

Week 6: ToolBox

Excel Terminology



Dashboard

A dashboard is a summary display designed to give the user a quick overview of the data. They often contain graphs and tables of numbers. They sometimes have some interactivity so that the user can select the specific points of interest to focus on. Dashboards usually update automatically so that the user is looking at the most recent or relevant information.

PivotChart

A chart based on a PivotTable. By using a PivotChart you get the summarization and filtering power of a PivotTable combined with the visualization power of Excel charting.

PivotTable

A powerful and convenient way to summarize data in Excel. Similar to a cross-tabulation in other software.

Slicer

Slicers provide a convenient way to filter a PivotTable. You can also see which filters are currently in use.

<https://support.office.com/en-us/article/Use-slicers-to-filter-PivotTable-data-249f966b-a9d5-4b0f-b31a-12651785d29d>

Dataset

A dataset is a set of data that contains fields (columns) that usually have different formatting for example, text, number, currency.

Field List

This is the list of all the columns contained in the dataset. For example Account Manager, Total Revenue, Cost, etc.

Field

This is one of the elements that makes up the field list (one of the columns in the dataset e.g. Account Manager).

Data Source

This refers to where the data is coming from (the original table on which the pivot table depends on).

Ninja Tip of the Week



You can format empty cells in a pivot table by right-clicking on any cell in the table, then go to Pivot Table Options. In Layout & Format, under Format, you can choose to put a hyphen for every empty cell. A hyphen is one reasonable example of something you could add, you can add something else more appealing for yourself.

PivotTable Options

Name: RegionalPivot

Layout & Format Totals & Filters Display Printing Data

Layout

☐ Merge and center cells with labels

When in compact form indent row labels: 1 character(s)

Display fields in report filter area: Down, Then Over

Report filter fields per column: 0

Format

☐ For error values show:

☒ For empty cells show: -

☒ Autofit column widths on update

☒ Preserve cell formatting on update

OK Cancel