

# CREATING DASHBOARDS WITH EXCEL & POWER BI

**November 06 and 07, 2025 | Grand Millennium Hotel, Kuala Lumpur - Malaysia**

## COURSE INTRODUCTION:

This two-day course offers a fast-paced, hands-on experience designed to elevate your skills in Microsoft Excel and Power BI. Through a series of practical, discussion-driven modules, you'll learn how to handle real-world data challenges with confidence. From foundational Excel techniques to advanced data modelling and visualization, the course emphasizes application over theory. You'll work with tools such as Power Query, Power Pivot, Regular Expressions, and even Python within Excel. Delegates are encouraged to actively contribute ideas and examples, making each session highly interactive and collaborative. Pre-course setup instructions ensure all participants are fully equipped to dive in from the start. Whether you're building dashboards, streamlining reporting, or deepening your data analysis, this course delivers immediately usable expertise in just two intensive days.

## COURSE METHODOLOGY:

The course employs an experiential learning approach, combining instructor-led demonstrations with hands-on exercises to ensure participants develop practical skills. Each module integrates real-world examples and case studies, encouraging delegates to apply concepts immediately. Group discussions and peer collaboration are fostered to deepen understanding and share diverse perspectives. Interactive tasks challenge learners to explore features and problem-solve using both Excel and Power BI tools. The curriculum is carefully paced to balance foundational knowledge with advanced techniques, supported by ongoing feedback and Q&A sessions. Pre-course setup and resource materials prepare participants to focus fully on skill acquisition from day one.

## COURSE KEY TAKEAWAYS:

- Master dynamic and advanced Excel functions, including REGEX and array formulas
- Build automated, interactive dashboards in Excel and Power BI
- Import and transform data using Power Query and Power Pivot
- Apply visualization best practices for clear, impactful reporting
- Use interactive controls to enhance user experience and flexibility
- Prepare, clean, and validate data from diverse sources
- Track performance with custom visuals and KPI-driven layouts
- Turn complex data into strategic business insights

## WHO SHOULD ATTEND:

- Financial Accountants
- Management Accountants
- Corporate Financiers
- Investment Bankers
- Financial Controllers
- Sales and Marketing Staff
- Auditors
- Finance Staff
- Commercial Bankers
- Business Analysts
- Financial Analysts
- Statisticians
- Production Managers
- Professors and Teachers



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## MODULE 1: Reviewing Excel and Pivot Tables

High quality dashboards rely on a number of ideas and skills being used. In this first four modules, we will review the following key skills that everyone needs to understand and apply in order to create and use effective dashboards.

### Excel Tables

- Appreciating why we need them
- Maximising their power

### Pivot Tables

- Effectively using
  - Filter
  - Row
  - Column
  - Value
  - Slicers

### Charts and Graphs

Best practice visualisations: including linking charts with

- Excel Tables
- Pivot Tables

## MODULE 3: Business Intelligence begins with Power BI for the Desktop

- Importing data from
  - Excel
  - CSV Files
  - The Web
  - Databases
- Basic Visualisations
- Tabulation of data
- Manipulating data: some basic calculation and measures

## MODULE 5: Design Principles

Delegates are encouraged to bring along or provide links to their own dashboards or dashboards they like or dislike. This will encourage full and free discussion of the kinds of elements needed for a successful dashboard.

We will refer to examples and suggestions from

- Edward Tufte
- Stephen Few
- Microsoft
- And more

## MODULE 6: Display Principles

- Charts for Time Series/Trending
- Smoothing Data
- Sparklines
- Highlighting Comparisons
- Frequency Distribution
- Target v Variance Charts
- Performance Against Target Range
- Win/Loss/Draw Conditional Format
- Text Formulas
- Dynamic Data Validation List
- Panel Charts

## MODULE 2: Critical Excel Functions

In addition to exploring the most basic functions in Excel, we will explore and apply the following, among others

- IF ... and IF(AND) ... IF(OR) ... IF(AND(OR))
- SUMIFS()
- SUMPRODUCT()
- V/HLOOKUP()
- FREQUENCY()
- TRANSPOSE()
- IFERROR()
- Regular Expressions
  - REGEXTEST()
  - REGEXREPLACE()
  - REGEXEXTRACT()
- Dynamic Array Functions
  - UNIQUE()
  - SORT()
  - SORTBY()
  - RANDARRAY()
  - FILTER()
  - SEQUENCE()
  - XLOOKUP()
  - XMATCH()
- GROUPBY()
- PIVOTBY()
- Flash Fill
- Data Types
- Forecast Sheet

## MODULE 4: More Advanced Business Intelligence

In this module we will use Power BI, Power Query and Power Pivot as we start to unleash our importing, manipulating, cleaning and analytical skills. Taking data from a variety of sources to ensure your data are clean and ready to use. We will use a variety of techniques in this module including

- Manually cleaning, by inspection
- Using Power Query to help with data cleaning
- Power Query can replace your VLOOKUP functions
- By using the following data importing techniques, we will use Power Query to optimise our data, create basic models, break down large tables into smaller, more manageable tables
- Importing data from
  - A worksheet
  - Another Excel file
  - A CSV file
  - A database
  - A web page
- Unpivoting data
- Manage data types that Excel sometimes cannot manage
- Combine tables from within a folder
- Split complex columns into multiple columns
- Create functions
- Create ratio analysis tables
- And more

The following Power Pivot/Power BI work cannot be done in basic or ordinary Excel and yet it is so powerful yet simple to do!

- Power Pivot: Creating data models to create relationships between Excel and database tables
- Power BI can be used as well as and instead of Power Pivot in this context



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## MODULE 7: Interactive Controls

- Form Controls Introduction
  - Check Boxes
  - List Boxes
  - Option Buttons
  - Group Boxes
  - Scroll Bar
  - Buttons
  - Combo Boxes
- INDIRECT Function
- Dynamic Named Range with OFFSET
- Dynamic Named Range with INDEX
- Dynamic Ranges for Charts

## MODULE 8: Analysing The Data

- Pivot Charts
- Slicers
- Power Pivot

## MODULE 9: Automating Your Dashboard

- Linking to various data sources through
  - Power Query
  - Power Pivot and
  - Power BI
- Incorporating New Data Automatically
- Auto Refresh Pivot Tables

## MODULE 10: Putting It All Together

- Choosing the appropriate visualisation(s)
  - Column Chart
  - Line Chart
  - Pie Chart
  - Scatter Chart
  - Step Graphs
  - Pyramid Chart
  - Heatmaps
  - Sunburst chart
  - Histograms
  - Box & Whisker Plots
- Array Formula Alternative to
  - SUMIFS()
  - LARGE() and SMALL()
  - Array and DAVERAGE
- Rank Values with Pivot Table
- Formatting Quickly

## MEET YOUR TRAINER

### Mr. Duncan Williamson

Duncan Williamson is an accomplished author, trainer, and business consultant specializing in Financial and Management Accounting. With a proven track record of success across educational, financial, and commercial sectors, Duncan excels in financial analysis and management accounting.



As a highly skilled communicator, Duncan has delivered presentations and training across multiple countries and cultures, helping students, trainees, and colleagues reach their full potential. His international consultancy experience spans the Middle East, Africa, Central Asia, South Asia, the Caucasus, the Balkans, Central Europe, and Denmark.

Duncan's career blends academic expertise with practical experience in various industries, including oil and gas, manufacturing, and consulting. He has worked as a management accountant in the UK, consulted on product costing in Eastern Europe, and has deep expertise in the oil and gas sector. Known for his strong analytical skills, problem-solving abilities, and commitment to quality customer service, Duncan's consultancy work stands out for its exceptional results.

Duncan is also a prolific author. His publications include Excel Solutions for Accountants (in preparation, published by Bookboon.com), The Bookkeeping and Accounting Coach (Hodder & Stoughton), a textbook on Cost and Management Accounting (Prentice Hall), and numerous ebooks, articles, and website contributions.

An experienced trainer and qualified teacher, Duncan has led seminars on a variety of topics, including International Financial Reporting Standards (IFRS), UK and US Financial Reporting, Oil and Gas Financial Reporting, Management Accounting, Strategic Management, Financial Controllershship, Budgeting and Forecasting, and Spreadsheet Modeling in accounting and management. He combines his extensive academic knowledge with hands-on expertise to deliver impactful training and development.

Some of Duncan clients include:

- |                                                |                                  |
|------------------------------------------------|----------------------------------|
| • Saudi Aramco                                 | • SABIC                          |
| • Kuwait Petroleum Corporation                 | • Oman Oil Corporation           |
| • Dubai Ministry of Finance                    | • Arab Potash Company            |
| • Nigerian Oil Corporation                     | • Sonangol Angola                |
| • Bank Simpanan Nasional Malaysia              | • Eastern Bank Ltd Bangladesh    |
| • Electricity Generating Authority of Thailand | • Kasikornbank Thailand          |
| • Maldives Airport Company                     | • Siam Cement Company Thailand   |
| • The Brunei Economic Development Board        | • Petrozim Line Pvt Ltd Zimbabwe |
| • Petrozim Line Pvt Ltd Zimbabwe               | • Abu Dhabi National Oil Company |
| • Zakum Development Company (ZADCO)            | • Amazon.com                     |
| • Mark and Spencer                             | • British Airways                |
| • EasyJet                                      | • Marktlint                      |



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## REGISTRATION DETAILS:

Delegate 1

- Name: \_\_\_\_\_
- Job Title: \_\_\_\_\_
- Email: \_\_\_\_\_
- Mobile: \_\_\_\_\_

Delegate 2

- Name: \_\_\_\_\_
- Job Title: \_\_\_\_\_
- Email: \_\_\_\_\_
- Mobile: \_\_\_\_\_

Delegate 3

- Name: \_\_\_\_\_
- Job Title: \_\_\_\_\_
- Email: \_\_\_\_\_
- Mobile: \_\_\_\_\_

Delegate 4

- Name: \_\_\_\_\_
- Job Title: \_\_\_\_\_
- Email: \_\_\_\_\_
- Mobile: \_\_\_\_\_

Delegate 5

- Name: \_\_\_\_\_
- Job Title: \_\_\_\_\_
- Email: \_\_\_\_\_
- Mobile: \_\_\_\_\_

**Note:** In case of 6 or more nominations make a duplicate of this form & fill in the details.

## ORGANIZATION DETAILS:

Company: \_\_\_\_\_

Address: (to be used on invoice):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Country: \_\_\_\_\_

## AUTHORIZED BY:

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Email: \_\_\_\_\_

Date: \_\_\_\_\_

## PAYMENT DETAILS:

Credit Card Holder's Details - To send Payment Link

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Email: \_\_\_\_\_

Country: \_\_\_\_\_

## BOOK & PAY:

**Actual Fee:** USD 2,295 per delegate.

**Book before 03 October 2025, Pay:** USD 1,895 per delegate.

**Group Discount:**

|                              |                        |
|------------------------------|------------------------|
| Book 2-3 participants.       | USD 1,695 per delegate |
| Book 4-5 participants.       | USD 1,495 per delegate |
| Book 6 or more participants. | USD 1,295 per delegate |

\_\_\_\_\_ **All Pricing Excludes All Taxes** \_\_\_\_\_

## Payment Mode:

Payments will be made by Credit Card or by Bank transfer, an Invoice will be sent soon after we receive the signed & filled registration form.

**Payment is required within 5 working days after the receipt of the invoice.**

## Session Timings:

09:00 am - 04:00 pm (Malaysian Standard Time)

## TERMS & CONDITIONS:

### Customer Information:

Fees include tuition, full course documentation, lunches, and refreshments for the duration of the programme. Delegates are responsible for their own travel and accommodation arrangements.

### Incidental Expenses:

**CorEvents** is not responsible for covering airfare, hotel stays, or other travel costs incurred by registrants. Delegates are strongly advised to obtain the necessary travel visas at least 3 weeks prior to the course start date.

### Invoicing & Payment Terms:

An invoice will be issued upon receipt of the registration form. **Full payment is required within 5 working days** of the invoice date. Participation in the course is only confirmed once full payment has been received.

### Disclaimer:

**CorEvents** reserves the right to change or cancel any part of its published programme due to unforeseen circumstances.

### Cancellation, Transfers & Substitutions:

Cancellations must be submitted via email. A full refund, less a \$100 administrative fee, is available for cancellations received at least 20 working days before the event. Cancellations received after this period, or non-attendance (no-show), are subject to the full course fee with no refund.

A one-time transfer to another course of the same value is allowed, provided the fee has been paid in full; 50% of the new course fee will be invoiced. Transfers must be used within 12 months. Replacement delegates are welcome at no additional charge, but must be confirmed in writing with full delegate details.

### Programme Changes:

**CorEvents** reserves the right to change the course timing, venue, speaker, or content due to unforeseen circumstances. In the rare event of a cancellation by **CorEvents**, a full refund will be issued, less any applicable bank or service charges (up to 5%). **CorEvents** is not responsible for any other expenses incurred by the delegate.

### Acknowledgement:

By registering, the client acknowledges and agrees to these terms. **CorEvents** will not be liable for any expectation or financial loss not explicitly covered herein.

## In-House Trainings & Consultation:

If you're looking for Consultation OR if you have a number of delegates with similar training needs, then you may wish to consider having an In-House Training solution delivered locally onsite.

Course can be tailored to specific requirements.

Please contact **Mibsam Ali** on **+92 304 2833695** or email **mibsam@corevents.org** to discuss further possibilities.

