8. DEVELOP AN INTERACTIVE DASHBOARD FOR THE FINANCIAL SAMPLE EXCEL WORKBOOK

Solution :

Step 1: Write the Problem Statements(Goals)

1) Category wise profit
2) Region wise profit
3) Segment wise Profit
   Doughnut chart
4) What are the total sales by segment in each / all years?
5) What is the total sales in different / all categories
6) What is the total sales in different / all region.
   Bar chart
7) What are the profit and sales in different regions
   Bar chart
8) What is total quantity in different / all categories
   Pie chart

Steps to create a Dashboard on Sample Super Store
1) Data cleaning:
a) Add filters to all the columns
b) For each column check the filters for any data anomaly such as blank cells, incorrect data etc.
c) If any anomalies correct them manually
2) For every Goal defined above do the analysis in the following manner:
a) Insert Pivot table in the new sheet and include all the columns from the data set.
b) Drag the field on which analysis has to be done into the respective tab of pivot table field.
c) Remove the grand total from the pivot data using following steps
   Select the pivot table data from the excel sheet and click on design ribbon → click grand total → Select off for rows and columns.
d) Select options ribbon → click on pivot chart option from the ribbon → select type of chart from the menu → click on ok
e) You will get a desired chart which can be formatted using various options from the pivot chart tools ribbon

3) Copy all the charts create by following step 2 into a new sheet. Name the sheet as Excel Dashboard
4) In this excel dashboard sheet
   go to pivot chart tools ribbon -→ select Analyze option → select insert slicer→select columns on which you need to insert slicer
5) Connect all the slicers using following steps
   Goto slicer tools→ click on options → select pivot table connections → check all the pivot tables you need to connect.
6) This dashboard will be interactive. When you select data from the slicer, your charts will dynamically update to display the selected options.

O/P: Dashboard