

Excel BI and Dashboards in 7 Days

*Build interactive dashboards for
powerful data visualization and insights*

Jared Poli



www.bpbonline.com

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Dedicated to

My beloved wife:

Laura

and

My daughter April

About the Author

Jared Poli is an enthusiastic designer of BI solutions and data analytics with ten years of experience in the industry.

He has worked with a wide range of stakeholders across all levels of seniority and has extensive experience in tailoring solutions to meet that range of demands. He has knowledge utilizing a skill set built up of many of the popular BI tools in the market today. He has years of experience as an Excel expert, using it to deliver everything from dashboards to automation tools. He has delivered function-wide Excel training to colleagues of various technical backgrounds. He is effective at tailoring training to the skill level and proficiency of the trainees, maximizing the understanding and value takeaway for what is delivered.

Jared is passionate about Excel and considers it the kind of tool anybody can use, being flexible enough to do just about anything you can imagine. For example, he's used it for budget tracking and baby planning and even made a mastermind and sudoku generator!

About the Reviewers

- ❖ **Juan Sebastian Osorio Ospina** seamlessly integrates his roles as an innovation and entrepreneurship consultant and educator. As a professor at La Colegiatura, he shares his extensive knowledge in data science and innovation processes with the next generation of aspiring professionals. Juan Sebastian holds a degree in public accounting and brings a robust financial perspective to his technical assessments.

With over eight years of hands-on experience, he has actively contributed to projects challenging traditional business models. Currently, Juan Sebastian is deeply involved in freelance work, collaborating with various startups and small enterprises. His expertise in business intelligence and data management proves pivotal in enabling these ventures to leverage data for strategic decision-making.

Outside the professional realm, Juan Sebastian enjoys reading thrillers, expressing himself through storytelling as an art form, and conquering mountains. In all these activities, he seamlessly applies his data knowledge to enhance personal growth and contribute to improving his environment.

- ❖ **Staci Warne** is a highly skilled Microsoft Certified Trainer (MCT), Project Management Professional (PMP), and a published author with over 25 years of experience training individuals at all skill levels. She obtained her MCT certification in 2008 and holds an array of other certifications such as Microsoft Certified Professional (MCP) and Microsoft Office Master Instructor, Ic3 Internet and Core computer instructor, Modern Classroom Certified Trainer (MCCT) and most recently Certified AI Specialist (CAIS). She has been a Financial Analyst, lead technology trainer for the Federal Reserve Bank of San Francisco, and technology trainer at CompUSA. Staci provides quality training to thousands of business, military, and corporate professionals in all industries. Her most immense joy in the classroom comes from seeing the students have those Aha moments when learning a new tool they never knew was available. Staci's style is not to train out of the book but to offer individual insights and augment course materials with her tips and tricks to meet your needs.

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I want to express my sincere gratitude to my family and friends for their steadfast support and advice and for the unwavering patience of my wife, Laura, and daughter, April.

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Finally, I would like to thank all the readers who have taken an interest in my book and for their support in making it a reality. Your encouragement has been invaluable.

Preface

Everyone thinks of Excel differently, and its full potential is often untapped. Businesses tend to decide to invest heavily in proper BI tools, assuming that Excel has a minimal role in that industry. This perception is wrong!

Excel can be used effectively to collect, refresh, transform, and visualize your data in beautiful and eye-catching ways. This book covers building those skills and unlocking Excel and your potential in just seven days.

Understanding the full power behind Excel will allow you to improve your spreadsheet game and prove that you can do it all with one industry standard tool and this book.

This book is for everyone who wants to be a powerful user of Excel and leverage its tools for maximum data insight. It is a highly attractive book for finance teams, sales and marketing teams, MIS Analysts, BI aspirants, and all those who work with Excel sheets daily and want to refine that skill set into something more practical. Aimed at those with the most basic understanding of Excel, focusing on dashboard building— if you can open a spreadsheet, then start here!

The book breaks down the dashboard development into distinct sections, allowing the reader to understand the building blocks of what constructs their dashboard, from data to delivery.

Chapter 1: Getting Started with Data Management Techniques – It begins by setting out the basic understanding of using a spreadsheet for data manipulation and some core techniques behind Excel navigation and use.

Chapter 2: Aggregating and Summarizing Data – It deepens the understanding of Excel for data manipulation, explaining how to take our large data sheets and turn that unintelligible grid into some meaningful summaries.

Chapter 3: Using Charts to Visualize Data – It introduces taking our consolidated figures and demonstrating how they can be visualized

differently to communicate information, gaining a basic understanding of Excel's charting tools.

Chapter 4: Organizing and Customizing Your Excel Dashboard – It takes the reader through setting up the controls and interactions a user will make when interacting with our dashboards.

Chapter 5: Refining the Component Look – It will take what we have learned thus far and add some consistency to the visual elements, covering other enhancements we can make that will add appeal and ease of use to our layouts.

Chapter 6: Designing the Dashboard – It takes the principles of visuals, interactions, and other design components and brings them together concerning layout and content, thinking about how our content will sit on a page.

Chapter 7: Maintaining and Refreshing Your Dashboard – It finishes the learning by bookending the development and wrapping things up with documentation and refresh techniques.

Chapter 8: Dashboard Case Studies - We will dive into a few worked examples of dashboards from data and see how we can use the skills developed in this book to convert a data spreadsheet into a dashboard conveying meaningful and usable information.

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Table of Contents

1. Getting Started with Data Management Techniques.....	1
Introduction.....	1
Structure.....	2
Objectives.....	2
Tables and ranges.....	2
Basic formula to enhance our data.....	5
Advanced lookup formula to enhance our data.....	11
Cleaning the data with tools.....	20
Saving time with keyboard shortcuts.....	29
Power Query for advanced data table manipulation.....	30
Freezing panes for easier viewing.....	35
Data formats.....	37
Understanding copy-paste.....	37
Ensuring data compliance with requirements.....	42
Conclusion.....	42
2. Aggregating and Summarizing Data.....	43
Introduction.....	43
Structure.....	43
Objectives.....	44
Cell names and name ranges.....	44
Pivot tables.....	47
Grouping data in pivot tables.....	55
Pivot tables calculated fields.....	56
Referencing from a pivot table.....	58
Aggregation formula.....	59
The data model.....	63
Power query aggregation.....	66

Conclusion	68
3. Using Charts to Visualize Data.....	69
Introduction.....	69
Structure.....	70
Objectives.....	70
Charting basics.....	70
Selecting and changing chart data	76
Formatting charts.....	78
Pivot charts and normal charts.....	85
Advanced data labels.....	87
Basic analytical enhancements.....	89
Conclusion	91
4. Organizing and Customizing Your Excel Dashboard	93
Introduction.....	93
Structure.....	93
Objectives.....	94
Slicers and timelines.....	94
Formatting Slicers and timelines.....	100
Adapting controls for multiple visuals	102
Data validation and developer controls	103
Single data point summaries.....	109
Print area.....	112
Object alignment for consistent layout.....	113
Conclusion	115
5. Refining the Component Look	117
Introduction.....	117
Structure.....	117
Objectives.....	118
Design standards	118

Colors	119
Iconography.....	124
Prettifying a table.....	126
The camera tool.....	129
Conclusion	130
6. Designing the Dashboard.....	133
Introduction.....	133
Structure	133
Objectives.....	134
An introduction to Dashboards	134
Layout principles	136
Visual layout advice	140
Indicators for performance monitoring.....	143
Understanding stakeholders.....	144
Judging page success.....	145
Linking between tabs	146
Conclusion	148
7. Maintaining and Refreshing Your Dashboard	149
Introduction.....	149
Structure	149
Objectives.....	150
Taking notes.....	150
Supporting documentation	151
Reference page	152
Refreshing data	153
Workbook and worksheet protection	155
Conclusion	159
8. Dashboard Case Studies	161
Introduction.....	161

Structure.....161
Objectives.....161
Dashboard #1: Electric vehicles in Washington162
Dashboard #2: Vehicle collisions.....165
Dashboard #3: HR data.....171
Conclusion.....180

Index181-183

CHAPTER 1

Getting Started with Data Management Techniques

Introduction

In this chapter, we cover enhancing your data, adding important calculated information, and cleaning up what we start with. On its own, inputting data is not enough. Getting the data clean, concise, and relevant will be the foundation for building our final product. We will discuss how to decide what needs to be done and consider how the work will shape our development.

After addressing the data, structure, formatting, and any columns we need to add, we will look at power pivot for handling table manipulations that are difficult to cover with conventional methods or things that we could only achieve with Power Pivot. We will also cover more advanced formulas to give the reader a comprehensive understanding, such as **VLOOKUP** vs. **INDEX MATCH**, when to use them, and explain why we chose this over working in Power Pivot.

We will assume that at this stage in your work, you would have a task in mind or a business problem to solve and have your data available. You will have engaged with your stakeholders to understand what they are looking for from your dashboard. These conversations are essential when dashboarding, as we must ensure that what we build is fit for purpose. In some cases, you

may be the subject matter expert on the data, but it is always worth getting the opinions of your dashboard users to check what they consider essential to be successful in their roles. Maintaining alignment with the objectives of your stakeholders will not only improve the reception of your product but also speed up the development process at each level because you will know more clearly why and for what purposes you are making decisions and improving your data.

Structure

In this chapter, we will cover the following topics:

- Tables and ranges
- Basic formula to enhance our data
- Advanced lookup formula to enhance our data
- Cleaning the data with tools
- Saving time with keyboard shortcuts
- Power Query for advanced data table manipulation
- Freezing panes for easier viewing
- Data formats
- Understanding copy-paste
- Ensuring data complies with requirements

Objectives

By the end of this chapter, you will be equipped with the core techniques to manipulate, transform, and restructure your data in Excel. You will understand how to use simple and more advanced formulas to add additional columns to your data, either through calculation or reference from other data tables.

You will consider and understand the purpose of our actions in this chapter and how they will support us with the work in the following chapters when building a dashboard.

Tables and ranges

The first thing you would be greeted with when opening a data spreadsheet is data; however, how Excel stores information on the sheet can affect our work.

Traditionally, when you start with a blank worksheet to input some data, you work with the cells, rows, and columns as they are. Once you have completed your data input, we will refer to this data as a range. A range of data does not have any particular implications in Excel. It is how we refer to the table size on the spreadsheet. For example, see *Figure 1.1*:

	A	B	C	D	E
1	OrderNumber	Sales Channel	Online Sale	WarehouseCode	ProcuredDate
2	SO - 000101	In-Store	Not Online	WARE-UHY1004	31/12/2017
3	SO - 000102	Online	Online	WARE-NMK1003	31/12/2017
4	SO - 000103	Distributor	Not Online	WARE-UHY1004	31/12/2017
5	SO - 000104	Wholesale	Not Online	WARE-NMK1003	31/12/2017
6	SO - 000105	Distributor	Not Online	WARE-NMK1003	10/04/2018
7	SO - 000106	Online	Online	WARE-PUJ1005	31/12/2017
8	SO - 000107	In-Store	Not Online	WARE-XYS1001	31/12/2017
9	SO - 000108	In-Store	Not Online	WARE-PUJ1005	10/04/2018
10	SO - 000109	In-Store	Not Online	WARE-PUJ1005	31/12/2017
11	SO - 000110	In-Store	Not Online	WARE-UHY1004	31/12/2017
12	SO - 000111	Distributor	Not Online	WARE-XYS1001	31/12/2017
13	SO - 000112	In-Store	Not Online	WARE-NMK1003	10/04/2018
14	SO - 000113	In-Store	Not Online	WARE-PUJ1005	10/04/2018
15	SO - 000114	In-Store	Not Online	WARE-PUJ1005	10/04/2018
16	SO - 000115	In-Store	Not Online	WARE-NMK1003	31/12/2017
17	SO - 000116	In-Store	Not Online	WARE-MKL1006	31/12/2017
18	SO - 000117	In-Store	Not Online	WARE-PUJ1005	10/04/2018
19	SO - 000118	In-Store	Not Online	WARE-XYS1001	10/04/2018
20	SO - 000119	In-Store	Not Online	WARE-MKL1006	10/04/2018
21	SO - 000120	Online	Online	WARE-NMK1003	31/12/2017
22	SO - 000121	Wholesale	Not Online	WARE-NMK1003	10/04/2018
23	SO - 000122	In-Store	Not Online	WARE-PUJ1005	10/04/2018
24	SO - 000123	In-Store	Not Online	WARE-XYS1001	10/04/2018

Figure 1.1: A range of data

In this example, our range of data spans from cell A1 to cell G25. The other way that Excel can store our data for us is as a table. When dealing with a table, Excel takes care of naming, referencing, formatting, and many other helpful aspects that we might have to complete when working with a range manually.

In some cases, you would use both; a range is easy to work with, and Excel will make no assumptions about our intentions. We have complete control and work with the sheet on a cell-by-cell basis. In contrast, a table allows Excel to understand the size of our data, and it will make assumptions as we work out our intent. An example of this would be adding a new column of data. When we add the column, the size of the table will change. If we were to type a formula into the first cell of the new column, Excel would automatically populate the rest of the columns with the equivalent formula for each row. You can see how useful this can be, and it can save us lots of needless clicks, as we would have to do with a range. The main benefit of a range is its simplicity, which is precisely what you see on the spreadsheet using Row/Column referencing.

Now that we have discussed the differences, we will cover several ways to convert a range to a table. You must select your range by highlighting all cells in your data, then navigate to the Insert ribbon. Click the **Table** button (Figure 1.2). In the pop-up, you will see the selected range displayed and an option for headers:

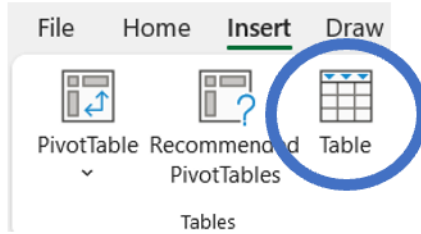


Figure 1.2: The table button

Clicking **OK** here will complete the setup (Figure 1.3):

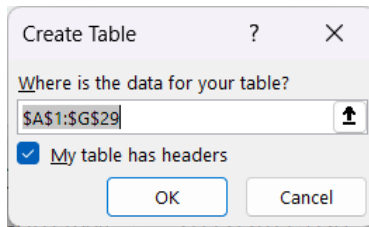


Figure 1.3: The table pop-up dialogue

Other methods involve clicking the table button before selecting the cells and selecting your range after the pop-up appears. If we click one cell in our data, Excel will often assume the range of our data for us when clicking the table button. If you create a table like this, ensure that the range in the pop-up is what you expect. Finally, instead of clicking the table button, you can use the Windows keyboard shortcut *Ctrl + T* to convert a range to a table quickly. Remember that a table must have a title in the first row of each column (Excel will fill these generically if none are available). These should be meaningful to the content of each column to aid with your analysis.

If you want to convert your table back to a range, right-click anywhere in your data table, then select **Table | Convert to the range**. This will remove all the table referencing, but the range of data will persist in the style formatting of the table.

A final note on tables: Excel will format them, removing them from a classic blank spreadsheet's white and grey pattern. The default will be blue, with the rows being banded. You can change the theme or revert to the classic design

using the table styles under the Table Design ribbon, which is visible when selecting any cell within your table (Figure 1.4).

It should be noted that any data created by Power Query will always be returned as a table, and it is usually advisable to leave it as such, which will be discussed in detail further on:

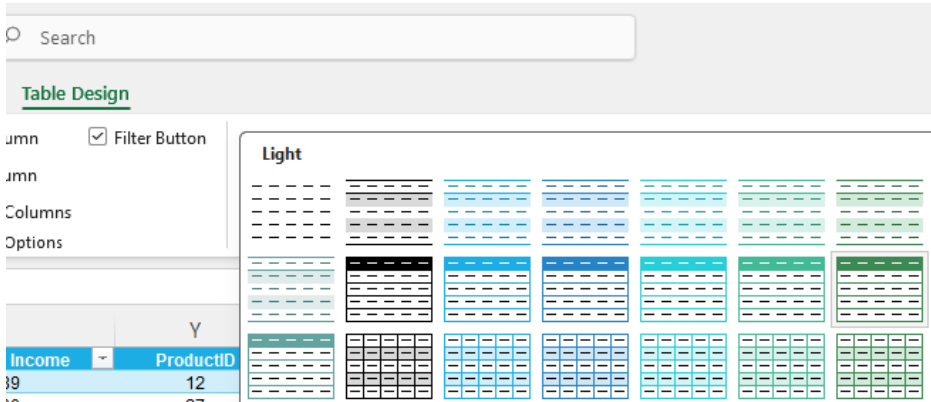


Figure 1.4: Table design; see the top left option for unformatted style

Basic formula to enhance our data

Now that we understand how our data sits on the sheet, we can start by enhancing our data, using basic formulas to add additional columns. We will be working through a sales report example throughout this book.

In this first example, we have two columns **OrderDate** and **DeliveryDate**. A useful column may be **DaystoDelivery**, which we can use to measure our order fulfillment speed.

The first thing will be deciding where your data will sit, either next to the dependent columns or at the end of your data. It generally makes sense to keep similar columns of information grouped, and it can be useful to put new columns in place near where the columns dependent for those calculations are. However, sometimes placing them at the end will be more suitable. One example would be copying and pasting data into the sheet from another source and adding additional columns. In this case, a column in the middle will interfere with the correct placement of your data when pasting. This method is generally ineffective, and good use of Power Query can help streamline copy-paste data activities, which we will cover further on.

To add our column, right-click the column header to the right of the column we want our data to sit next to and select **Insert**. A new column will be