

Advanced Dashboards

Relevel
by Unacademy



Datasets for Class Practice

Please find below the link for the data set that will be used in the class for practice.

- Instructions to download the file-

Click on the link → File → Download → Microsoft Excel(.xlsx)

1. <https://docs.google.com/spreadsheets/d/1LtQfVLREaaXVHpIWm6WYf6HmzitlBLIR/edit?usp=sharing&oid=107266068801601122977&rtpof=true&sd=true>
2. <https://docs.google.com/spreadsheets/d/1enN-sKM2cYYZNEvDLwTQd4-v6MayTTex/edit?usp=sharing&oid=107266068801601122977&rtpof=true&sd=true>
3. <https://docs.google.com/spreadsheets/d/1HYyGM9VnmQE2QJ5S5xYmmykiB4s80-tg/edit?usp=sharing&oid=107266068801601122977&rtpof=true&sd=true>



Getting started with the Dashboard

- Getting the Data in Excel
- Outlining the Structure of the Dashboard
- Interactive Tools to Make Your Excel Dashboard Awesome
 - Slicers



Getting started with the Dashboard

Getting the Data in Excel

- Once we have a clear outline for the Dashboard and have answered the aforementioned questions, it is time to collect the data. If the data is in Excel, that's great; if it's not, you'll need to figure out an effective way to get it there.
- If given CSV or Text files, you may easily convert them into Excel. If you have access to a database where the data is stored, you can connect to it and update it indirectly.
- Once we have the data, we must standardize it. For example, you may need to delete leading, trailing, or double spaces and locate and eliminate duplicates, blanks, and errors. We may even need to rearrange data at times (for example, creating a Pivot table). These steps might vary depending on the project and the appearance of your data in Excel.

Getting started with the Dashboard

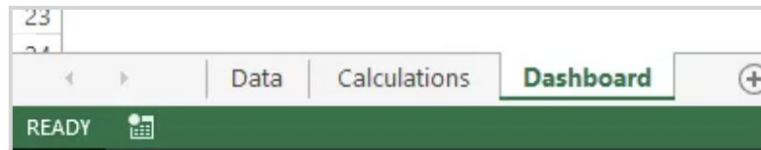
Outlining the Structure of the Dashboard

Once we have the data in Excel, we will figure out what we can show in the Dashboard and what we cannot. It will be a decent approach to connect with dashboard consumers and share data quality issues at this stage.

Maybe we can restructure the Dashboard that can be built upon the current data state. The goal of this phase is to ensure that your stakeholder understands what kind of Dashboard they can expect based on the data available. It also allows the stakeholder to suggest modifications that would increase his value.

As a best practice, divide your Excel workbook into three sections (these are the worksheets with the same name that I create):

- **Data** - This could be one or more worksheets containing raw data.
- **Calculations** - This is where you conduct all of your math. Again, you may use one or more sheets for calculations.
- **Dashboard** - The Dashboard is located on this sheet. It is a single-page view that displays data-backed analysis/insights in most cases.

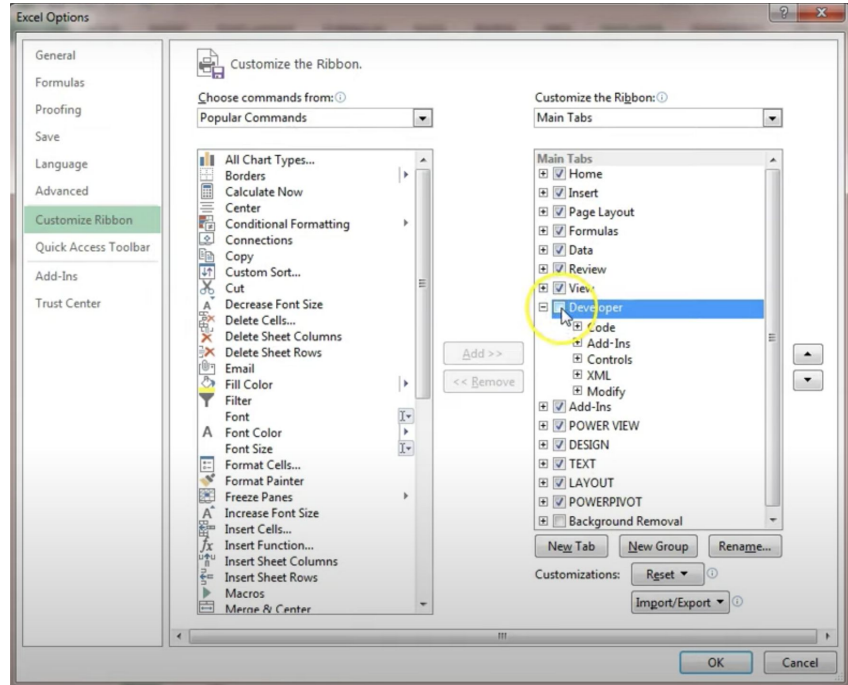


Elements used in the Dashboard to make it Interactive

Enable Developer Mode in Excel –

Before we practice any Interactive tools Options, make sure that the Developer Tab in your excel is enabled. If not, please follow the instructions below to enable the Developer Tab:

- Click on File>Options
- Go to Customized Ribbon
- Check Developer Option

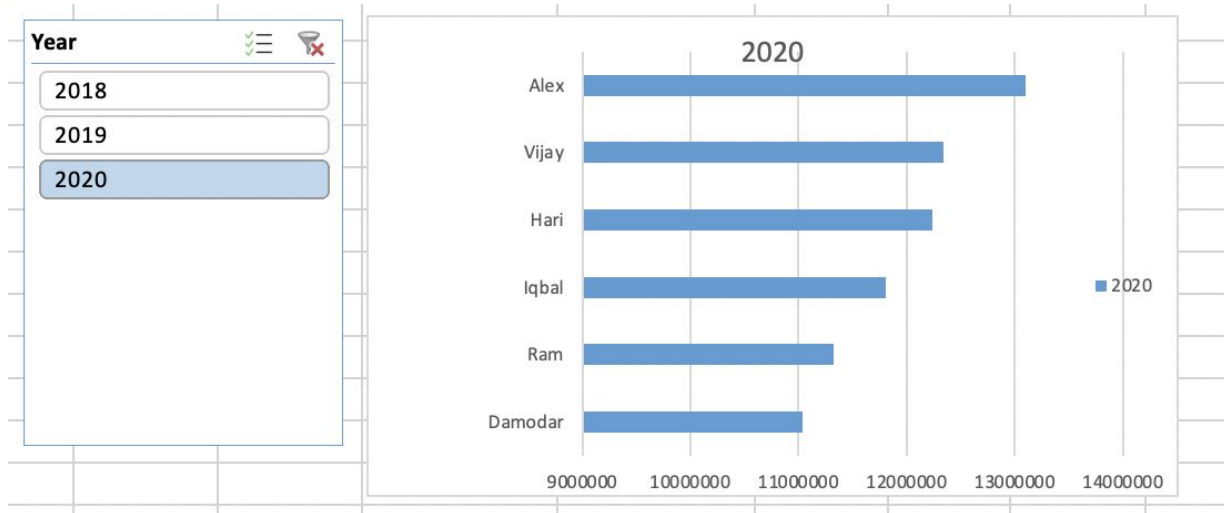


Elements used in the Dashboard to make it Interactive

Once the Developer mode is checked, let's study our first interactive Tools.

1. Slicer

Slicers provide buttons that can be used to filter tables or PivotTables. In addition to quick filtering, Slicers also identify the current filtering status, making it simple to grasp what is now presented. A slicer can easily filter data in a table or Pivot Table.



In the next class we will study:



Advanced Dashboard Tools- Scroll Bar, Spin Button and Check Box