



## WEEK 5 — CREATE AN INTERACTIVE DASHBOARD

To wrap up the course we created an interactive dashboard to show key metrics at a glance and help make informed business decisions quickly.

### DASHBOARD DESIGN

A dashboard should show the most important information on one screen. Choose a few key items to tell your story.



Start your design by wireframing using pencil and paper, markers and whiteboard or even sticky notes.

### DASHBOARD LAYOUT

Dashboards are usually laid out using a series of tiles, these can be created by changing the colour of groups of cells but using shapes can give you greater control over where each element on the page lives. There are a wide variety of different shapes at **Insert > Shapes**.

### THEMES AND COLOURS

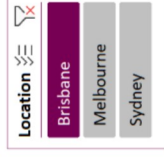
With themes, you can change your dashboard colour scheme by selecting a different theme. However, themes can also change the font, which can affect the layout. Instead, you can just change the colour scheme using the **Colors** dropdown on the **Page Layout** Ribbon.

### HYPERLINKS

You can use hyperlinks to link to a different place within an Excel workbook, allowing for easy navigation. You can link to a cell reference or defined name. To create a hyperlink, **right-click > Link** or **Insert > Link**.

### SLICERS

A slicer allows you to filter one or more PivotTables or PivotCharts at once. You can use any fields in the data set. There is also a special type of slicer called a timeline slicer that filters by date.



To create a slicer, click in the PivotTable or PivotChart and select **Insert Slicer** from the **PivotTable/Chart Analyze** Ribbon. You can create as many slicers as you have fields.



On the **Slicer Ribbon** select from the style options to change the colours of your slicer or you can create a custom style to match your dashboard by either duplicating an existing style and modifying it or create a new style.

Use **Slicer Settings** to display or hide the header and items with no data, among others. On the slicer ribbon, you can also adjust the number of columns in a slicer.



Use **Report Connections** to connect the slicer to several PivotTables.

### LINKED IMAGES

Some items, like SparkLines, cannot be put into Shapes. Use **Paste Special > Linked Picture** to show a live snapshot that behaves just like the real thing.



### DESIGN BEST PRACTICE

Choosing where to place your metrics and visualisations is an art, but there are some guidelines to help.

- If most of your readers use a left-to-right language, then they will probably start looking at your dashboard from the top-left, move right, and then move down (like the letter Z). Position your key metrics in the top row. This is called Z-pattern design. There is a similar pattern called the F-pattern. Both emphasise the top row being important.
- Group related items together.
- Use slicers or dropdown lists to allow your users to interact with the dashboard to focus on and highlight the areas that are important to them.
- Move detailed metrics to a separate sheet so they do not clutter the main dashboard. Use hyperlinks to allow users to move between the sheets.

### CODE SNIPPETS

```
Sub RefreshAll()  
ActiveWorkbook.RefreshAll  
End Sub
```

OR to only refresh PivotTables in the active sheet:

```
Sub RefreshPivotTables() 'Only refresh pivot tables  
Dim pivotTable As PivotTable  
For Each pivotTable In ActiveSheet.PivotTables  
pivotTable.RefreshTable  
Next  
End Sub
```