

Getting Data In: The Hidden Skill Behind Every Great Dashboard

Before You Polish the Dashboard

Before you polish your masterpiece, you need to get the paint on the canvas — your data. No matter how slick the visuals, a dashboard is only as good as the data you import. This guide walks through the four main ways to bring data into Excel, with concrete examples of successes and pitfalls.

From File — The Classic Method

Everyone starts here. A CSV, a confident double-click — then alphabet soup when Excel guesses the wrong delimiter.



What can go wrong

Excel can mis-detect delimiters (commas vs semicolons), date formats, or encoding. Example: a customer CSV opened as a single column because semicolons were used — all columns jammed into one cell. Result: wasted cleanup time and lost trust in the dataset.



Practical tips

Always inspect the preview window before loading. If the preview looks wrong, cancel and try a different delimiter, encoding, or import method. Keep a quick checklist: expected delimiter, sample rows, header presence, and encoding (UTF-8 vs legacy).

From Folder — The Power Move

Importing a folder of files is fast and scalable — until tiny inconsistencies create large, silent errors.



What can go wrong

Power Query combines files faithfully. If headers differ — even slightly — new columns appear. Example: monthly sales combined until one file used "Sales £" instead of "Sales", creating duplicate fields and broken totals. Accidental test files or hidden temp files can also sneak in and corrupt the roll-up.



Practical tips

Standardize file templates and headers before combining. Use a staging folder that contains only the intended monthly files. In Power Query, inspect column names and types, apply transforms consistently, and validate totals after combining.

From Picture — The Unexpected Hero

Excel can read table images from your phone, but OCR mistakes are common without clear photos.



What can go wrong

OCR can misread words when photos are angled or poorly lit. Example: "Extension Lead – 4 m" turned into "Extinction Lead – 4 M", or brand names merged into product descriptions. These subtle errors survive cleaning if you don't manually verify unusual values.



Practical tips

Use flat, straight-on shots with even lighting. Check the extracted text for odd capitalizations, unexpected words, or missing columns. Treat OCR as a first draft — always validate suspicious entries manually.

From PDF — The Quiet Revolution

Excel can detect tables in PDFs — a huge time-saver — but it also picks up headers, footers, and logos if you're not careful.



What can go wrong

Importing a long PDF can pull in every table: page headers, footers, logos, and repeated summary lines. Example: a 40-page supplier statement imported all tables and created dozens of redundant columns and rows, bloating the workbook.



Practical tips

Preview detected tables and select only the tables you need. Import smaller ranges when possible and merge them intentionally in Power Query. Remove repeated headers and footer lines, and validate row counts against the original PDF.

The Golden Rules



File

Watch out for wrong delimiter (comma vs semicolon).Golden tip: Check the preview before loading.



Folder

Watch out for inconsistent headers across files.Golden tip: Keep identical column names and use a clean staging folder.



Picture

Watch out for glare, blur, and bad angle.Golden tip: Take clear, flat, well-lit shots.



PDF

Watch out for too many tables, headers, and footers.Golden tip: Preview and select only the tables you need.

Why Importing Well Matters

Importing data isn't glamorous, but it's the foundation of every trusted dashboard. When you master imports — consistent headers, correct delimiters, clean OCR, and selective PDF tables — downstream tasks become simpler: cleaning is faster, analysis is reliable, visuals are accurate, and your work becomes portfolio-worthy. Excel will do exactly what you tell it. Give it clear instructions: calm commas, consistent files, and a small amount of skepticism.

Treat Excel like a loyal assistant: be explicit, inspect previews, and standardize inputs. Importing well is the hidden skill that makes great dashboards possible.