

Creating Dashboards in Excel

Excel is a powerful tool for creating dashboards that provide a clear and concise overview of key data and metrics. With its extensive charting capabilities and data analysis features, Excel can be used to build dashboards that are both visually appealing and informative.

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Why use dashboards in Excel?

Dashboards provide a centralized location to monitor key performance indicators (KPIs) and track progress toward goals. Excel offers a user-friendly interface, making it easy for anyone to create and interpret dashboards. Its accessibility and versatility make it a suitable tool for various industries and departments.

1 Data Visualization

Excel provides a range of charting options to visualize complex data in an easily understandable format.

2 Real-time Monitoring

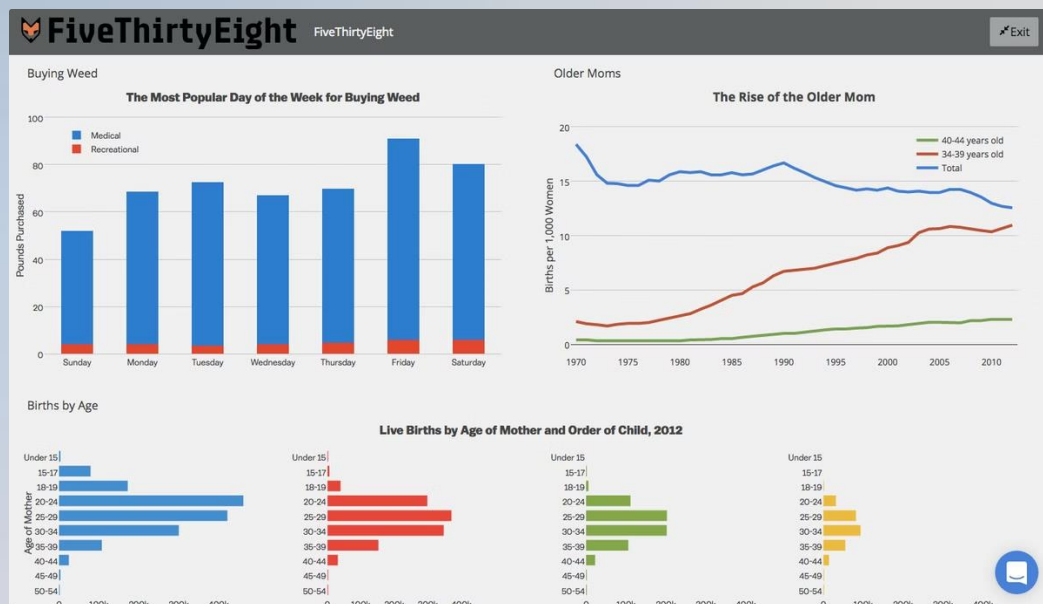
Dashboards can be configured to refresh data automatically, providing up-to-date insights.

3 Trend Analysis

Dashboards enable you to spot patterns and trends in data, allowing you to make informed decisions.

Key components of an effective dashboard

An effective dashboard should include a combination of key elements that present information in a clear and concise manner. These elements work together to communicate insights and support decision-making.



Clear Objectives

Define the purpose of the dashboard and the key metrics it aims to track.

Relevant Data

Include only the most important data points and KPIs that align with your objectives.

Visual Appeal

Use clear colors, fonts, and layouts to make the dashboard easy to read and understand.

Interactive Elements

Incorporate features like filters, drill-downs, and charts that allow users to explore the data further.

Data visualization best practices

Effective data visualization is crucial for making dashboards informative and engaging. Choosing the right chart types and applying design principles helps to communicate insights clearly and effectively.

Chart Selection

Use bar charts for comparing values across categories, line charts for showing trends over time, and pie charts for displaying proportions.

Color Palette

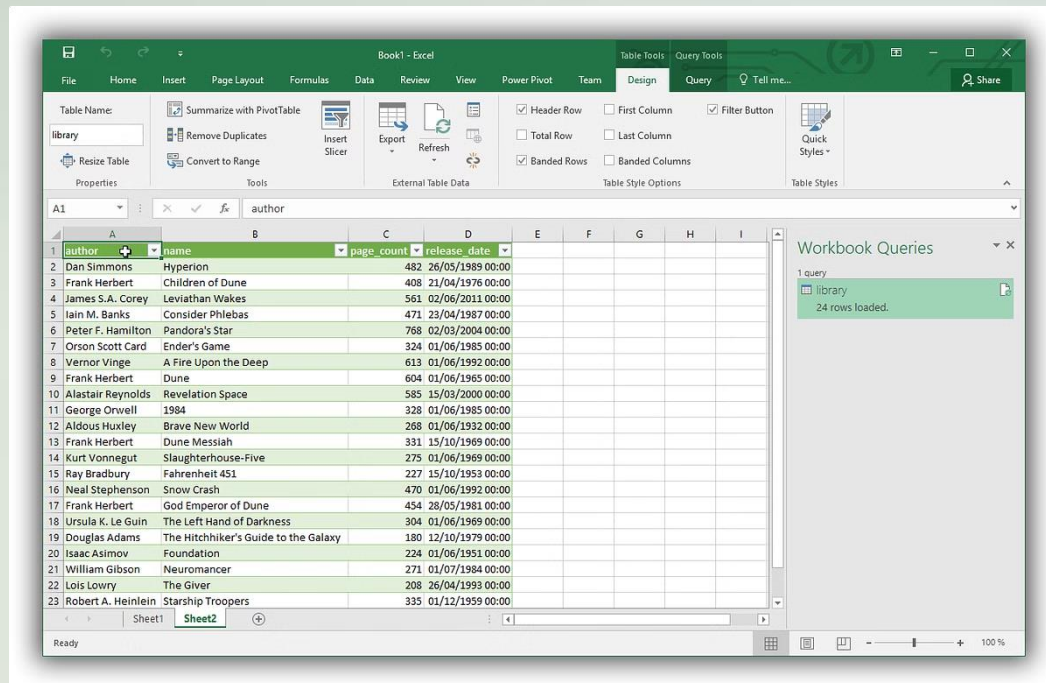
Employ a consistent and visually appealing color scheme to highlight important data points and enhance readability.

Clarity and Simplicity

Keep charts clean and uncluttered, using clear labels and concise titles to guide the user's understanding.

Connecting data sources to your dashboard

Excel offers various methods for connecting data sources to your dashboard, enabling you to dynamically update the displayed information.



1

Excel Tables

Utilize Excel tables to organize and structure your data, making it easier to work with and refresh.

2

External Data Sources

Connect to databases, spreadsheets, or other data sources using Excel's built-in tools.

3

Data Queries

Use Power Query to import, clean, and transform data before connecting it to your dashboard.

Leveraging Excel's built-in charting tools

Excel provides a wide range of charting tools that allow you to create visually appealing and informative representations of your data.



Column and Bar Charts

Compare values across categories using column or bar charts, which are suitable for presenting data in a structured and organized way.



Pie Charts

Show proportions and percentages of a whole using pie charts, offering a clear visual breakdown of data contributions.



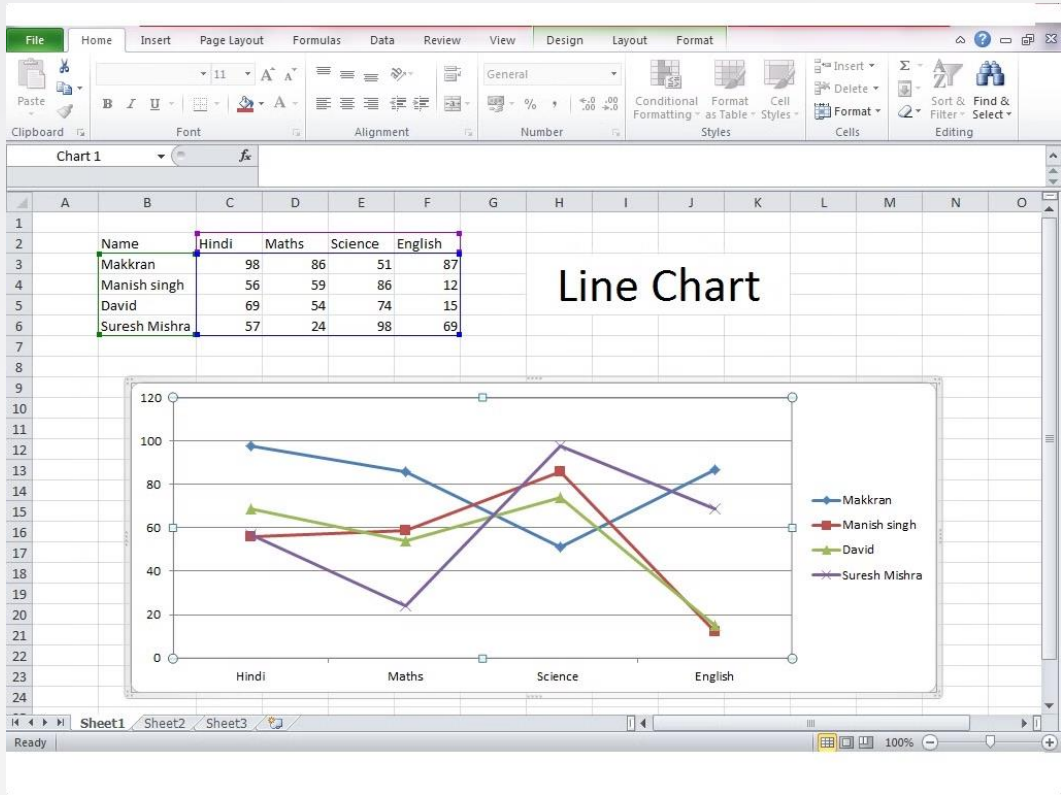
Line Charts

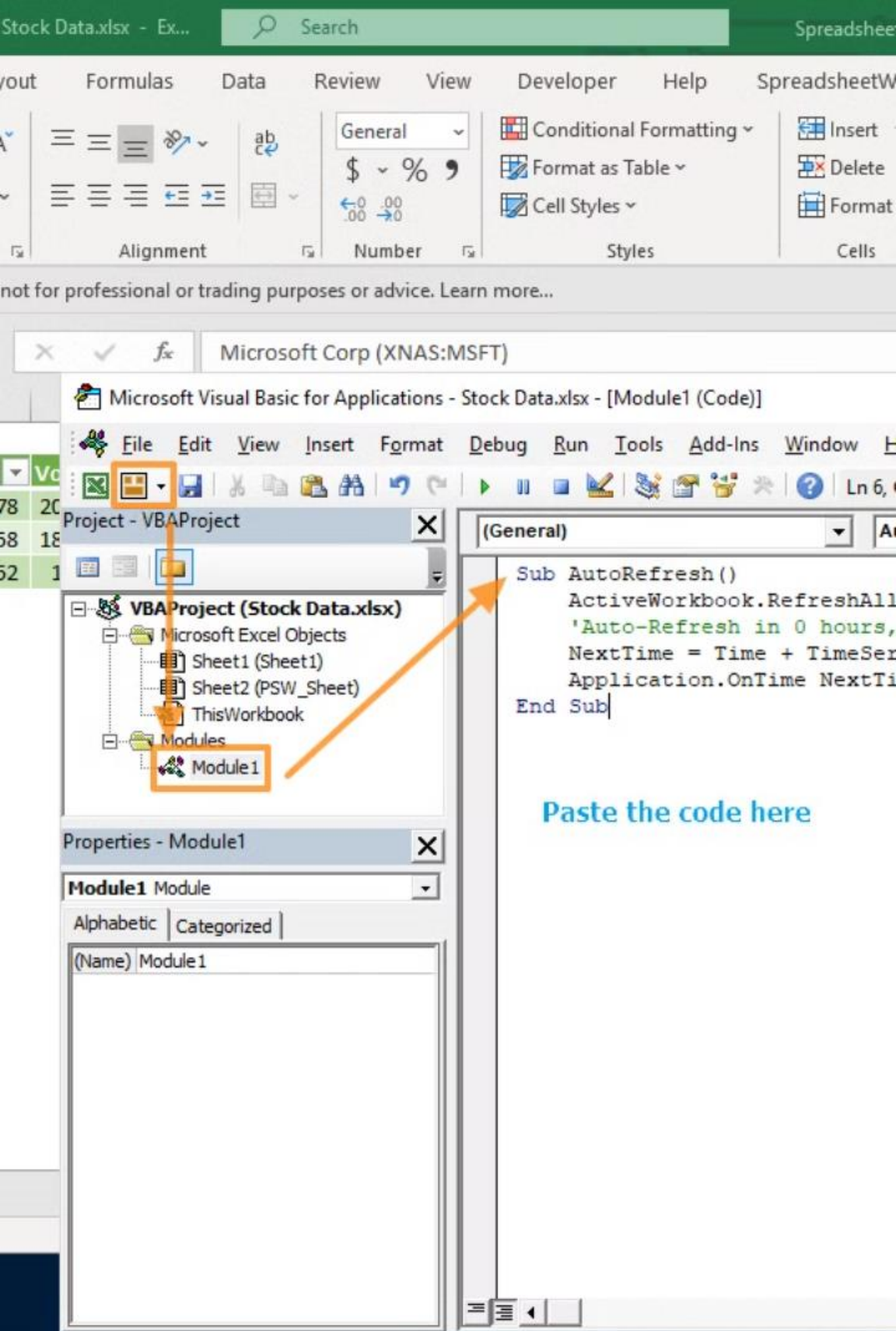
Display trends and patterns over time using line charts, which effectively illustrate changes and progressions.



Scatter Plots

Illustrate relationships between two variables using scatter plots, which are useful for identifying correlations and trends.





Dynamic data updates and refreshing

To ensure your dashboard remains up-to-date, Excel offers features for automatically refreshing data connected to external sources.

1

Data Connections

Establish connections to external data sources like databases or spreadsheets.

2

Refresh Options

Configure refresh intervals to automatically update data at specific time intervals or manually trigger refreshes.

3

Data Validation

Implement data validation rules to ensure data integrity and prevent errors during updates.

Interactive elements and user experience

Adding interactive elements to your dashboard can enhance user experience and enable deeper data exploration.

Filters	Allow users to refine data based on specific criteria, providing more focused insights.
Slicers	Offer a visual and interactive way to filter data based on different categories or dimensions.
Drill-down	Enable users to explore underlying data points within a chart or table for greater detail.

EMPOWER YOUR DATA ANALYSIS WITH INTERACTIVE DASHBOARDS

Metric	Jan	Feb	Mar
Sales	\$10,000	\$15,000	\$12,000
Expenses	\$5,000	\$7,000	\$6,000
Profit	\$5,000	\$8,000	\$6,000
Customers	200	250	220
Conversion	20%	25%	22%
Avg. Revenue	\$50.00	\$60.00	\$54.55

Sharing and publishing your dashboard

Sharing and publishing your dashboard allows you to disseminate insights and collaborate with others.

1 Excel File Formats

Save your dashboard as an Excel file (xlsx) to share it with others who have Excel.

2 PDF Export

Export your dashboard as a PDF document for a static and printable format.

3 Web Publishing

Utilize Excel's web publishing features to create a web-based version of your dashboard.

PROJECT MANAGEMENT DASHBOARD



Maintenance and optimization over time

Regular maintenance and optimization are essential for keeping your dashboard accurate and effective over time.



Data Quality

Ensure data accuracy and consistency by regularly verifying and cleaning data.

A screenshot of an Excel spreadsheet titled "cov_matrix_overall_yearly". It contains a "Covariance Matrix" table with columns for ABOT, HADC, FERQZ, EXIDE, and ENGRO. Below this is an "Annual Mean Returns" table with the same columns. To the right, there are sections for "Optimal Variance" and "Portfolio Return", both showing "EVALUE". At the bottom, there is a "Share/Weight" section with a "Sum of shares" of 0%.

Chart Updates

Update charts and visualizations to reflect changes in data and reporting needs.

A screenshot of a "Sales invoice tracker" dashboard. It features a header with navigation links like "Home", "Draw", "Page Layout", "Formulas", "Data", "Review", "View", "Automate", and "Help". Below the header, there is a section for "Project 2" with contact information. The main part of the dashboard is a table with columns for "Description", "Qty", "Unit Price", "Discount", and "Price". It lists two invoices: "Invoice 3-456-2 Data 1" and "Invoice 3-456-2 Data 4".

Automation

Utilize macros and other automation features to simplify repetitive tasks and save time.