REGION 5 COMPREHENSIVE CENTER (R5 CC)

Data Dashboard User Guide

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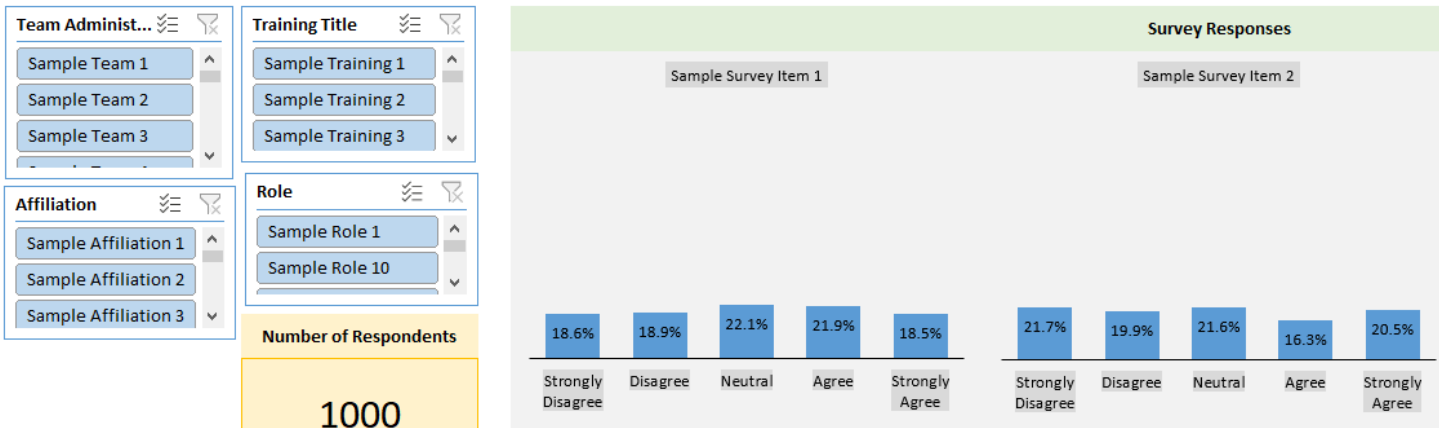
Contents

The data dashboard includes Microsoft Excel PivotTables and several formulas. This document provides guidance on how to use, maintain, and update the dashboard. Specifically, this document provides information about the interface and Excel file and detailed instructions about how to prepare the Input and Calculation sheets.

I. Excel file components

The Excel file contains four worksheets that each have a unique role and function. A brief description of each worksheet is provided below.

- **Input:** Dashboard users will enter survey data in this sheet. Sample categories of survey elements are included in row 1, and sample data have been entered in the cells. Dashboard users should update the categories based on their survey.[1] Detailed instructions for data preparation are provided in section II of this document.
- **Calculation:** This sheet contains PivotTables that aggregate the survey data. Currently, it has PivotTables for up to 15 survey questions. Detailed instructions on how to prepare and update this sheet are provided in section III.
- **Graphic Support:** Data used to create the graphics are outputted to this worksheet. This sheet contains many complex formulas extracting data from the Calculation sheet in particular formats. Data updates automatically once the Input and Calculation worksheets are prepared or updated. *We recommend that you protect this sheet with a strong password.*
- **Dashboard:** This sheet contains the data dashboard. Typically, it shows analysis and insights backed by the data in a single-page view. The data dashboard contains the following two main areas:
  - **Filters:** Buttons that dashboard users can click to manipulate the data and generate the results graphically. The dashboard includes four filters based on the sample categories described in the Input section—the team that administered the learning experience, learning experience title, affiliation of the learning experience participant, and role of the participant.
  - **Graphics:** Figures generated based on the filter(s) selected (and data/formulas).



The remaining sections of this user guide provide instructions for maintaining and updating your dashboard. Instructions begin with the input data and are followed by the Calculation worksheet.

[1] Columns B-F contain information that could be used as filters, and you will enter survey responses in columns G-U. You can delete one or more of columns B-F if you do not need that many categories. If you need more categories, you can add columns. When you add columns, R5CC recommends inserting them before the survey response columns.

II. Input data

Updating the dashboard starts with preparing the input data. This section describes the steps to prepare such an input file.

It is very important to review and clean your data. To clean the data:

1. Review the content of data, making sure that you have all necessary variables (e.g., survey items, response options). Are the columns listed in the same order? Make necessary changes so that the data are structured consistently across data collection cycles.

   a. Dashboard users should exclude open-ended items (i.e., survey items with a written/text response) from the Input data sheet, as responses to open-ended items will not be included in the dashboard. Any other data that are not included in the dashboard should be removed.

   b. Make data consistent. For example, the following screenshot shows raw data for two sample survey questions. The left column has data as words (e.g., Strongly agree), while the right column shows data as numbers plus words (e.g., 5-Outstanding). R5CC suggests using only words, and not a combination of words and numbers, as response categories.

3. To what extent do you agre	4. Overall, how v
g Strongly agree	5-Outstanding
Agree	4-Above Average
Agree	4-Above Average
gı Neither agree nor disagree	3-Average

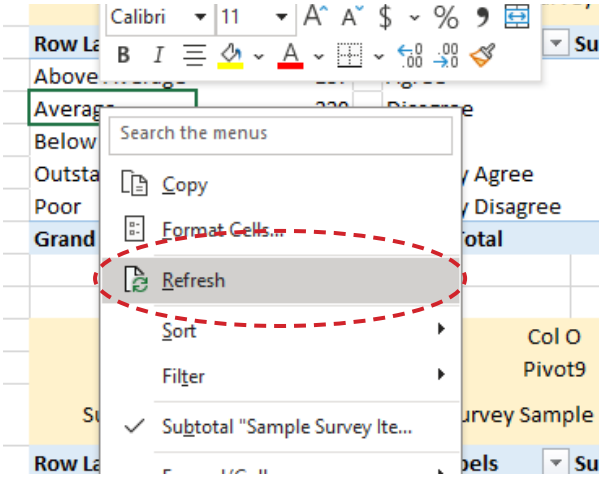
2. Once you clean the data and confirm that all the columns in the new dataset are in the same order as the columns in the input sheet of the dashboard file, select all contents from the Excel file containing new data, and then copy the data from that sheet and paste it below the existing data in the Input sheet of the dashboard file.
3. To aggregate the data, Excel needs to have a variable that can be used to count the data (a record). Enter "1" as the value for all rows in this column.

	A	B	C	D	E
	Record	Team Administering Training	Training Title	Survey Type	Affiliation
	1	Sample Team 5	Sample Training 1	Sample Survey Type 2	Sample Affiliation 5
	1	Sample Team 3	Sample Training 1	Sample Survey Type 2	Sample Affiliation 3
	1	Sample Team 4	Sample Training 1	Sample Survey Type 2	Sample Affiliation 4
	1	Sample Team 2	Sample Training 1	Sample Survey Type 2	Sample Affiliation 2
	1	Sample Team 1	Sample Training 1	Sample Survey Type 2	Sample Affiliation 1
	1	Sample Team 1	Sample Training 1	Sample Survey Type 1	Sample Affiliation 1
	1	Sample Team 3	Sample Training 1	Sample Survey Type 1	Sample Affiliation 3
	1	Sample Team 5	Sample Training 1	Sample Survey Type 1	Sample Affiliation 5
)	1	Sample Team 2	Sample Training 1	Sample Survey Type 1	Sample Affiliation 2
l	1	Sample Team 3	Sample Training 1	Sample Survey Type 1	Sample Affiliation 3
2	1	Sample Team 5	Sample Training 1	Sample Survey Type 1	Sample Affiliation 5

The input file is now updated!

III. Calculation sheet

As previously stated, the Calculation sheet contains formulas for PivotTables. The PivotTable is an Excel tool used to summarize raw data in a table format. PivotTables must be updated when new data are added to the Input sheet. To update the PivotTables, right-click on any of the PivotTables in the Calculation sheet and click Refresh. Make sure the grand total is updated after the data are refreshed. Since all PivotTables are connected, refreshing one PivotTable should update all PivotTables.



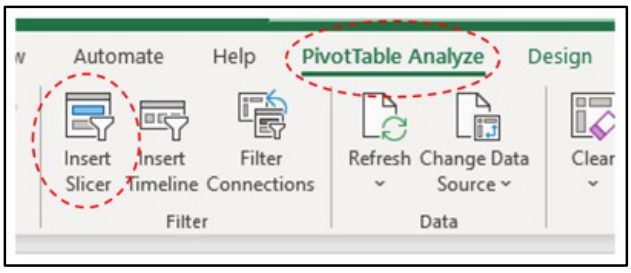
IV. Other important things to know

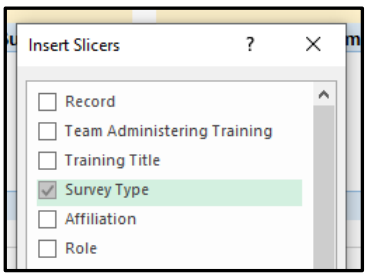
This last section includes a few important tips to keep your dashboard functional.

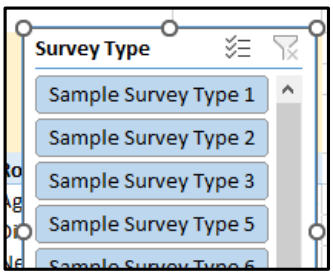
How to add another filter

As you continue to maintain and update your dashboard, you may want to add one or more slicers (filters). The following steps outline how to add slicers.

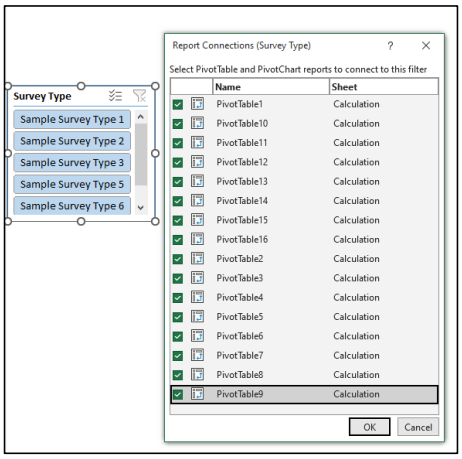
1. Click anywhere in any PivotTable in the Data Dashboard sheet.
2. Click the PivotTable Analyze or Analyze tab and then click Insert Slicer. The Insert Slicers dialog box should appear. Click the category (or categories) that you would like to add as a slicer (or slicers) and click OK. The selected slicer should appear. In the following example, Survey Type is selected as a slicer.







3. Cut the slicer (right-click your mouse on the slicer and select Cut) from the Calculation sheet and paste it to the desired location on the Dashboard sheet (right-click your mouse and select Paste). Click the Slicer or Options tab and use the formatting tools to organize the slicer as preferred.
4. Connect the slicer to the PivotTables. Click the Option tab, click Report Connections, and check the box for PivotTable2 for the total number of slicers (there are currently 16). Click OK.



The newly added slicer should now work with the graphics on the dashboard.

Protecting the Input, Calculation, and Graphic Support sheets

We strongly recommend that you protect the dashboard and limit the number of individuals who can access the Input, Calculation, and Graphic Support sheets by following these recommendations:

Protect the sheets with a strong password: A password prevents unauthorized individuals from changing the content or removing any of the worksheets. You should use a strong password that combines uppercase and lowercase letters, numbers, and symbols. The password should be 8 or more characters in length; a password that uses 14 or more characters is ideal. The small group of individuals with access to the Input, Calculation, and Graphic Support sheets will use the same password. They should remember the password or store it in a secure location. **It is important to note that the password cannot be retrieved if it is lost or forgotten, so it must be protected.** Follow these steps to create a password for each sheet in the Excel file.

1. Select the Input sheet. Click the Review tab, and then click Protect Sheet.
2. In the "Allow all users of this worksheet to" list, select the elements that you want users to be able to change. Be sure that you leave unchecked any elements you do not want altered.
3. Repeat steps 1 and 2 for the Calculation and Graphic Support sheets.

Hide the Input, Calculation, and Graphic Support sheets: You can hide any worksheet to remove it from view (you should first protect the sheet with a strong password, then hide it). The data in hidden worksheets are not visible but can still be referenced from other worksheets, and you can easily unhide hidden worksheets as needed.

1. Right-click the sheet tab you want to hide—or, if you want to unhide a sheet, right-click any visible sheet.
2. On the menu that appears, do one of the following:
   - To hide the sheet, select Hide.
   - To unhide hidden sheets, select them in the Unhide dialog that appears, and then select OK.