



Video Transcript for Module 3: How to Create Automated Dashboards

Hi guys, so in this movie, we'll be looking at how to create automated reports using pivot table. So far we've been working with the sugar factory sales transactions and we've created a table to capture the data sets. We have also tried to understand the kind of information we had and in the last movie. We looked at types of fields within these datasets and we looked at some of the fact fields and the dimension field. So, the next thing for us at this stage is to create an automated report that just keeps updating itself whenever this transaction is updated or increased information.

To do that, the first step is to go into the table design tab and there a number of ways to do this, but this is one of the fastest ways. So, we go into the table design tab and from the table design tab we can see on the left-hand side the command button for summarising the data with a pivot table. So, this is where we want to go. So go to your table design tab and choose summarise with pivot table. Now, once you click on that command, it brings up a dialog box for the pivot table. And the first requirement is to specify the source of the information you want to use for the pivot table. In our case, because we are working with a defined table, which we have named in the previous movie sales DB. The system automatically picks the entire table, and you can see that the table range is called sales DB.

The next information for us to provide is where we want the pivot table reports to be placed and since in this case file, we already have a page for our report. So rather than choosing a new worksheet, we can simply click on the existing worksheet and choose location. So, for this, I'm going to choose the reports page now, and I want my table to start from row 12 so I can simply select B12, click on B12 and then choose, OK And that brings the pivot table wizard into this screen and very quickly, we can see on the right-hand side a pivot table field list has been created. So, this area here is called

Your field list. And within this area, you will see the different column headings for each of the columns within the dataset.

So starting with the date field to the value field, and then you notice at the bottom of the field lists that you have four quadrants here and it's important to understand how these guys work. So, in the previous movie, we talked about the types of fields we had, and we mentioned value or fact field and dimension field. So, the way your pivot table works is your fact fields go into the values quadrant whilst your dimension field go into the row's, columns and the filter quadrant. Right. So that's pretty much all you need to know regarding that.

So to create a simple report, all you need to do is you can move a fact field into the values and then move related dimension field into the column. So enough of theory. Let's look at some simple examples so very quickly.

We already know that our dataset is a sales transaction data, so we may have a report. So, let's do some sample reports that we can create. So, I'm just getting some of them down to sample reports. And then the first one could be our sales by period. For example, we could decide to also have sales by product, by product, and then we might also have Sales volume, which is now talking about quantity, so sales volume by product as well. You may also have other types of reports, but I think a good a good point to note is, most of your reports will simply be a combination of your fact field and a dimension field, or a series of a couple of dimensions. And if we look at the first reports we have here, sales is a fact field and the period which is a date column is a dimension field, so we combine those two.

The second one the sales is also a fact field and the product name or product category is also a dimensional field. And the third example is sales volume. Sales volume is also a fact field whilst product name or category would be a dimension field. So, let's let's create one example. So, our value field represents the sales so we can drag that into values box and immediately it creates a value in the cell. Well you might look at this and it looks strange a bit, this is a scientific number format. So, all we can do is we can click on this number and then choose number format to put it in the right format. So, let's use currency for this, can choose the currency we are working with Naira so I am just going to scroll down and choose



Naira. I don't want any decimal places so make that zero and simply choose. Okay, so now I have my sales value, but this sales value is giving me the total sales for the entire three-year period that we saw within the dataset.

So, to analyse this by period, I can drag my date field into the row section. Right. Remember, your dimensions can either go into the rows or into columns and the name pivot table comes from the idea that you can actually pivot from rows to columns so I can decide to pivot my years rather than it showing on the rows, I can pivot the years into the column, and then it shows a different view for the report and you can see that here we have Q1 and then we have the years on the column. I'm pretty comfortable with the first view, which was years on the row and with this idea. Once you have the years and the quarters and the dates, you can expand the field to see the different levels.

So at the second level, you have Q1, Q2 to Q3, Q4 and you can also expand Q1 to see different multi periods if you wanted to see the dates as well. You can also add the dates one more time, as the last level into the dataset, and then should be able to see through into that as well. OK. So having said that, let's create a simple example for the sales by product and for that, there are different ways to go about this.

The first is that you go back into your dataset and you try to run through the steps we took the last time. But a better way to do it is to actually copy this existing pivot table. We can go into the pivot table, select all by pressing Ctrl A and then copy that table and simply leave some space between the first pivot table and the second one you're about to add and then paste it Ctrl V to paste. Now, once you've done this, you can then edit the different fields within the fields box. So we don't want to show the years or date anymore so I'm going to just drag and drop outside. So, the way you remove fields from this area is you just click and drop outside the field list and that takes it out to click and drop outside.

Now, once that is done, our second report is sales by product so I can choose my product name and drop that in the row section. And now we can see that that table is the report is analysing the entire sales by product. A good practice, whenever you create reports, is to have a table title to a line or two lines above the corresponding table. So for this, we can call this sales by product for the first one we



created a few minutes ago, we can call that sales by period. Sales by period right. So, I think this works for now and in the next movie we'll look at other ideas in terms of automating your part and also creating some nice visuals. See you in the next movie.

