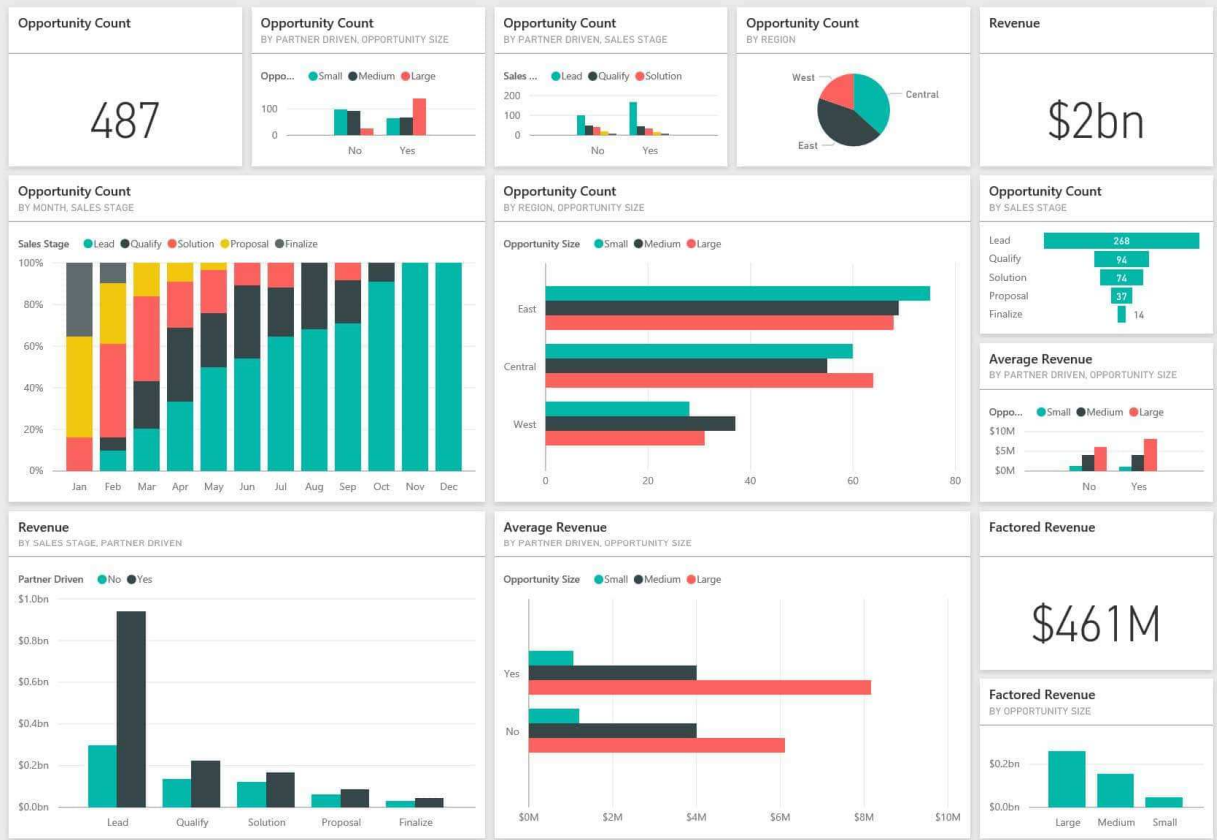




Excel Dashboards & Reporting

Ask a question about your data





What you will learn?



You will learn

Design Principles

| | | | |
|---|---|---|---|
| 1 | 1 | 2 | 3 |
| 1 | 1 | 2 | 2 |
| 2 | 2 | 2 | 3 |
| 3 | 3 | 3 | 3 |

Building data model

Raw-Data

| | A | B | C | D | E | F | G |
|-------|--------------------|---------------------|------------------|---|---|---|---|
| 1 | SalesPeriod | Sales Amount | UnitPrice | | | | |
| 2 | Jan | \$6,120 | \$2,040 | | | | |
| 3 | Jan | \$4,050 | \$2,025 | | | | |
| 4 | Jan | \$6,075 | \$2,025 | | | | |
| 5 | Jan | \$46 | \$6 | | | | |
| 6 | Jan | \$2,040 | \$2,040 | | | | |
| 7 | Jan | \$6,075 | \$2,025 | | | | |
| 8 | Jan | \$6,120 | \$2,040 | | | | |
| 9 | Jan | \$4,080 | \$2,040 | | | | |
| 10 | Jan | \$4,050 | \$2,025 | | | | |
| 11 | Jan | \$4,080 | \$2,040 | | | | |
| 60918 | Dec | \$61 | \$20 | | | | |
| 60919 | Dec | \$8,160 | \$2,040 | | | | |
| 60920 | Dec | \$1,445 | \$723 | | | | |
| 60921 | | | | | | | |

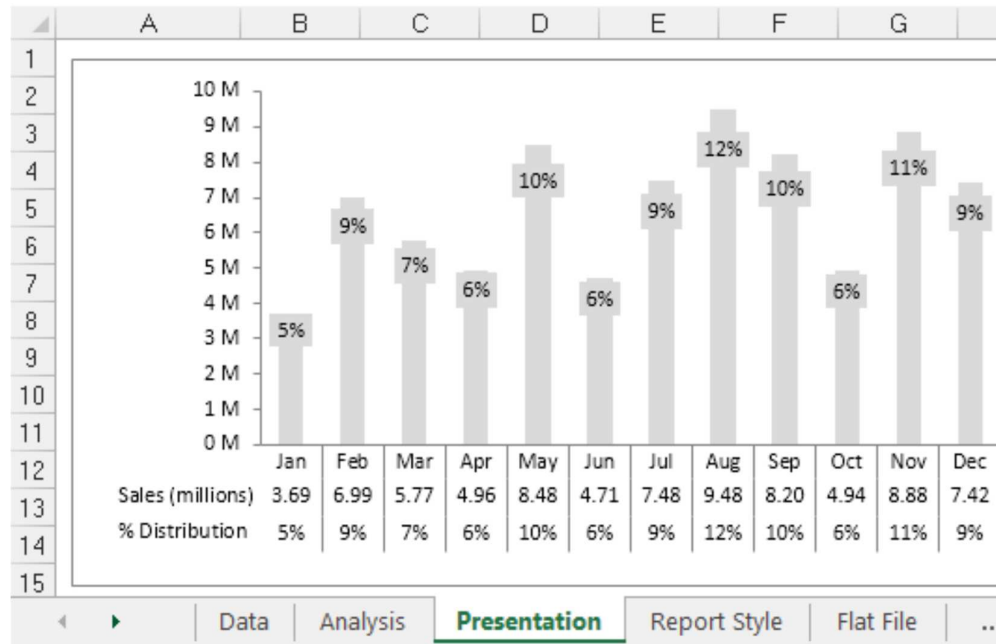
Navigation: Data | Analysis | Presentation | Report Style | Flat File | ...

Analysis

| | A | B | C | D | E | F | G |
|---|---|--------|--------|--------|--------|--------|--------|
| 1 | This Table Feeds the Revenue Trend Chart | | | | | | |
| 2 | | Jan | Feb | Mar | Apr | May | Jun |
| 3 | Sales (millions) | 3.69 M | 6.99 M | 5.77 M | 4.96 M | 8.48 M | 4.71 M |
| 4 | % Distribution | 5% | 9% | 7% | 6% | 10% | 6% |



Presentation



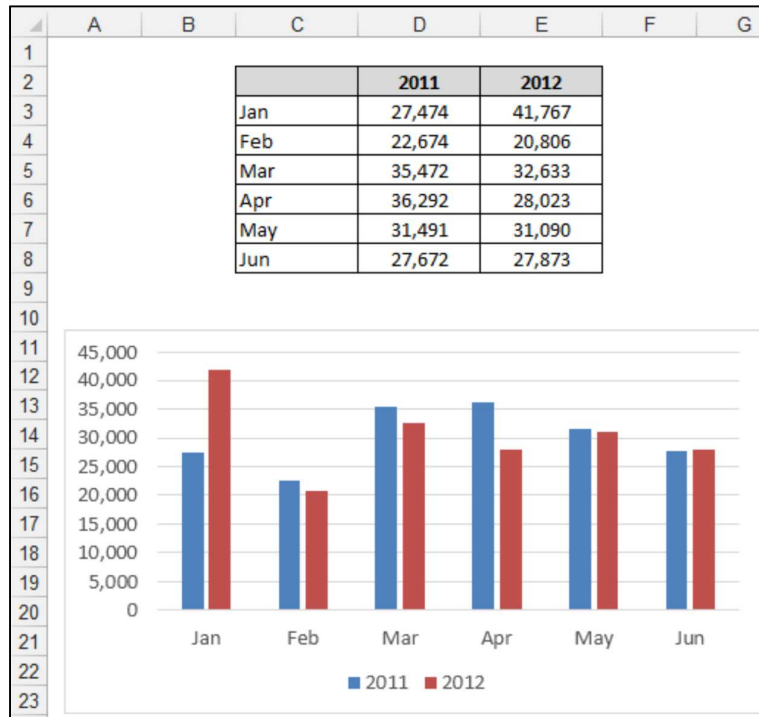
Excel Functions to build the super data model

VLOOKUP Function

SUMPRODUCT Function



Building SMART table

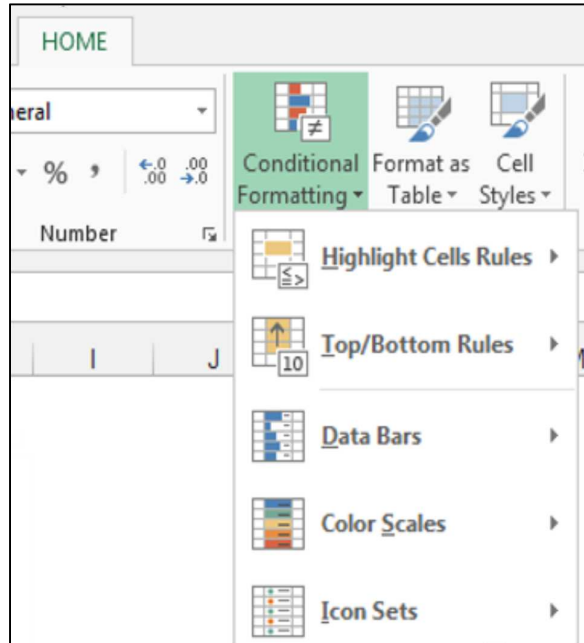


Sparklines

| | A | B | C | D | E | F | G | H | |
|----|----------------------------|--------|--------|--------|--------|--------|--------|------------|--|
| 1 | Line Sparklines | | | | | | | | |
| 2 | Fund Number | Jan | Feb | Mar | Apr | May | Jun | Sparklines | |
| 3 | A-13 | 103.98 | 98.92 | 88.12 | 86.34 | 75.58 | 71.2 | | |
| 4 | C-09 | 212.74 | 218.7 | 202.18 | 198.56 | 190.12 | 181.74 | | |
| 5 | K-88 | 75.74 | 73.68 | 69.86 | 60.34 | 64.92 | 59.46 | | |
| 6 | W-91 | 91.78 | 95.44 | 98.1 | 99.46 | 98.68 | 105.86 | | |
| 7 | M-03 | 324.48 | 309.14 | 313.1 | 287.82 | 276.24 | 260.9 | | |
| 8 | | | | | | | | | |
| 9 | Column Sparklines | | | | | | | | |
| 10 | Fund Number | Jan | Feb | Mar | Apr | May | Jun | Sparklines | |
| 11 | A-13 | 103.98 | 98.92 | 88.12 | 86.34 | 75.58 | 71.2 | | |
| 12 | C-09 | 212.74 | 218.7 | 202.18 | 198.56 | 190.12 | 181.74 | | |
| 13 | K-88 | 75.74 | 73.68 | 69.86 | 60.34 | 64.92 | 59.46 | | |
| 14 | W-91 | 91.78 | 95.44 | 98.1 | 99.46 | 98.68 | 105.86 | | |
| 15 | M-03 | 324.48 | 309.14 | 313.1 | 287.82 | 276.24 | 260.9 | | |
| 16 | | | | | | | | | |
| 17 | Win/Loss Sparklines | | | | | | | | |
| 18 | Fund Number | Jan | Feb | Mar | Apr | May | Jun | Sparklines | |
| 19 | A-13 | | 0 | -5.06 | -10.8 | -1.78 | -10.76 | -4.38 | |
| 20 | C-09 | | 0 | 5.96 | -16.52 | -3.62 | -8.44 | -8.38 | |
| 21 | K-88 | | 0 | -2.06 | -3.82 | -9.52 | 4.58 | -5.46 | |
| 22 | W-91 | | 0 | 3.66 | 2.66 | 1.36 | -0.78 | 7.18 | |
| 23 | M-03 | | 0 | -15.34 | 3.96 | -25.28 | -11.58 | -15.34 | |



Enhancing Reports with conditional formatting

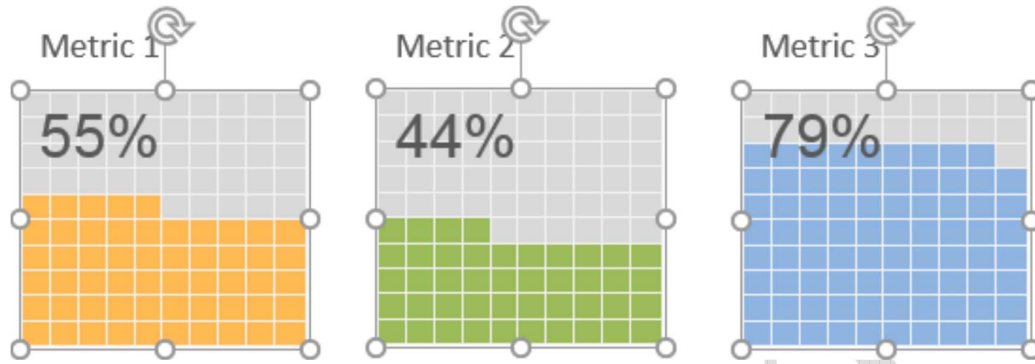


Creating Data Bars

| | Data Bars | |
|-----|-----------|------|
| Jan | | 100 |
| Feb | | -100 |
| Mar | | 200 |
| Apr | | 250 |
| May | | -50 |
| Jun | | 350 |
| Jul | | 400 |
| Aug | | 450 |
| Sep | | 500 |
| Oct | | 550 |
| Nov | | 600 |
| Dec | | 650 |



Creating Waffle Chart



Creating Pivot tables

Compact Form Layout

| Row Labels | Sales |
|------------------|--------------------|
| Australia | 1622869.422 |
| Accessories | 23973.9186 |
| Bikes | 1351872.837 |
| Clothing | 43231.6124 |
| Components | 203791.0536 |
| Canada | 14463280.15 |
| Accessories | 119302.5429 |
| Bikes | 11714700.47 |
| Clothing | 383021.7229 |
| Components | 2246255.419 |
| Central | 7932851.609 |
| Accessories | 46551.211 |
| Bikes | 6782978.335 |
| Clothing | 155873.9547 |
| Components | 947448.1091 |
| France | 4647454.207 |
| Accessories | 48941.5643 |
| Bikes | 3597879.394 |
| Clothing | 129508.0548 |
| Components | 871125.1938 |
| Germany | 2051547.729 |
| Accessories | 35681.4552 |
| Bikes | 1602487.163 |
| Clothing | 75592.5945 |
| Components | 337786.516 |

Outline Form Layout

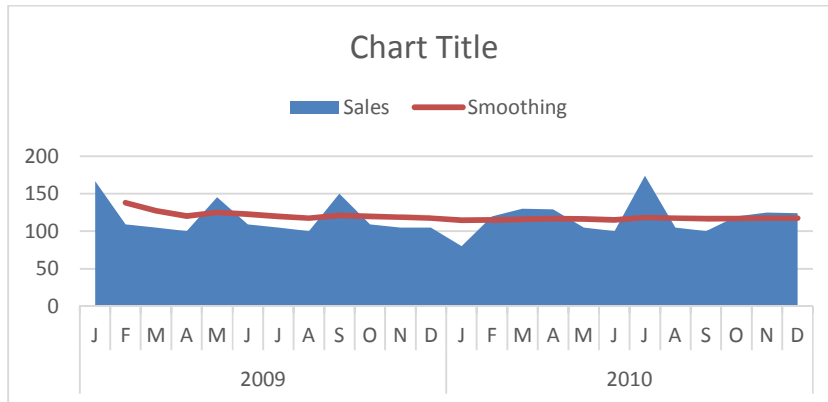
| Market | Segment | Sales |
|------------------|-------------|--------------------|
| Australia | | 1622869.422 |
| | Accessories | 23973.9186 |
| | Bikes | 1351872.837 |
| | Clothing | 43231.6124 |
| | Components | 203791.0536 |
| Canada | | 14463280.15 |
| | Accessories | 119302.5429 |
| | Bikes | 11714700.47 |
| | Clothing | 383021.7229 |
| | Components | 2246255.419 |
| Central | | 7932851.609 |
| | Accessories | 46551.211 |
| | Bikes | 6782978.335 |
| | Clothing | 155873.9547 |
| | Components | 947448.1091 |
| France | | 4647454.207 |
| | Accessories | 48941.5643 |
| | Bikes | 3597879.394 |
| | Clothing | 129508.0548 |
| | Components | 871125.1938 |
| Germany | | 2051547.729 |
| | Accessories | 35681.4552 |
| | Bikes | 1602487.163 |
| | Clothing | 75592.5945 |
| | Components | 337786.516 |

Tabular Form Layout

| Market | Segment | Sales |
|------------------------|-------------|--------------------|
| Australia | Accessories | 23973.9186 |
| | Bikes | 1351872.837 |
| | Clothing | 43231.6124 |
| | Components | 203791.0536 |
| Australia Total | | 1622869.422 |
| Canada | Accessories | 119302.5429 |
| | Bikes | 11714700.47 |
| | Clothing | 383021.7229 |
| | Components | 2246255.419 |
| Canada Total | | 14463280.15 |
| Central | Accessories | 46551.211 |
| | Bikes | 6782978.335 |
| | Clothing | 155873.9547 |
| | Components | 947448.1091 |
| Central Total | | 7932851.609 |
| France | Accessories | 48941.5643 |
| | Bikes | 3597879.394 |
| | Clothing | 129508.0548 |
| | Components | 871125.1938 |
| France Total | | 4647454.207 |
| Germany | Accessories | 35681.4552 |
| | Bikes | 1602487.163 |
| | Clothing | 75592.5945 |
| | Components | 337786.516 |
| Germany Total | | 2051547.729 |

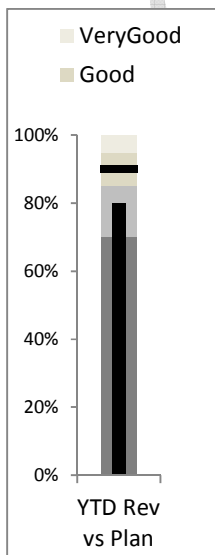
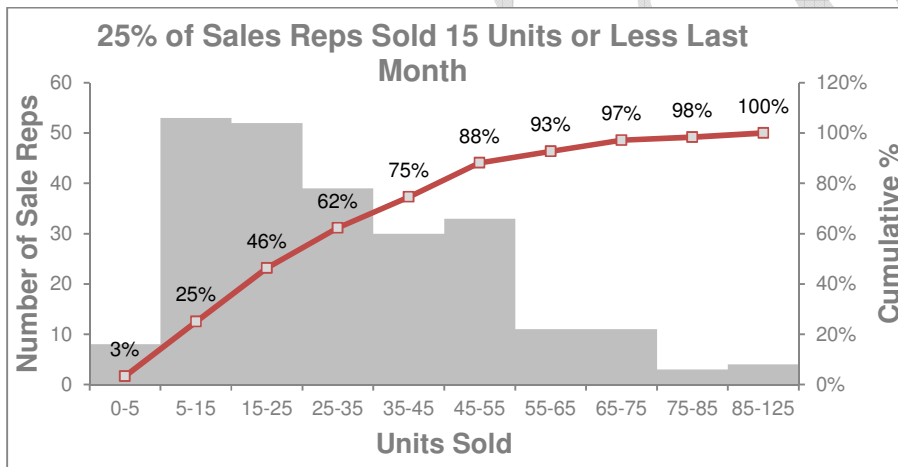
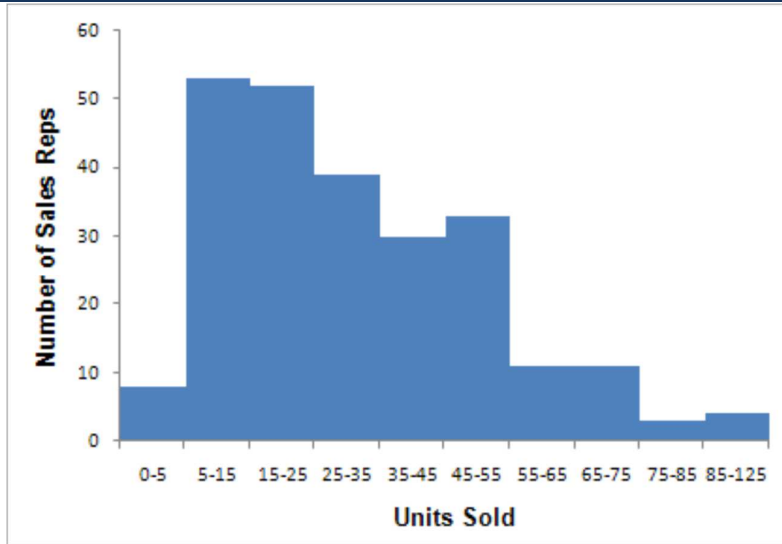


Creating different charts



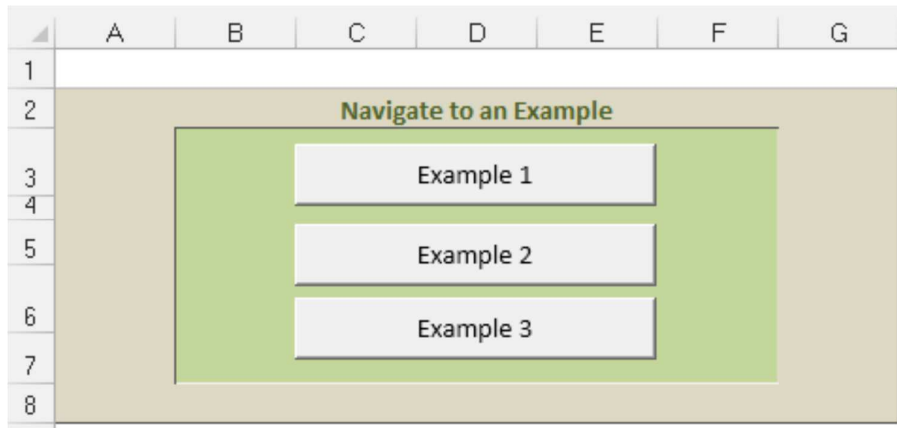
| Top 10 Sales Reps | | | | | vs Last | |
|---------------------|-----------|------|------------|-------|---------|--|
| | Sales | Rank | Last Month | Month | | |
| HIRNANDIZ, EDUARDO | \$137,707 | 1 | 1 | ⇒ | 0 | |
| WATTS, GREER | \$111,682 | 2 | 3 | ↑ | 1 | |
| SLECIM, ROBERT | \$106,299 | 3 | 5 | ↑ | 2 | |
| MCCILLEIGH, JEFFREY | \$102,240 | 4 | 2 | ↓ | -2 | |
| BICKIR, WILLIAM | \$83,526 | 5 | 3 | ↓ | -2 | |
| GALL, JASON | \$78,824 | 6 | 12 | ↑ | 6 | |
| PHALLAPS, JAMES | \$77,452 | 7 | 7 | ⇒ | 0 | |
| KIMPIRT, RONALD | \$76,790 | 8 | 9 | ↑ | 1 | |
| SIN, THOEUNG | \$76,685 | 9 | 8 | ↓ | -1 | |
| IDWERDS, MICHAEL | \$76,532 | 10 | 4 | ↓ | -6 | |

| Bottom 10 Sales Reps | | | | | vs Last | |
|----------------------|----------|------|------------|-------|---------|--|
| | Sales | Rank | Last Month | Month | | |
| NEBLE, JASON | \$5,547 | 244 | 244 | ⇒ | 0 | |
| CELIMAN, WILLIAM | \$9,779 | 243 | 241 | ↓ | -2 | |
| KRIZILL, ADAM | \$11,454 | 242 | 235 | ↓ | -7 | |
| MIDANA, FRANK | \$15,044 | 241 | 221 | ↓ | -20 | |
| GRANGIR, DAVID | \$16,129 | 240 | 240 | ⇒ | 0 | |
| DALLEARE, ANDRE | \$16,265 | 239 | 239 | ⇒ | 0 | |
| HICKLIBIRRY, JERRY | \$16,670 | 238 | 225 | ↓ | -13 | |
| VAN HUILE, KENNETH | \$18,821 | 237 | 242 | ↑ | 5 | |
| RACHERDSEN, KENNETH | \$19,675 | 236 | 237 | ↑ | 1 | |
| STIGALL, DAVID | \$20,092 | 235 | 243 | ↑ | 8 | |

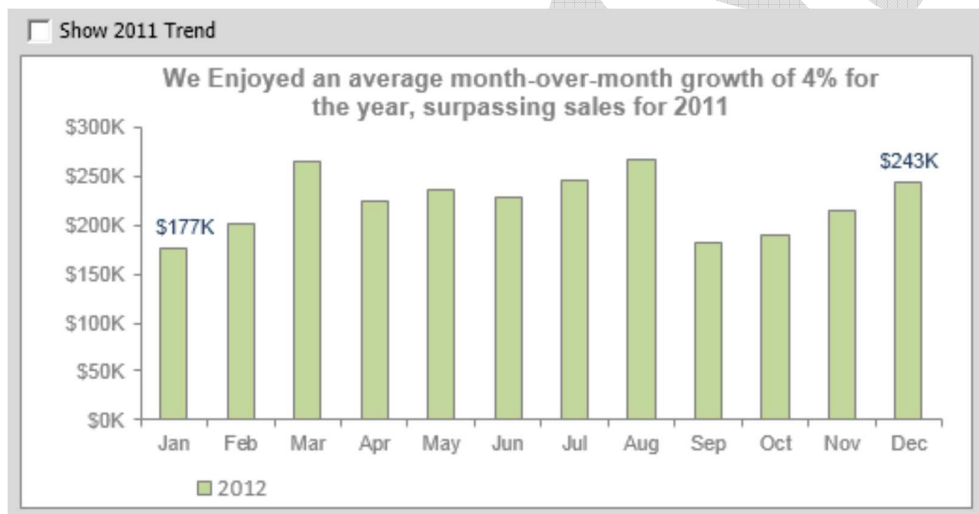




Creating Macro enabled Charts



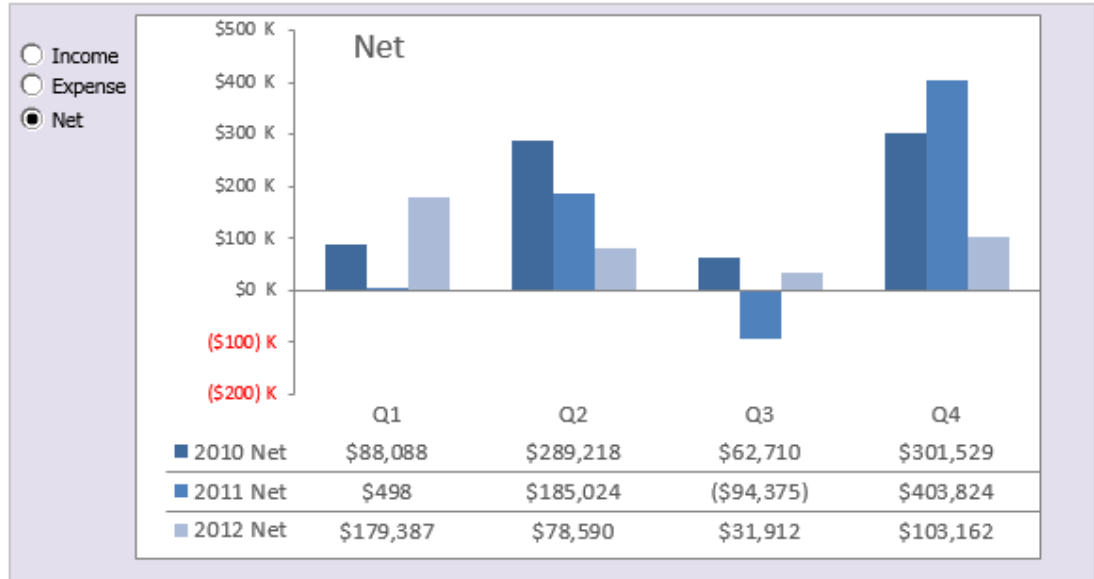
Check box controlled charts



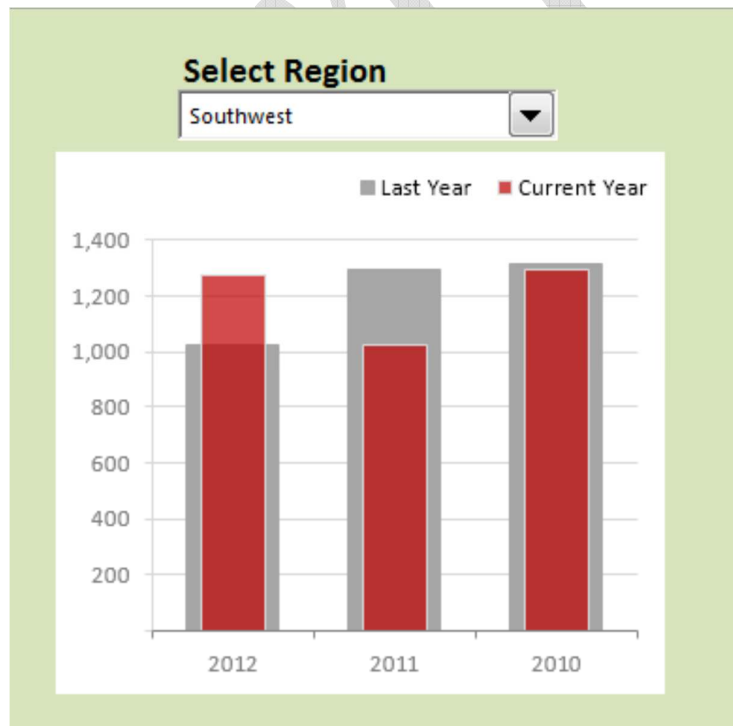


Option button controlled Charts

Example of Using Option Button Controls:
Each option feeds this one chart with different data. (no VBA)



Drop Down Charts

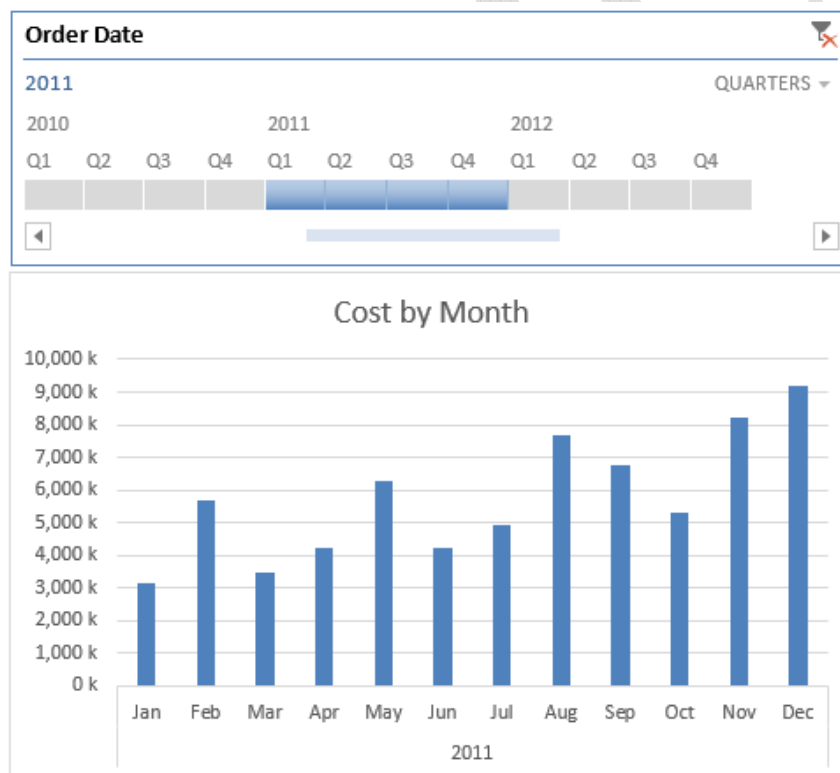




Creating Slicers

| Ship Date | Revenue | Region | Market |
|--------------------|------------------|-----------|-------------|
| Jan | 136,939 | Canada | Chicago |
| Feb | 488,700 | Midwest | Kansas City |
| Mar | 223,268 | North | Omaha |
| Apr | 319,675 | Northeast | Tulsa |
| May | 645,427 | South | Baltimore |
| Jun | 291,476 | Southeast | Buffalo |
| Jul | 224,076 | Southwest | California |
| Aug | 522,541 | West | Canada |
| Sep | 613,202 | | |
| Oct | 246,529 | | |
| Nov | 475,655 | | |
| Dec | 557,068 | | |
| Grand Total | 4,744,556 | | |

Creating time line slicers



Protecting Dashboards

Linking Dashboards to PowerPoint presentation