

# Microsoft Excel - Dashboards

GoSkills online course syllabus

Thursday, November 21, 2024

**Skill level**

Beginner

**Lessons**

42

**Accredited by**

CPD

**Pre-requisites**

[Excel - Basic](#)

**Versions supported**

2016

**Video duration**

3h 55m

**Estimated study time**

21h for all materials

**Instructor**

Ken Puls

## Introduction to Dashboards

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- 1** **What is a Dashboard?**  
The goals of data visualization and dashboards, what they should do, and what they shouldn't.
- 2** **Getting Started**  
How do you go from a blank spreadsheet to a dashboard?

## Conditional Formatting

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- 3** **Cell Highlighting**  
Dynamically highlighting values that fall in the top or bottom ranges of your data sets.
- 4** **Data Bars**  
The easiest way to add easy to read "bling" to your Dashboard.
- 5** **Icon Sets**  
Adding stoplights, check marks, flags and other icons to your Dashboard.
- 6** **Color Scales**  
Applying dynamic heat maps to your data in order to show outliers and trends.
- 7** **Logic Function Review**  
The key to adding dynamics to your dashboard starts with Excel's Logic Functions.

**8** **Formula Based Conditional Formats**  
Leveraging the logic of the IF() function to drive conditional formats based on formulas.

**9** **Understanding Conditional Formatting Rule Precedence**  
Understanding why you can define two different conditional formatting rules, yet end up with a mixture of both.

## Basic Charting

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**10** **5 Rules of Effective Charting: Rules 1-2**  
Exploring two rules that help ensure your charts convey their intended message.

**11** **5 Rules of Effective Charting: Rules 3-5**  
Exploring the final three rules that help ensure your charts convey their intended message.

**12** **Bar Charts**  
Bar Charts are useful for comparing values to each other. This lesson examines features that can be tweaked to optimize their consumption.

**13** **Column Charts**  
Column Charts are useful for comparing values to each other. This lesson explores ways to help make them as effective as possible via some of their available options.

**14** **Pie Charts**  
Pie Charts can be useful for comparing values as a % of the whole. This lesson explores way to help make them more effective.

**15** **Line Charts**  
Useful for showing trends over time, this lesson explores line charts and some of their options.

**16** **Scatter Plots**  
This chart type can be useful for identifying clusters and outliers.

**17** **Sunburst Charts and Treemaps (Excel 2016+)**  
Sunburst and Treemap charts are intended to show the breakdown of the source data.

## Advanced Charting

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**18** **Combination Charts - Column and Line**  
Combination charts open a whole new world of charting. In this lesson we combine column and line charts together to make a compelling chart.

- 19** **Combination Charts - Area and Line**  
This lesson shows a trick to include an extra data series in your chart that fades in and out of view as it's needed.
- 20** **Plotting Data Using the Secondary Axis**  
When you need to show values of a different scale, there is no better way than to add an additional axis.
- 21** **Bullet Charts**  
This complex looking chart conveys a TON of information comparing a single target value against multiple different markers.
- 22** **Waterfall Charts**  
Waterfall charts help break "net change" into increases and decreases, giving more information about the business cycle.
- 23** **Sparklines**  
In this lesson, we will look at sparklines: what they are and how to create and modify them.
- 24** **Forecast Sheets (Excel 2016)**  
Generating forecast charts in Excel is only a few clicks away, resulting in a chart that you can customize and update later.
- 25** **Micro Charting**  
Leveraging Micro Charts to build a very quick visual summary of your key metrics.

## Adding Interactivity to Your Dashboard

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- 26** **Understanding the MATCH() Function**  
The MATCH() function may not look like much, but it can pull back the position of a data element: something that is key for dynamic dashboarding
- 27** **Pinpoint Data with INDEX(MATCH())**  
Using a combination of the INDEX() and MATCH() functions to dynamically restate the dashboard source information
- 28** **Benefits of NA Values**  
Many users fear #N/A values appearing in their spreadsheets. This module explores how to create this result with the NA() function, and why it's fantastic for charts
- 29** **Data Validation**  
Drop down lists avoid the risk of "Garbage Out" by preventing your users from putting "Garbage In"
- 30** **Working with Form Controls**  
A variety of different objects that add some visual style to your dashboards, as well as provide mechanisms to force valid data entry

# Leveraging Pivot Data in Dashboards

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- 31** **Intro to Pivot Tables**  
A brief introduction/reminder about the power of Pivot Tables
- 32** **Applying Conditional Formats to Pivot Tables**  
Understanding the tips and tricks to get conditional formats working properly on Pivot Tables
- 33** **Filtering and Linking Dashboards Using Slicers**  
Highly visible and engaging, these devices can provide your users with a method to easily select valid object or filter in to just their slice of the pie
- 34** **Extracting Data Points with GETPIVOTDATA()**  
Leveraging the GETPIVOTDATA() function in order to extract specific data points from a Pivot Table
- 35** **Using Pivot Charts**  
The ins, outs and shortcomings of Pivot Charts

# Black Magic Dashboarding Techniques

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- 36** **Understanding Custom Number Formats**  
Excel has an entire language for displaying values just the way you need them. Don't see your format in the list? Let's look at how to roll your own!
- 37** **Displaying Variances with Custom Number Formats**  
A classic cost-accounting trick to display variance in a easy to read way (and avoid watching your audience do math in their heads at each review)
- 38** **Conditional Formatting of Chart Axes**  
Leveraging Custom Number Formats in order to provide conditional formatting for chart axes
- 39** **In-Cell Charts Using the REPT() Function**  
Leveraging the REPT() function and a special font in order to build charts in cells via formulas
- 40** **Display Emojis in Your Dashboards**  
Did you know that Excel can display Emojis in the worksheet? Why not leverage that ability to help convey your message?
- 41** **Displaying Indicators on Charts**  
Sometimes showing the chart just isn't enough and you want to display a text message with an indicator on the chart canvas. This lesson explores how to make that happen

# 42

## VLOOKUP() for Pictures

A cool trick that shows how we can dynamically look up pictures and return them to our worksheet

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