

Project Report: Excel Portfolio Project

Background:

This project focused on creating a comprehensive and professional Excel-based portfolio to demonstrate advanced data analysis and visualization skills. Using a raw dataset, I transformed it into a polished, interactive Excel dashboard. The project simulated a real-world scenario, allowing me to showcase my ability to clean, model, and visualise data effectively using Excel.

Task Overview:

The objective was to handle a raw dataset and turn it into actionable insights through advanced Excel functionalities. The project involved the following key steps:

- **Data Cleaning:** Addressing inconsistencies and preparing the dataset for analysis.
 - **Data Modelling:** Structuring the data with relationships to support meaningful analysis.
 - **Dashboard Creation:** Designing an interactive dashboard to present insights in a user-friendly manner.
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Solution:

1. Data Cleaning:

- I meticulously cleaned the raw data by identifying and correcting errors, removing duplicates, and standardising formats to ensure data integrity.
- Applied formulas and tools such as conditional formatting and text-to-columns to refine the dataset.

2. Data Modelling:

- Created a data table and established relationships between different tables to allow for streamlined analysis.
- Used Excel features such as pivot tables and data validation to organise and categorise data efficiently.

3. Dashboard Design:

- Developed a dynamic, visually appealing dashboard using charts, slicers, and conditional formatting.
- Incorporated key metrics, such as total sales and performance trends, using formulas and measures to calculate insights.
- Designed an interactive interface that enabled users to filter data by categories, time periods, and other dimensions for deeper insights.

End Result:

The result was a professional, fully functional Excel dashboard that transformed raw data into actionable insights. The dashboard allowed for easy exploration of key metrics and trends through interactive elements. This project highlighted my ability to manage the end-to-end data analysis process, from cleaning and modeling to visualization. It demonstrated my proficiency in Excel as a powerful tool for solving real-world analytical challenges and creating impactful data-driven stories.

Snapshots of the Project

	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	Customer ID	Product ID	Quantity	Customer Name	Email	Country	Coffee Type	Roast Type	Size	Unit Price	Sales	Coffee Type Name	Roast Type Name	Loyalty Ca
1	17670-51384-MA	R-M-1	2	Aloisia Allner	aallner0@lulu.com	United States	Rob	M	1.0 kg	\$ 9.95	\$ 19.90	Robusta	Medium	Yes
2	17670-51384-MA	E-M-0.5	5	Aloisia Allner	aallner0@lulu.com	United States	Exc	M	0.5 kg	\$ 8.25	\$ 41.25	Excelsa	Medium	Yes
3	21125-22134-PX	A-L-1	1	Jami Redholes	jredholes2@tmail.com	United States	Ara	L	1.0 kg	\$ 12.95	\$ 12.95	Arabica	Light	Yes
4	23806-46781-OU	E-M-1	2	Christoffer O' Shea		Ireland	Exc	M	1.0 kg	\$ 13.75	\$ 27.50	Excelsa	Medium	No
5	23806-46781-OU	R-L-2.5	2	Christoffer O' Shea		Ireland	Rob	L	2.5 kg	\$ 27.49	\$ 54.97	Robusta	Light	No
6	86561-91660-RB	L-D-1	3	Beryle Cottier		United States	Lib	D	1.0 kg	\$ 12.95	\$ 38.85	Liberica	Dark	No
7	65223-29612-CB	E-D-0.5	3	Shaylynn Lobe	slobe6@nifty.com	United States	Exc	D	0.5 kg	\$ 7.29	\$ 21.87	Excelsa	Dark	Yes
8	21134-81676-FR	L-L-0.2	1	Melvin Wharfe		Ireland	Lib	L	0.2 kg	\$ 4.76	\$ 4.76	Liberica	Light	Yes
9	03396-68805-ZC	R-M-0.5	3	Guthrey Petracci	gpetracci8@livejournal.com	United States	Rob	M	0.5 kg	\$ 5.97	\$ 17.91	Robusta	Medium	No
10	61021-27840-ZN	R-M-0.5	1	Rodger Raven	rraven9@ed.gov	United States	Rob	M	0.5 kg	\$ 5.97	\$ 5.97	Robusta	Medium	No
11	76239-90137-UQ	A-D-1	4	Ferrell Ferber	fferbera@businesswire.com	United States	Ara	D	1.0 kg	\$ 9.95	\$ 39.80	Arabica	Dark	No
12	49315-21985-BB	E-L-2.5	5	Duky Phizackerly	dphizackerly@utexas.edu	United States	Exc	L	2.5 kg	\$ 34.16	\$ 170.78	Excelsa	Light	Yes
13	34136-36674-OM	R-M-1	5	Rosaleen Scholar	rscholarc@nyu.edu	United States	Rob	M	1.0 kg	\$ 9.95	\$ 49.75	Robusta	Medium	No
14	39396-12890-PE	R-D-2.5	2	Terence Vanyutin	tvanyutin@wix.com	United States	Rob	D	2.5 kg	\$ 20.59	\$ 41.17	Robusta	Dark	No
15	95875-73336-RG	L-D-0.2	3	Patrice Trobe	ptrobe@wunderground.com	United States	Lib	D	0.2 kg	\$ 3.89	\$ 11.66	Liberica	Dark	Yes
16	25473-43727-BV	R-M-2.5	5	Llywellyn Oscroft	loscroft@ebay.co.uk	United States	Rob	M	2.5 kg	\$ 22.89	\$ 114.43	Robusta	Medium	No
17	99643-51048-IC	A-M-0.2	6	Minni Alabaster	malabasterg@hexun.com	United States	Ara	M	0.2 kg	\$ 3.38	\$ 20.25	Arabica	Medium	No
18	62173-15287-CU	A-L-1	6	Rhianon Broxup	rbroxup@jmdo.com	United States	Ara	L	1.0 kg	\$ 12.95	\$ 77.70	Arabica	Light	No
19	57611-05522-ST	R-D-2.5	4	Pall Redford	predfordi@ow.ly	Ireland	Rob	D	2.5 kg	\$ 20.59	\$ 82.34	Robusta	Dark	Yes
20	76664-37050-DT	A-M-0.2	5	Aurea Corradino	acorradinoj@harvard.edu	United States	Ara	M	0.2 kg	\$ 3.38	\$ 16.88	Arabica	Medium	Yes
21	76664-37050-DT	E-D-0.2	4	Aurea Corradino	acorradinoj@harvard.edu	United States	Exc	D	0.2 kg	\$ 3.65	\$ 14.58	Excelsa	Dark	Yes
22	03090-88267-BQ	A-D-0.2	6	Avrit Davidowsky	adavidowskyj@netvibes.com	United States	Ara	D	0.2 kg	\$ 2.99	\$ 17.91	Arabica	Dark	No
23	37651-47492-NC	R-M-2.5	4	Annabel Antuk	aantukm@kickstarter.com	United States	Rob	M	2.5 kg	\$ 22.89	\$ 91.54	Robusta	Medium	Yes
24	95399-57205-HI	A-D-0.2	4	Iorgo Kleinert	ikleinertn@timesonline.co.uk	United States	Ara	D	0.2 kg	\$ 2.99	\$ 11.94	Arabica	Dark	Yes
25	24010-66714-HW	A-M-1	1	Chris Blofeld	cblofeldo@amazon.co.uk	United States	Ara	M	1.0 kg	\$ 11.25	\$ 11.25	Arabica	Medium	No
26	07591-92789-UA	E-M-0.2	3	Culley Farris		United States	Exc	M	0.2 kg	\$ 4.13	\$ 12.38	Excelsa	Medium	Yes
27	45231-44455-IC	A-M-0.5	4	Selene Shales	sshalesq@umich.edu	United States	Ara	M	0.5 kg	\$ 6.75	\$ 27.00	Arabica	Medium	Yes
28	50124-88608-EO	A-M-0.2	5	Vivie Dannel	vdannel@mtv.com	Ireland	Ara	M	0.2 kg	\$ 3.38	\$ 16.88	Arabica	Medium	No
29	00888-74614-UZ	A-D-0.5	3	Theressita Newbury	tnewbury@usda.gov	Ireland	Ara	D	0.5 kg	\$ 5.97	\$ 17.91	Arabica	Dark	No
30	14158-30713-OB	A-D-1	4	Mozelle Calcutt	mcalcutt@baidu.com	Ireland	Ara	D	1.0 kg	\$ 9.95	\$ 39.80	Arabica	Dark	Yes
31	51427-89175-QJ	L-M-0.2	5	Adrian Swaine		United States	Lib	M	0.2 kg	\$ 4.37	\$ 21.83	Liberica	Medium	No
32	51427-89175-QJ	A-D-0.5	6	Adrian Swaine		United States	Ara	D	0.5 kg	\$ 5.97	\$ 35.82	Arabica	Dark	No
33	51427-89175-QJ	L-M-0.5	6	Adrian Swaine		United States	Lib	M	0.5 kg	\$ 8.73	\$ 52.38	Liberica	Medium	No

XLookup function used to input data into Orders sheet from Customers sheet

File

Home

Insert

New Tab

Page Layout

Formulas

Data

Review

View

Developer

Help

Table Design

Tell me what you want to do

Paste

Cut

Copy

Format Painter

Clipboard

Calibri

11

B

I

U

Font

Alignment

Wrap Text

Merge & Center

Number

General

%

0.00

0.00

Conditional Formatting

Format as Table

Cell Styles

Styles

Insert

Delete

Format

Cells

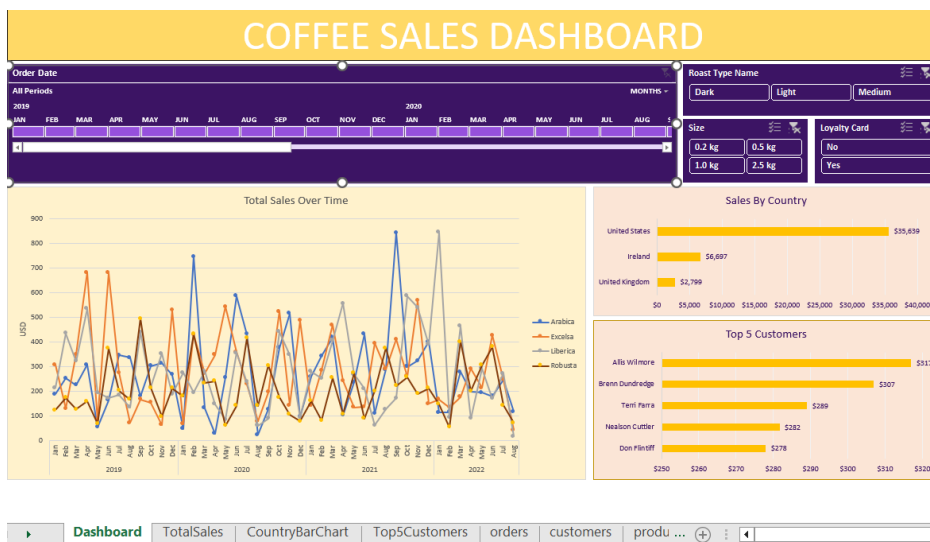
AutoSum

Fill

Clear

<

Index and Match function use case to input data from different sheet into main worksheet



Final Dashboard with all the important KPIs on one page