Excel® Dashboards

Essential Tips for Getting Started

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Six different Excel workbooks lie open on Heather's desktop, and each of them had at least three different worksheets with vital information hidden somewhere on it. She clicks around, frantically searching for the specific metric she needs.

Her boss, Walter, frowns at her screen from over her shoulder.
"How do you live like this?"

"I only need this information once a month, so I..."

He cuts her off. "Once a month? You should be looking at this at least weekly!"

She could have sworn her notes said something else, but she had just started the job and his lip is already twitching. "Oh... I'm sorry, I must have..."

"You need to get this all in order." He shakes his head. "Like yesterday."

"Okay, I'll sort it out, give me a minute-" Heather starts in on another workbook.

"I'll do you one better – I'll give you a week. I'm on my way to that conference, but when I return..."

"You'll have it, I promise." She just has to figure out how to make it happen.

He starts out of her office, but pauses before he closes the door. "
I'll give you a hint – dashboards. Give me a dashboard."

Heather would like to slam her head against a dashboard right at this moment, but she just says, "Okay, thanks!" As soon as he's out, she leans forward until her head rests on her desk.

She had just brought in her family photos and her little bobble-head bulldog - she'd even loaded one drawer with healthy snacks and the one bag of chips she would actually eat. It'd taken her so long to find this job, this nice desk, this perfect location. She's getting married in two months.

Heather will not lose this job.

Heather's going to blow Walter's mind when he gets back.

First, however, she needs to learn.
She sits back up, closes down the six workbooks,
opens up her browser, and starts her research:

What is an Excel Dashboard?

A dashboard is an interactive visual reporting tool that presents varied data in a useful way. It provides an at-a-glance look at important data and key performance indicators so that anyone could understand the information presented. They are built for a specific goal, and typically display information in a way that makes decision-making easy without the distraction of the details. While designs can vary based on needs, they might look a little like this:
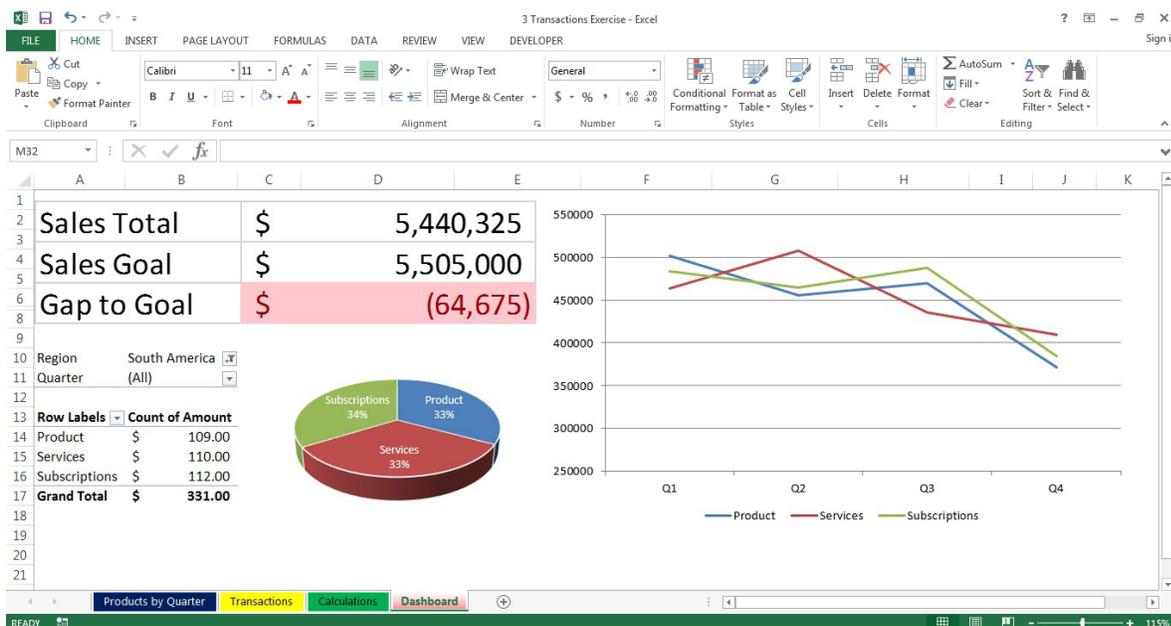
How do I identify and use key performance indicators?

Key performance indicators (KPIs) represent the intersection between your metrics and your company's goals. These could be sales totals, sales by product, or gap to goal - whatever is important to you. These will often be directly tied to revenue.

These performance indicators should be simple and clear to track – it's basically a scorecard for your business goals. When selecting an indicator, prioritize items that are both insightful and relevant in the short-term. It may or may not be directly actionable – what matters is that it tracks useful information.

KPIs are often numerical responses to business-critical questions. Some questions a KPI might address:

- How well am I doing vs expectations?

- How does this product compare to others?

- Where am I doing poorly?

- Where is the opportunity?

Use your KPIs to identify the central elements of your dashboard. In a car dashboard, for instance, each meter represents a KPI, be it gas level, car speed, or miles travelled. By the same token, Heather wants her dashboard to highlight the gap to goal in sales, the success of various products by region, and the balance of product vs subscription vs service.

What should I know about my end user?

Heather knows that her dashboard will need to present information for Walter, who may have different needs and expectations. For instance, he may use different terms than she does, so she'd want to take advantage of a dashboard's customizable display options. If she was building the dashboard for a different vendor, board member, or coworker, she would take their background and preferred terminology into account.

She also considers their objectives. Walter wants to know how sales are coming along, and he wants to be able to look at success by region and project. A different user may have different needs and expectations.

This is largely a function of the viewer's scope of influence. Above all else, a dashboard should be useful. If Walter wasn't responsible for the sales team, he might not have much use for the section on sales performance. She wants a dashboard that only contains useful content and metrics.

How do I plan and design the right dashboard?

Create a blueprint: Before even opening up Excel, you'll want to sketch out a design. She could do this on a whiteboard or a piece of paper – it doesn't matter. What matters is that she has an end in mind before she even begins, so that nothing gets muddled on the way.
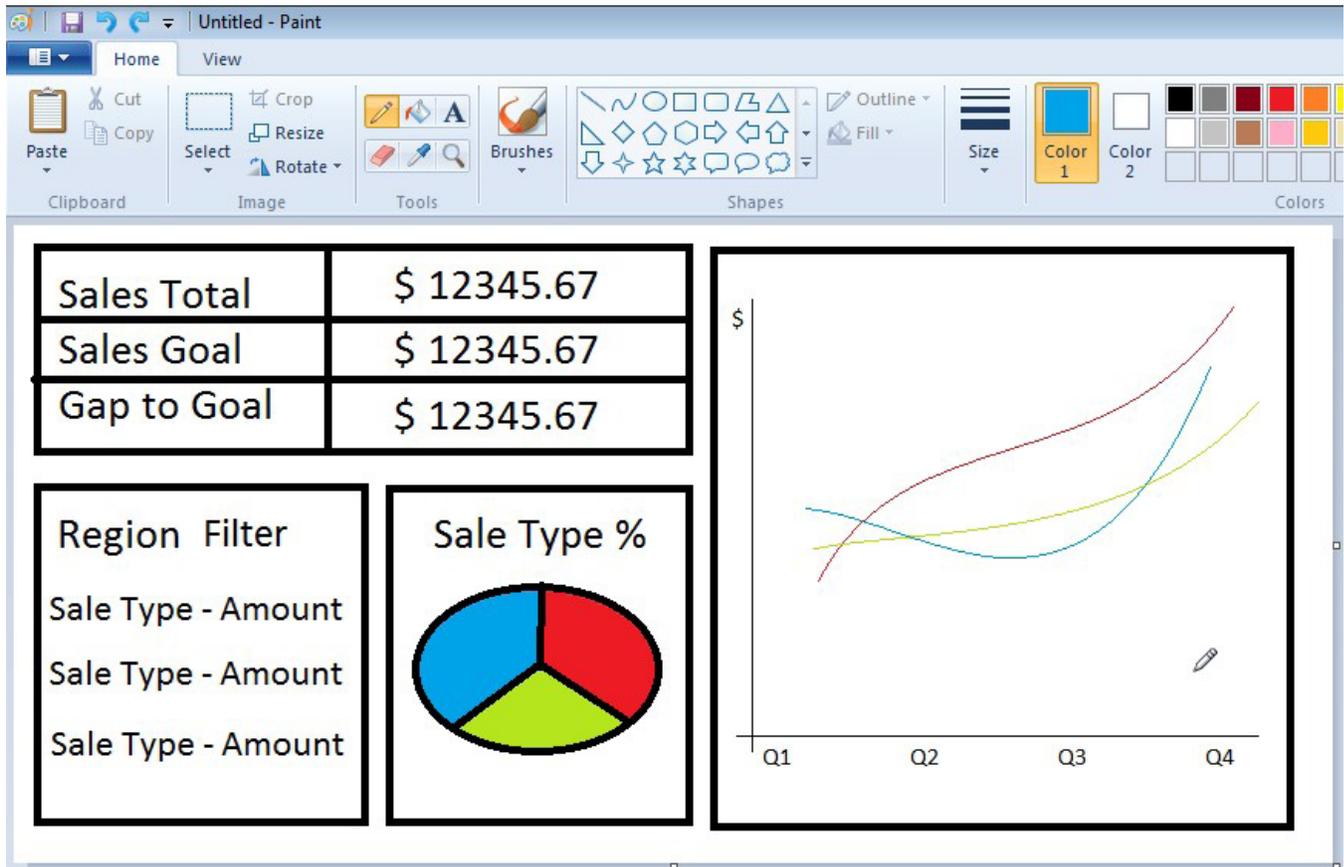
Assess Interactivity – Don't just think about today, but consider the next few months or years. Will you add new lines of business or regions? A good dashboard should have room to grow and be easy to manipulate.

Separate Dashboard from Data – A dashboard is the combination of the data source and your analysis. If you separate your data source, you'll be able to avoid damaging or corrupting your original data. Even if you're working straight from Excel, remember that your dashboard is a display for data, but not the best way to edit data. Keeping data separate will also allow you to refresh data.

Data Sources

When collecting data for your dashboard, you can pull from several sources. Note you may need to work with your IT department to confirm your access to these sources or identify which ones you need.
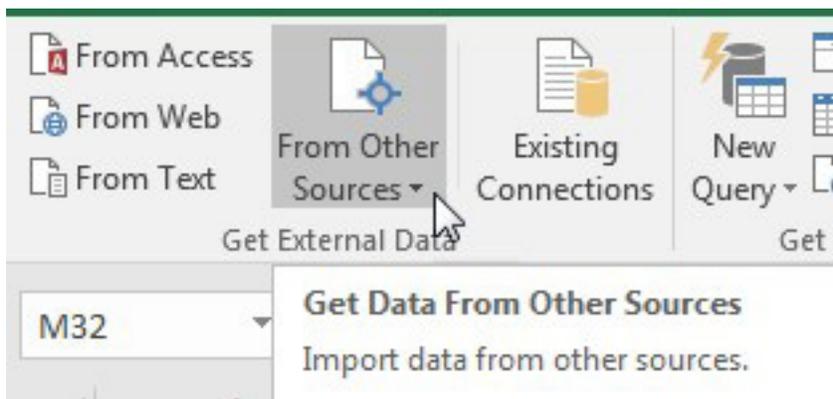
- Databases in Access, SQL, or Excel – If you have an Access database, simply click the From Access button.
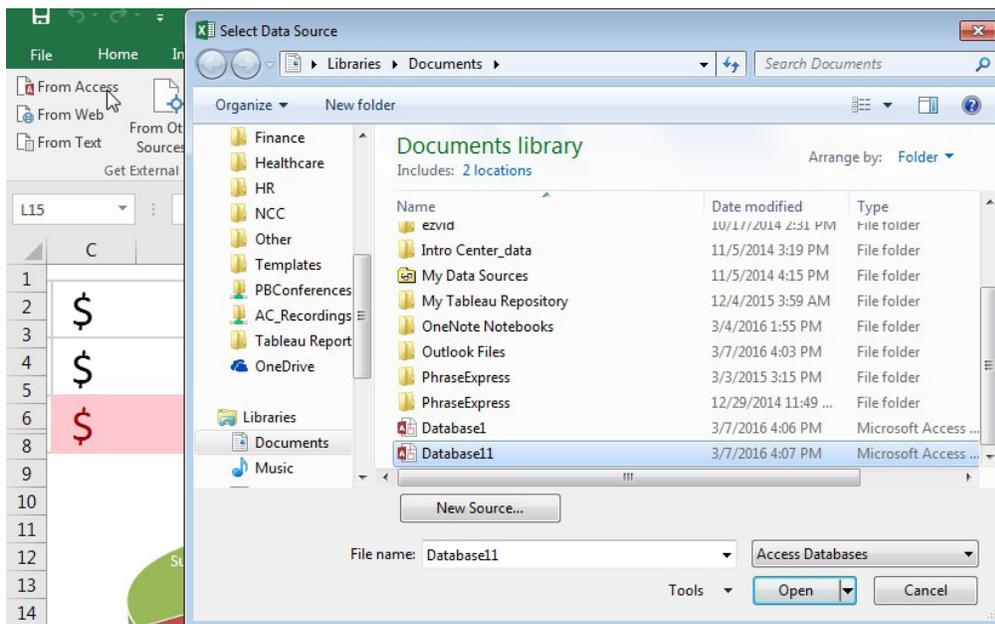
- You can pull from either a table (all transactions) or a query (transactions in North America):
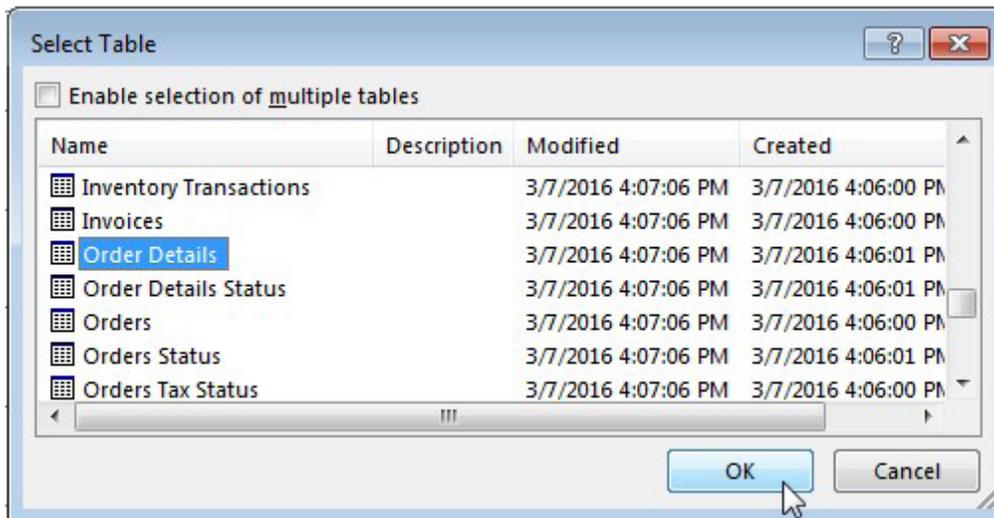
- Select any properties you may want (often it's wise to set a background refresh) and import it as a table.
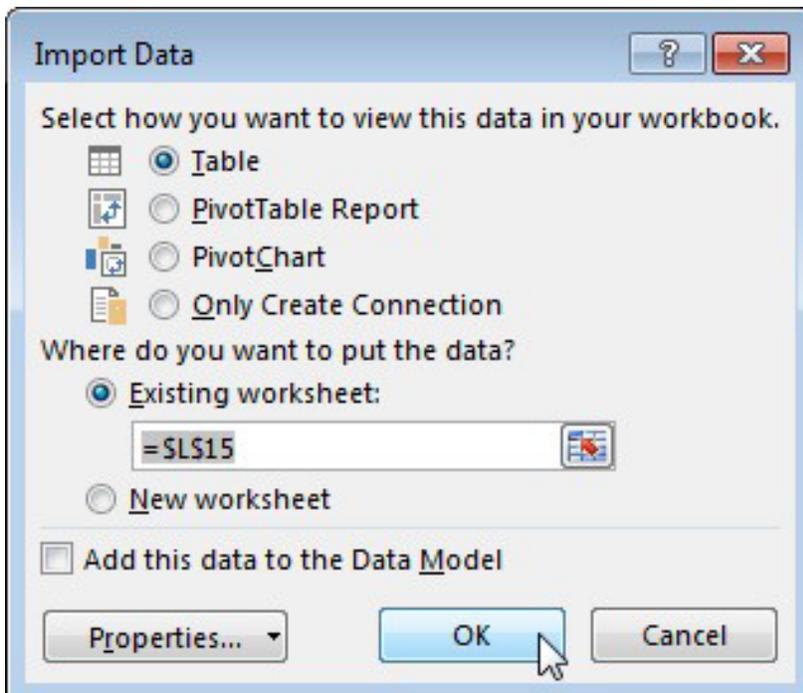
This provides the live access data in an easy and visible way.

ID	Order ID	Product ID	Quantity	Unit Price	Discount	Status ID	Date Allocated	Purchase Order ID	Inventory ID
27	30	34	100	14	0	2		96	83
28	30	80	30	3.5	0	2			63
29	31	7	10	30	0	2			64
30	31	51	10	53	0	2			65
31	31	80	10	3.5	0	2			66
32	32	1	15	18	0	2			67
33	32	43	20	46	0	2			68
34	33	19	30	9.2	0	2		97	81
35	34	19	20	9.2	0	2			69
36	35	48	10	12.75	0	2			70
37	36	41	200	9.65	0	2		98	79
38	37	8	17	40	0	2			71
39	38	43	300	46	0	2		99	77
40	39	48	100	2.75	0	2		100	75
41	40	81	200	2.99	0	2		101	73
42	41	43	300	46	0	1		102	104
43	42	6	10	25	0	2			84
44	42	4	10	22	0	2			85
45	42	19	10	9.2	0	2		103	110
46	43	80	20	3.5	0	1			86
47	43	81	50	2.99	0	1			87
48	44	1	25	18	0	1			88

- To pull from a SQL server, you'll need to work with your IT department to get the link to the information. The option is under the "From Other Sources" button.
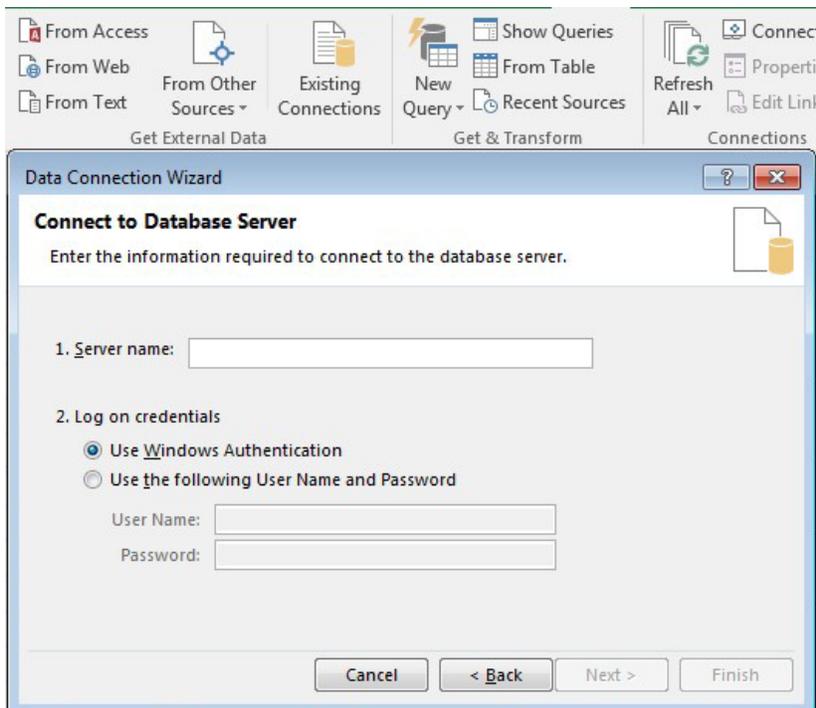
- To pull from another Excel worksheet, use the existing connections option.

- This will show you all pre-created connections in the currently open workbook, but to create one from scratch you'll "browse for more"
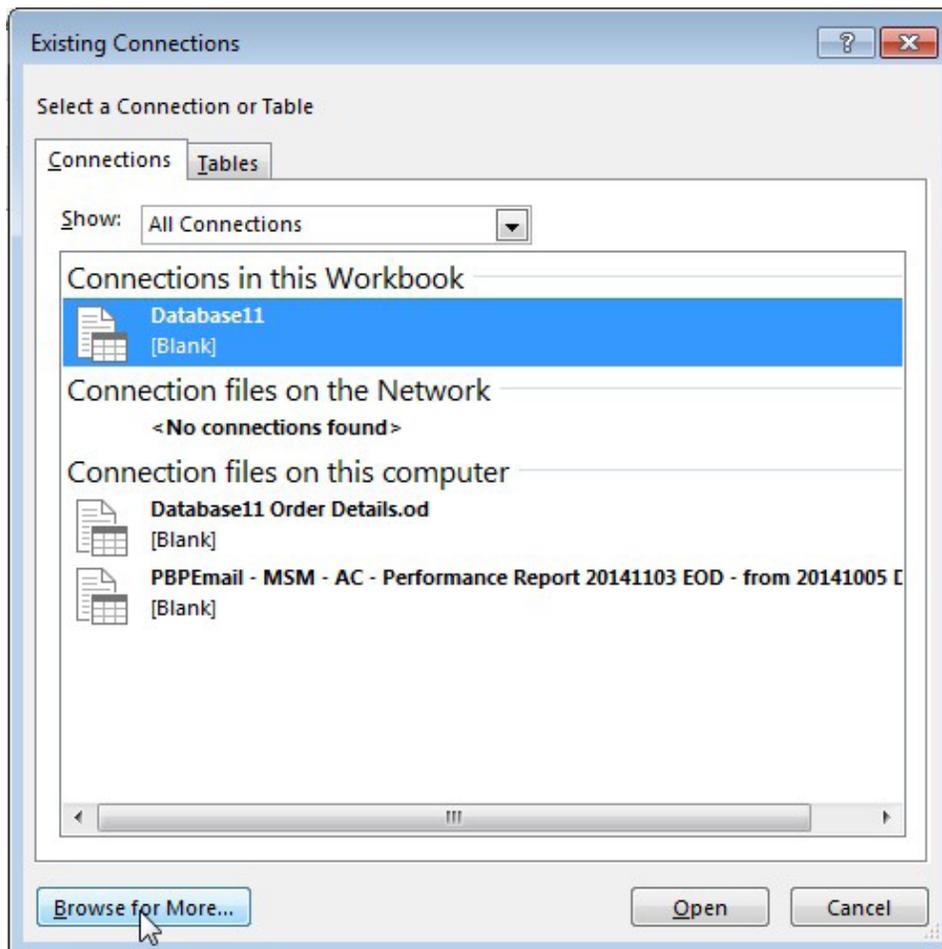
And just like with access, you can pull it in as a table. This information will update according to your refresh settings under properties.
With this function, your information will be updated soon after it changes in the source data.
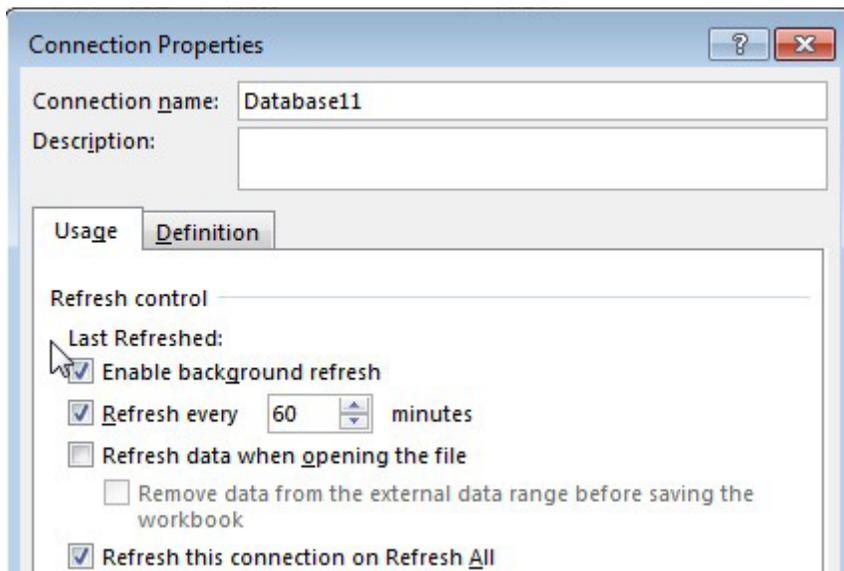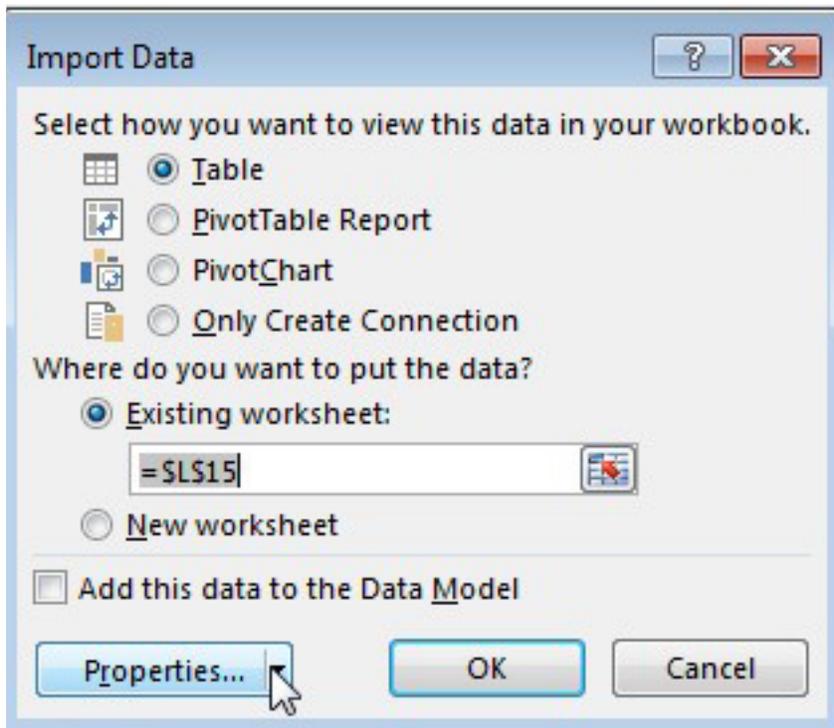
This is an advantage of pulling from external data. You can also pull data from 3rd Party cloud sources, which would be specific to whatever source you use. There are many such databases specific to different industries. When pulling from the web, you select that option under get external data.
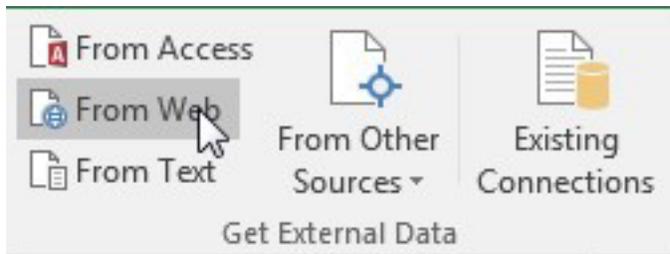
This will open Excel's web browser. You may get a warning asking if you'd like to run scripts, and you'll want to click "NO." All data that can be imported will have a little arrow beside it. Click that arrow and hit import:
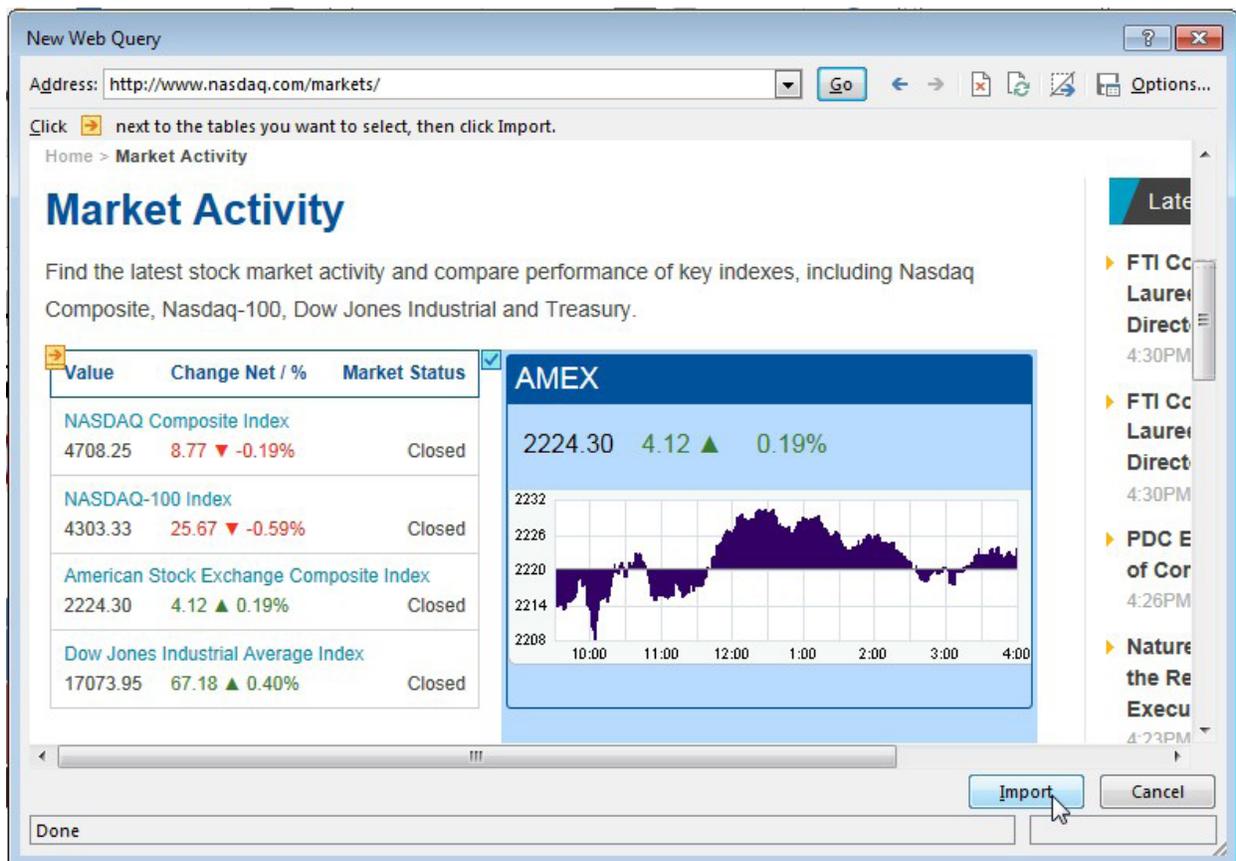
Like anything else, you can then edit the connection and its refresh rate.

Once you've found your data, you'll want to troubleshoot usability to make sure any user has access to the information and can manipulate it as necessary.

Heather knows she's just getting started with dashboards. Now she knows what they are and what they need to display – even how to get the right data in there and how to design it – but she hasn't even begun putting everything in its right place.

She leans back and cracks her knuckles. She knows what she wanted and she knows how to get it – and she had the whole week before Walter came back.

Now that she had the basics, she's excited to learn even more.

Walter's jaw is going to drop!

We'll return to Heather's story when she starts digging further.

We hope you enjoyed this free guide, and don't forget to check out other free resources and great training programs at:

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