


**TECH**   
KNOWLEDGE

# **Building Business Intelligence KPIs Based Reports with Microsoft Excel**

# About Course

This course helps the participants to learn how to create Business Intelligence (BI) Key Performance Indicators (KPIs) reports using Microsoft Excel. The course starts by introducing BI concepts, KPIs concepts, Microsoft Power BI tools and how Microsoft Excel implements BI processes. After that, the course will show you how to connect Microsoft Excel with different data sources. Afterwards, participants will be taken through extensive details on computational analysis and analytics in Microsoft Excel. Following that, the concepts of data integration will be explained and practiced by going through different scenarios. Next, the phase of constructing KPIs' reports will be focused on where participants will be shown how to construct templates, base reports, and KPIs, implementing created KPIs on dynamic and static reports and lastly testing. This course will share many tips, tricks and secrets that are the result of many year of dedicated work and research. At the same time, the course will be fully practical-based, with hands-on cases and small-scale projects in order to have a solid understanding of the concepts.



# Outline

- Introduction
- What are key performance indicators (KPIs)?
- What is Business Intelligence (BI)?
- How can BI support KPIs based reports?
- What are Microsoft Excel Power BI tools?
  - Exploring Power Pivot
  - Exploring Power Query
  - Exploring Power View
  - Exploring Power Mapping
  - How does Business Intelligence processes get implemented 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

## **Constructing dashboards:**

- How to create an information base to have the right KPIs.
- How to decide the needed KPIs.
- Constructing KPI reports' templates & structures.
- Creating reports' base for the KPI reports.
- Creating KPIs.
- Implementing KPIs to static and dynamic reports.
- Testing.

# This course is important for:

- Professionals who wish to develop a customized reporting systems for monitoring and evaluation.
- Professionals who wish to develop interactive reporting systems.
- Professionals who need to deals with business reporting.
- Professionals who need to create Business Intelligence outcomes.
- 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.

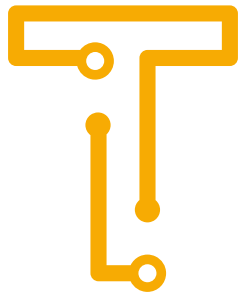
# Software Requirements

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.



**TECH**   
KNOWLEDGE

[www.techknowledge.ca](http://www.techknowledge.ca)