present photo identification (NRIC, driving licence or company's ID card) at the point of registration prior to signing the registration list when attending the programme. Admittance may be denied upon failure to present photo identification.

### CERTIFICATE OF ATTENDANCE AND CPE CREDIT HOURS

- Upon full attendance of the programme, participants will be issued an e-certificate of attendance. For this purpose, it is **COMPULSORY** to fill in the email address clearly.
- CPE credit hours will be credited into the MIA Member Services Portal within 14 days of the programme for participants who have complied with all terms and conditions stipulated herein.
- Participants will only be entitled to the CPE hours upon attending the entire duration of the programme. CPE hours will not be accorded for partial attendance.

### COPYRIGHT

The materials of the programme shall not be disclosed or used in any manner, either wholly or partially against any other parties and/or used in any manner, either wholly or partially as a defence by you and/or any other parties under any circumstances. The participants are therefore prohibited from reproducing any materials of this programme. All copyright and/or intellectual property rights in any relevant materials produced in this Programme will remain with the party who produced such materials. MIA disclaims responsibility for the materials of this programme. Neither the MIA, its Council or any of its Boards or Committees nor its staff shall be responsible or liable for any claims, losses, damages, costs or expenses arising in any way out of or in connection with any persons relying upon the materials provided during the programme.

### DATA PROTECTION

Information given by the participants to MIA is true, accurate and to the best of their knowledge. The participants have read and agreed with the Privacy Notice as stated on MIA's official website and therefore, allow MIA to collect, process, store and use the participants' data other than what is provided under the Personal Data Protection Act 2010.

### EXCLUSION OF LIABILITY

This programme shall not constitute an endorsement of the speaker(s) by MIA and MIA shall not be liable for whatsoever circumstances arising from any engagement between the speaker(s) and the programme's participants.

### DISCLAIMER

Malaysian Institute of Accountants (MIA) reserves the right to change the speaker(s), date(s), time(s) and to cancel the programme should circumstances beyond its control arise. MIA shall not be responsible for any costs, damages or losses incurred by the participant due to the changes and/or cancellation. MIA also reserves the right to make alternative arrangements without prior notice should it be necessary to do so. Upon registering, you are deemed to have read and accepted the terms and conditions herein.

## FACILITATOR

### PALANI MURUGAPPAN

Palani a.k.a. The Interpreter (who helps converge data into information), applies the VERIIFYTM training methodology, i.e. Validate, Encapsulate and Rationalise raw data in Identifying Information for Future Yield. He is a HRD Corp certified trainer who shares his knowledge and experience culled from over 20 years of involvement in the software application training industry.

If you want to make sense of the data surrounding you; how your organisation's data can help you expand or cut down areas of expenses; or simply move up the corporate ladder by being ahead in terms of interpreting raw data, the Interpreter will be able to assist by mapping the data into a spreadsheet format like Microsoft Excel and performing various business process analysis.

Excel is the most common spreadsheet used in an office environment. While most are familiar with Excel, only a handful know the art of extracting data from a database; or converging raw data into information using Excel's built-in tools. This is where the Interpreter excels in showing the many ways of doing this.

## PROGRAMME FEES

Member/Member Firm	RM 1,400
Non-member	RM 1,600

*Preferred Payment: Pay with MIA-CIMB Affinity Credit Card.*

## PROGRAMME DETAILS & REGISTRATION

HRDC Training Programme No. : 10001217945

7 & 8 August 2023 (Monday & Tuesday)

Pullman Kuala Lumpur Bangsar

Contact : Azie  
Tel : 03 2722 9265  
Fax : 03 2722 9009  
Email : [sp@mia.org.my](mailto:sp@mia.org.my)  
Address : Malaysian Institute of Accountants  
Dewan Akauntan  
Unit 33-01, Level 33  
Tower A, The Vertical  
Avenue 3, Bangsar South City  
No. 8, Jalan Kerinchi  
59200 Kuala Lumpur