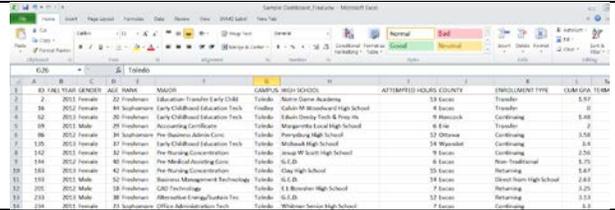


How to Create an Interactive Dashboard in Excel

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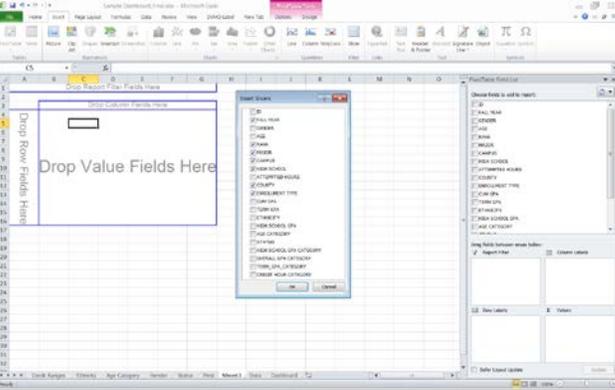
1. Extract data from information system and export to Excel.



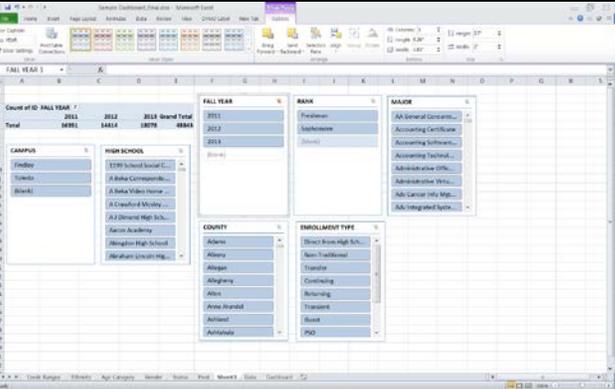
2. Create a pivot table of datasheet (highlight data, go to Insert PivotTable, and place in a new worksheet).



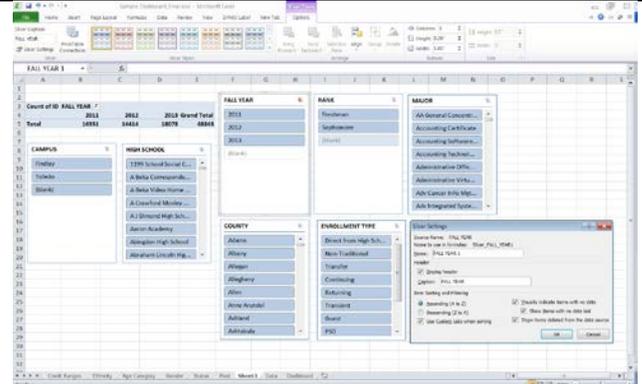
3. Click on pivot table and go to Insert Slicer; select fields that you want to be able to filter (e.g., year, rank, major, campus, high school, county, enrollment type).



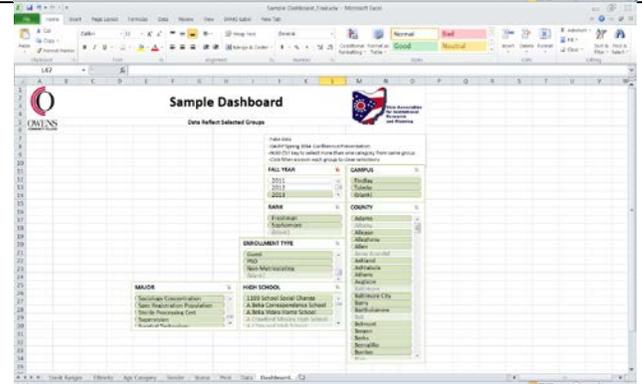
4. Format size and color of slicers under Slicer Tools tab.



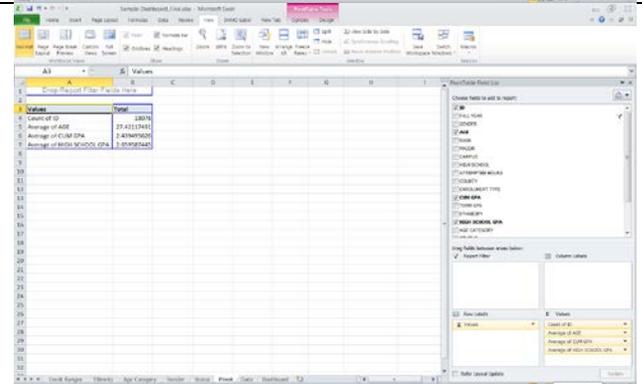
5. Change slicer header (if desired), sort slicer categories, and set data display options in Slicer Settings (i.e., check “Visually indicate items with no data” and leave “Show items with no data last” and “Show items deleted from data source” unchecked).



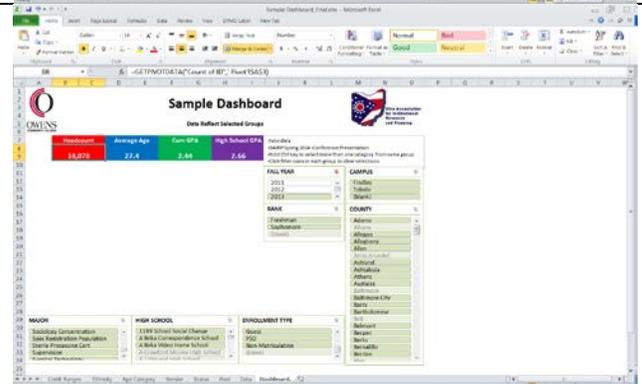
6. Start a new worksheet to use as dashboard canvas, add desired text and pictures, and paste slicers.



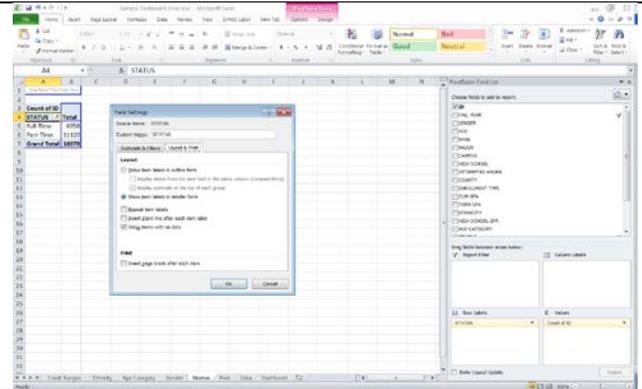
7. Return to pivot table and pull continuous variables that you want to display on your dashboard into the values area of the pivot table.



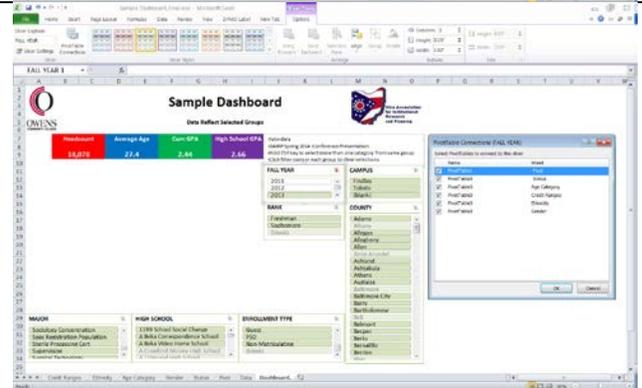
8. Create cell references on dashboard to continuous variables in pivot table and format as desired.



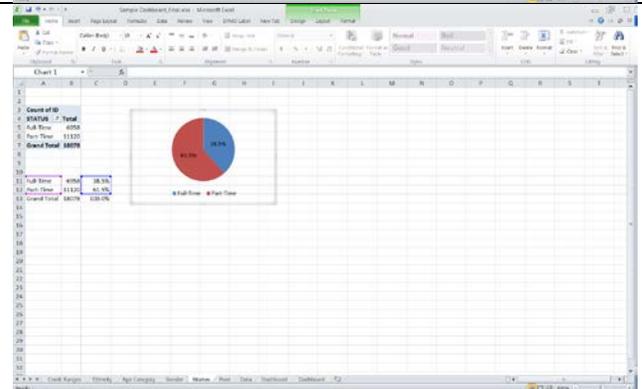
9. Create separate pivot tables for each categorical variable. Go to each pivot table's field settings and display items with no data (otherwise cell references will not point to correct location(s) when selections are made).



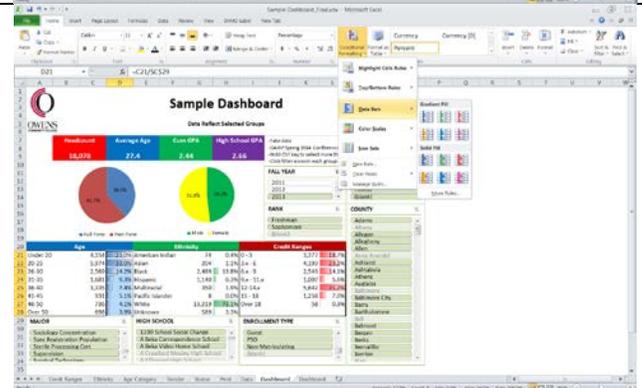
10. Go to dashboard and link slicers to newly-created pivot tables by clicking on each slicer, going to Slicer Tools, and checking desired pivot tables from list under PivotTable Connections.



11. Create charts of desired data elements by indirectly referencing data in pivot tables and pasting into dashboard. You can reference pivot tables directly but this will create pivot charts, which have features and appearance characteristics that may not be desired; create cell references to pivot tables instead and build charts off of referenced data.



12. Create frequency distributions of categorical variables by making cell references from dashboard to values in pivot tables, calculating percentages, and adding data bars or other icons from the Conditional Formatting menu of the Home tab.



Advantages

- Simple to create
- Software is widely available
- No cost
- Powerful data exploration tool
- Empowers stakeholders and creates a transparent and evidence-based culture
- Reduces ad hoc requests, saving IR staff time

Limitations

- Requires Excel 2010 or higher
- May not display on all mobile devices
- Slow performance with large file sizes and low-capacity computer systems
 - ≥ 4.0 GB RAM, 2.93 GHz Processor
 - Limit the number of datasheets in workbook
 - Limit the number of years of data
 - Put more than one metric in the same pivot table
 - Save a second copy of file for sharing with the datasheet(s) DELETED
 - If available, use 64-bit Excel for creating dashboards
- Slicer positions cannot be locked without disabling functionality
- Slicers do not have search capability
- Users may not understand data definitions and assumptions