

HOW TO USE THE EXCEL DASHBOARD TEMPLATE

DR. ALVIN ANG

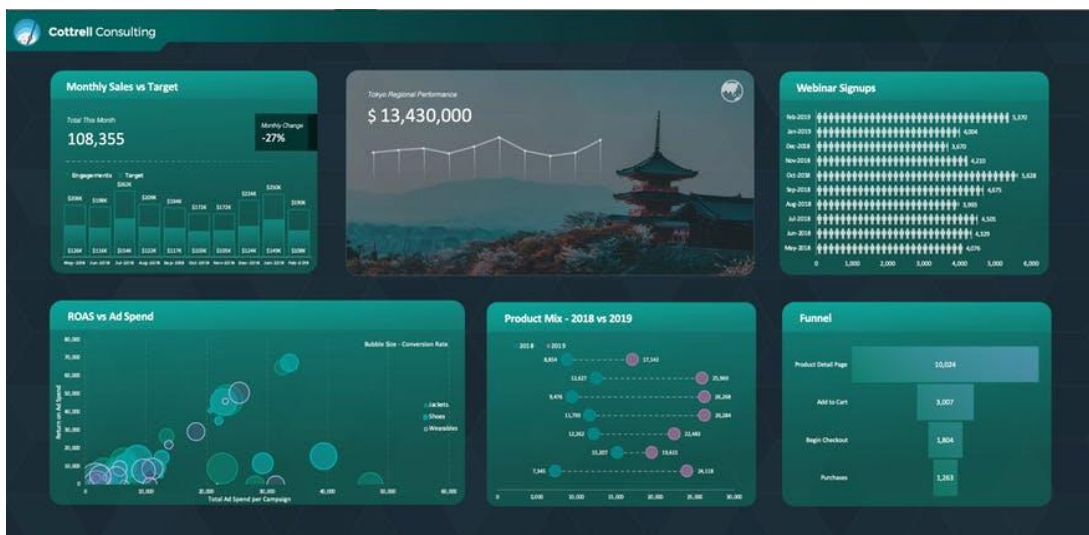


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INTRODUCTION

- <https://exceldashboardtemplate.com/>
- This manuscript teaches you how to use the template (bought from the web link above).
- This toolkit is for you if...
 - You're a consultant or freelancer that needs to present professional and visually stunning reports to your clients.
 - You're a business intelligence professional or an analyst that wants to impress your team.
 - You're an in-house Excel pro that needs buy-in from your management or the C-Suite.

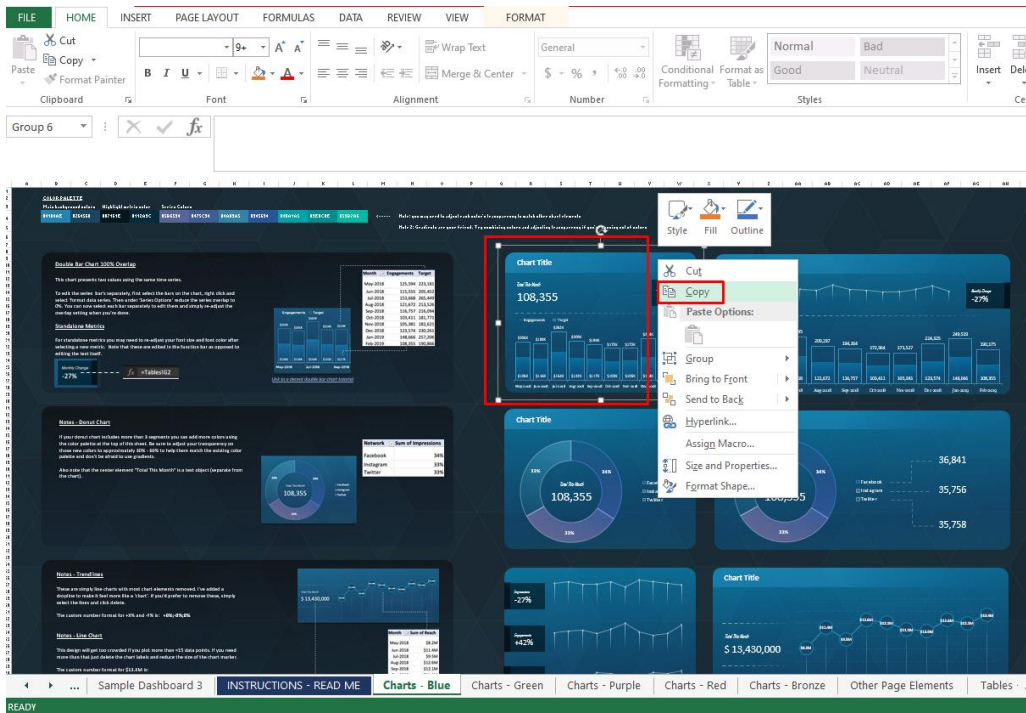


STEP 1: SELECTING YOUR CHART TYPE

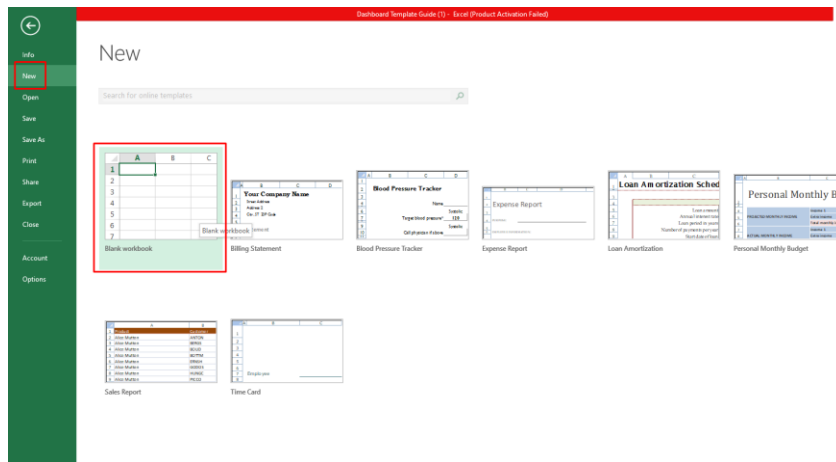
- Find the file “Dashboard Template Guide.xlsx” and open it.

The screenshot displays the Microsoft Excel interface with a dashboard template. The ribbon at the top includes FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, and VIEW. The HOME ribbon is active, showing options for Clipboard (Paste, Cut, Copy, Format Painter), Font (Calibri, 12, Bold, Italic, Underline, Text Color, Background Color), Alignment (Wrap Text, Merge & Center), Number (General, Currency, Percentage, Decimals, Thousands Separator), Conditional Formatting (Normal, Bad, Good, Neutral), Styles, and Insert/Delet. The main area shows a dashboard with several charts and tables. The charts include a bar chart titled 'Double Bar Chart 100% Overlay', a donut chart titled 'Notes - Donut Chart', and a line chart titled 'Notes - Line Chart'. The tables show data for 'Programs' and 'Network'. The tab bar at the bottom includes 'Sample Dashboard 3', 'INSTRUCTIONS - READ ME', 'Charts - Blue', 'Charts - Green', 'Charts - Purple', 'Charts - Red', 'Charts - Bronze', and 'Other Page Elements'. The 'Charts - Blue' tab is highlighted with a red box.

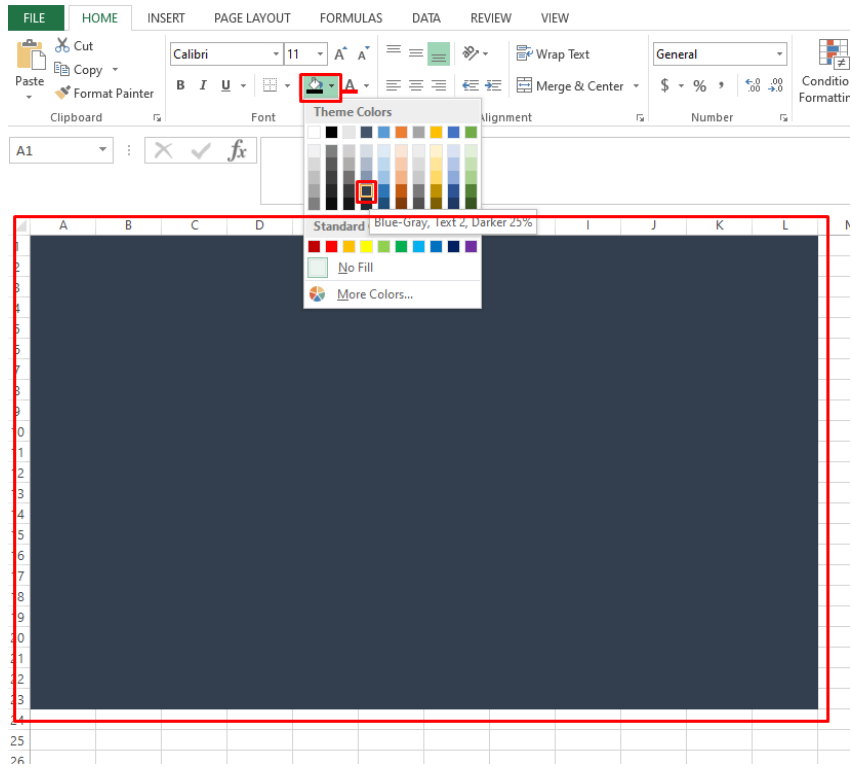
- Many tabs are below the spreadsheet – Navigate to
 - Charts – Blue
 - Charts – Green
 - Charts – Purple
 - Charts – Red
 - Charts – Bronze



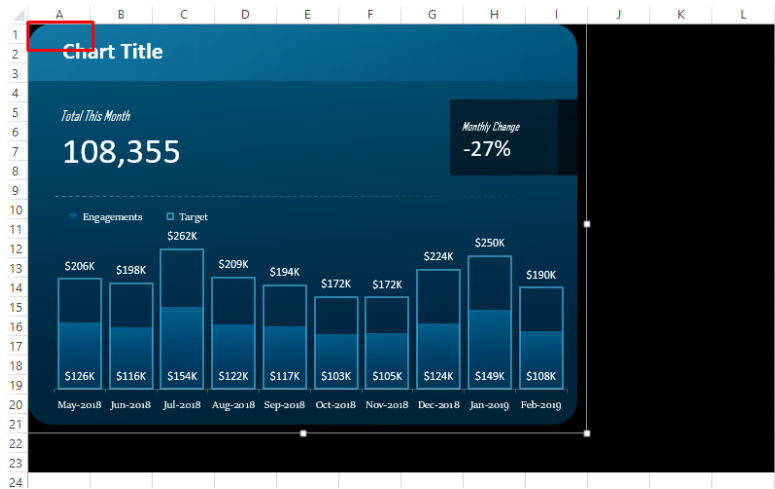
- Choose any of the chart that you like.
- Select it and right click → copy.



- Open a new workbook



- In the new sheet, select an ample space and make it dark.



- Select cell A1 and Paste the chart.

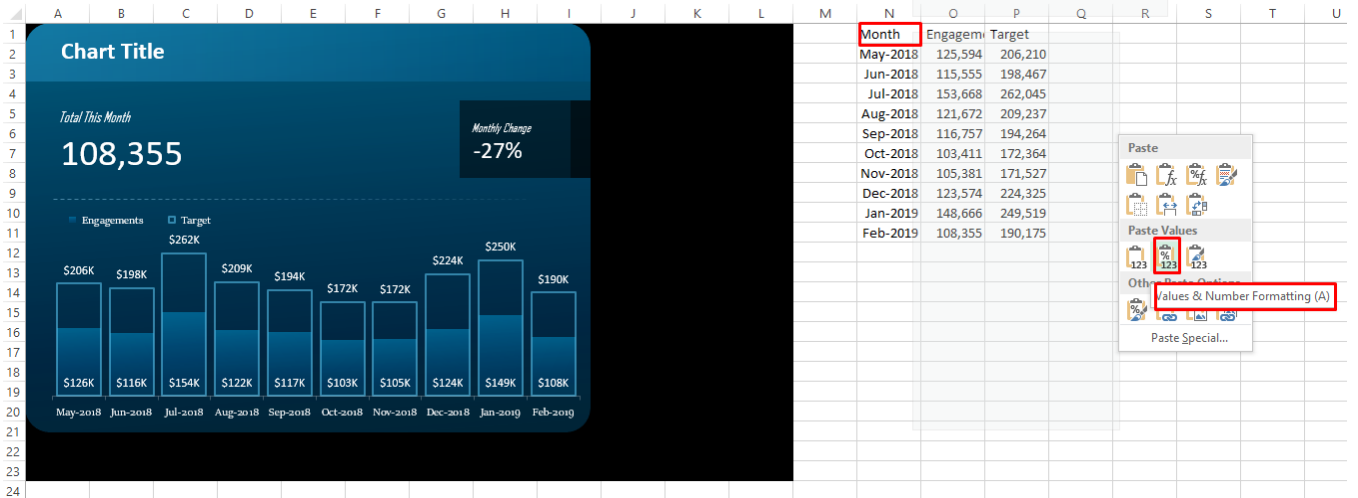
STEP 2: SELECTING THE TABLE TO GO WITH IT

The screenshot shows an Excel dashboard with the following data tables:

Month	Engagements	Sum of Engagements
May-2018	125,594	
Jun-2018	115,555	-8%
Jul-2018	153,668	+33%
Aug-2018	121,672	-21%
Sep-2018	116,757	-4%
Oct-2018	103,411	-11%
Nov-2018	105,381	+2%
Dec-2018	123,574	+17%
Jan-2019	148,666	+20%
Feb-2019	108,355	-27%

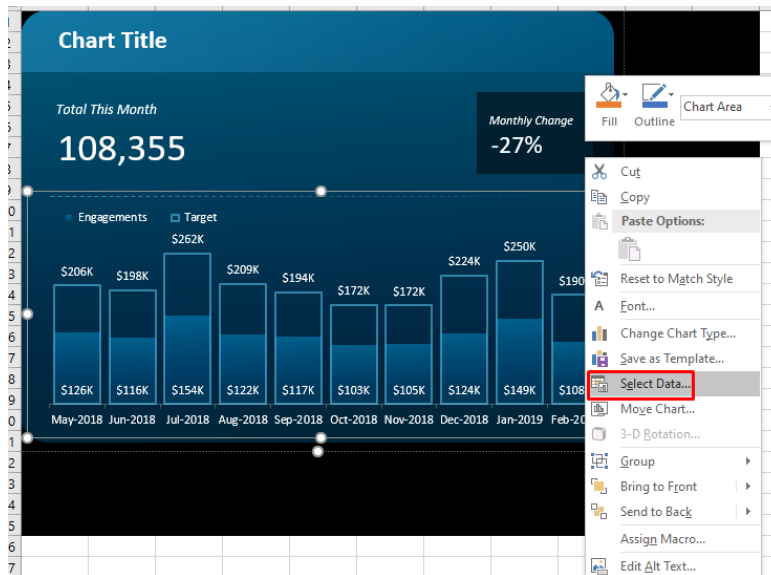
Month	Engagements	Target	Network	Sum of Impr
May-2018	125,594	206,210	Facebook	
Jun-2018	115,555	198,467	Instagram	
Jul-2018	153,668	262,045	Twitter	
Aug-2018	121,672	209,237		
Sep-2018	116,757	194,264		
Oct-2018	103,411	172,364		
Nov-2018	105,381	171,527		
Dec-2018	123,574	224,325		
Jan-2019	148,666	249,519		
Feb-2019	108,355	190,175		

- Go back to “Dashboard Template Guide.xlsx” → Select the tab “Tables – Source Data for Charts”.
- Scroll from left to right to identify the Chart Type that you have previously selected.
- In other words, use the “mini pictures” above the tables and tally it with the Chart Type you have chosen earlier (the one that you wanted).
- In this case, we have chosen a Histogram / Bar Chart type → Select the table below it and click Copy.

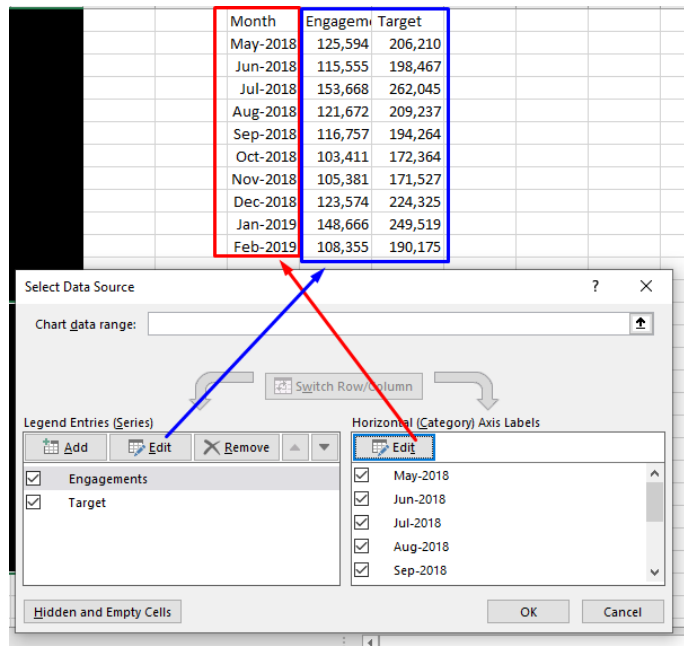


- Go back to the New Workbook.
- Select any cell on the right side (of the pasted chart), then
 - Right Click
 - Paste Special → Values & Number Formatting
 - (Purpose is to remove all previous formatting and just Paste as it is)

STEP 3: SELECT YOUR DATA

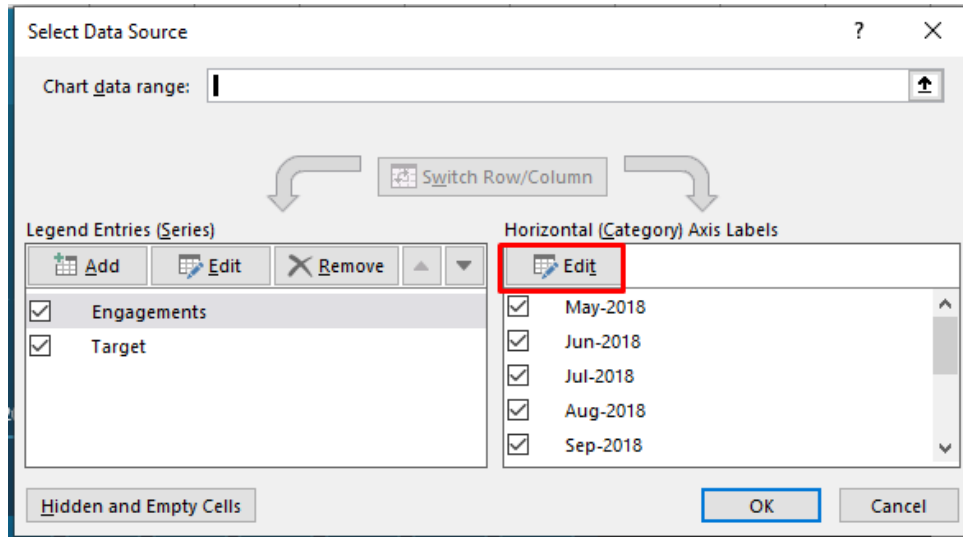


- Right click on your chart → Select Data

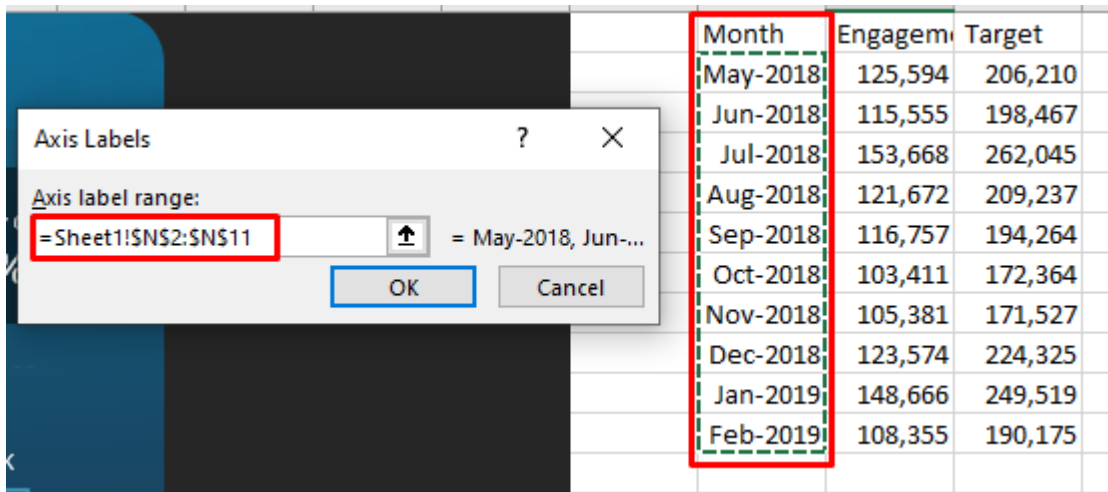


- Currently, the Chart and the Table are not linked. We need to link them.
- Once linked, we can change the values in the table; and the Chart will reflect the new values.

LINKING THE HORIZONTAL AXIS (MONTHS)

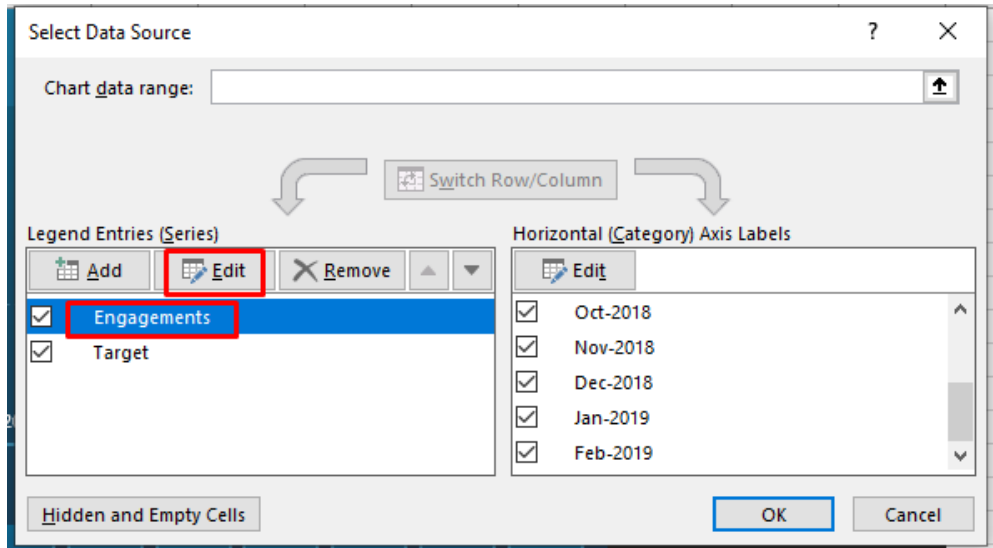


- Under the “Horizontal Axis Labels”, Click Edit

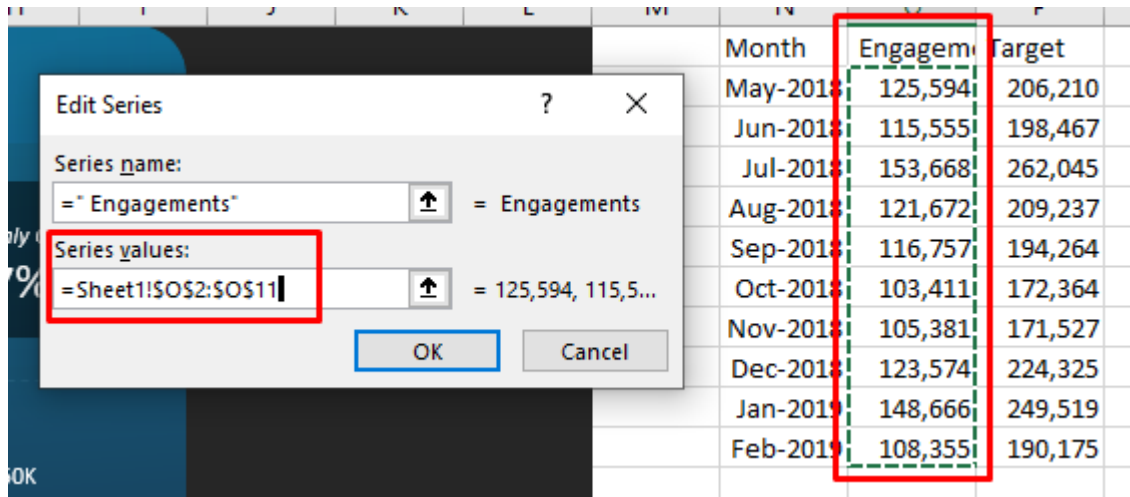


- Select the “Month Column” and click OK.

LINKING THE ENTRIES (ENGAGEMENTS)



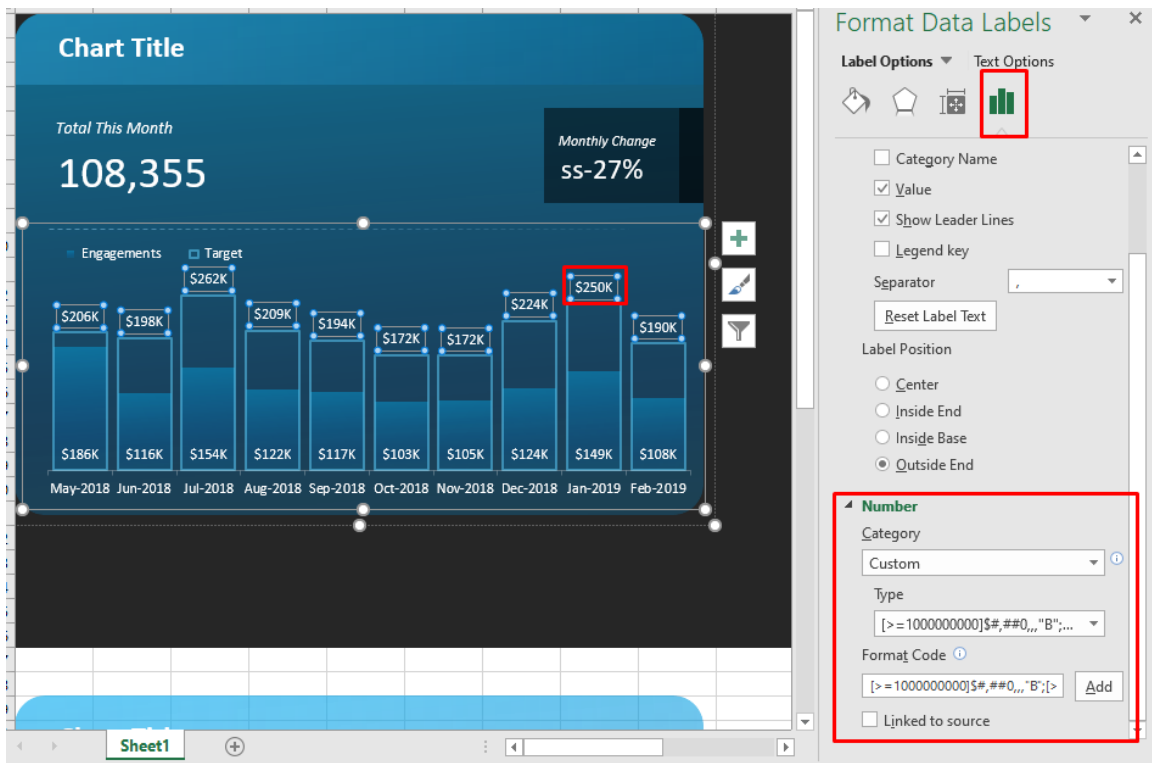
- Under “Legend Entries (Series), Click Edit



- Select the “Engagements” Column and click OK

STEP 4: EDITING NUMBER FORMATS

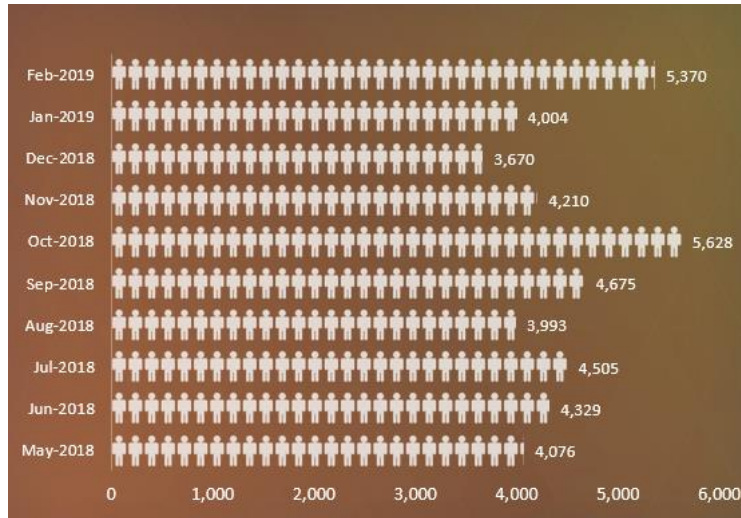
- In this example, the Chart has numbers on it.
- They are in “\$...K” format → Means in thousands.
- However, what if we wish to display numbers below a thousand?
- We need to change the number format.





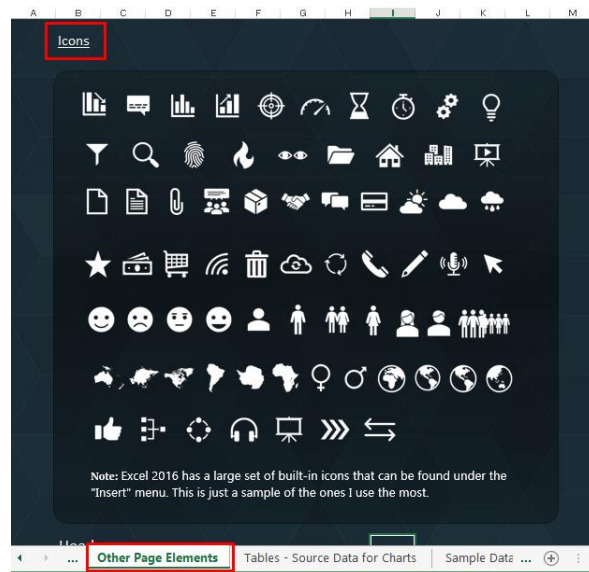
- Right click on any number label... and follow the above picture to adjust the number format.

STEP 5: PICTURE FILL FOR ICONS

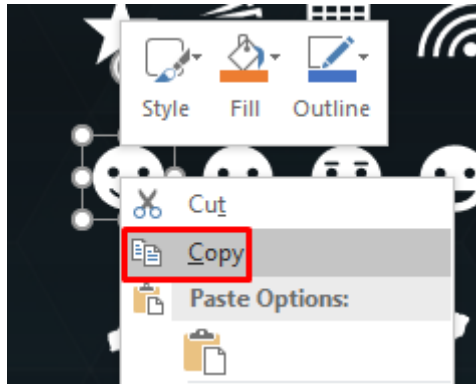
- Just in case we selected the Chart Type below



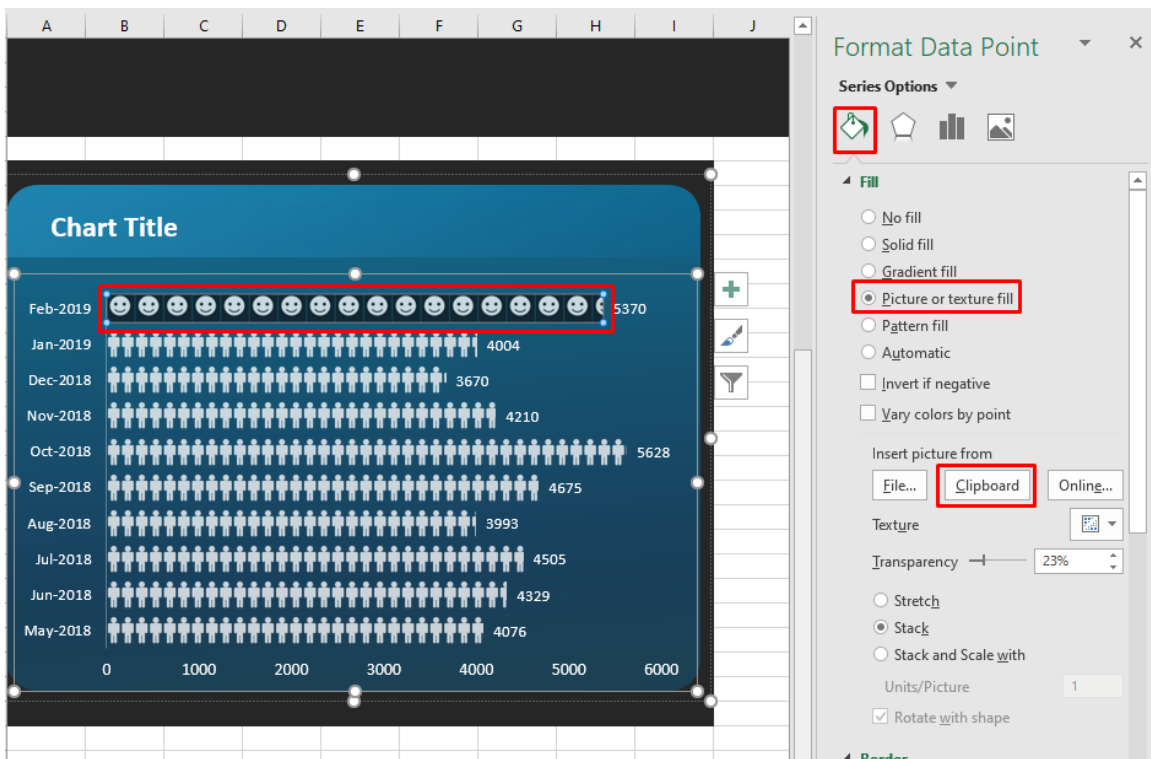
- How can we change the icon  to  ?




- Go to “Dashboard Template Guide.xlsx” → Select “Other Page Elements” Tab



- Right click on the  and copy



- Select any Row of icon  → Picture Fill → Insert picture from “Clipboard”
- Done! The icon has been changed!

ABOUT THE AUTHORS

Dr. Alvin Ang earned his Ph.D., Masters and Bachelor degrees from NTU, Singapore. He is a scientist, entrepreneur, as well as a personal/business advisor. More about him at www.AlvinAng.sg.