

Microsoft Excel - Dashboards

GoSkills online course syllabus

Saturday, May 18, 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

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

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

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

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

- 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

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

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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