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Microsoft Excel - Dashboards

GoSkills online course syllabus

Tuesday, July 16, 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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