

Tips for ***crafting*** your Excel Dashboard

Once you're ready to assemble your dashboard...

Collect

Refine

Assemble

Foster

Tweak

1. Convert Data into a Table

Paste in a cleaned dataset into Excel and turn it into a table for dynamic referencing.

- Why? Tables auto-expand and work seamlessly with PivotTables, charts, and formulas.
- How? Select a cell in your data, Press Ctrl + T

2. Insert a Pivot

Use PivotTables to quickly group, filter, and calculate insights from your table data.

- Why? Easily summarize large datasets without formulas.
- How?
 - Click inside your table
 - Go to Insert → PivotTable
 - Choose where to place

3. Summarize with the Pivot

Once inserted, slide a variable as your ROW and a variable as your VALUES.

- Why? Instantly generate summaries like totals, counts, or averages by category.
- How?
 - Drag a field (e.g. "Facility") into Rows
 - Drag a field (e.g. "Days Served") into Values

4. Create the Visuals

Turn your PivotTables into charts to highlight trends, comparisons, and key metrics.

- Why? Visuals make data easier to interpret at a glance.
- How?
 - Click on your PivotTable
 - Go to Insert → choose a chart type: Column, Line, Pie, etc.

5. Add Interactivity

Use slicers to let users explore the data without touching the backend.

- Why? Makes your dashboard dynamic and user-friendly.
- How?
 - Click on a PivotChart
 - Go to Insert → Slicer
 - Select the fields you want users to filter by

6. Finish with Polish & Flare

Refine the look and layout of your dashboard to make it presentable..

- Why? A well-designed dashboard improves readability and impact.
- How?
 - Use shapes, icons, and text boxes for labels and sections
 - Apply consistent fonts, colors, and alignment

GJ Farina

GaryMFarina@orianahouse.org

Elliot King

ElliotCKing@orianahouse.org