



Building Dashboards in Excel

An Excel dashboard is a visual tool that displays and organizes data in a way that's easy to understand and analyze. This job aid provides step-by-step instructions for creating a dynamic and interactive dashboard in Excel.

Part 1: Create Pivot Charts

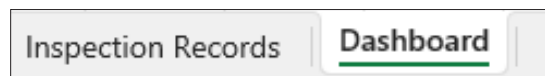
STEP 1

Create a new Worksheet

To build your dashboard, begin by creating a new worksheet in your Excel file. Click the [+] to create a new worksheet.



Rename the sheet to identify your dashboard. As you build each element of your dashboard, you will copy it to this worksheet.

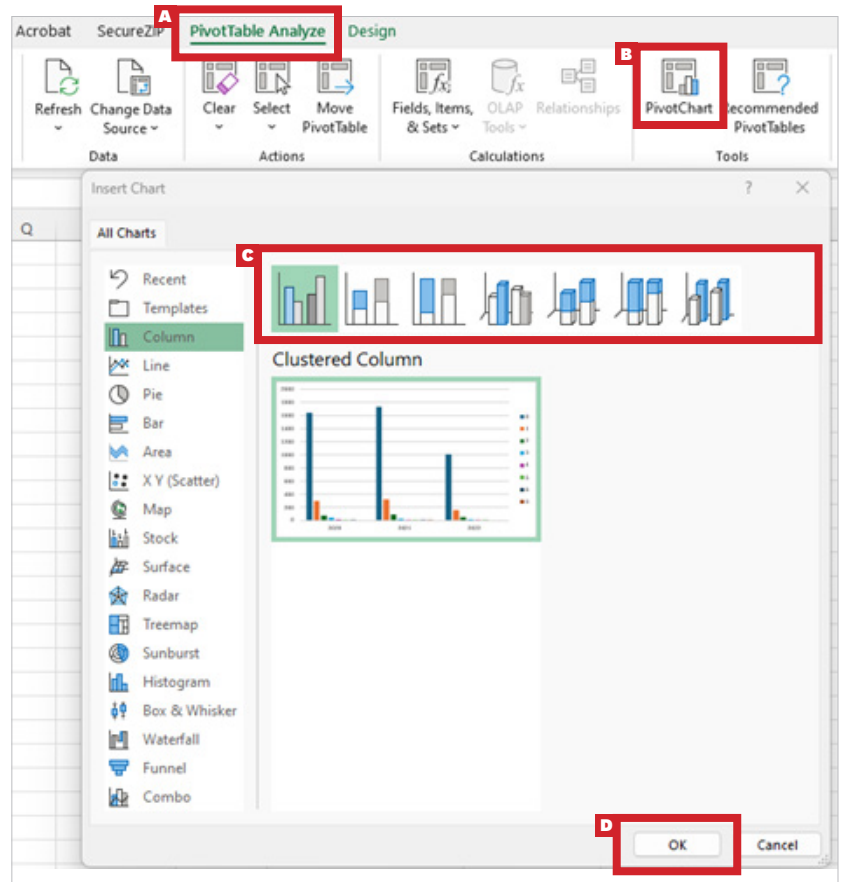


STEP 2

Create Pivot Charts

Each element in your dashboard begins with a Pivot Table. Use the [Pivot Tables Job Aid](#) to help you build your Pivot Tables.

- A** Once you have your Pivot Tables, you will create Pivot Charts to start building your dashboard. Click anywhere in the pivot table, then in Excel's top menu bar, select **PivotTable Analyze**.
- B** Select **PivotChart**.
- C** Select the chart that best represents your data.
- D** Click **OK**.



STEP 3

Formatting Options

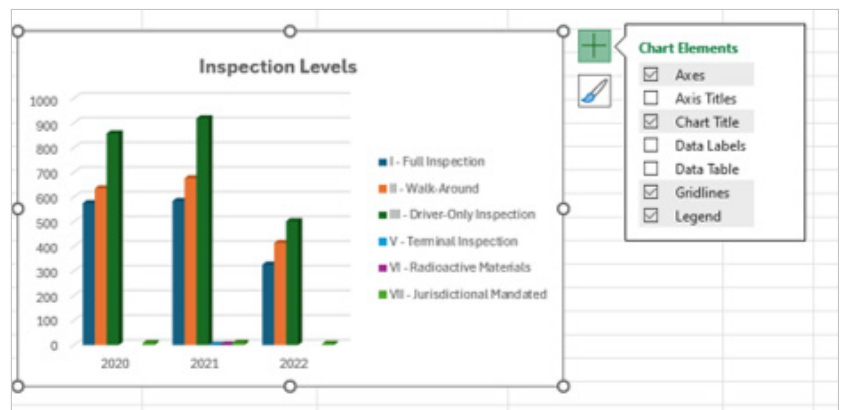
The pivot chart will appear on the sheet.

Click the [+] to add or delete elements in your chart.

Click the paintbrush icon to format your chart using Excel's formatting options, such as:

- **Chart Title:** Change the title of your chart
- **Legend:** Enable, disable, and edit the legend as needed
- **Axes:** Edit the horizontal axis and/or vertical axis of your chart
- **Gridlines:** Enable or disable the gridlines of your chart

Click the paint brush icon [] to format the style and colors of your chart.



Note: Be sure to hide the filter options in your pivot chart. In Excel's top menu bar, select **PivotChart Analyze**, then **Field Buttons**, and choose **Hide All**.

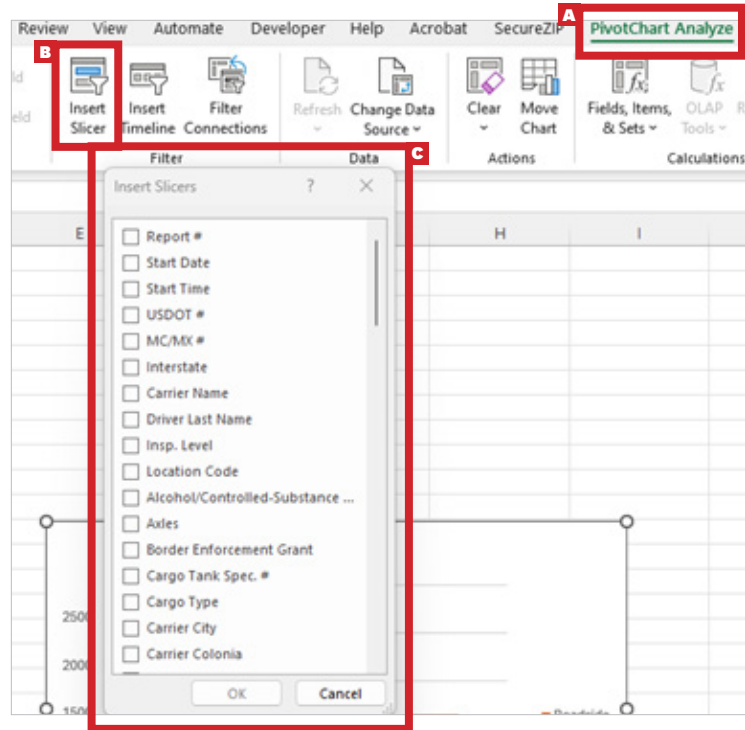
Part 2: Adding Interactive Elements

STEP 1A

Add Slicers to Filter Data

Slicers allow you to filter the data in your pivot tables, pivot charts, and dashboard.

- A** Click anywhere in the pivot chart. In Excel's top menu bar, select **PivotChart Analyze**.
- B** Click **Insert Slicer**.
- C** Select the check boxes for the fields you want to filter, then select **OK**.



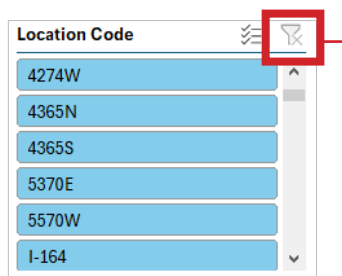
STEP 1B

Selecting Fields

A slicer will be created for every field you select. Clicking any of the slicer buttons will automatically apply that filter to the linked pivot table.

To select more than one item, hold **Ctrl**, and then select the items that you want to show.

- To clear a slicer's filters, select **Clear Filter** in the slicer.



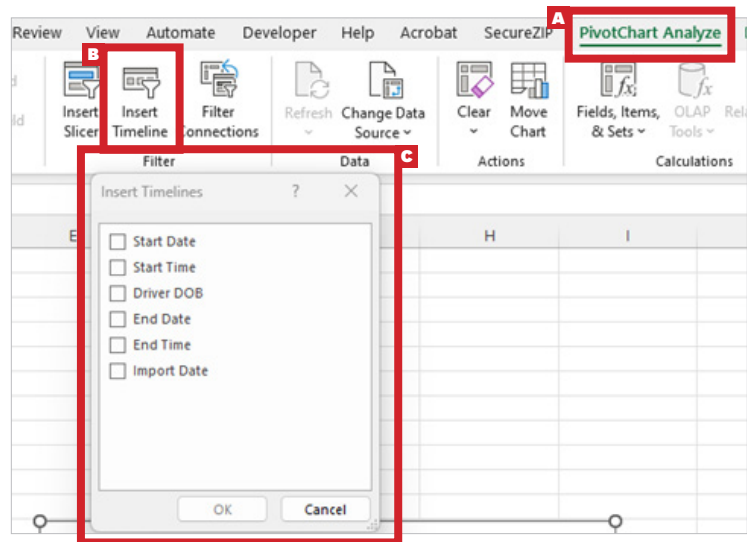
You can create multiple slicers for each pivot table as needed.

STEP 2

Add a Timeline to Filter Data

An interactive timeline can be added to any pivot chart that contains a Date column in your data.

- A** Click anywhere in the pivot chart. In Excel's top menu bar, select **PivotChart Analyze**.
- B** Select **Insert Timeline**.
- C** In the Insert Timelines dialog box, select the check boxes for the fields you want to display, then select **OK**.

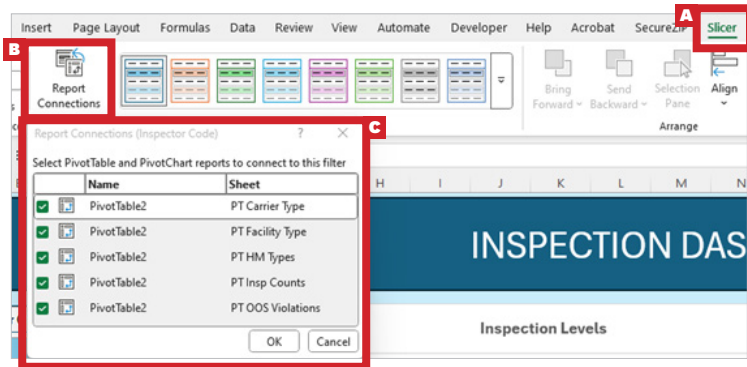


STEP 3

Connect Slicers

Slicers and timelines can be used across multiple pivot tables that use the same data source.

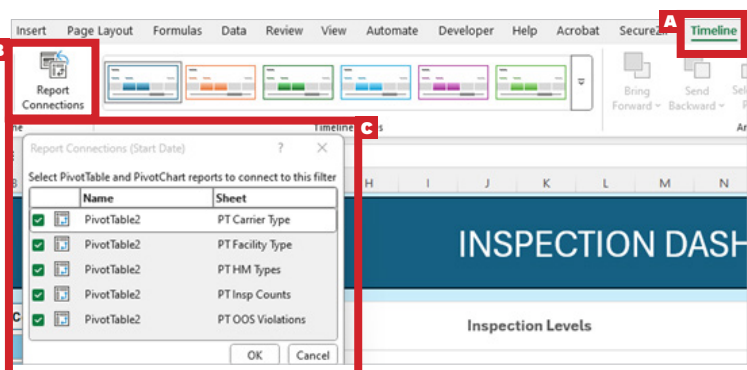
- A** Select the slicer you want to connect. In Excel's top menu bar, select **Slicer**.
- B** Select **Report Connections**.
- C** In the dialog box, select the check box of the PivotTable in which you want the slicer to be available.



STEP 4

Connect Timelines

- A** Select the timeline you want to connect. In Excel's top menu bar, select **Timelines**.
- B** Select **Report Connections**.
- C** In the dialog box, select the check box of the PivotTable in which you want the timeline to be available.

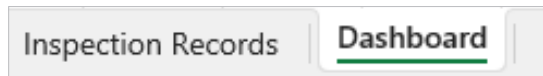


Part 3: Build a Dashboard

STEP 1

Copy Interactive Elements

For each interactive element, copy and paste into the Dashboard worksheet you created in Part 1, Step 1.

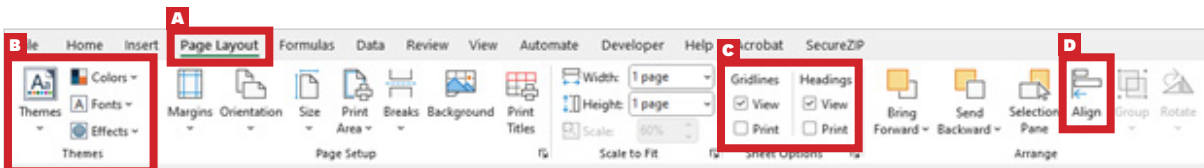


STEP 2

Format Your Data

Place elements on the sheet in any order you want and format your dashboard as needed.

- A** In Excel's top menu bar, click **Page Layout**, and then choose your formatting options.
- B** Adjust the theme and colors of the dashboard.
- C** Turn off Gridlines and Headings.
- D** Align the elements of the dashboard.

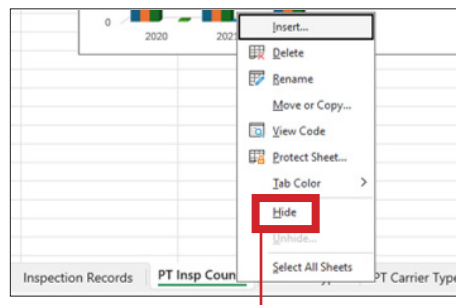


STEP 3

Hide Sheets

Another helpful formatting option is to hide all other sheets to only show the dashboard. This is especially helpful when sharing your dashboard with others.

To hide a sheet, right click on the sheet at the bottom of the window and click **Hide**.



Part 4: Adding New Data and Sharing your Dashboard

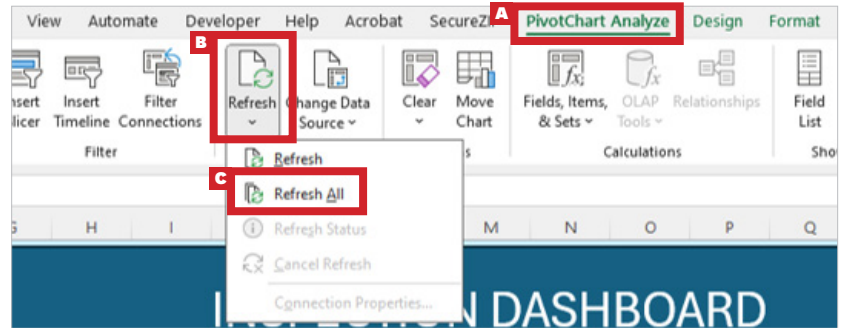
STEP 1

Adding New Data

Once your data table is established, you can add new data to it at any time. Simply copy and paste your new data into the existing data table.

- A** Click anywhere inside a pivot chart, then in Excel's top menu bar, click **PivotChart Analyze**.
- B** Select **Refresh**.
- C** Select **Refresh All**.

This updates all your pivot tables, pivot charts, and dashboard to include the new data.

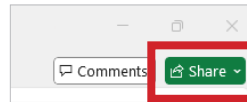


Note: Be aware that Excel has a limit of 1,048,576 rows per tab.

STEP 2

Sharing your Dashboard

To share your dashboard with others, click **Share** in the upper right corner of Excel.



STEP 3

Add Users and Set Access

You can share your dashboard by either adding specific people or copying a link to the dashboard.

You can set the level of access by choosing one of the options provided.

