


**TECH**   
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# **Building BI Customized Static and Dynamic Interactive Reports with Microsoft Excel**

# About Course

This course has been designed to help you build static and dynamic interactive BI reports connected with the data sources. The course will start by explaining what BI is and the BI tools in Microsoft Excel. After that, participants will be shown how BI processes are accomplished in Microsoft Excel. Afterwards, an illustration will be made on how to connect Microsoft Excel to different data sources. This will be followed by going through the details of computational analysis and data management. Later, an explanation of data integration concepts and methodologies will take a place. At this point, the participant will be ready to learn how to build the report structure and templates. Finally, participants will be shown how to construct and test the reports. At the end of the course, the participant will finish a real-life project that will help in practicing and understanding all the delivered concepts. Throughout this course many tips, tricks and secrets will be shared as a result of many years of dedicated work and research.



# Outline

- Introduction
- What is business intelligence?
- What are Microsoft Excel Power BI tools?
  - Exploring Power Pivot
  - Exploring Power Query
  - Exploring Power View
  - Exploring Power Mapping
- Describing how the business intelligence process works in Microsoft Excel

## **Connecting to data sources:**

- Connecting to multiple data sources such as:
  - Flat Files:
    - Microsoft Excel
    - CSV files
  - Databases:
    - Microsoft SQL Server
    - Oracle
    - Microsoft Access
  - Azure
  - Online services
  - Web pages

## **Computational analysis and data management:**

- Functions
- Predefined (built-in) functions
- Conditional Formatting
- Sorting tools
- Filtering
- Tables' tools
- Pivot tables

## **Data Integration:**

- Database relationship concepts
- Joint functions and concepts
- Vlookup functions

## **Building reports structures and templates:**

- Formatting options
- Border options
- Merging cells options
- Grouping / ungrouping options

## **Constructing Report**

- Connecting reports with data sources
- Building functions
- Testing

# This course is important for:

- Professionals who need to deal with creating static and dynamic reports.
- Professionals who wish to develop interactive reporting systems.
- Professionals who need to have customized reports.
- Professionals who need to deal with business reporting.
- Professionals who need to create business intelligence outcomes.
- Professionals who evaluate and monitor performance.
- Managers.
- Decision makers.

# The course is available with the following modes:

- **Online live instructor-led mode:**

The course will be delivered using ZOOM application. Participants are required to install ZOOM application to their computers.

- **Face to face instructor-led mode:**

The course will be held in a training venue at reputable hotel or business center. The participants will be informed about the venue details after registration. Participants are required to bring their own computing devices.

# Duration

- One day, from 9 am - 5 pm , including refreshments and lunch break.

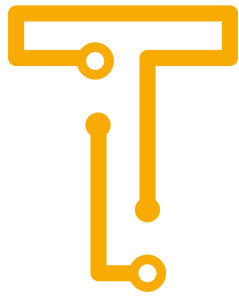
# Software Requirements

Participants are required to have the following software to be installed prior to the course session:

- **ZOOM**
- **Microsoft Excel 2016 or higher**
- **Microsoft Access 2016 or higher**

# Course Prerequisites

To have good understanding for the course, it is important to have at least basic computer skills and basic understanding for relational database concepts.



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