

CREATING DASHBOARDS WITH EXCEL & POWER BI

December 08 and 09, 2025 | Dusit Thani Hotel, Dubai - UAE

COURSE INTRODUCTION:

Modern organizations rely on clear, actionable insights from data to make informed decisions. This course is designed to guide professionals through the complete journey of building high-impact dashboards—starting from Excel fundamentals and progressing into advanced analytics with Power BI. Participants will learn how to manage, clean, and visualize data effectively, and how to present that data in dashboards that are both informative and visually compelling. The course also explores the design and automation techniques that ensure dashboards remain dynamic and relevant over time.

COURSE METHODOLOGY:

The course is structured around a progressive, hands-on learning model, with a strong emphasis on practical application. Key features include:

- Live demonstrations using real-world data
- Step-by-step exercises for Excel, Power Query, Power Pivot, and Power BI
- Collaborative dashboard reviews and feedback
- Design critique sessions using industry examples
- Incremental build-up from core concepts to complex solutions

Participants will be encouraged to bring their own dashboards or datasets for review and improvement, fostering deeper learning and relevance.

COURSE KEY TAKEAWAYS:

Upon completion, participants will be able to:

- Build and enhance dashboards using Excel and Power BI
- Utilize pivot tables, slicers, and charts to uncover insights
- Apply advanced Excel functions including Dynamic Arrays and REGEX
- Clean and transform data using Power Query and Power Pivot
- Structure data models to create efficient relationships across sources
- Incorporate automation techniques to keep dashboards up-to-date
- Apply principles of effective dashboard and data visualization design
- Choose appropriate charts and visuals for different data scenarios

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

FEATURING YOUR COURSE 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 Controllorship, 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:

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

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MODULE 01: 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.

Pivot Tables

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

Charts and Graphs

Best practice visualisations: including linking charts with

- Excel Tables
- Pivot Tables

MODULE 02: Critical Excel Functions

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

- Regular Expressions
 - REGEXTEST()
 - REGEXREPLACE()
 - REGEXEXTRACT()
- Dynamic Array Functions
 - UNIQUE()
 - SORT()
 - SORTBY()
 - RANDARRAY()
 - FILTER()
 - SEQUENCE()
 - XLOOKUP()
 - GROUPBY()
 - PIVOTBY()

MODULE 03: 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 04: 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

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

RECAP OF DAY 01

MODULE 05: 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 06: Display Principles

- Charts for Time Series/Trending
- Smoothing Data
- Sparklines
- Highlighting Comparisons

MODULE 07: Analysing The Data

- Pivot Charts
- Slicers
- Power Pivot

MODULE 08: 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 09: 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

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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 01 November 2025, Pay: USD 1,895 per delegate.

Group Discount:

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

————— 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 (UAE 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.

