Creating a Dashboard in Microsoft Excel

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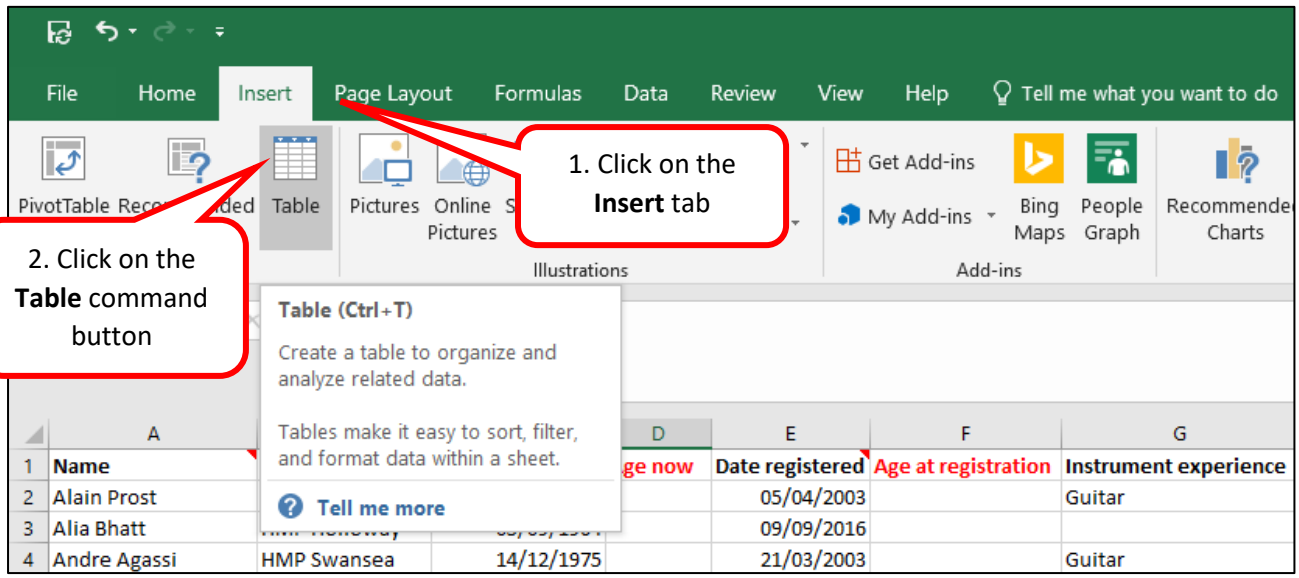
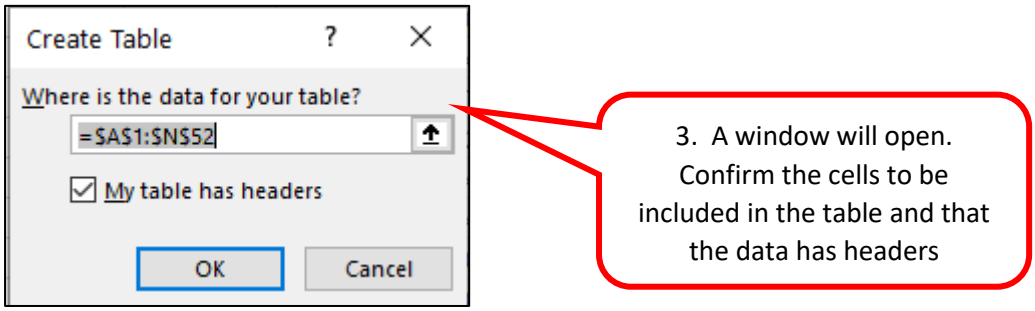
Tables

1. Make your data into a table

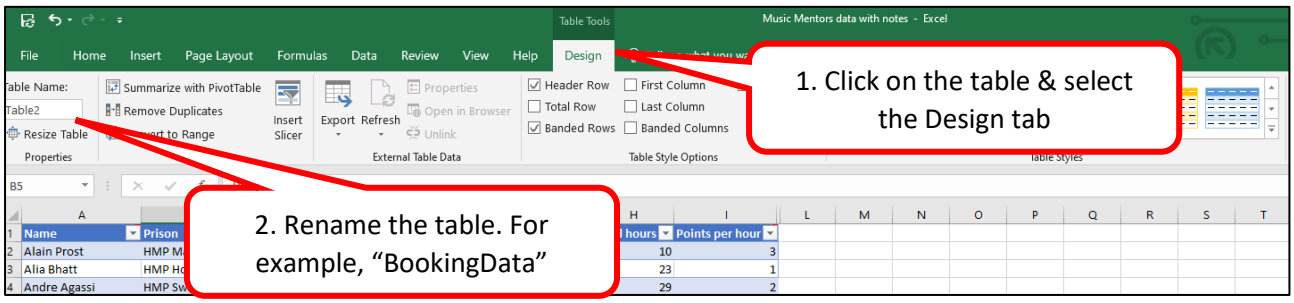


→ Alternative shortcut: Ctrl + T



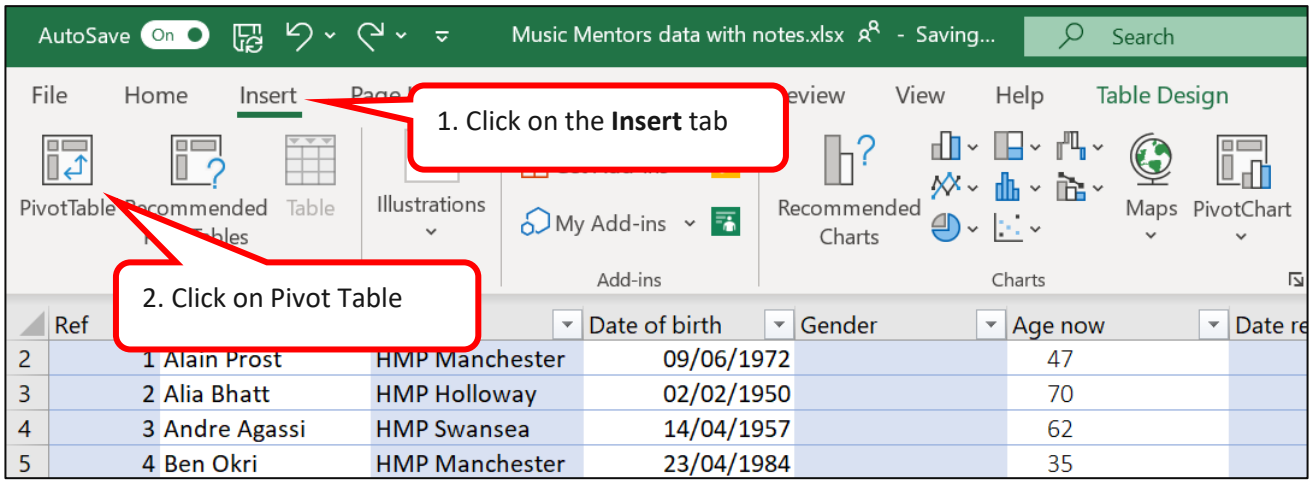
2. Name the table

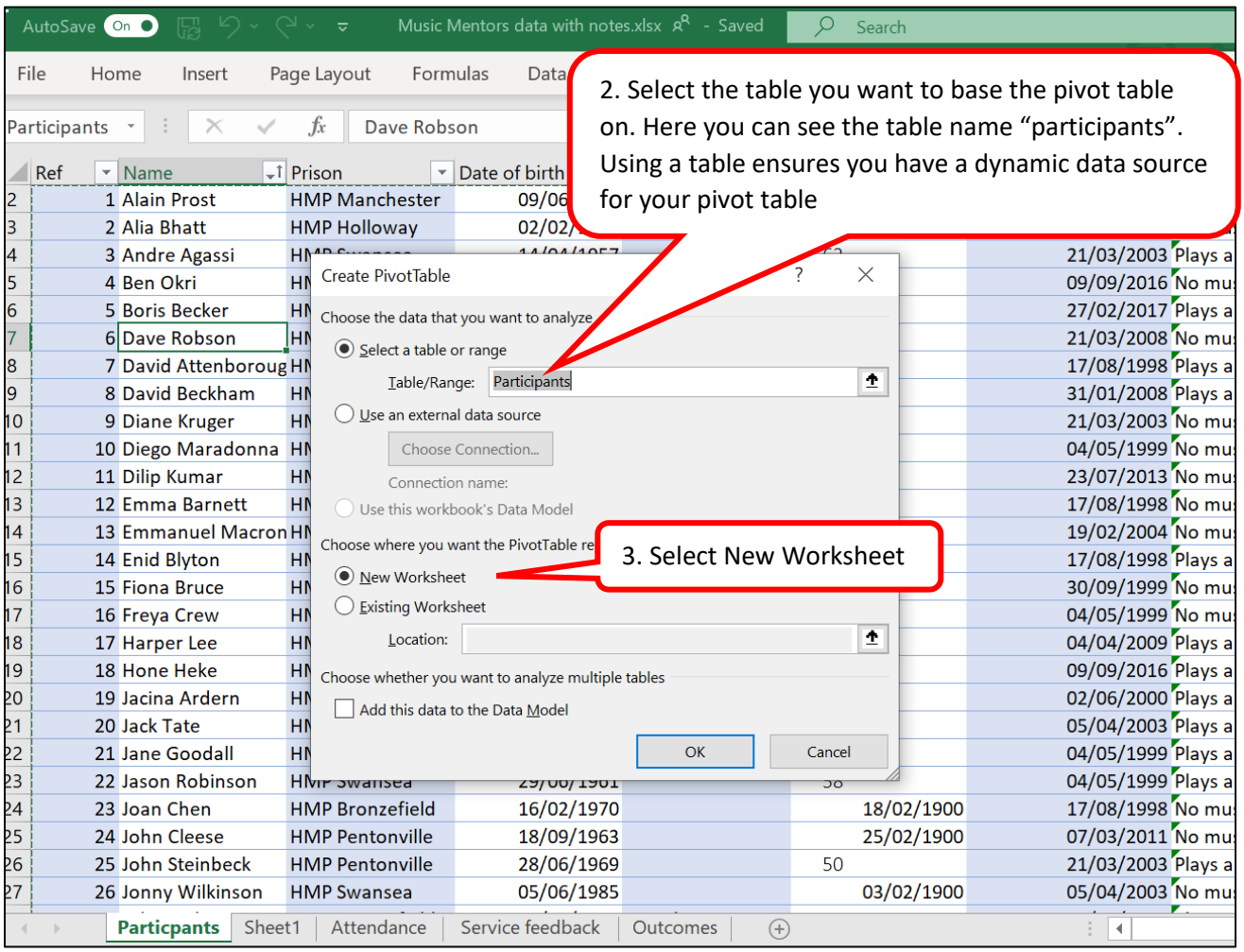
It is good practice to name the table as it makes life much easier later when working with formulas. Naming the formula is basically giving your data set a name which will enable you to recognise which data set you need to be working with.

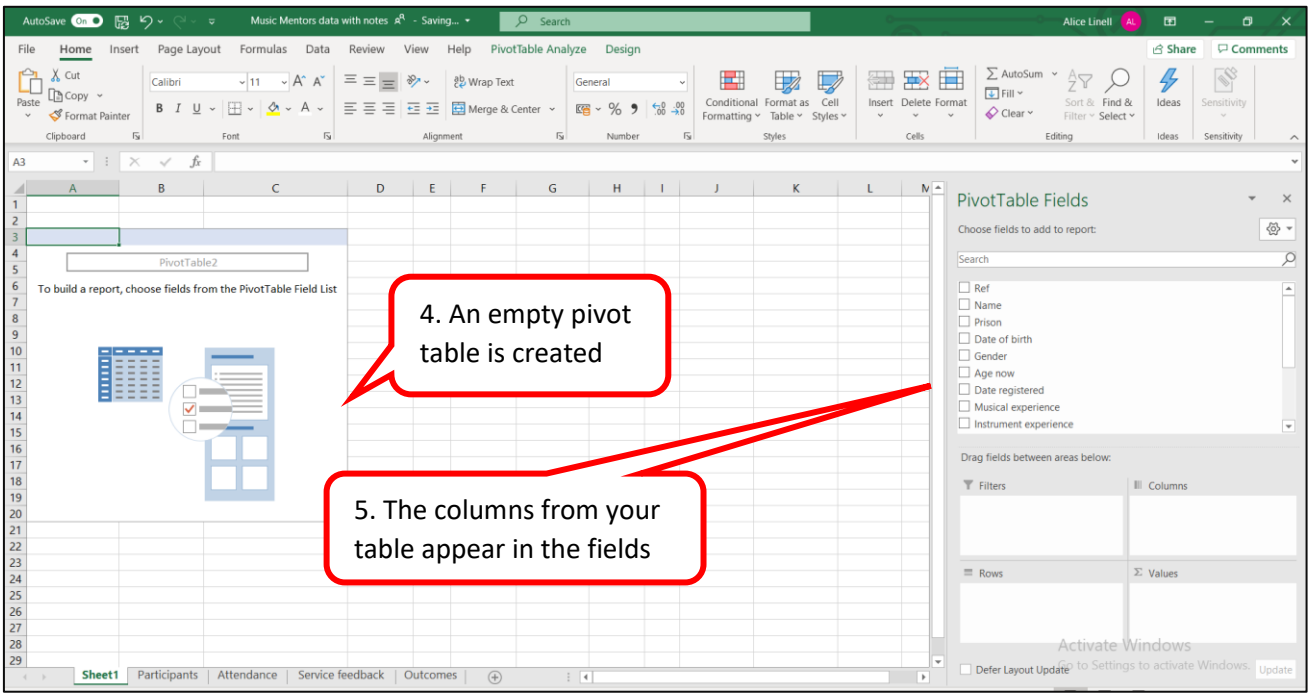


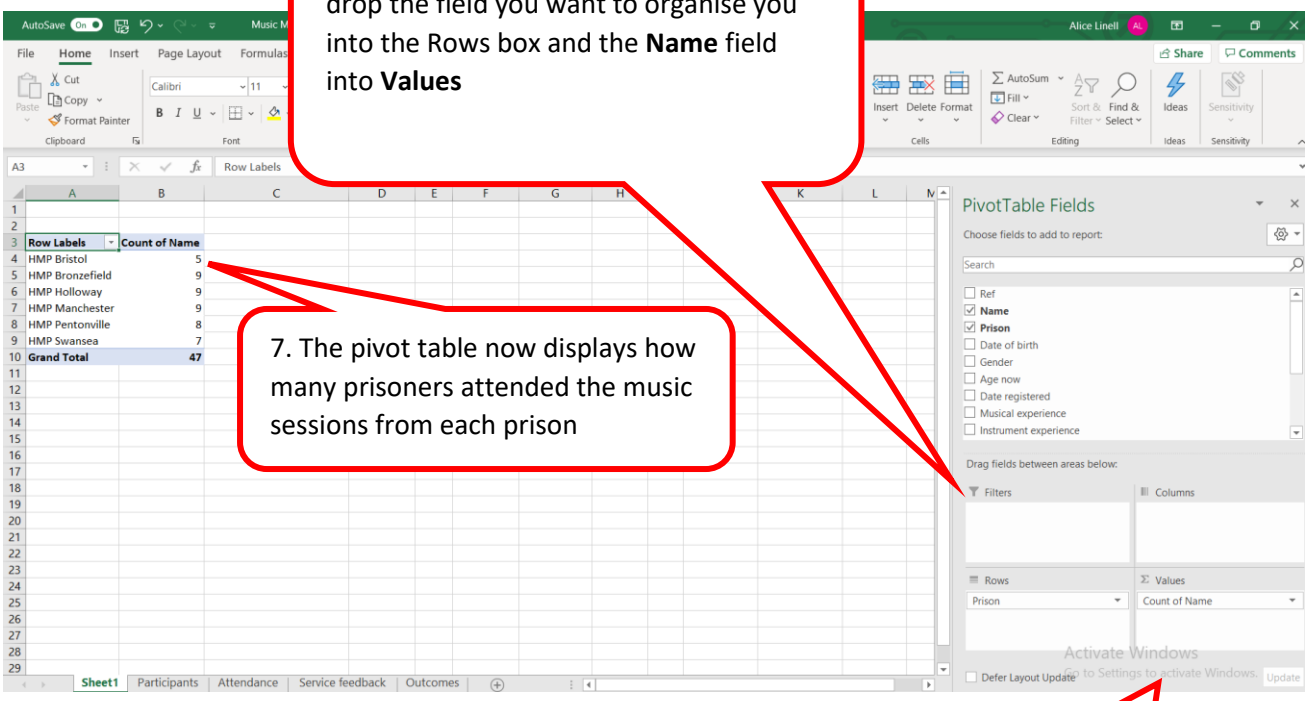
Pivot Tables

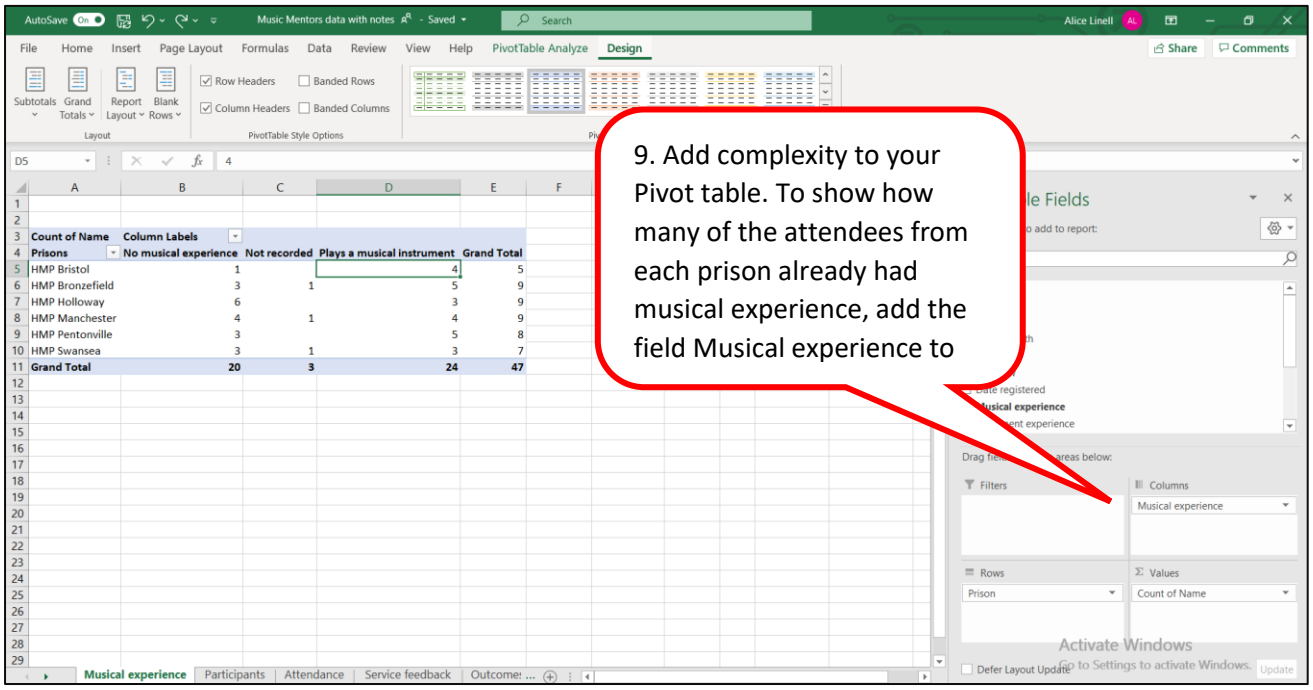
1. Creating a pivot table





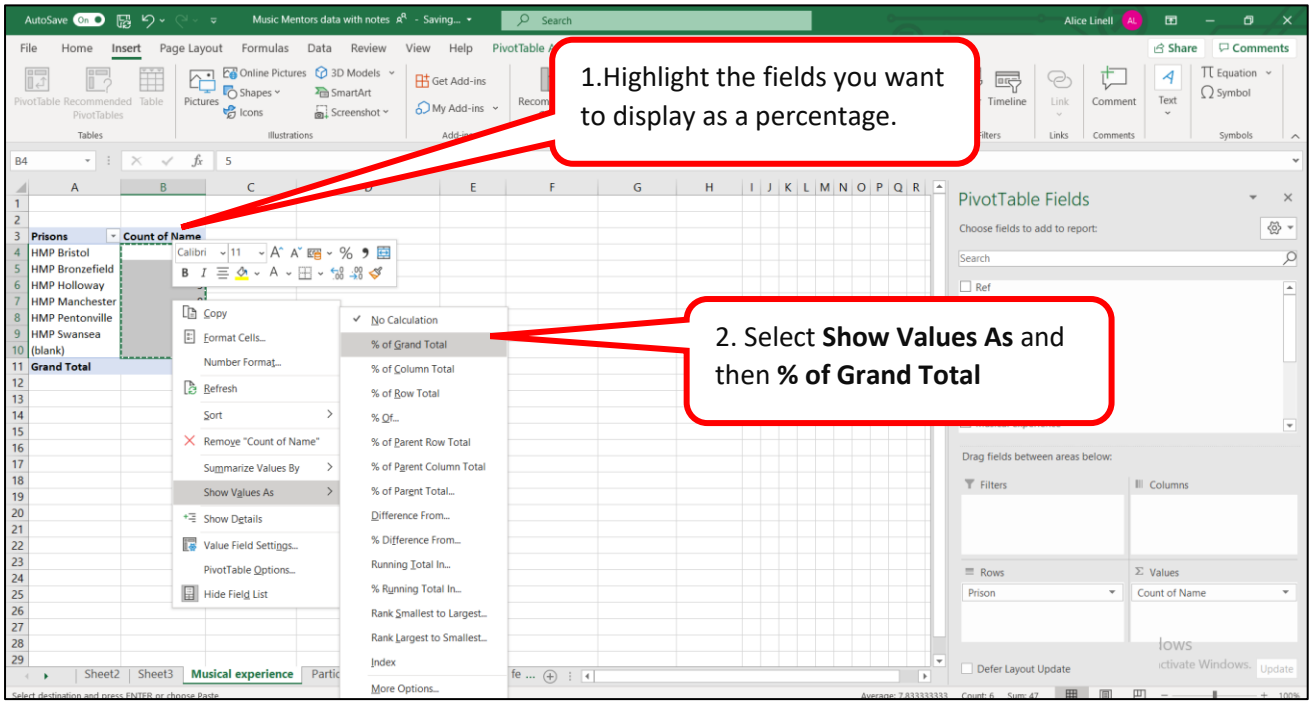

4. An empty pivot table is created
5. The columns from your table appear in the fields
PivotTable Fields
PivotTable2
To build a report, choose fields from the PivotTable Field List

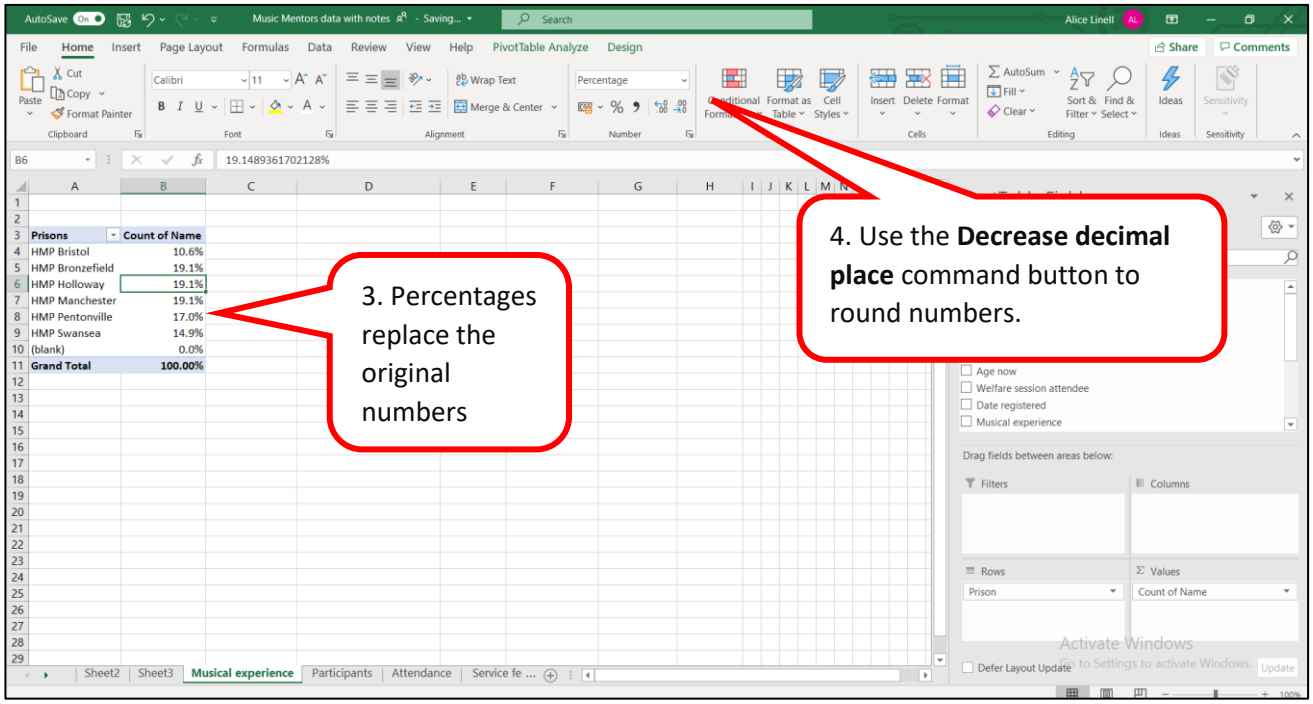

6. To create a simple pivot table drag and drop the field you want to organise you into the Rows box and the **Name** field into **Values**
7. The pivot table now displays how many prisoners attended the music sessions from each prison
8. As the name field is text the pivot table assumes you want to **Count** the number of records in the Name
PivotTable Fields
Row Labels
Count of Name
HMP Bristol 5
HMP Bronzefield 9
HMP Holloway 9
HMP Manchester 9
HMP Pentonville 8
HMP Swansea 7
Grand Total 47



2. Field values

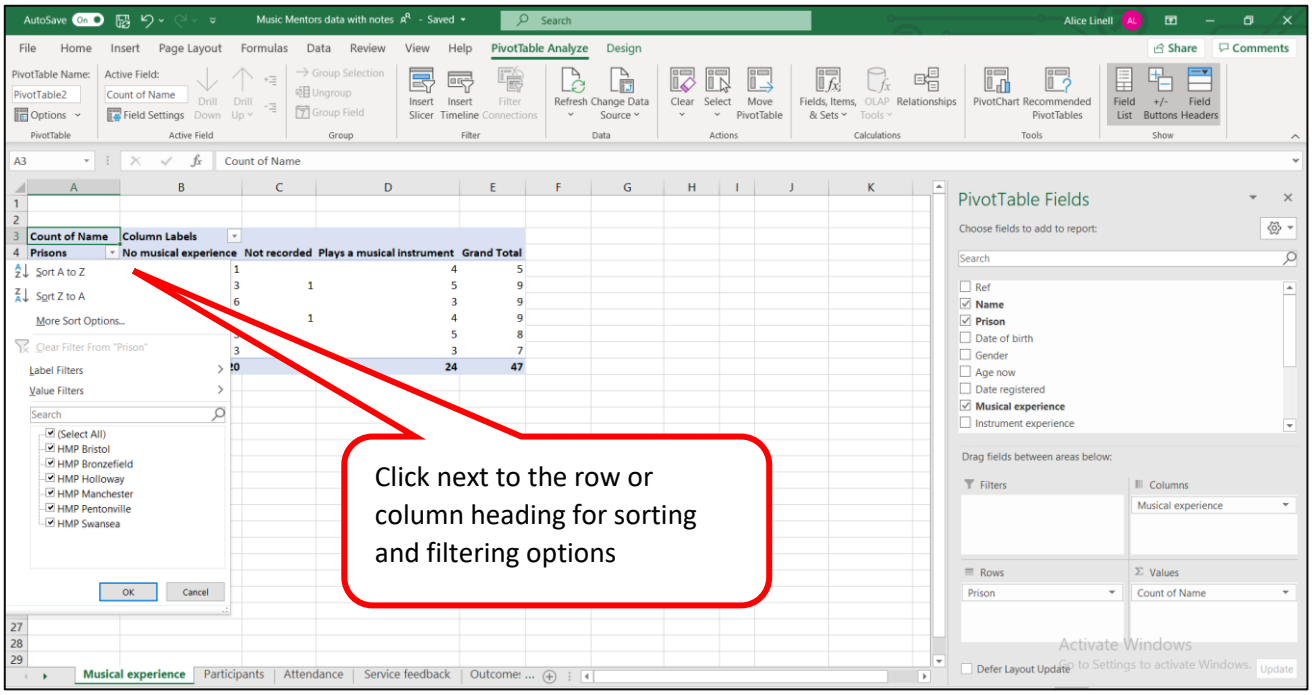
Numberical fields can be displayed in a number of ways in Pivot tables, for example you can display fields as a percentage of the grand total.





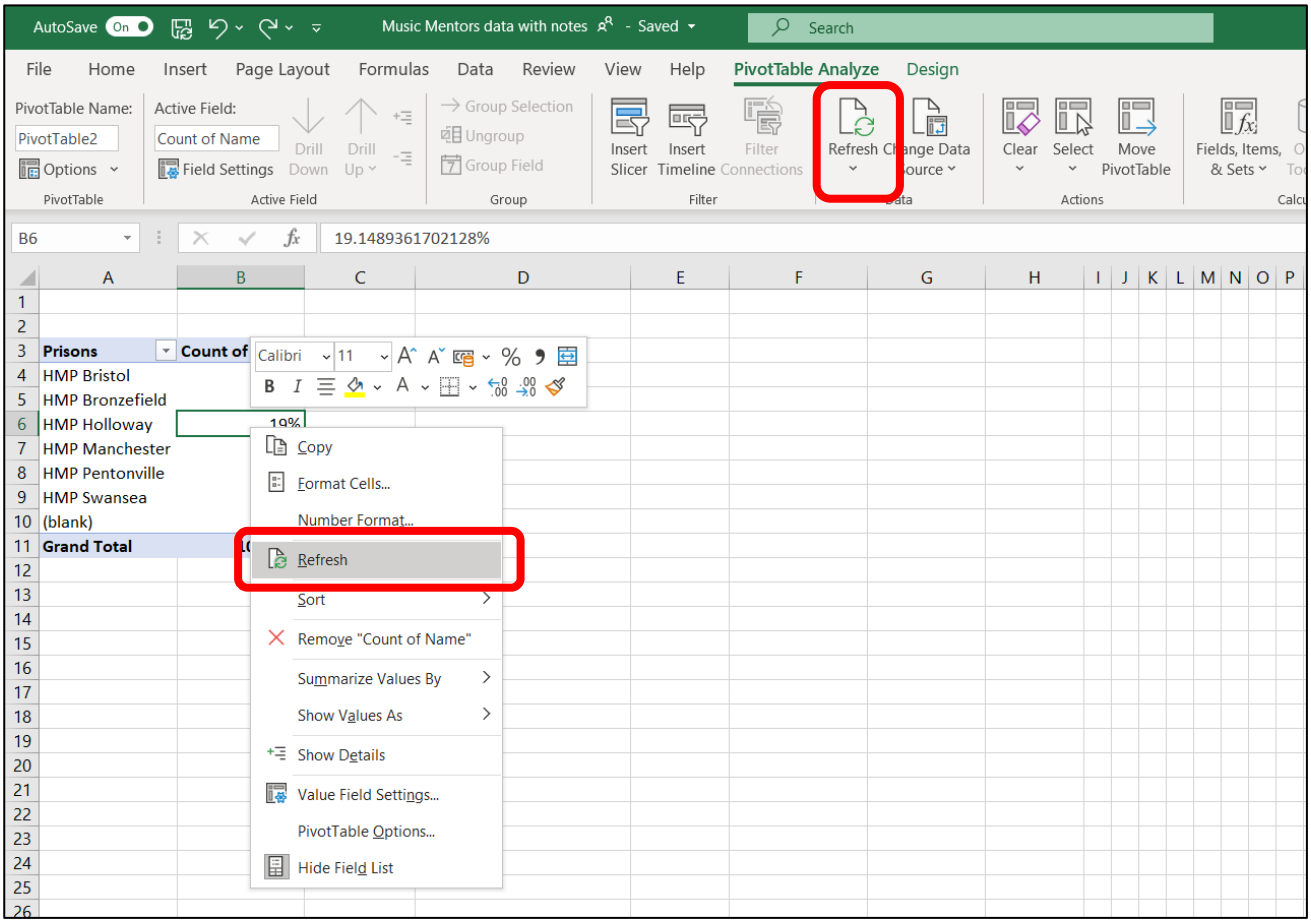
3. Sorting & Filtering a pivot table

Simple sorting and filtering work exactly the same as elsewhere in Excel.



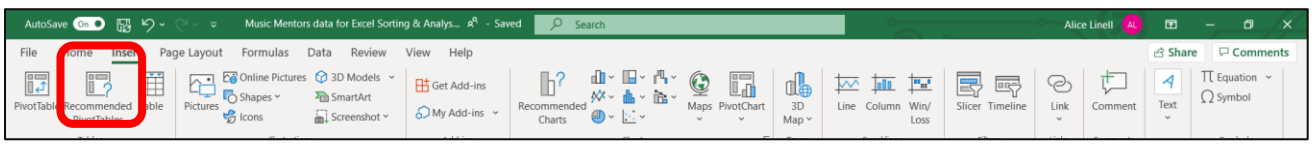
4. Refreshing data in a Pivot table

If you make changes to the data set being used to the pivot table, you might need to refresh the chart so that the changes are immediately reflected in the chart.

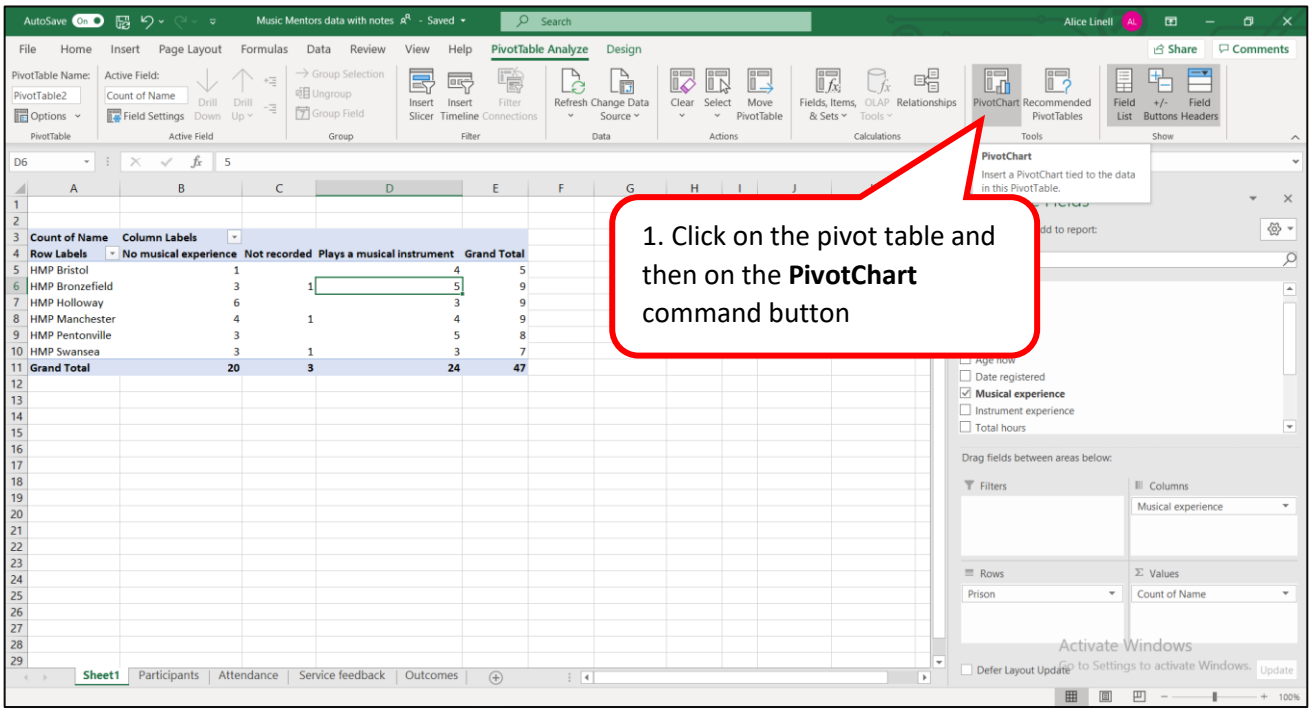


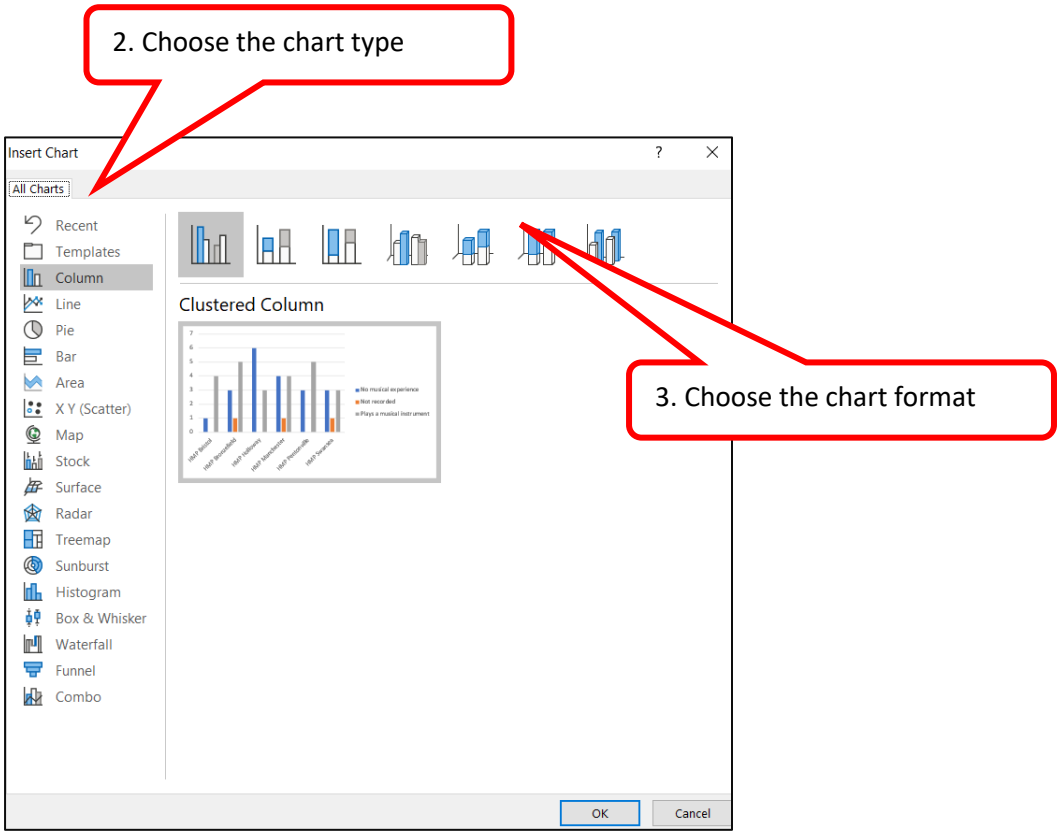
5. Recommended Pivot Tables

A short cut to creating pivot tables can be to use the recommended Pivot table function.



6. Pivot table charts





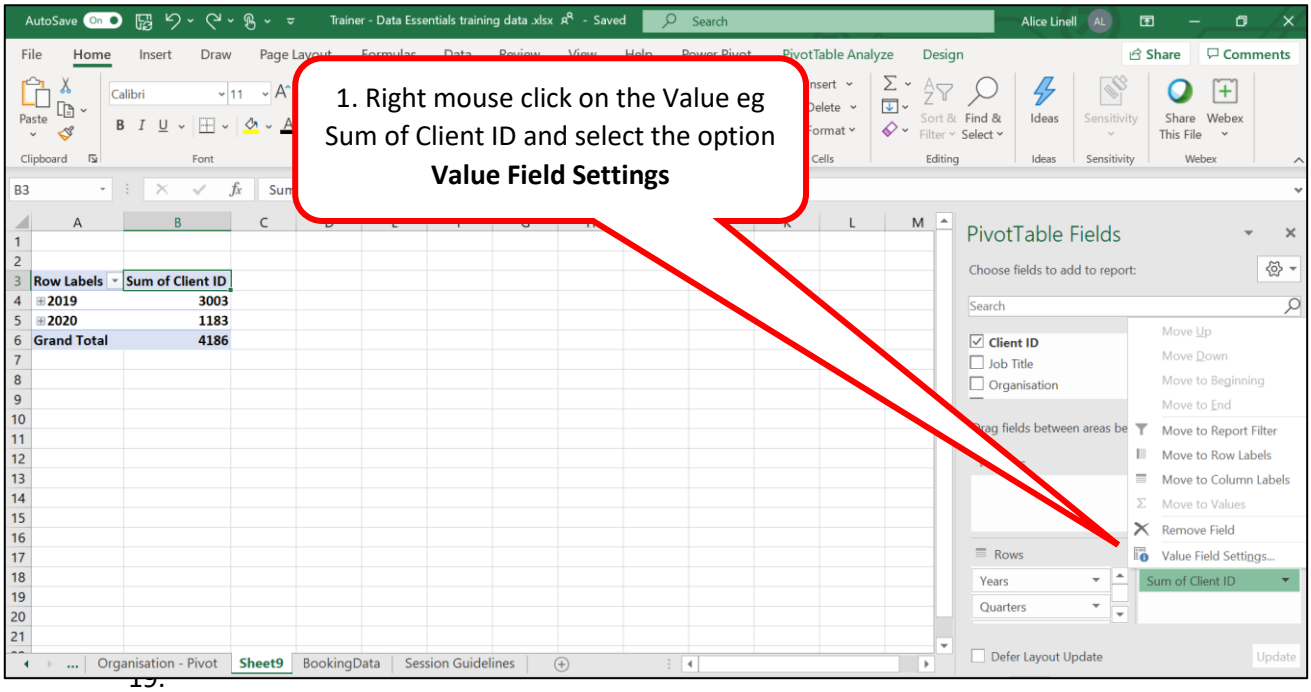
Working with Pivot tables

7. Changing value field settings

In pivot tables you can select different types of setting for the values portion of your Pivot table. You can:

- Give the value set a custom (display) name
- Specify how you want to summarise values
- Specify how you want to display values

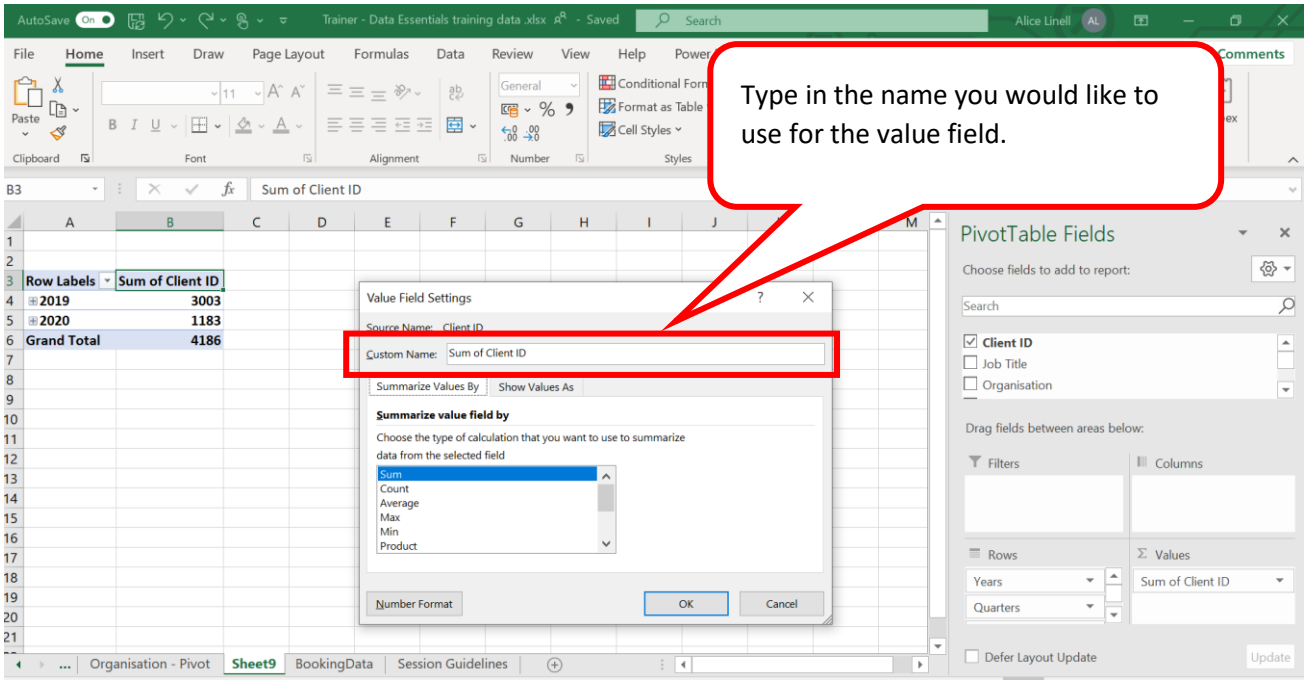
1.



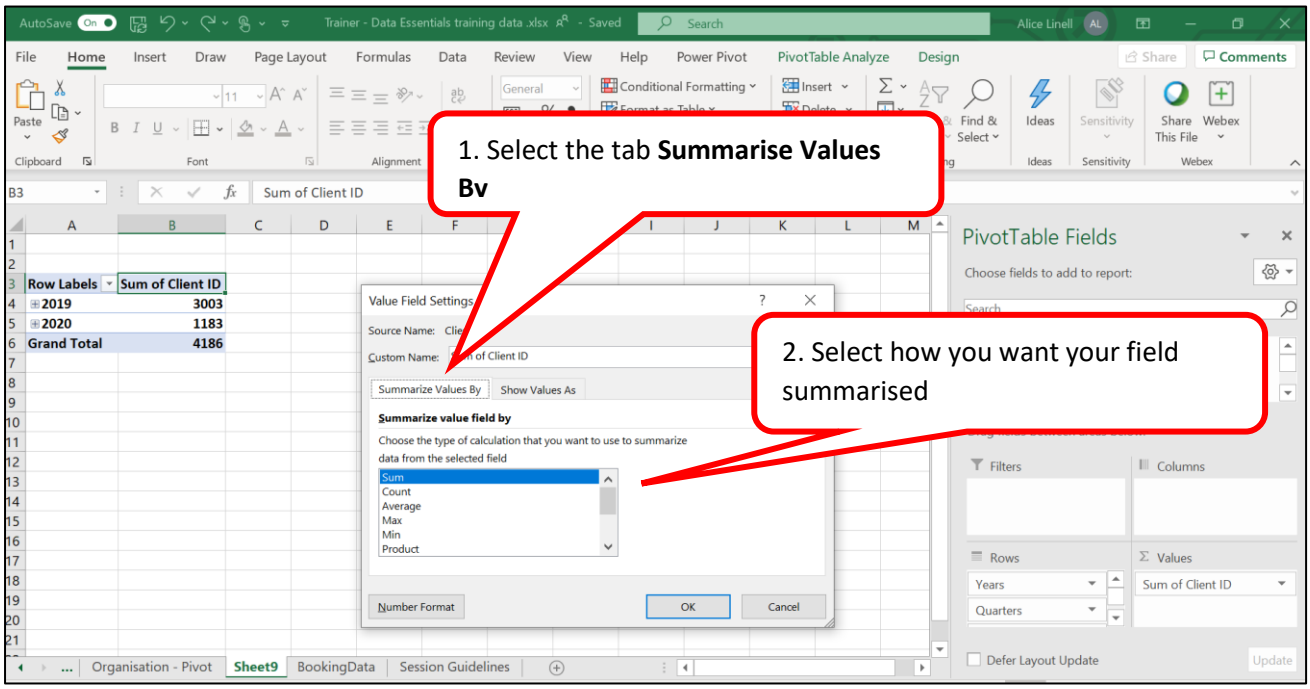
19.

20.

Custom value name



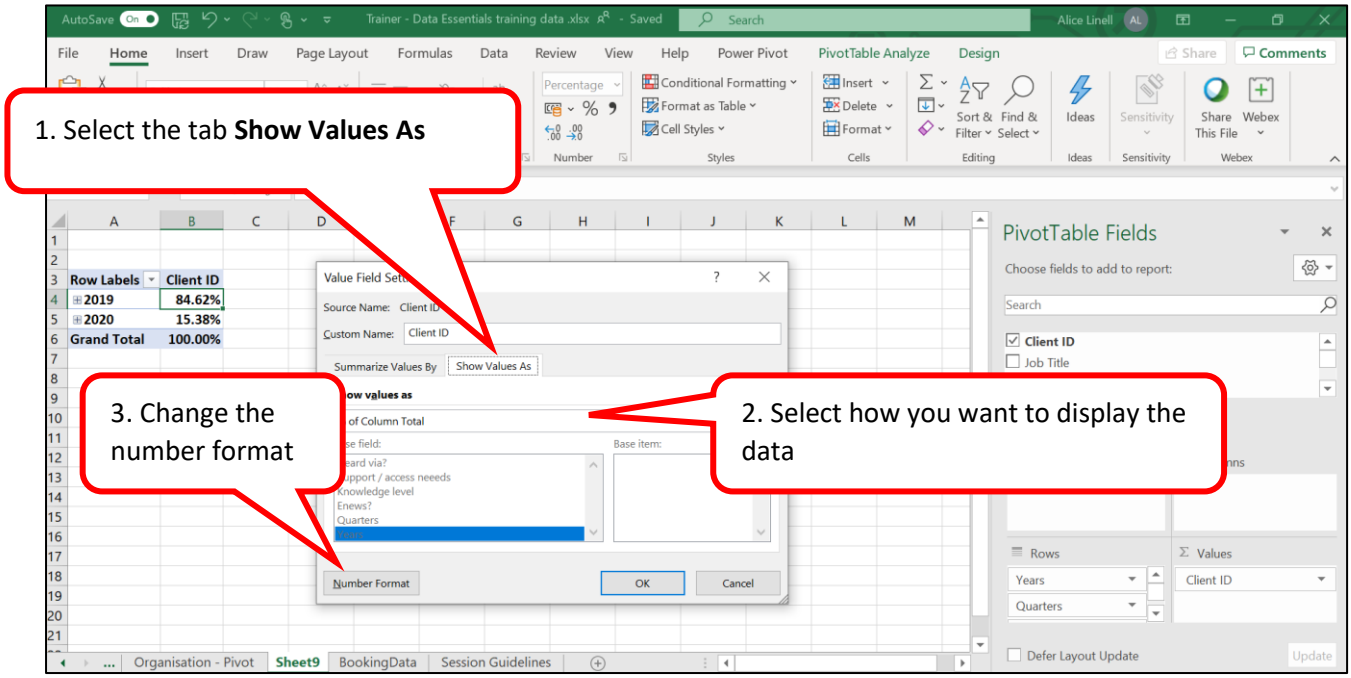
Summarise values by



Most common calculations used to summarise data:

Function	Summarizes
Sum	The sum of the values adds all the values in the selected data range. This is the default function for numeric values.
Count	The number of values. The Count summary function works the same as the COUNTA worksheet function. Count is the default function for values other than numbers.
Average	The average of the values. The average is the mean average of the numbers. To calculate: Excel adds up all the numbers, then divides by how many numbers there are. In other words it is the sum divided by the count.
Max	The largest value.
Min	The smallest value.
Product	The product of the values. The product is the result of multiplying the numbers eg the product of 2 and 3 is 6.

Show values As

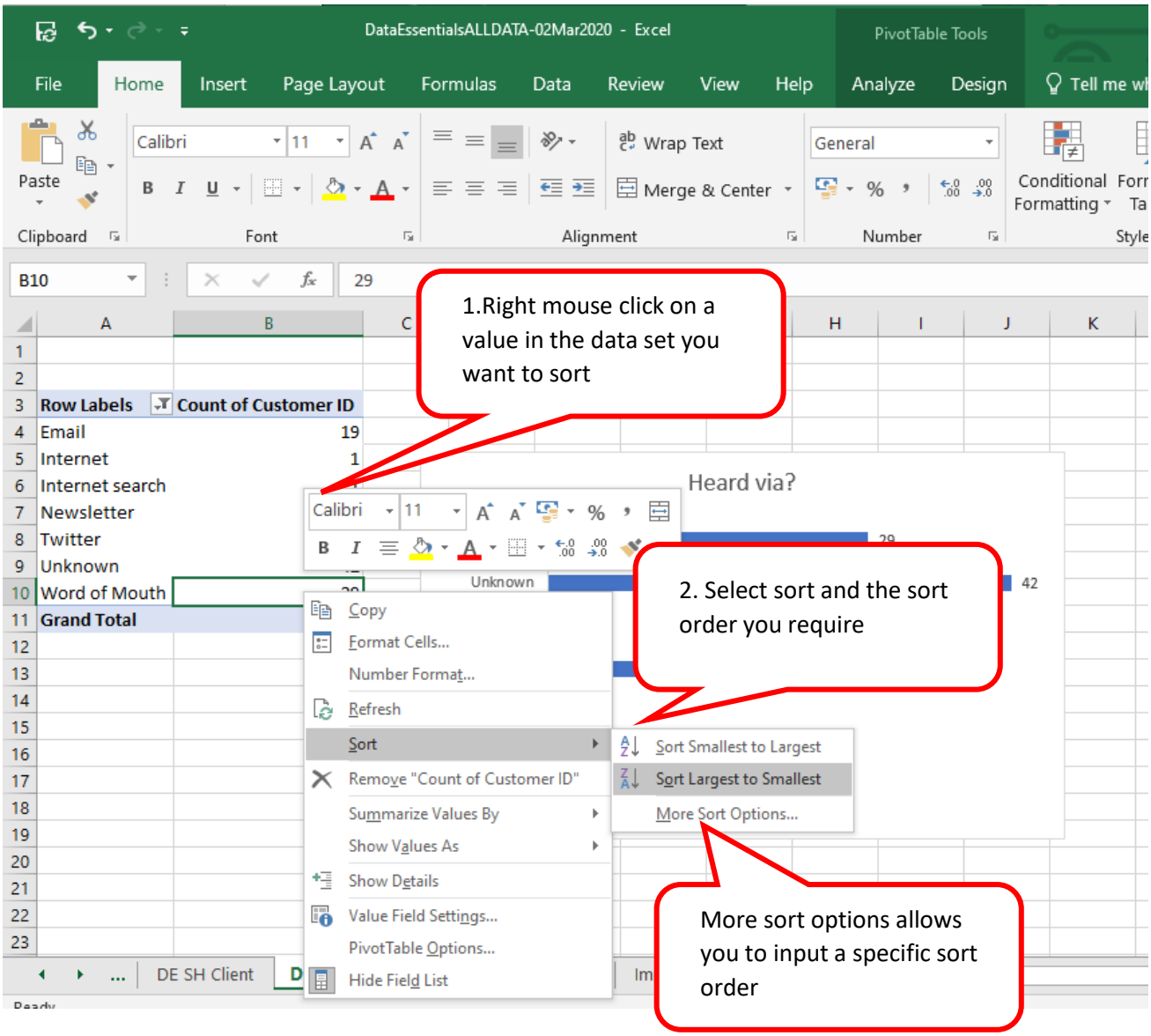


Most common ways of displaying data:

Use this calculation	To
No calculation	Turn off custom calculation.
% of Column Total	Display all the values in each column or series as a percentage of the total for the column or series.
% of Row Total	Display the value in each row or category as a percentage of the total for the row or category.

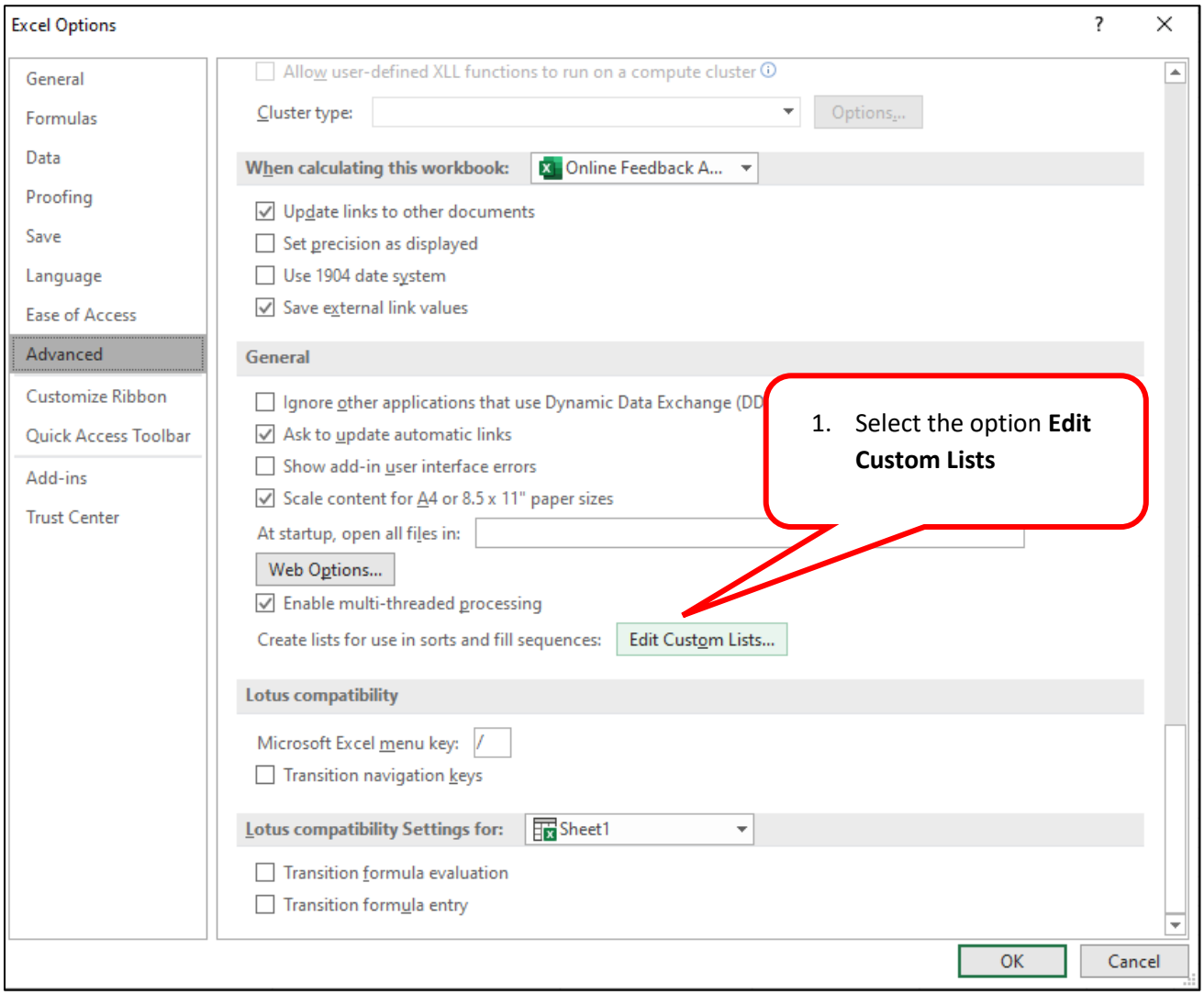
Rank smallest to largest	Display the rank of selected values in a specific field, listing the smallest item in the field as 1, and each larger value with a higher rank value. Create a new column for Rank if you want to show the specific amounts too.
Rank largest to smallest	Display the rank of selected values in a specific field, listing the largest item in the field as 1, and each smaller value with a higher rank value. Create a new column for Rank if you want to show the specific amounts too.

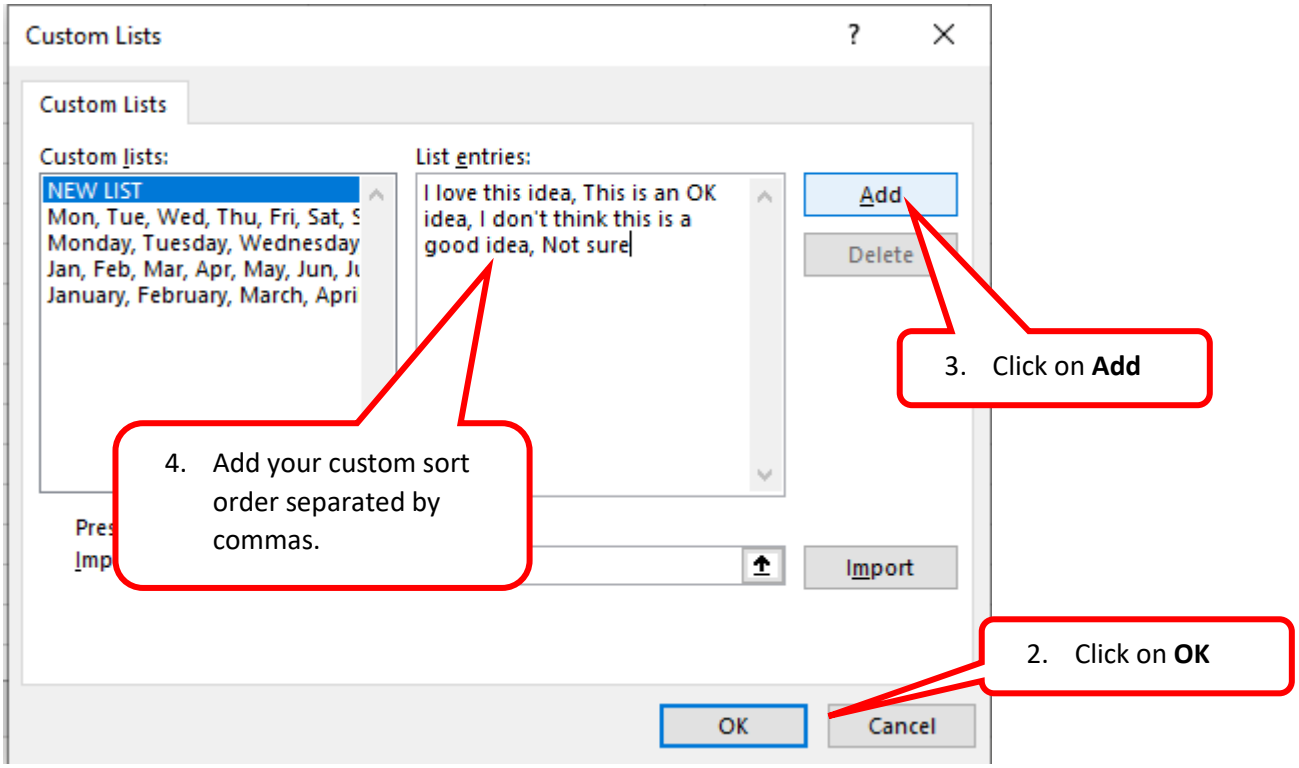
8. Changing the sort order



9. Custom sort order

Go to File > Options > Advanced

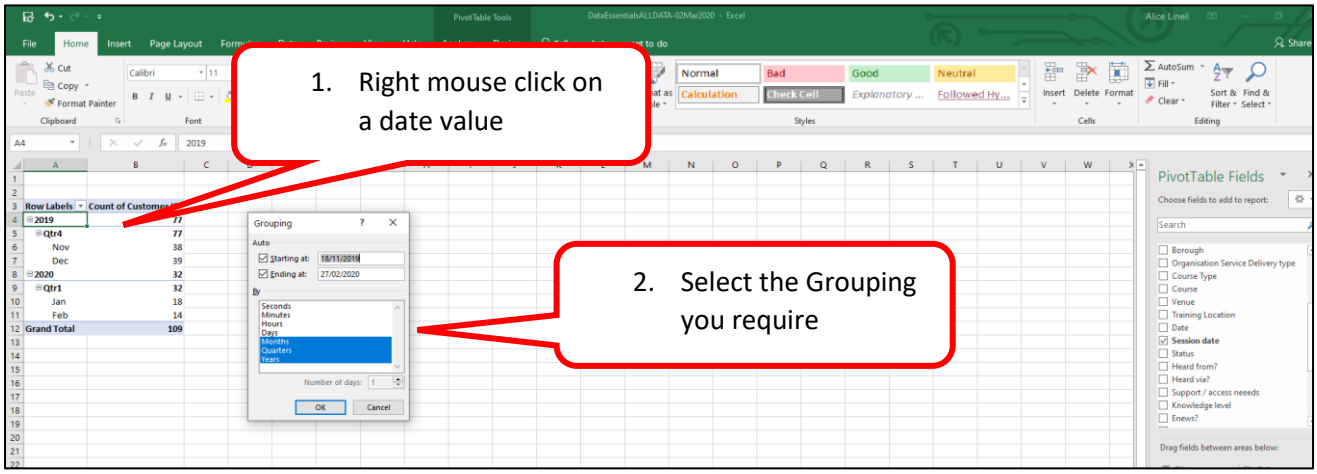




You can also choose to import the values from a range of cells.

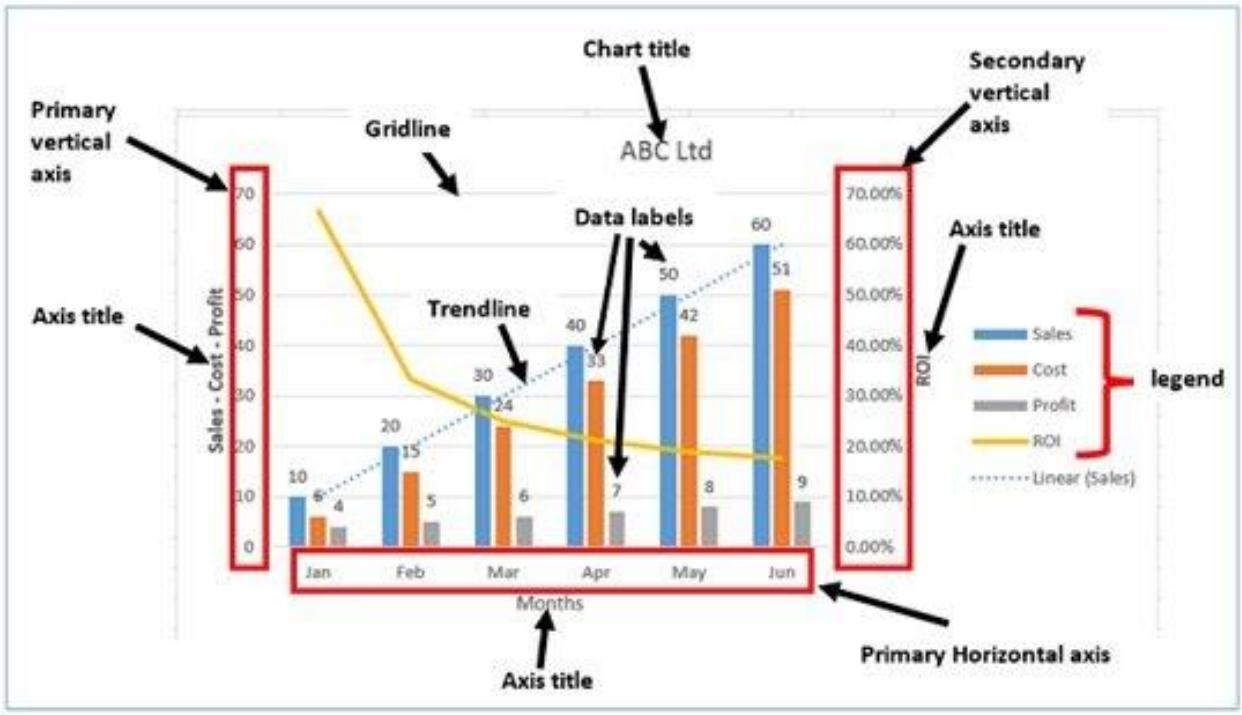
10. Grouping dates

In Excel 2016 forward Excel automatically groups dates by months & quarters. If you are working with an Excel version prior to that or you want to change the automatic grouping you can manually group dates.

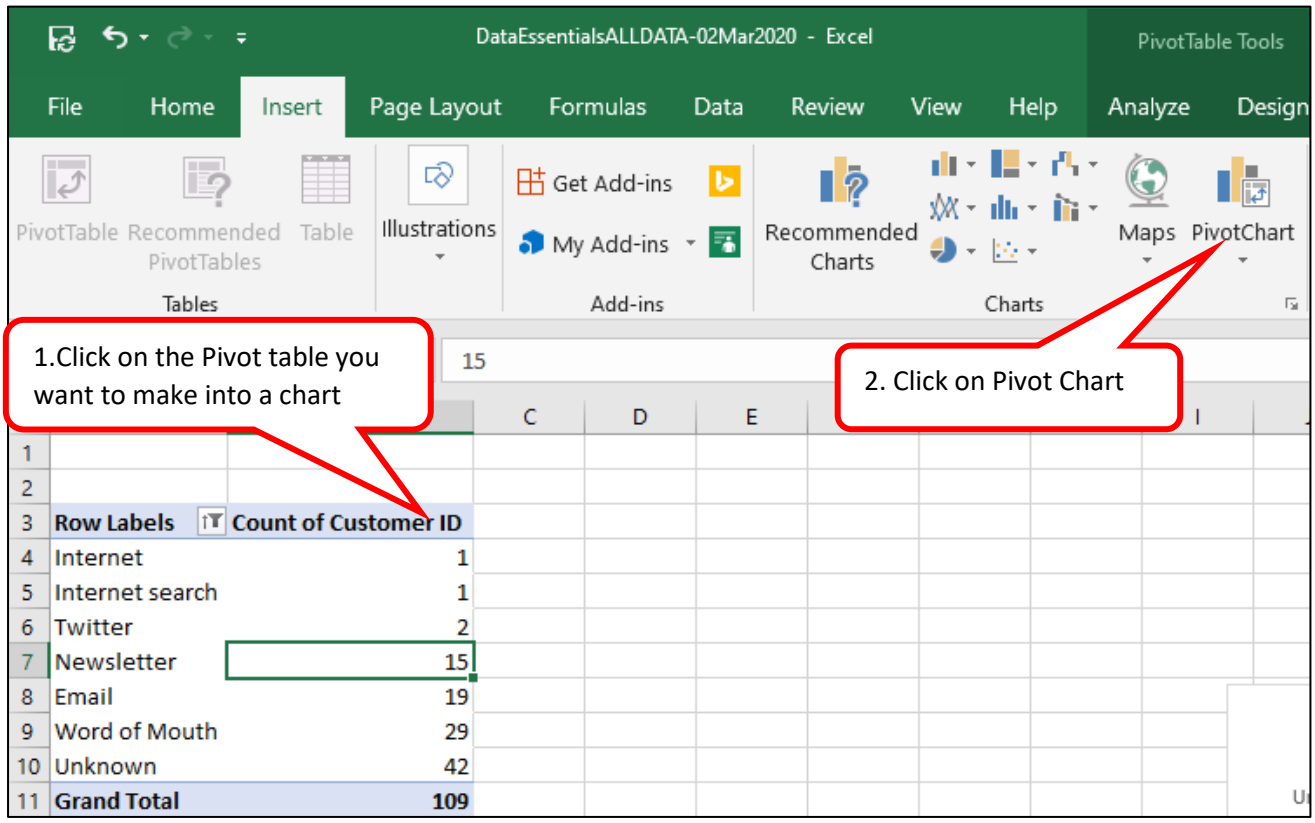


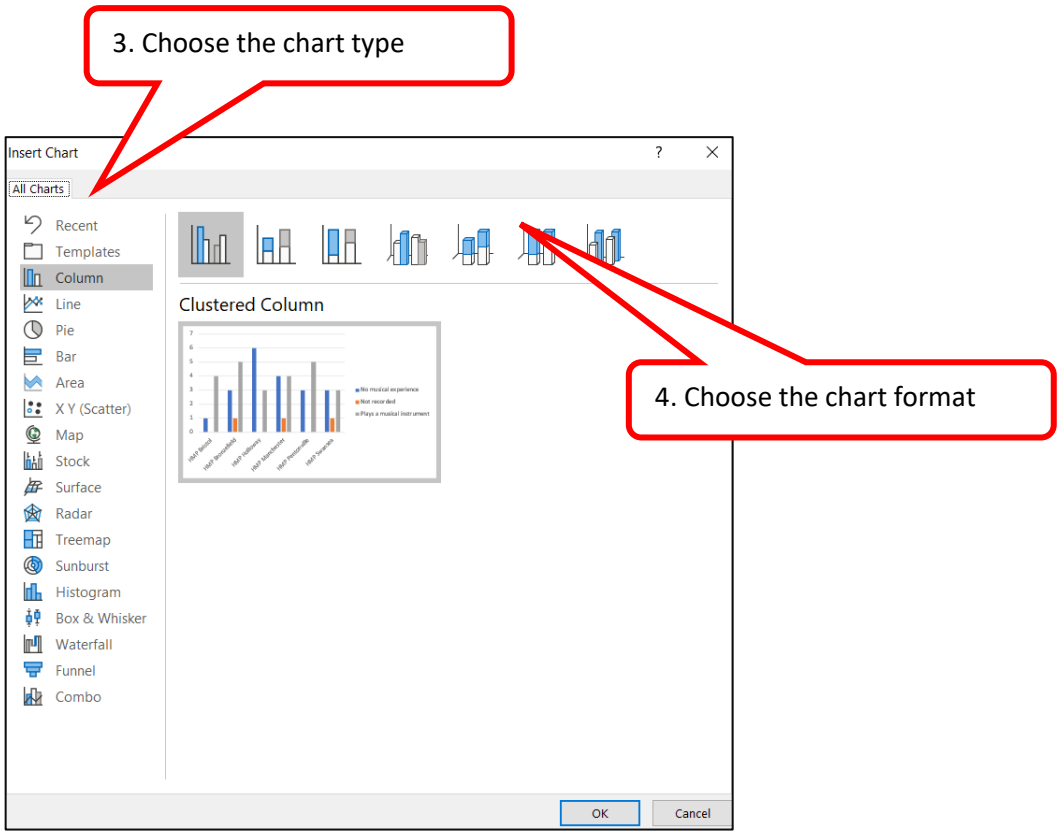
Working with Charts

11. Anatomy of a chart

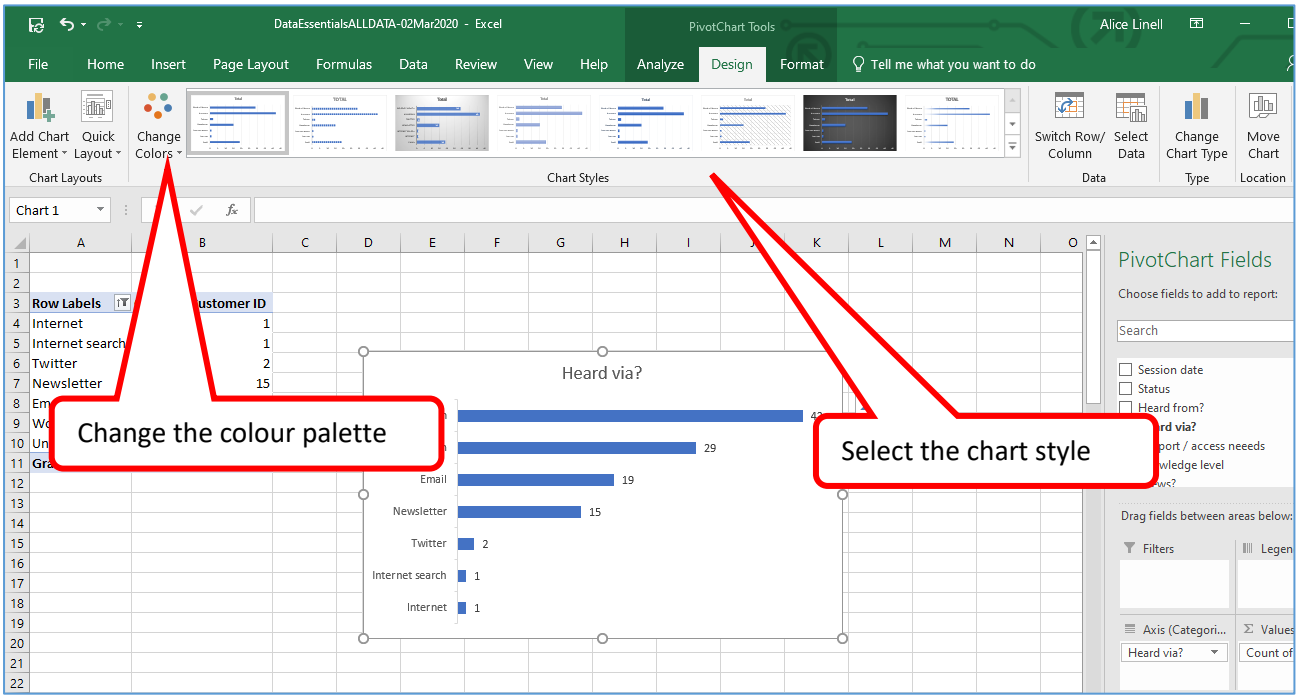


12. Creating Pivot charts

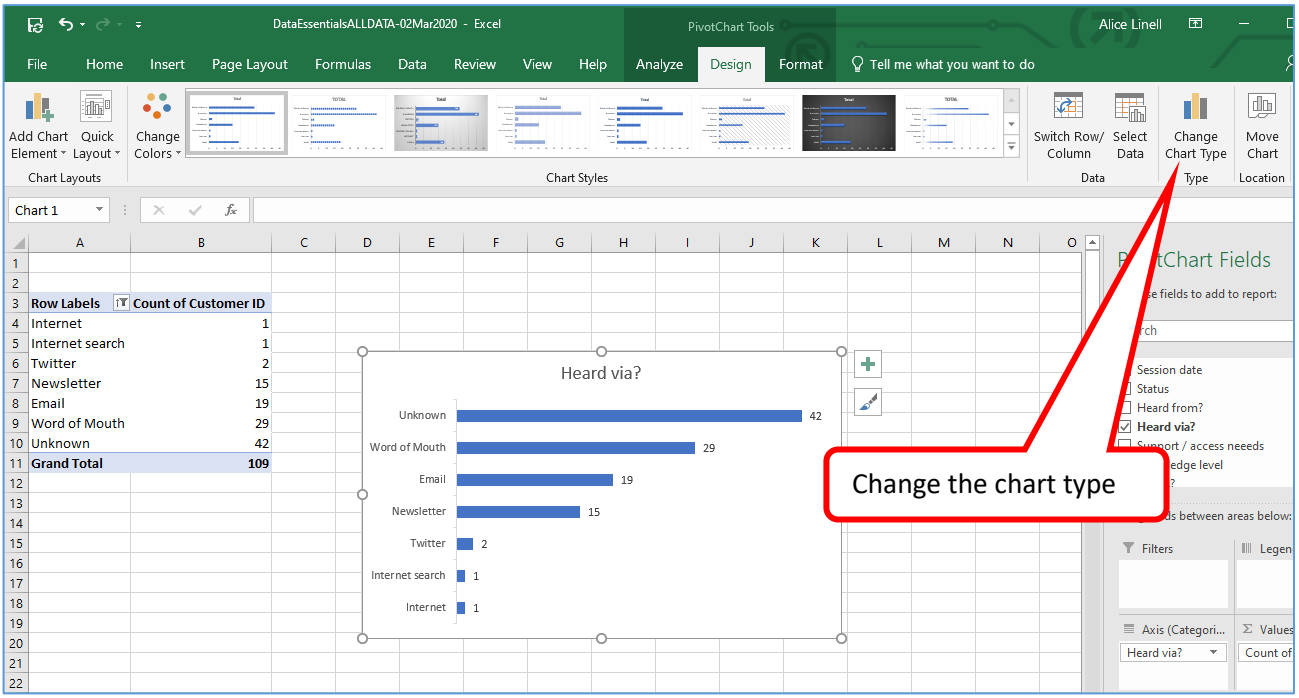




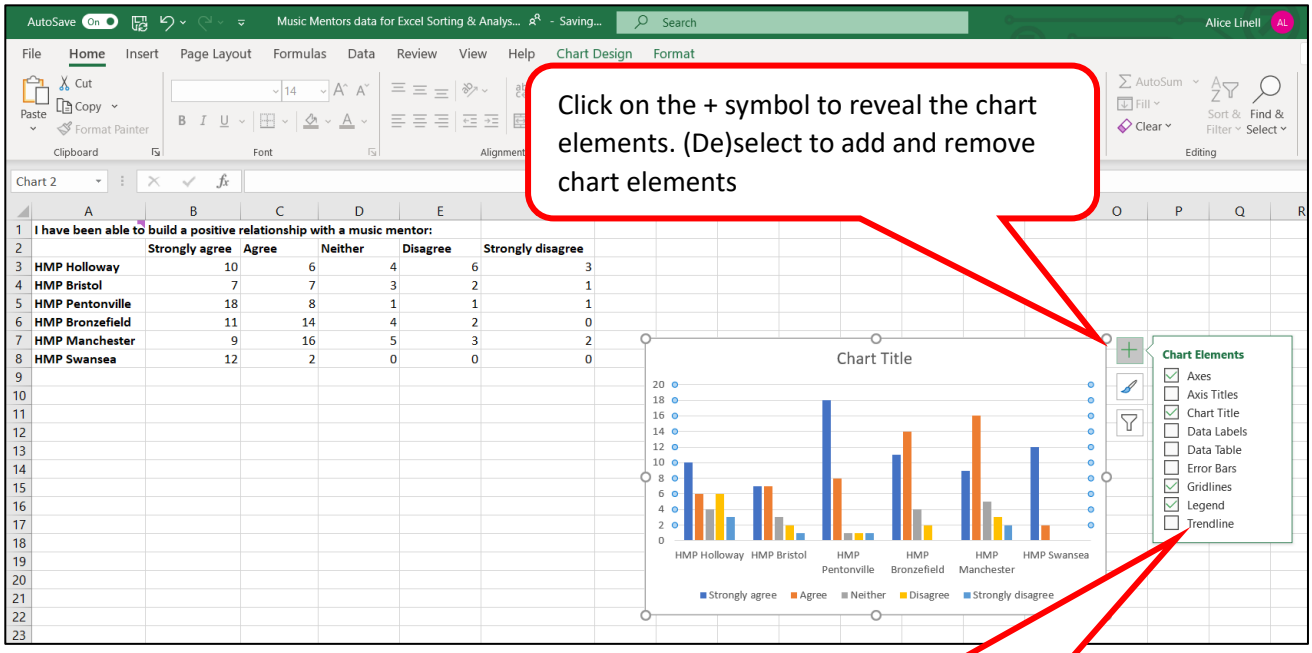
13. Chart design



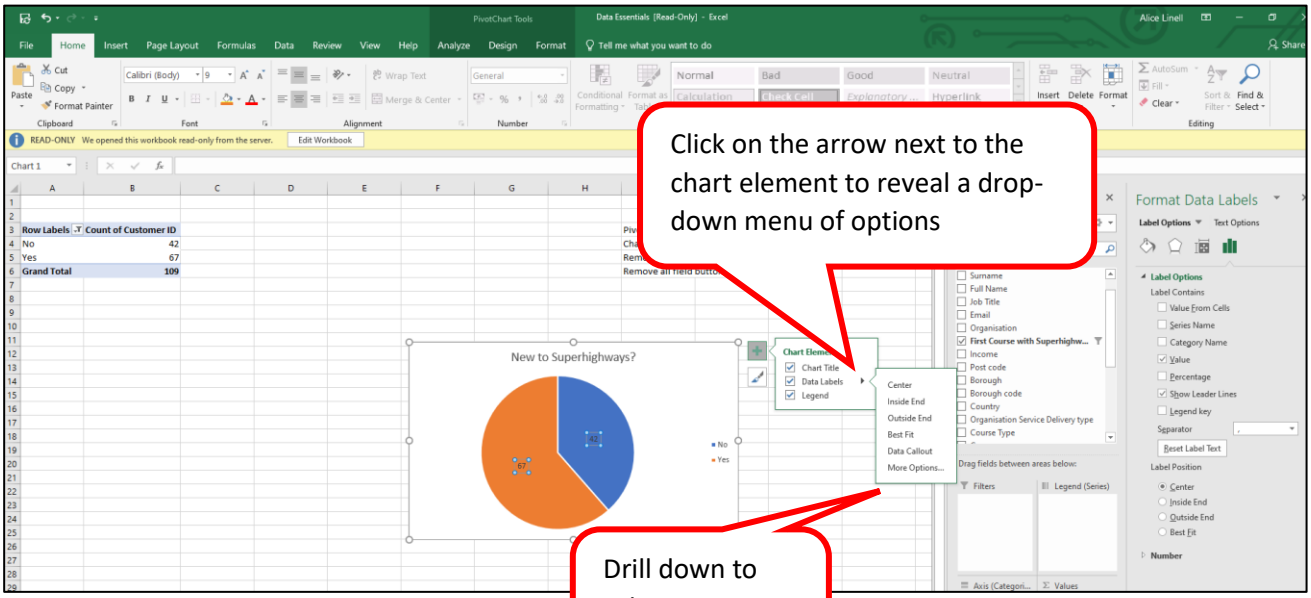
14. Change chart type



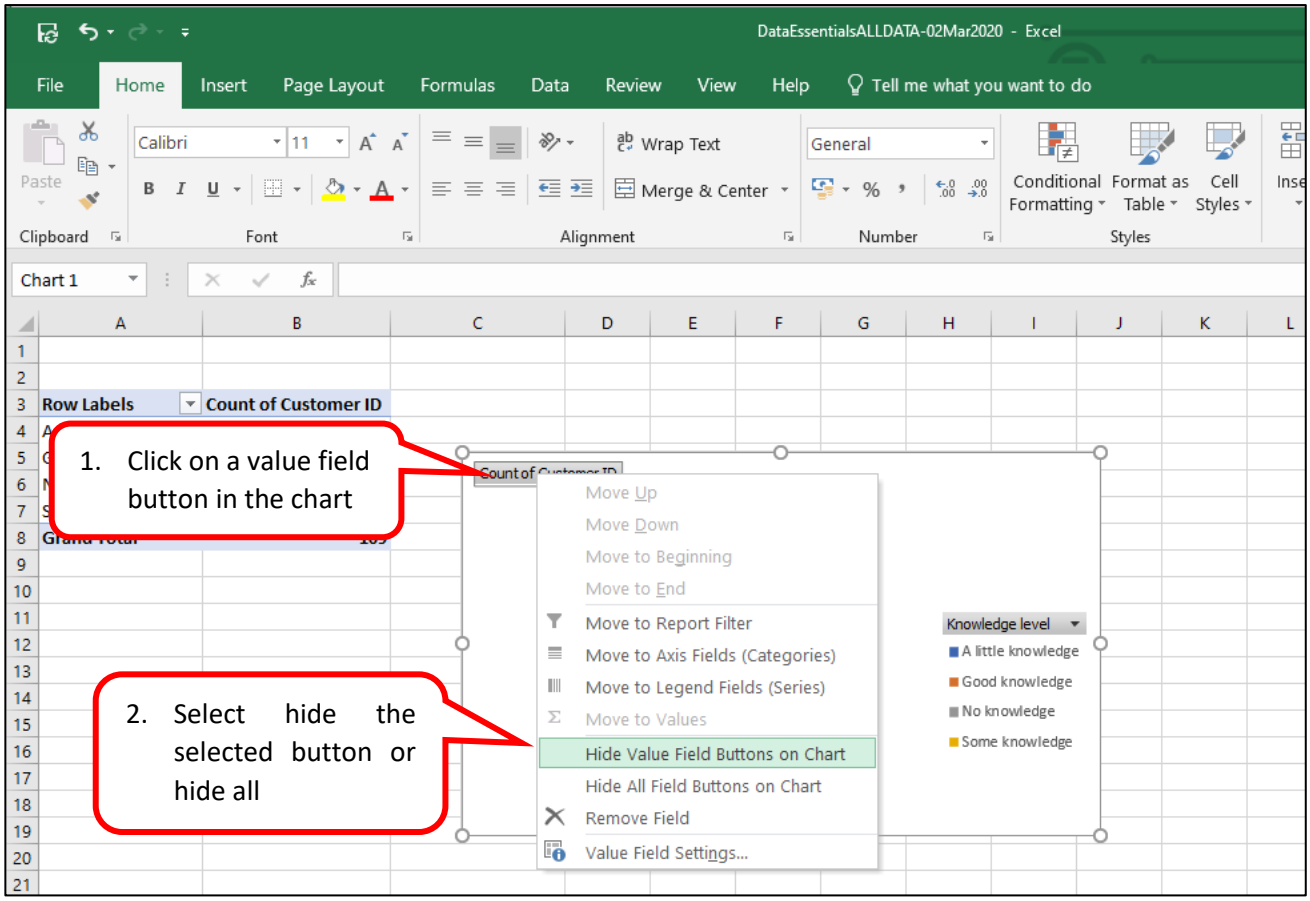
15. Chart elements



I have been able to build a positive relationship with a music mentor:					
	Strongly agree	Agree	Neither	Disagree	Strongly disagree
HMP Holloway	10	6	4	6	3
HMP Bristol	7	7	3	2	1
HMP Pentonville	18	8	1	1	1
HMP Bronzefield	11	14	4	2	0
HMP Manchester	9	16	5	3	2
HMP Swansea	12	2	0	0	0

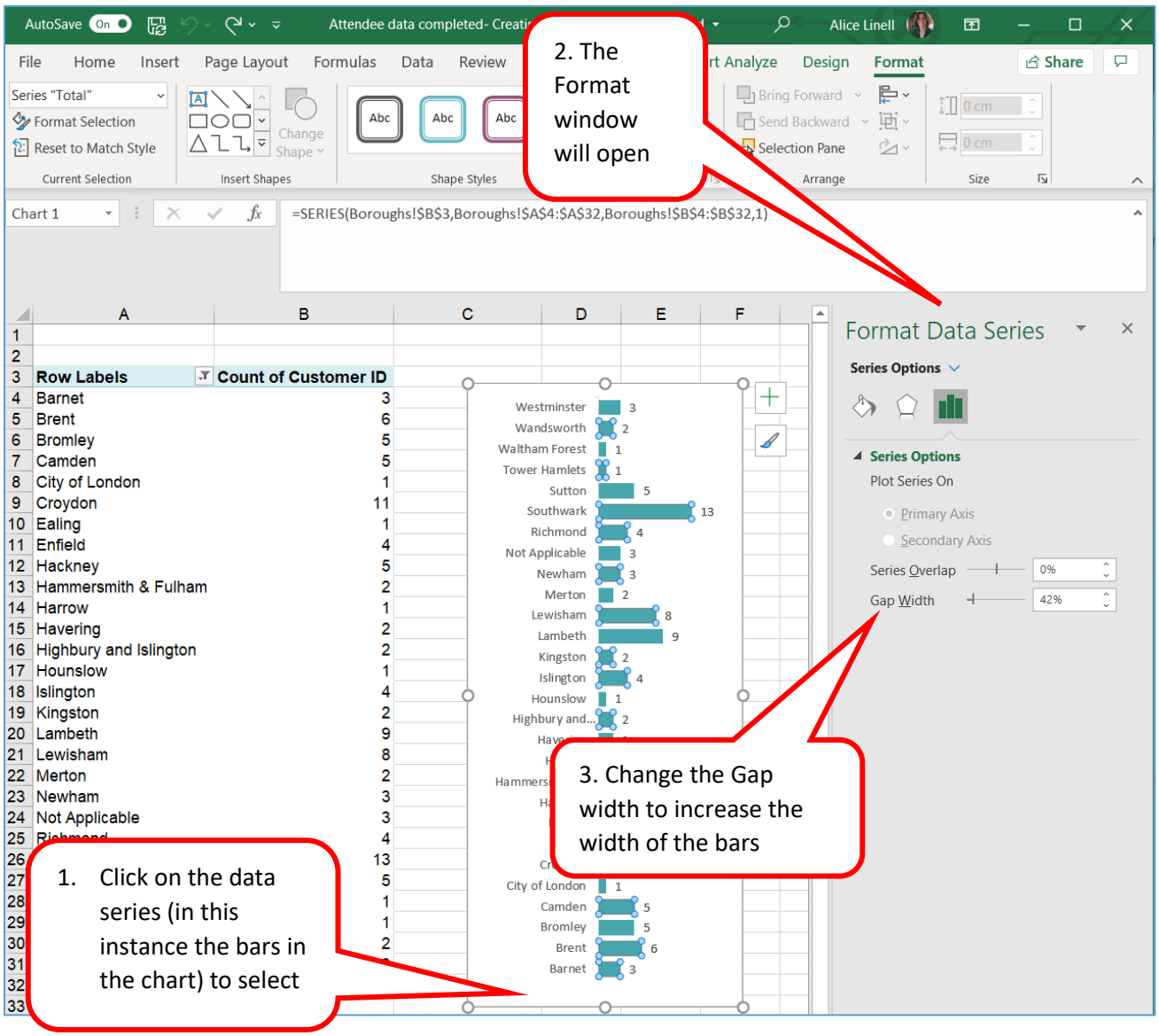


16. Hide Value field button settings

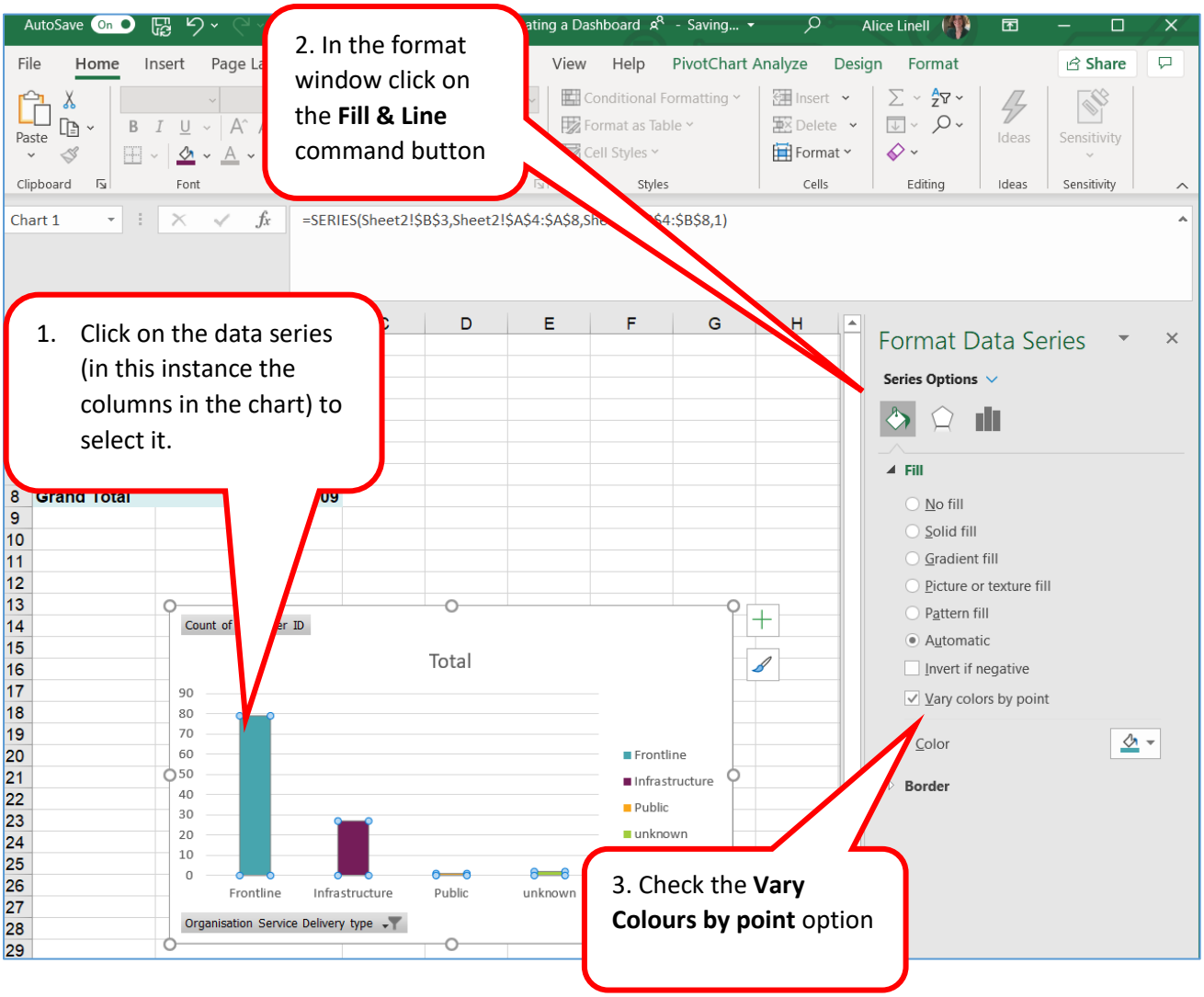


17. Changing the data series

Making Rows/columns broader



Make each data point a different colour

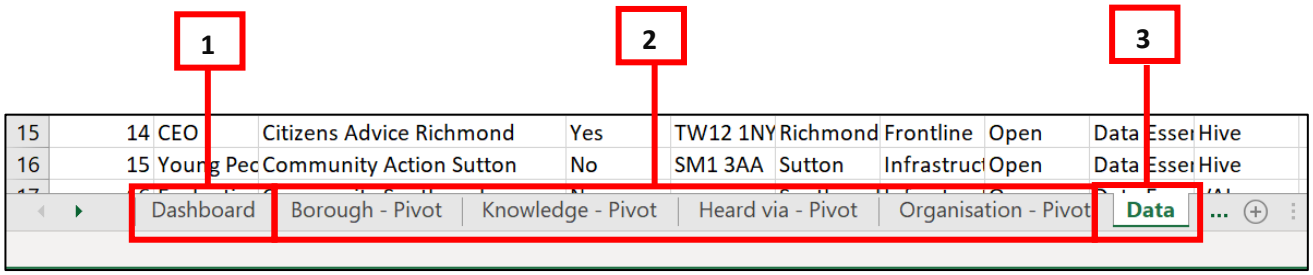


Creating an Excel Dashboard

18. Preparing your Workbook

Create worksheets in your workbook as follows:

1. **Data**
2. **Analysis**
   You can create these as you begin to work on the data. Ideally create one worksheet for each pivot table.
3. **Dashboard**



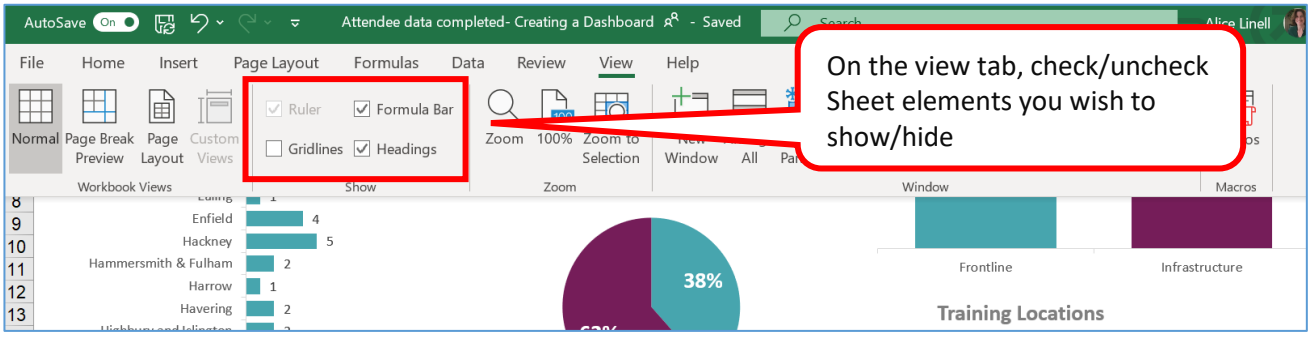
19. Formatting your Dashboard

Add Title

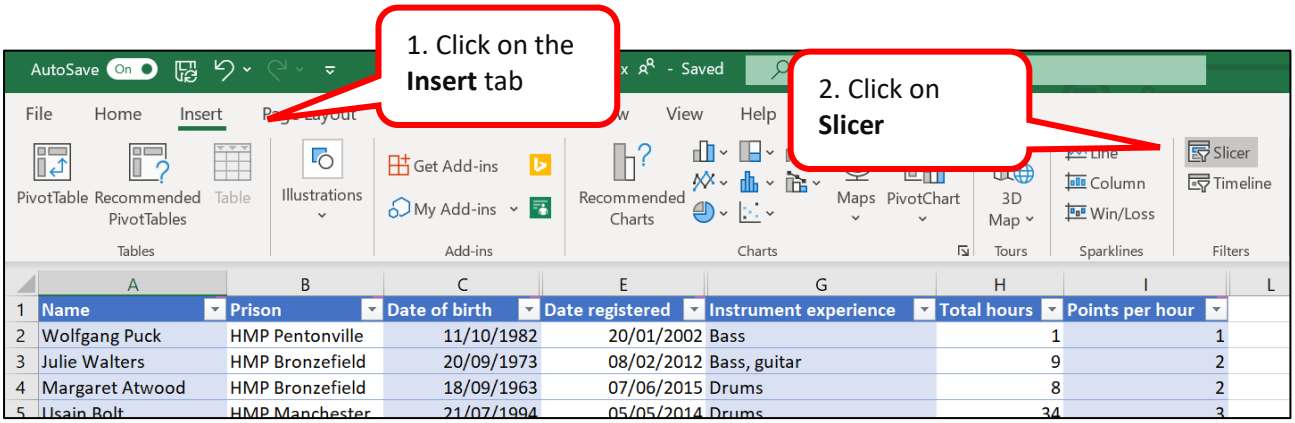
Add a text box to add a title to your chart

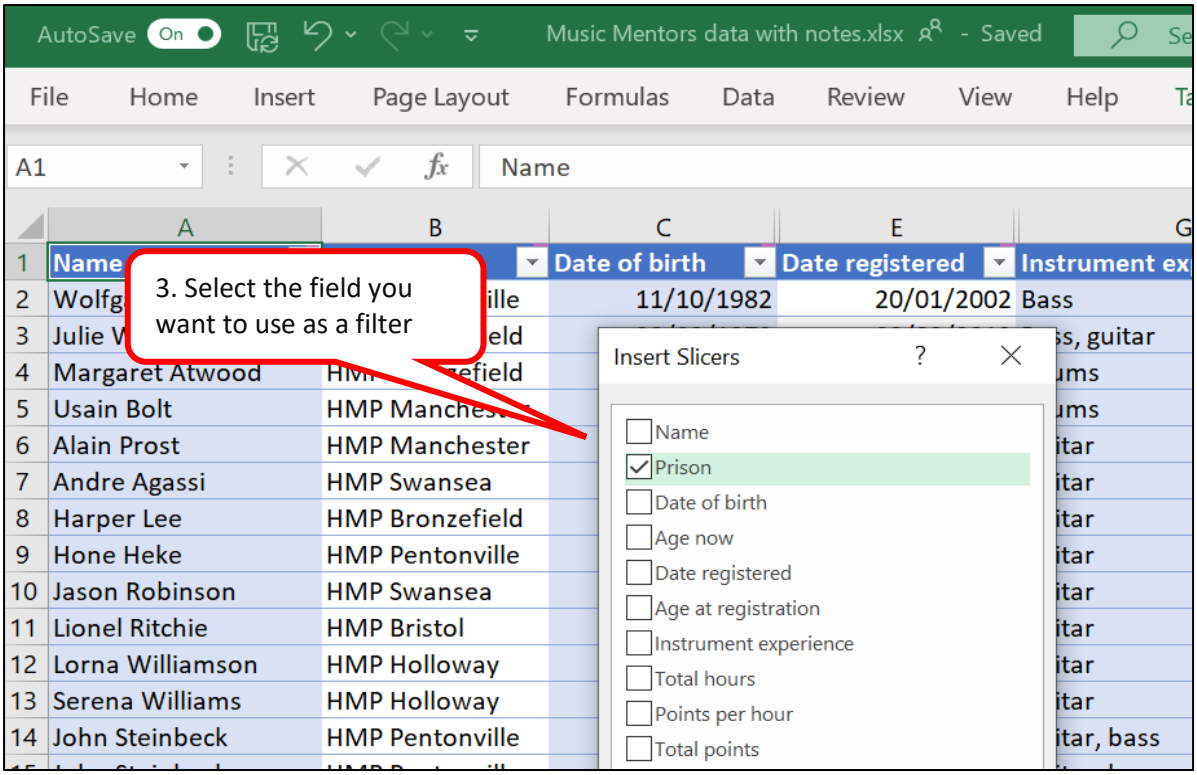
Copy and paste charts in from other sheets, hold Alt key down when moving to snap charts to the gridlines

Hide Gridlines, Headers & the formula bar



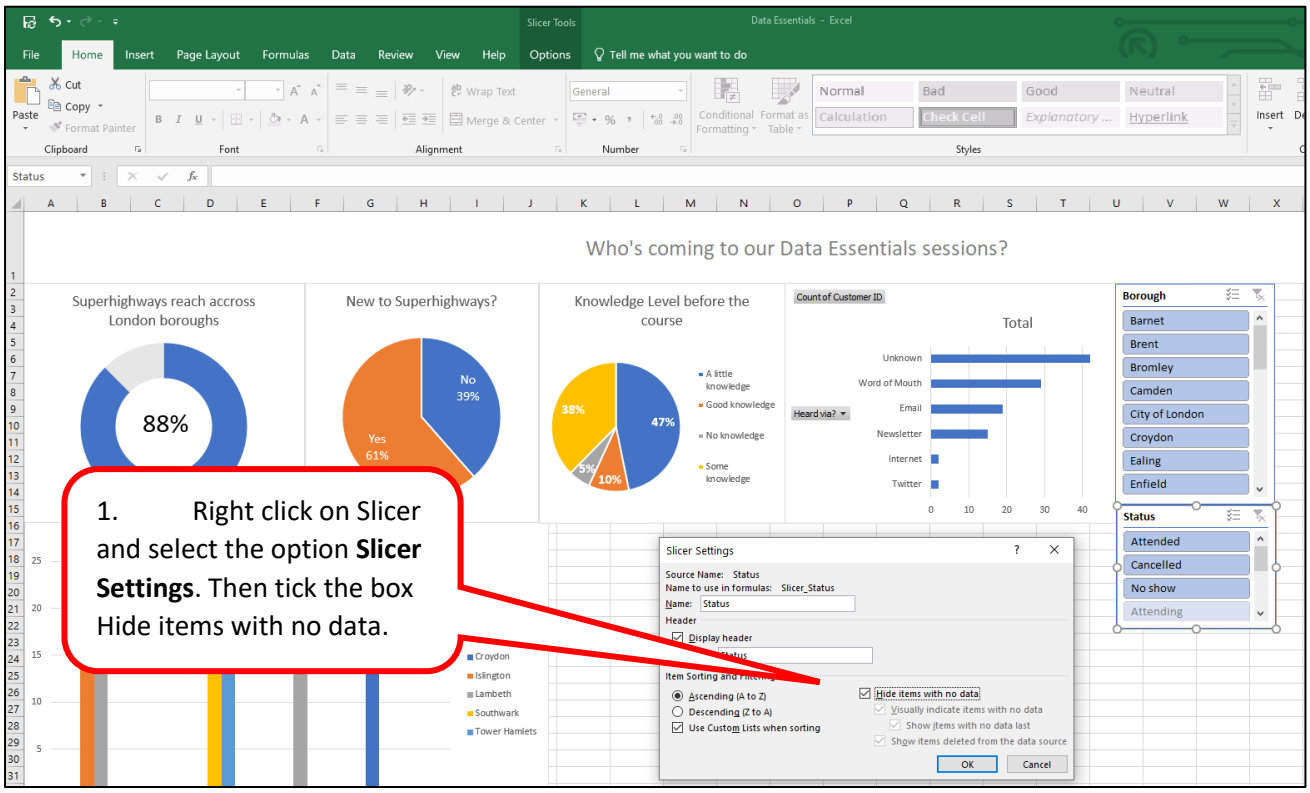
20. Slicers



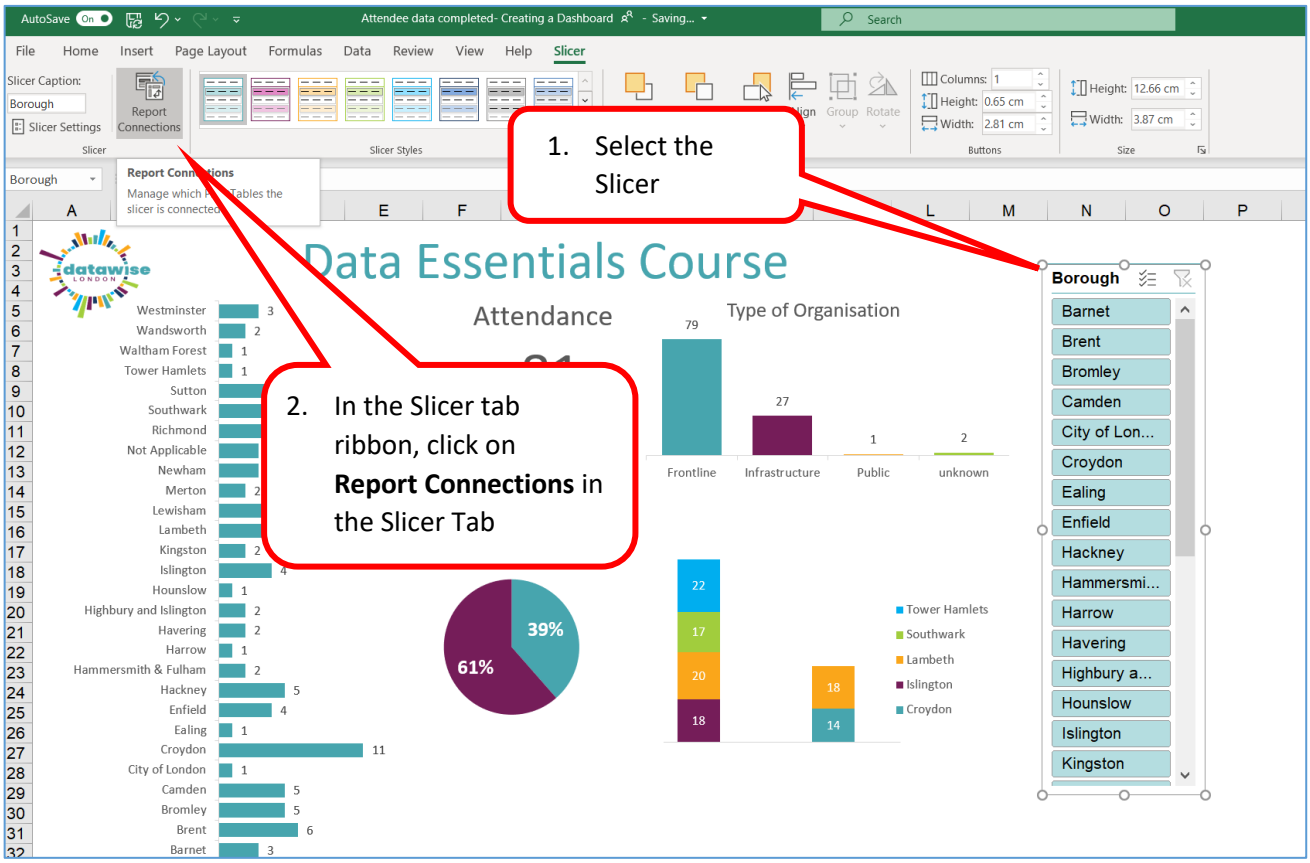
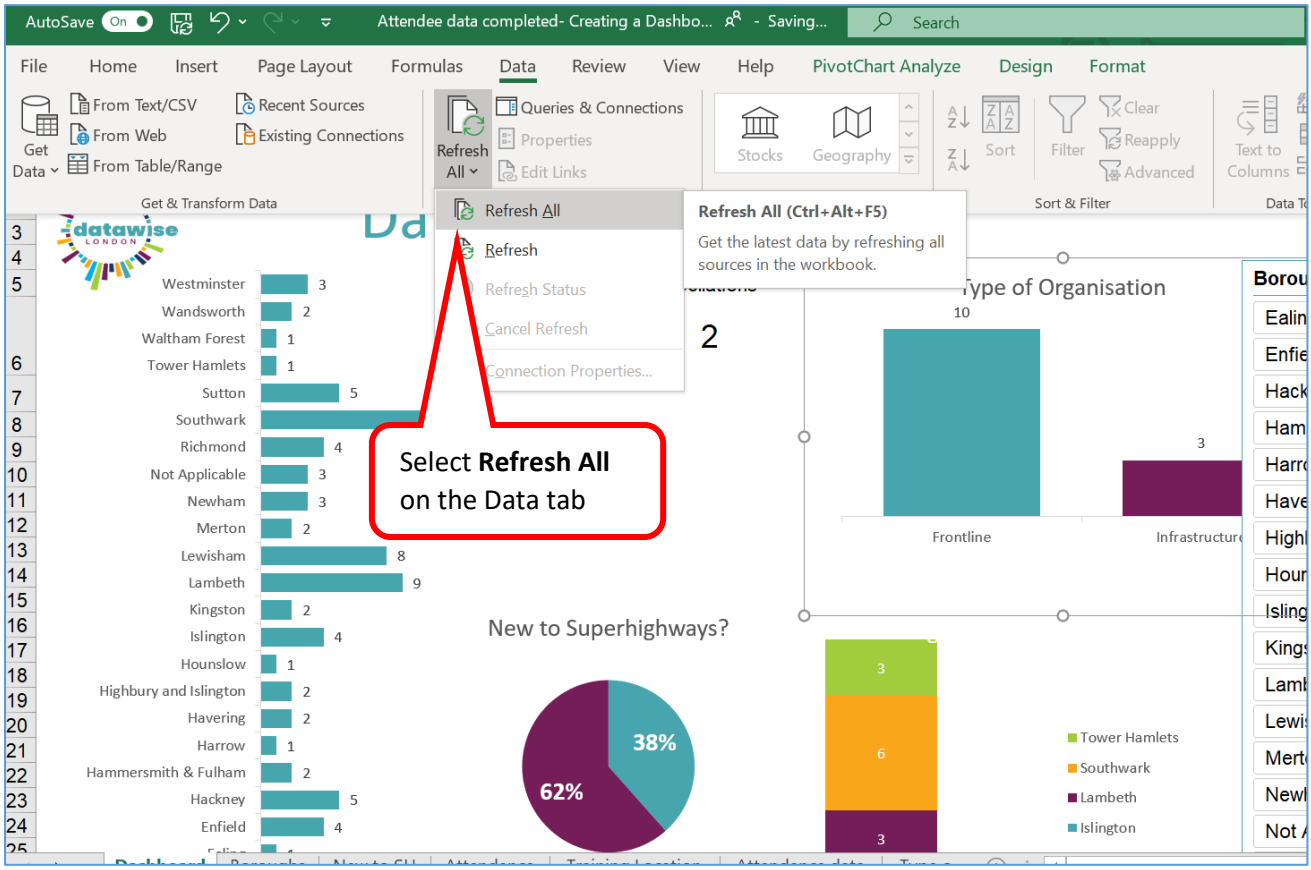


Formatting a Slicer

When using a slicer it is a good idea to only include only filters for where data exists otherwise the filter will return no results.



Linking the slicer to your charts



Refreshing the Dashboard