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Excel Tips and Dashboard Design Techniques

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Introduction

- Excel tips and an introduction to dashboards
- Speaker introductions
- Survey attendees' Excel usage
- Conversational/ask questions during presentation

Discussion Outline

- Spreadsheet history
- Quick Excel tips
- Example dashboard
- Basic dashboard techniques
- Handout of Windows keyboard shortcuts

History of Electronic Spreadsheets

- Accountants used manual spreadsheets before widespread computer access, then mainframe accounting software offered some automation of spreadsheets
- 1978: 1st “Killer App” - Visi-calc for the Apple II
- 1982: Lotus 1-2-3 for the IBM PC
- 1982: Microsoft Multiplan for Unix systems
- 1985: Microsoft Excel 1.0 PC
- 1987: Microsoft Excel 2.0 for MS-DOS and Windows PCs
- Today: Multiple Excel versions in use; Bill Gates richest guy in the world



Excel Quick Tips

- Copy down
- Quick charting
- Duplicate and modify a chart
- Camera tool
- Datedif function (undocumented)

Dashboard Tools

- Snap to border
- Data Validation for drop-down inputs
- Conditional formatting of symbols
- Named ranges
- Averageif and Averageifs
- Vlookup (“True” and “False” options)
- Match
- Offset
- Array formulas



Questions during and after

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