No More Boring Reports

Create Beautiful Interactive Dashboards from Large Amounts of Data Using Microsoft Excel™ in 5 Simple Steps.

No Experience Required

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Introduction

Times have changed, yet we still create reports in Microsoft Excel™, like we did 20 years ago.

In this book (which is a transcript of my video course available at http://exceldashboardtraining.com), I will show you how to create an alternative type report, which is in my view is a lot better. In this course you will learn how to use PivotTables, PivotCharts and several other Microsoft Excel™ techniques to produce an Excel DashBoard report that is:

1. Beautiful and appealing to users
2. After initial creation easier to update
3. Interactive and engaging to with the ability for the user to self-serve

This course is intended for beginners who have a basic understanding of Microsoft Excel™.

Before we start...a disclaimer.

Please understand that the information provided in this book and (training course and example files – applied only to the online course) are fictitious and used for demonstration purposes only. The files provided for download are Microsoft Excel™ files and are only intended for the use in this training program. You can modify the files for your own reporting needs, but I do not take any responsibility or accuracy for your modified reports.

I have the benefit of using Microsoft Excel™ for past 20 years. The application and success of using the material in this book and online training material will vary and depend on many factors ...including but not limited to your background, experience, and work ethic. All success in my view entails risk as well as massive and consistent effort and action. If you’re not willing to accept that, please DO NOT INVEST IN THE ONLINE TRAINING or use this book.

The full video course with full step-by-step demonstrations with all the excel files used in this book are available at http://exceldashboardtraining.com for a small nominal price for a limited time for a limited time.
Here are the five steps to analyzing large amounts of data in minutes.

- Step 1: understand the requirements for analyzing your data.
- Step 2: ensure data is organized as data records. I’ll go through all these steps in detail in my next few slides.
- Step 3: understand what information is available in the data so that you can analyze it.
- Step 4: use Excel PivotTables to get answers to your requirements.
- Step 5: most importantly, present your report nicely formatted for your audience.

Module 1 in The Online Course (Introducing Excel PivotTables)

The full video course with full step-by-step demonstrations with all the excel files used in this book are available at http://exceldashboardtraining.com for a small nominal price for a limited time for a limited time.

Step 1: Understanding the requirements

Before you start, you will need to know why you are analyzing the data. In other words, what insights are you trying to get from the data? This will keep you focused on what needs to be achieved.
Step 2: Ensure data is organized in data records

This is probably the **most important thing** when creating Excel Pivot Table reports. Excel PivotTables can only be used when you have properly formatted data in table/list organized as data records. Let me explain this in more detail.

*Figure 1: Data organized as records*

Data must be organized with column headers, without any gaps between the columns, and related information presented along or down the columns.

For an example, in Figure 1, we have the column header “salesperson” and under salesperson, we have the sales peoples’ names. Under “country” we have the country names. Under “Date” we have the proper dates and “Year” we have years. For “Products”, we have oranges and bananas and so on.

The information in each row is related as well. If you look at the records across, i.e. one related record, Karen has sold bananas in the UK on the 3rd of February, 2016, she sold 699 boxes, for a total sales value of $33,552 and so on. This is again, to reiterate the concept. Also shown in Figure 1 are two records shown with red outlines.
Step 3: Understand what information is available in the data

When you want to analyze the data, you need to know what data is available. With the data found in Figure 1, it is possible to have a summary of sales by salesperson, sales by country, sales by year, and sales by products.

Step 4: Use pivot tables to get answers to requirements

What are Pivot Table Reports? The Pivot Table functionality is a very powerful tool in Microsoft Excel™ that can be used to summarise data very quickly. Figure 2 shows an example.

![Figure 2: Summarized data range and pivot tables](image)

The data source in Figure 2, has data relating to sales made by sales people. This data range can be summarized to show the value of sales each sales person has made. Notice that the totals in the Pivot Table reports agree to the total sales in the data source salesperson column. Similarly, Pivot table 2, summarizes the sales value by country.

You can also produce a chart as easily as you can produce these tables by just using a few simple clicks.
Pivot Table 3 (Figure 3) shows another aspect of summarizing data where you can summarize the data by the country and across by the products. In this example, this pivot table summarizes products by country and the number of boxes sold.

![Pivot Table 3](image)

*Figure 3: Summarizing data down and across*

**Step 5: Format the report for presentation**

After you produce your pivot tables, the last step is to produce a beautifully presented dashboard for your audience. This is important. It adds to your credibility if you can give them something easy to use and looks good. That’s exactly what I’m going to show you.
Module 2 in The Online Course (Full Demonstration – Creating an Excel Dashboard from 10,000 records of data)

The full video course with full step-by-step demonstrations with all the excel files used in this book are available at http://exceldashboardtraining.com for a small nominal price for a limited time for a limited time.

Now that you have a basic understanding of PivotTables, I’m going to show you how to analyze 10,000 rows of data and produce an Excel dashboard. I will use the 5-step method we discussed to do this.

Step 1: Understanding the requirements

Scenario

This is a fictitious scenario of a company that sells fruits worldwide.

Let us assume that your manager has given you 10,000 records of data (In real life your manager will only give you the questions you will have to find the relevant data). You have one day to give him the answers and I’m sure we can do it in a much shorter time.

Figure 4: Scenario
Step 2: Ensure data is organized as data records

Figure 5 shows, 10,000 records of data (Figure 5.). I have added total to the Number and Sales Value columns in cells D1 and E1 so that we can cross check out Pivot Tables. You will notice that this data is organized in a nice table with records of data: “Salesperson”, “Country”, “Fruit”, “Number” of fruits sold, “Sales value”, and the “Date” of sale.

![Excel screen showing 10,000 data records]

Figure 5: 10,000 data records

Step 3: Understand what information is available in the data

Let us examine the data range to determine what questions we can answer from the data range. The questions we can answer by looking at the data range are, Total sales by year, Total sales by Fruit, Total sales by Country, and Total sales by Salesperson.

However, to get Total sales by Year, we must do a modification to the table before we do that, I will show you how to do that when we do that step.
Step 4: Use pivot tables to get answers to requirements

We can easily get all the answers quickly using PivotTables, but we are going to go one step further and provide our manager a tool that can be used to get more insights. It is a really good idea to plan how we are going to create the DashBoard Report (Figure 6).

Dashboard Report Plan (Figure 6).

The plan is this. We have data and we’re going to summarize the data to answer the questions, while we are doing this we are also going to create components of the Dashboard report.

1. Sales by year and chart
2. Total sales by fruit and chart
3. Total sales by country and chart
4. Total sales by sales person and chart
5. Total sales % (This was not a requirement, but we will do this to impress the boss)

Using those workings, we are going to produce a dashboard.
Creating Pivot Tables

This is the process we will be using to create all the Pivot Table reports and charts.

When creating a pivot table, the first thing you need to do is to click on the data range, go to insert PivotTable. You will notice that Excel has automatically selected the data range, which is 10,000 rows (Figure 7).
Figure 7: Creating a pivot table

The next question the PivotTable wizard asks you is where you want to put your pivot table. Do you want to put it in a new worksheet or existing worksheet? In this instance, I’m going to put it in a new worksheet.
You will notice that once you do that, you are given a layout where you can summarize the data.

![Figure 8: Default pivot table](image)

I prefer the classic pivot table layout where I can drag and drop right into the Excel PivotTable area. To do it that way, you go to options and click on options. Under display, you select classic pivot table layout. That gives you a layout like the one you see in Figure 9. little where you can drag and drop the fields.

![Figure 9: Classic pivot table layout](image)
Question 1: Total sales by year

So, the first thing I do always is to drag the number that can be aggregated. For example, there are two numbers that I can summarize, which is sales value and the number of fruits. First, I am going to drag the sales value into the value section, i.e. $50,037,000.

Figure 10: Total sales by year 1

Figure 11: Total Sales by year 2
Then, I’m going to drag the year column. There is a date column, but I can’t see the year in this area. Therefore, I need to go back to my data range and create that. Let me go back to the data range here. I have a date range. I can use the date range to create the year column (Figure 11).

![Figure 12: Creating year column](image)

Generally, what I do after I have created the pivot table, if I have to insert any columns, I will insert it within the table. I won’t insert it outside the table. There is nothing wrong in doing that. You can always insert it and expand the data range, but to make it a lot easier, I’m going to insert it within the data range so that the data range automatically expands.

So, I’m going to insert a column. Alt, I, R is the shortcut to inserting a column. I’m going to rename the column as year. I’m going to type in the formula =YEAR( and point to the date section and close the brackets. I’ve got 2002.

Again, that looks like a number. Therefore, I’m going to reformat that to general format. Format>cells>general and I will copy it right down. Wait until the handle changes to a black cross and double-click and that should fill down. Just to check, go to control arrow down and that has been filled right through.
Figure 13: Data range with year column
If I go back to my pivot table, I still don’t see the year field available for selection. So, I click on the pivot table, right-click and refresh. Now, you’ll notice that I’ve got a year field in my pivot table wizard. I can now drag the year field into the row area. Now, I’ve got a summary of sales by year.

![Pivot Table and Field List]

*Figure 14: Total Sales by Year 3*

Are my total sales correct? That is $50,037,000. If I go into the data range, go right up, that is 50,037,000, which is the total of that column.
Figure 15: Check Showing “Total Sales value” in the data sheet.

The next thing I want to do is to also add the sales volume, which is the “Number” column in the data range. Drag it and put it into the value area and I can see that I have got that in as well, which is 150,153,800.
Figure 16: Summary of sales volume

Checking back to the data range and that is correct - 150,153,800 (Figure 16).

Figure 17: Check Showing “Total Number” in the data sheet.
The only thing I don’t like on this table is the number formatting. So, I’m going to format these numbers as dollar values.

![Excel screenshot showing formatting of numbers]

**Figure 18: Formatting numbers as dollar values**

Right-click on the number, value field settings, number format, and go into custom and select the appropriate formatting. I like the formatting with the red for negatives, so I’m going to select that. I also don’t like the negative sign. I’m going to use brackets instead and say OK.

I’ve got that column formatted and I’m going to format the number, the volume column. Right-click, value field settings, number format, custom, and I go right down. This time, I’m going to select the formatting without the dollar signs. However, I’m going to replace the negative sign with brackets and OK.
Creating Pivot Charts

The next step is to create a chart from this table. I’m going to click on the pivot table, go to PivotTables tools (menu) and click on insert a pivot chart.

The pivot chart that I’m going to use for this purpose is a combo chart. In particular, I’m going to use the combo clustered column chart. I say OK to that. It automatically gives me a chart.

Figure 19: Combo clustered column chart

I do not want these buttons on the PivotChart. I will right-click on the button and select hide all field buttons from the chart.

Buttons are gone. I’m going to move the legend to the top so that it looks a bit nicer. I’m going to pull this down a bit and drag the legend up to the top section and resize it.
I also don’t like those lines. I’m going to delete those lines and resize the chart a bit and center this as well.

Another thing I’m going to do is change the colouring of the chart to green. So, right-click and change that to green. I think that looks pretty good. I’m going to place the chart just inside those cells so that I can select the cells around it. I’ll tell you why I need to do that later when you do it.

Figure 20: Formatted sales by year pivot chart
Filtering data using slicers

Next thing I’m going to do is to insert some slicers to filter this data. To do that, you click on the pivot table. I’m going to PivotTable tools and select insert slicer.

Slicers are basically filters that we can apply to these charts and the pivot table. So, I’m going to select salesperson, country, and fruit as filters and say OK to that.

![Image of slicers inserted into Excel](image.png)

**Figure 21: Inserting slicers**

You see I’ve got three filters (Figure 20). I’m going to just drag them side by side so that they can be seen easily.
If you click on Australia, these two, the chart and the pivot table filters on what really happened in Australia. All these numbers now relate only to Australia.

Figure 22: Australia data
If I click on China, that will give me just the numbers relating to China.

Figure 23: China data
If I want to do multiple selections, I click on the button on the slicers to enable multiple selections.

![Sales Person filter](image)

**Figure 24: Data for several countries**

For now, we’re just going to clear the filters. I’d also like to recolour these filters; all the slicers. So, I’ll click on this and I come to this section where I can format the colour of the slicers. Again, I pick green. I’m going to colour these green. Okay, so we’ve got the first answer, which is sales per year. So, I’m going to rename this tab as sales by year.
Question 2: Total sales by fruit

Next answer we need is sales by salesperson, sales by fruit, and sales by country. So, let me do that. First thing I’m going to do, I’m going to copy this tab across and call this sales by fruit. I’m going to just delete these charts. I don’t need these charts for now and I don’t need the filters.

So, I can select all of them like that or hold control down and click on this. Hold the control key down, select all the slicers using the mouse and delete.

![Figure 25: Sales by year table to be replaced](image)

Instead of this table here, I need to replace the year with the fruit type and remove one of these columns. I don’t need the volume. I only need the sales value.
So, click here and the wizard automatically appears. In this section, all you need to do is to remove what you don’t need. So, I’m going to remove the year, replace it with the fruit. I’ve got fruits. I don’t need the numbers. I’m going to remove the number. Now I’ve got sales by fruit.

Figure 26: Sales by fruit pivot table
I’m also going to produce a chart for this data. To do that, you click on the pivot table, go to PivotTable Tools, and click on PivotTable chart. This time, I’m going to select a bar chart. Say OK to that.

![Excel PivotTable example]

*Figure 27: Sales by fruit pivot chart*

Again, I don’t need these buttons. Hide all field buttons on the chart. I’m going to drag it down a bit so that it looks nicer. Again, I’m going to put it within some cells so that I can select the cells around it.

These total fields don’t make too much sense. I’m going to click on delete and also these numbers. They look a bit ugly. So, I’m just going to click on it and press delete. And total, I’m going to change the title to “sales by fruit”.

To change the colour, I like green, so, right-click and change the colour, the fill. All I need to do is just click on it, right-click on it and the fill colour to green. I need to select the entire series. I’ve now selected the series, so right-click and fill. All done.
**Figure 28: Formatted sales by fruit pivot chart**
Question 3: Total sales by country

So, the next answer I need is sales by country. To do that, all I need to do is to copy the previous tab and change it to sales by country. All, I need to do is click on the pivot table, replace the fruit with country. Take the fruit out, put the country in.

![Sales by country pivot chart](image)

*Figure 29: Sales by country pivot chart*
By the way, if you want another layer of information, you can always put fruit as well. See what happens (Figure 29)? It changes the graph and also it gives you a lot more information.

Figure 30: Sales by country and fruit pivot chart

For now, I think it’s a bit cluttered for presentation so I’m not going to do that. I’m just going to remove the fruit field from the PivotTable.
Question 4: Total sales by salesperson

Next thing I want to do is to add another tab for sales by copying the sales by country tab, hold control down, and drag the tab you want to copy. I’m going to rename that as sales by salesperson.

All I need to do again is click on the pivot table and replace country with salesperson. Take the country out, put salesperson in. I just forgot to change the title of the graph. I’m going to change it to sales by salesperson.

![Figure 31: Sales by salesperson pivot chart](image-url)
Also, what I’m going to do is to sort it so that it sorts from the biggest to the smallest. Right-click here, sort from largest to smallest.

Figure 32: Sorting data from largest to smallest
You will notice that it goes the other way. So, to fix that, click on the column label and then right-click, format axis, and click on categories in reverse order. I’ve got what I need now.

Figure 33: Formatted sales by salesperson pivot chart

I’m going to do the same thing for country. Go to country, I need to change the title here, sales by country, and then click on the column title. Right-click, format axis, and categories in reverse order.

Still doesn’t work but that’s because I haven’t sorted the pivot tables. Click here, right-click, sort from largest to smallest. Okay, it works now. Great. I can also resize these letters on the chart, but I’m not going to do that.

Again, these lines look a bit ugly. So, I’m going to click on the lines. That’s the idea. Okay, all done. I’ve got my graphs.
Creating a sales percentage pie chart

One more chart, which is the pie chart. To do that, I’m going to select insert another sheet and I’m going to do a pie chart on sales percentage. So, I’m going to say sales percentage.

Okay, I’m going to get from the data tables. So, I go to total sales. This one I’m going to call filtered sales. That’s the sales value that is used when we filter total sales. Is equal to sales by and that is the filtered number. So, I’m going to select that for now. I’ll show you what I mean and that’s formatted just for consistency.

![Excel Sheet Showing Calculating Sales Percentage]

Figure 34: Calculating sales percentage

Now, I’m going to say that whatever sales that we have for the filtered one, I just want a percentage. So, E3 now is D3 minus D4. Now, let me see. That is equal to D3 minus D4. Okay, this number comes from the data sheet.
Let’s go by sales by year by Adam just to get this percentage right.

**Figure 35: Filtered sales by year data**
So, I just want to know, if E3 is 41, Adam should be D4 giving it a total of 50,037,000 which is that number there. So, if I do a percentage now, sales are going to be, the filtered sales are going to be, F3 is going to be E3 over the sum of E3 and E4. F4 is going to be E4 over the sum of E3 and E4. If I make percentages of these, that’s 83 and 17. To insert a pie chart select range(F3:F4) insert pie chart.

![Excel screenshot](image1)

**Figure 36: Calculating sales percentage using filtered sales by year data**
The pie chart I can format this using a quick layout.

Font size is 20. I’ve changed these percentages to about 14 as well. I’ll change the colour to green. I like green. Let me just pull this pie out a little bit. That looks pretty good, I think.

Figure 37: Sales percentage pie chart
Step 5: Creating the dashboard (Presenting your insights)

So, we’ve done the pie chart and the next step is to put the dashboard together. Insert a tab and call it dashboard.

Transferring slicers to the dashboard

Next thing I’m going to do is to bring the slicers into the dashboard. The slicers are “Sales by year tab”. I’m going to hold control down and click on the slicers and copy. I’m going to take it to the dashboard sheet and paste.

I’m going to resize these so that they look good. I’m going to zoom in a little bit so that I can show you everything. I can align these by just clicking on these like this and go to page layout and align.

A lot quicker.

Figure 38: Transferring slicers to the dashboard
Inserting a camera button

So, I’ve got that done and now I’m going to bring my charts in. So, sales by year, have you noticed that I’ve got a little button here? I’ve got a camera button here. How do you get that camera button here and what does it do? Let me show you how to get the camera button. I click on customize quick access button (Figure 38) and go more commands.

![Excel Dashboard](image)

**Figure 39: Step 1 - Inserting a camera button**

Now, I go into all commands and look for the camera. Obviously, it will be under C. Find the camera button and add it and say OK (Figure 39).
Figure 40: Step 2 – Inserting a camera button

The tool takes photographs of objects or areas of the worksheet.
Transferring charts to the dashboard

So, I select the cells around the chart that I want to copy and click on the camera button, go to the dashboard and press click on it, chart. Now, I can resize this chart. Okay, I think that looks good.

The next thing I’m going to do is I’m going to bring my other charts. So, I’ll go and bring the sales percentage, select around the chart and click on the camera button, come to dashboard and paste it. Let me put that underneath this little chart. I’m going to place it right underneath it.

Figure 41: Transferring charts to the dashboard
Transferring the sales summary to the dashboard

I was also going to bring another section of the sales summary. Go to sales here. I’d just like to bring this section here, but I want to colour this green. See even that little arrow changes to black. Click on it and then go and colour it with that green. I’m going to select that range and click on the camera button, go back to the dashboard, click on the dashboard and we’ll put that table in there. Great, it looks pretty good.

Figure 42: Transferring sales summary to the dashboard
Transferring other charts to the dashboard

The next thing I’m going to do is bring the other charts in. So, sales by fruit, copy that. Again, I need to select the cells around it, camera, and go into the dashboard, paste. Next one is sales by country. Again, move that a little bit like that and select the cells around it. Camera, dashboard, and click on the dashboard’s sheet. I’ve got the sales by country, so I can resize that. That looks good.

Again, I’m going to make it a bit thinner. I think these are a bit too fat. Okay, I’ve got sales by fruit, sales by country, and I’m going to get the other one: sales by salespersons. Copy that, select the cells around it, camera tool, click on the camera, click and just resize it. I think that looks reasonable.

*Figure 43: Transferring other charts to the dashboard*
**Formatting the dashboard**

Now, I’m going to colour the entire dashboard, maybe insert a few rows. The shortcut keys in Alt, I, R inserts one row the key F4 repeats that. I am going to name the Dashboard report “Sales Dashboard for World of Fruits”. The chart title is set at 48. I’m going to center that across the columns there and give it a bit of a darker green and make the font white.

Great and I can maybe drag this across a little bit. It looks pretty good. I’m just going to zoom in a bit, okay. I’m going to colour the entire background green as well. Let’s re-colour that one. Okay, so, I’ve got that done.

Let’s see if my buttons work. If I click on Rani, the only tool sections that are changing are these two, but I want everything to change. So, what I need to do is to connect my slicers. Right-click on the slicers, slicer connections, report connections, and connect them to all the reports.

Do that again. Right-click connections and connect all the reports. Do the same again here. Report connection... Okay, I think that looks pretty good. The only thing I want to now do is to just do two more fields and just put in the total sales and total units.

Total sales, maybe bold that. I’m going to bring that number from the data. That’s total sales. Again, I’ll do the same font size, which is 24, I think, by just using the format painter. Again, I can merge those cells here and maybe put the dollar sign in, take the zeros off and also maybe colour that white.

The next thing I want to do is to do the volumes. So, I’m going to do that, copy and just paste it here. I’m just going to call these total volume or number. That’s a little bit of a problem. So, I will copy, and I will delete this. I’ll unmerge that, copy the format from above and paste it in here. That’s the volume and I’m going to link this to the volumes section.

Now, I can format this as well. Cut, I will select the volume, equals and go to the data filtered data and click on volume. Now, I’ve got volume, but I don’t want the dollar sign. So, I just click on that formatting and take the zeros off. Okay, I think that dashboard looks reasonable and I think it is now done. If you click on my filtering, everything seems to work.
Figure 44: Sales dashboard

Okay and that ends that section. Let’s get back to the presentation now.
Summary

What we’ve done is we have understood that there are requirements for producing a pivot table or for producing data insights.

Second, we know what the data should be organized as a list/table as data records.

Third, we need to understand what information is available in the data so that we can summarize it. We went through that as well.

Lastly, we used Excel PivotTables to get the answers for those requirements and we formatted the outputs of those pivot tables to produce a beautiful Excel dashboard.

Your actions now. Now, you’ve learned about pivot tables. I recommend that you go to your workplace and find some practice data sources and start doing pivot tables. Also, use the five steps that we used in the presentation to do your analysis.

The full video course with full step-by-step demonstrations with all the excel files used in this book are available at http://exceldashboardtraining.com for a small nominal price for a limited time.

Happy pivoting from now on! All the best.
About Rennie Thangiah

Rennie Thangiah is a professional accountant with over 20 years of experience using Microsoft Excel™. His passion is to help Microsoft Excel™ users create beautiful Excel Dashboard Reports.

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