

# Pivot Tables & Charts And Intro to Excel 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/1t3xIQ0NgP1Ze0yXM3L8ARWg1vVuQ5MyN/edit?usp=sharing&oid=107266068801601122977&rt=pof=true&sd=true>



# Tables, Charts, Reports & Dashboard

## 1. Table:

### Simple Table

A table comprises columns and actual data rows (similar to a spreadsheet). Each column is assigned a name and a type (data type).

Product	Cost Price	Selling Price	Profit
Mobile	₹30,000	₹38,000	₹8,000
Laptop	₹60,000	₹72,000	₹12,000
Shoes	₹4,500	₹4,800	₹300
Watch	₹32,000	₹36,000	₹4,000
Earphone	₹3,000	₹3,400	₹400
Photo Frame	₹1,000	₹700	-₹300

# Tables, Charts, Reports & Dashboard

## Pivot Table

A Pivot Table is a tool for summarising, sorting, reorganizing, grouping, counting, totaling, or averaging data stored in a table. It enables us to convert columns to rows and rows to columns. It lets you aggregate items by any field (column) and do complex calculations on them.

Row Labels	Sum of Cost Price	Sum of Profit	Sum of Selling Price
Earphone	3000	400	3400
Laptop	60000	12000	72000
Mobile	30000	8000	38000
Photo Frame	1000	-300	700
Shoes	4500	300	4800
Watch	32000	4000	36000
<b>Grand Total</b>	<b>130500</b>	<b>24400</b>	<b>154900</b>

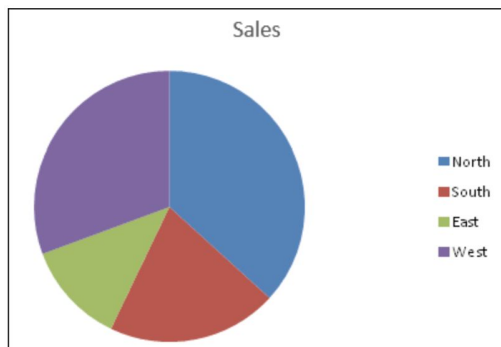
## What are Charts? Why we need charts?

- In Microsoft Excel, a chart is frequently referred to as a graph. It is a graphical depiction of data from a spreadsheet that can provide greater insight into the data than simply looking at the numbers.
- A chart is a valuable tool for visually displaying data in various chart types such as Bar, Column, Pie, Line, Area, Doughnut, Scatter, Surface, or Radar charts. It is simple to make a chart with Excel.
- A chart is a tool in Excel that allows you to explain data visually. Charts help your audience understand the meaning behind the data, and they make it much easier to display comparisons and trends. In this session, you'll learn how to insert and adjust charts so that they effectively communicate information.

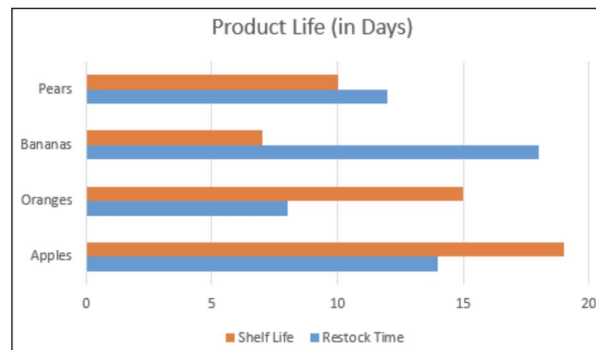


# Different Types of Charts

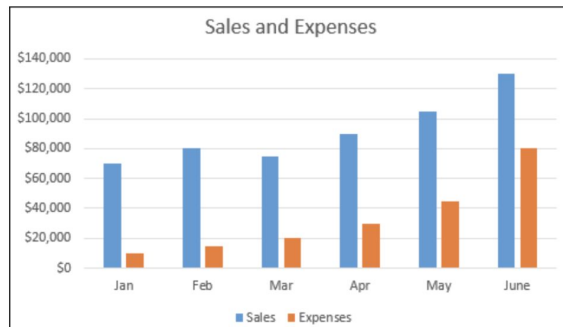
Pie Chart



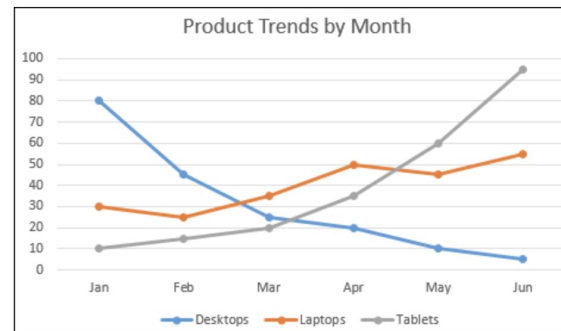
Bar Chart



Column Chart



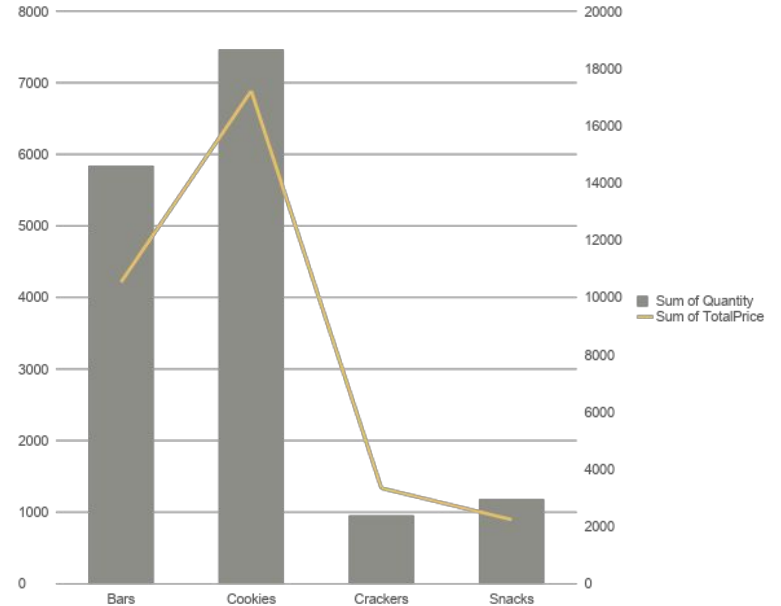
Line Chart



# Different Types of Charts

## Combo Chart

The combination chart is a type of visualization that combines the characteristics of a bar chart and a line chart. The data is displayed in the combination chart using several bars and/or lines, representing a different category. When comparing numbers from different angles, a mix of bars and lines in the same presentation might be informative.



# What is an Excel Dashboard and how does it differ from a report?

An Excel dashboard is a one-page document (usually, but not always) that assists managers and business executives track critical KPIs or metrics and making decisions based on them. It includes data-driven charts, tables, and views.

A dashboard is frequently referred to as a report; however, not all reports are dashboards.

Here's the distinction:

- A report would only collect and display data in one location. A report, for example, would not be able to answer a manager's question about how sales have increased over the recent period and which regions have been the most profitable. It would simply report all pertinent sales information. These reports are then used to build dashboards (in Excel or PowerPoint) to help decision-making.
- On the other hand, a dashboard would provide immediate answers to critical concerns such as which locations perform better and which items the management should prioritize. These dashboards can be either static or interactive (where the user can make selections and change views, and the data would dynamically update).





## Getting started with Dashboards

- Creating an Excel Dashboard is a multi-step process, and there are some essential considerations to bear in mind.
- Before you open Excel, you should be clear on the dashboard's goals.
- For example, if you're designing a KPI dashboard to track a company's financial KPIs, your goal would be to compare the current period with the previous period (s).
- Similarly, suppose you're designing a dashboard for the Human Resources department to track employee training. In that case, the goal is to display how many employees have been trained and how many still need to be trained to meet the target.



# Things to Do Before You Even Start Creating an Excel Dashboard

Below are some of the questions you must have already answered before you start building an Excel Dashboard:



- **Q: What is the Purpose of the Dashboard?** Dashboard is one-page or two-page document that assists managers and business executives to track critical KPIs or metrics and make decisions based on them.
- **Q: What are the data sources?** Data sources are anything that produces digital information based on which analysis can be done to get some useful and valuable insights.
- **Q: Who will use this Excel Dashboard?** Managers and business Executives
- **Q: How frequently does the Excel Dashboard need to be updated?** Based upon the use case and frequency of source data changes.
- **Q: What version of Office does the client/stakeholder uses?** 2021

In the next class we will study:



Caselets and Tables