Build an Interactive Dashboard in Excel

Create a dynamic and interactive Excel dashboard. With a dashboard, you can showcase the most important information and key performance indicators (KPIs) that your organization cares about.

1. For our dashboard, we will need 3 different charts. So this means we will first need to create 3 different pivot tables. Insert 3 blank Pivot Tables on 3 different worksheets.
   1. Label the 3 sheets:
      1. Profit by Country and Cookie
      2. Units Sold Each Month
      3. Profit by Month
   2. Create a new spreadsheet and label it Dashboard. Move the dashboard sheet to the first position in your Excel file.
2. On sheet one, show Profit by Country and Cookie.
3. Rename the tab as Profit by Country and Cookie
4. Now create your pivot table.
5. Pull the Country field into the Rows section
6. Drag Product into the Columns section
7. Drag Profit into the Values section
8. Now change some of the formatting of your pivot table:
9. Change all of the numbers to currency and turn off the decimals
10. Go to the Grand Total column and sort it from Largest to Smallest
11. Right-click on the first number of the Grand Total row and sort it from Largest to Smallest
12. Now we're going to insert a chart based on this pivot table.
13. Click on the tab at the top of Excel called Analyze
14. Click on Pivot Chart button
15. Insert a Stacked Column Chart
16. Click Okay
17. Add a title to your chart
18. click on the Design tab at the top
19. on the left side click on Add Chart Element --> Chart Title --> Above the chart
20. Remove the field buttons (Right-click and select Hide all field buttons)
21. Now copy and paste the chart to your dashboard
22. For the next sheet -- Units Sold Each Month
23. Create a pivot table
24. Put Month and Date into the Rows section
25. Drag Units sold into the Values section
26. For Units Sold numbers, add the Comma style and remove the Decimal points

Now Insert a pivot chart: this will be a Line Chart

1. Change the title to Units Sold Each Month
2. Remove the legend
3. Remove the field buttons (Right-click and select Hide all field buttons)
4. Now copy and paste the chart onto your Dashboard
5. For the next sheet - Profit by Month

On your pivot table ...

1. Drag Months into the Rows section
2. Drag Profit into the Values section
3. Changes your numbers to Currency and turn off the decimals
4. Add your Chart:
5. Click on the Analyze Tab at the top
6. Click on Pivot Chart button
7. Insert a Line Chart
8. Click Okay
9. Change the chart title to say Profit by Month
10. Delete the legend
11. Remove the field buttons (Right-click and select Hide all field buttons)
12. Copy the chart to your Dashboard

Now you have a static dashboard. But we are going to make it dynamic (interactive).

1. Click on your Column chart.
2. Click on the Analyze tab at the top
3. Click on Insert Timeline
4. Select the Date checkbox
5. Click Okay
6. Again click on your Column chart
7. Click on Pivot Chart Analyze button
8. Click on Insert Slicer
9. Click on the Country and Product checkboxes; this will create a slicer for each category.

Now we're going to turn off the headings of the slicers.

1. Right-click on the slicer, click on Slicer Settings, turn off Display Header
2. Do the same thing with the other slicer (turn off the Display Header)
3. Now move the slicers to the left side
4. Now Right-click on one of the slicers and select Report Connections
5. Click on the checkboxes for all of the pivot tables
6. Click Okay
7. Now do the same thing for the other two slicers
8. If new data is added to your spreadsheet, you want to make sure it shows up on your dashboard.
9. Click on the New Data tab.
10. Select all the data from this table (but not the headers), then press CTRL + C to copy it.
11. Now click on the Data Sheet, go to the bottom of the table and paste your data at the bottom of the table
12. Now click on the Dashboard tab to ensure your dashboard shows all of the new data you just added
13. Click on one of your pivot charts, then click on Pivot Chart Analyze (at the top), then click on Refresh 🡪 Refresh All; now your dashboard should show the new data
14. Now on your dashboard, turn off your Gridlines; then turn off your Headings.
15. Now hide all your worksheets except for the Dashboard:

Hold down CTRL and click on each of the tabs; then Right-click and select Hide

Source: **How to Build Excel Interactive Dashboards**

https://www.youtube.com/watch?v=MTlQvyNQ3PM