INFORMATION DESIGN

IN Microsoft EXCEL



Rahim Zulfiqar Ali

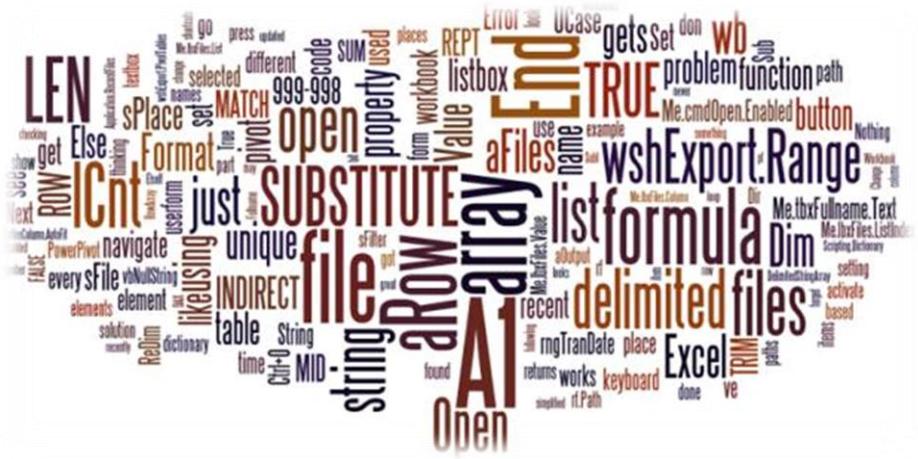
SPREADSHEET Consultancy INC.
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PakAccountants.com

LIVE Class (Webinar) WIZIQ
Sunday, December 29th 2013

ABOUT **TRAINER**





Rahim Zulfiqar Ali

Trainer by Passion
Banker by Profession
Business Graduate by Choice
Human Being by Blessings



AGENDA

INFORMATION DESIGN:

- Understanding of Information Design
- CRAP Rule
- Interactive session on Design Tips
- Examples

INFORMATION DESIGN

Information is not knowledge, it is **power!**



Why to Design Information ?

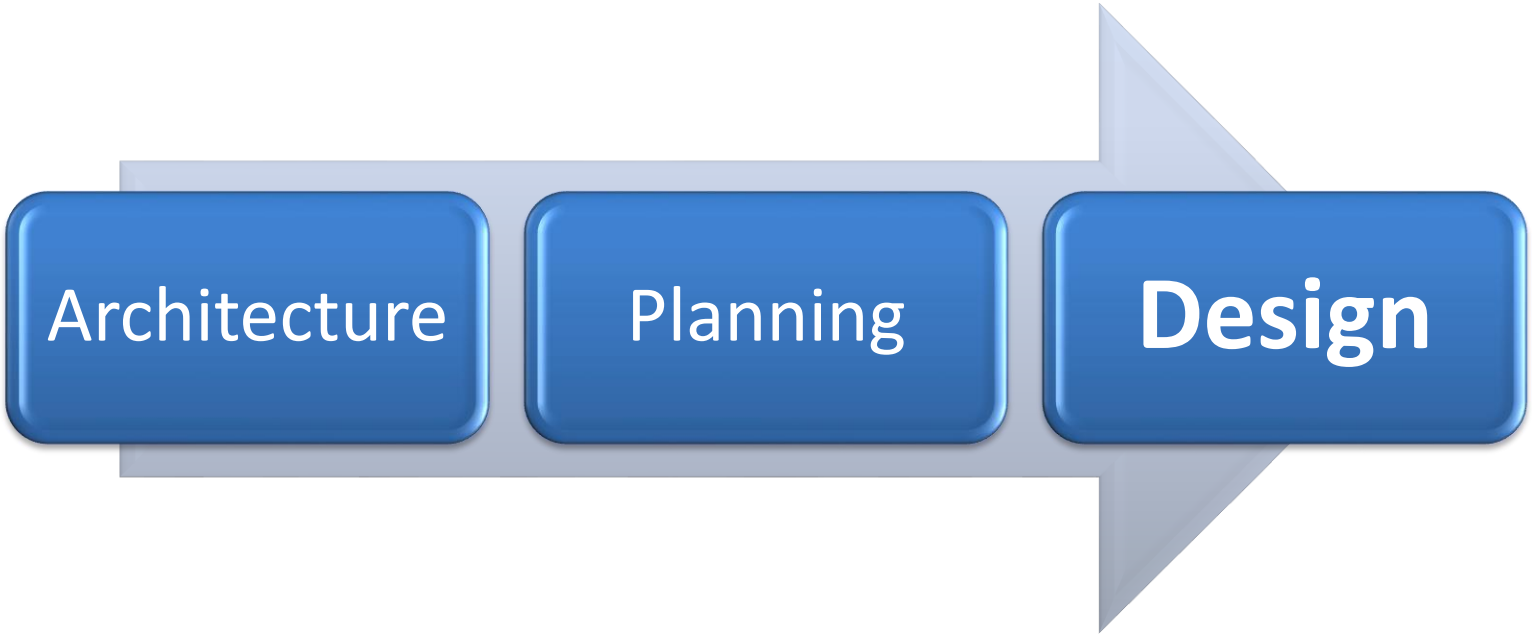
- To **inform**
- To **communicate**
- To bring the **message**
- To have proper **Decision Making**

Ways to Design Information in Excel

- **Dashboard Reporting**
- **Info Graphics**
- **Charts**
- **Financial Modeling**

INFORMATION DESIGN

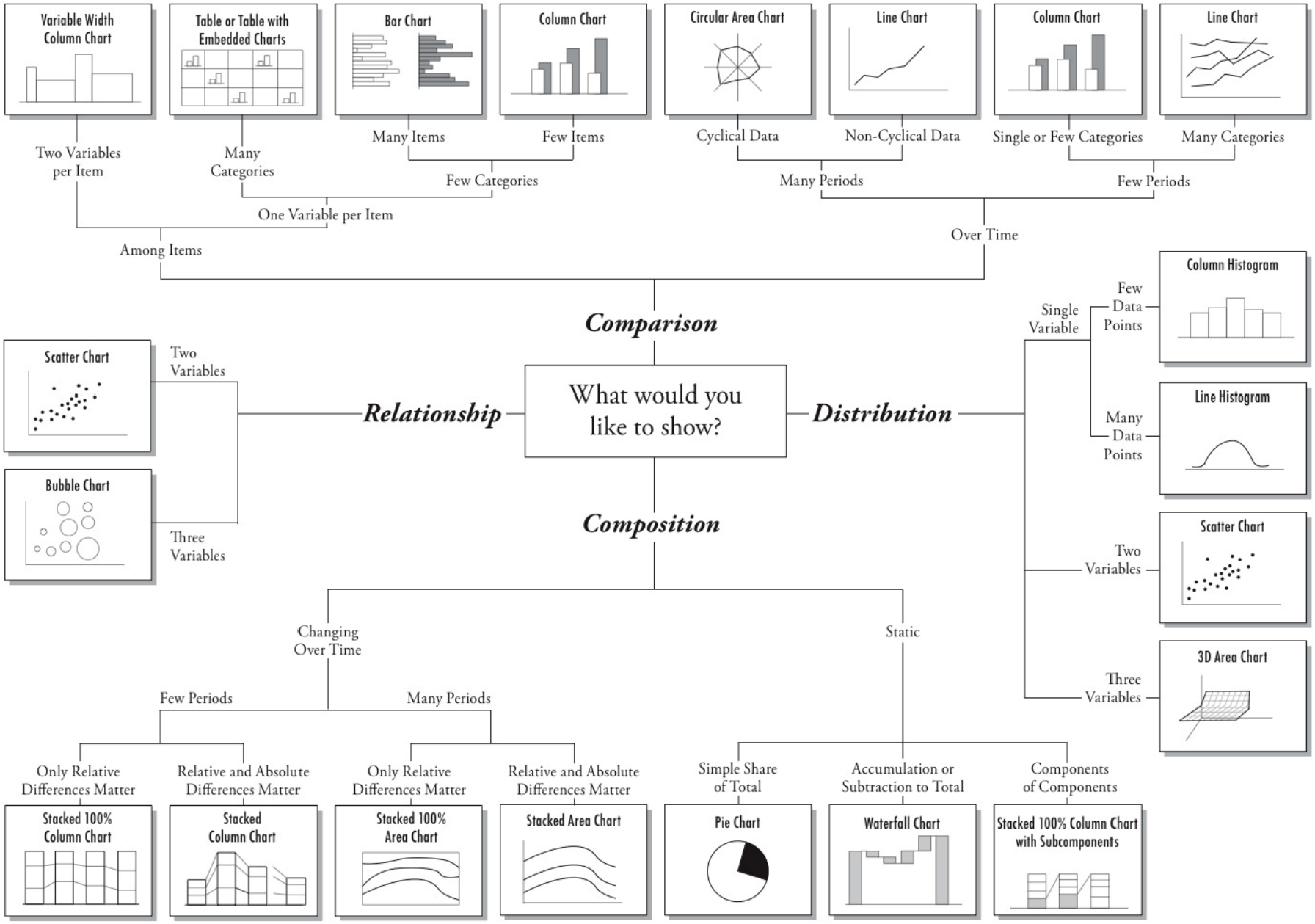
Information design is the detailed planning of specific information that is to be provided to a particular audience to meet specific objectives.



Information Design Tools in Excel

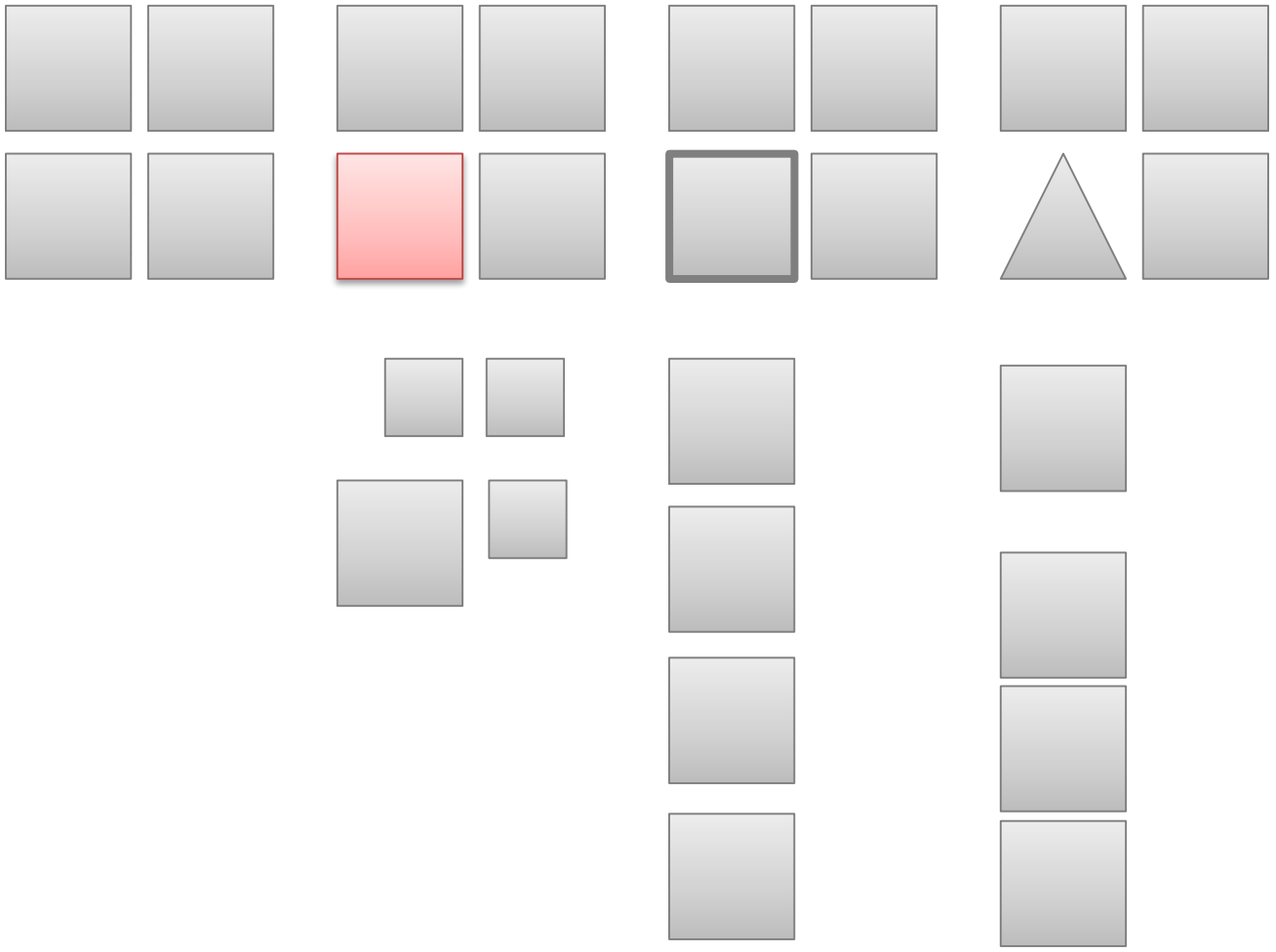
- Charts
- Shapes
- Conditional Formatting
- Pivot Tables
- Data Tables
- Smart Art
- Slicers & Timelines

Chart Suggestions—A Thought-Starter



CRAP Rule

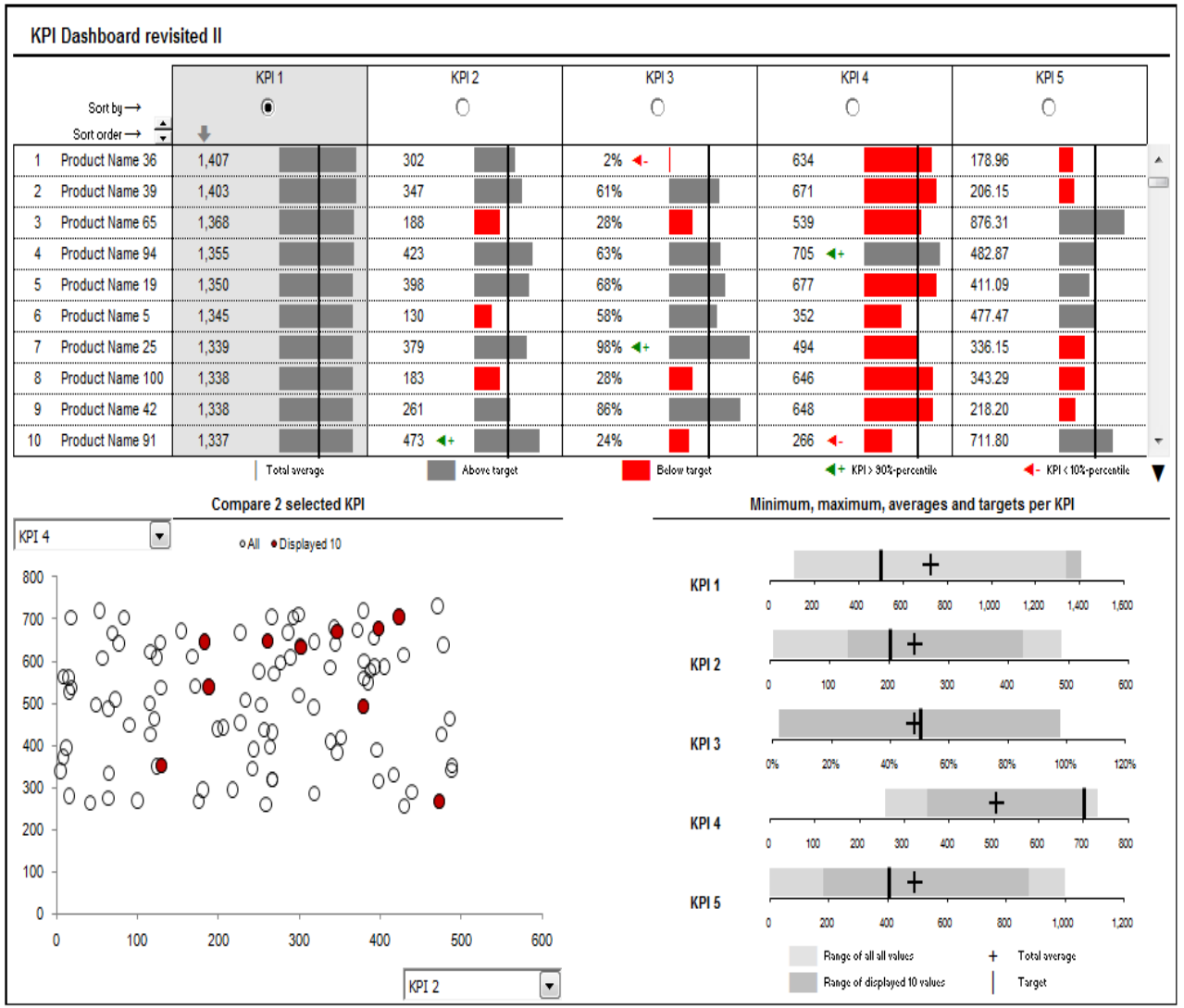
Contrast



Contrast by

- Color
- Thickness
- Shape
- Size
- Position
- Distance

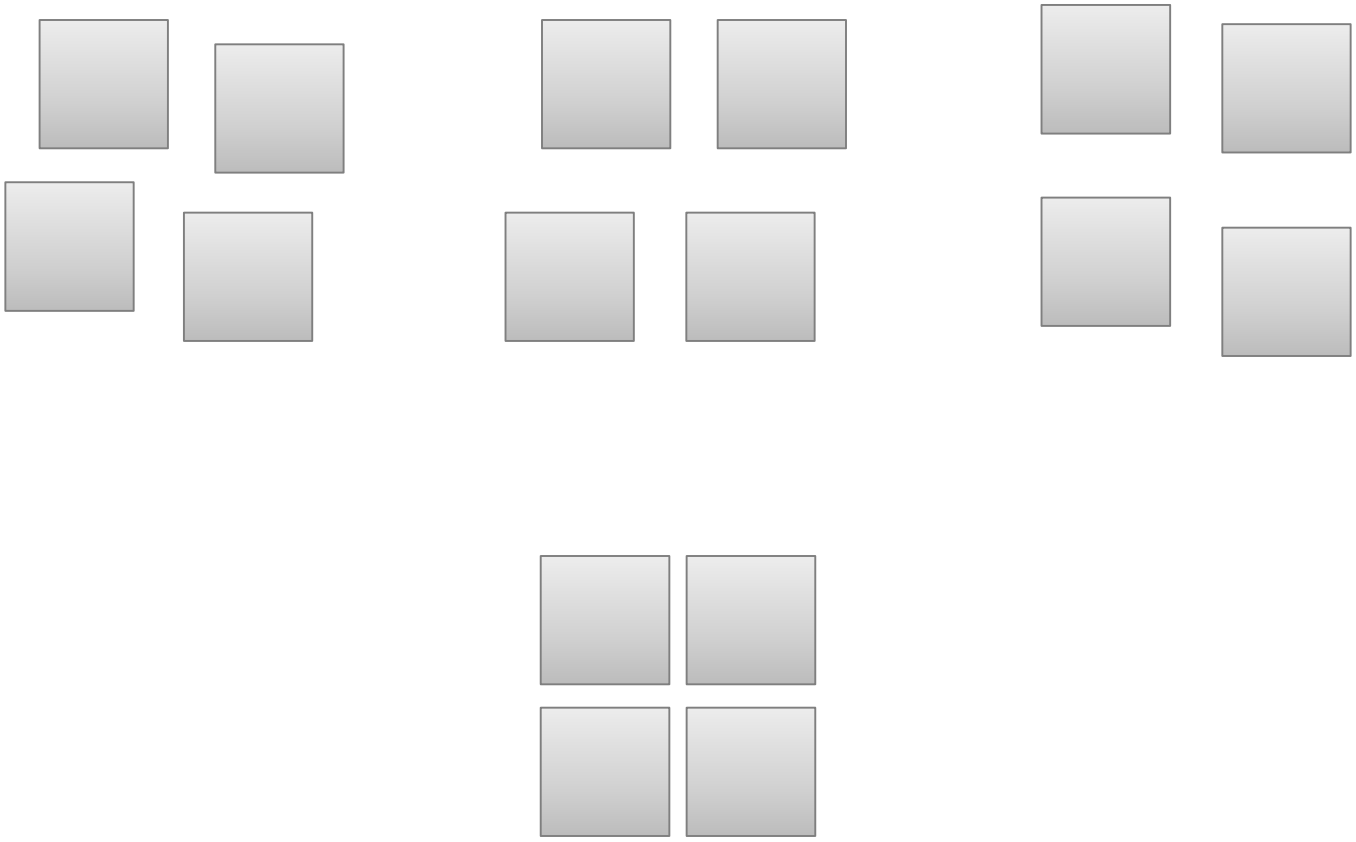
Repetition


KPI Dashboard revisited II
Sort by
Sort order
KPI 1
KPI 2
KPI 3
KPI 4
KPI 5
1 Product Name 36 1,407 302 2% 634 178.96
2 Product Name 39 1,403 347 61% 671 206.15
3 Product Name 65 1,368 188 28% 539 876.31
4 Product Name 94 1,355 423 63% 705 482.87
5 Product Name 19 1,350 398 68% 677 411.09
6 Product Name 5 1,345 130 58% 352 477.47
7 Product Name 25 1,339 379 98% 494 336.15
8 Product Name 100 1,338 183 28% 646 343.29
9 Product Name 42 1,338 261 86% 648 218.20
10 Product Name 91 1,337 473 24% 266 711.80
Total average
Above target
Below target
KPI > 90%-percentile
KPI < 10%-percentile
Compare 2 selected KPI
KPI 4
All
Displayed 10
KPI 2
Minimum, maximum, averages and targets per KPI
KPI 1
KPI 2
KPI 3
KPI 4
KPI 5
Range of all all values
Range of displayed 10 values
Total average
Target

Repeat

- Color
- Visual Elements
- Fonts
- Ideas

Alignment



Align

- Every edge of every shape with other shapes
- ALT Key
- Alignment tools

Proximity

Comments	Posts	Commenters	Words said...,
10,007	1,214	2507 people	485,215

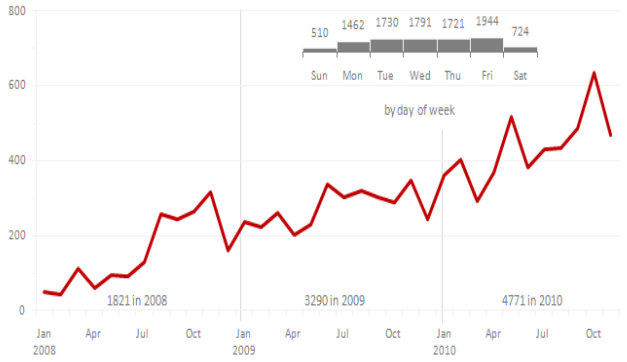
Comments	Trackbacks	@Replies
8,766	1,241	1,903

>0 comments	>50	Max
740	31	313

>5 comments	Top 20 Cmtrs	%
231 people	2782 cmts	28%

Median	Maximum	By
33 words	900	Stef@n

Comments Over Time (Last 3 years)



What do they say?



Last 3 years

	Days with Zero Cmts	Most Active Day
2008	66	1 August
2009	15	4 August
2010	5	29 October

Words Said	Min	Median	Max
2008	1	33	606
2009	1	35	700
2010	1	32	900

Top 10 ...,

Posts with Comments	
Poll on Last Visible Cell	313
Excel Conditional Formatting	192
Paste Special Tricks	107
Dynamic Excel Charts	101
VLOOKUP Tutorial	96
Excel Downloads	94
Excel Mouse Tricks	90
Chandoo.org Startup Story	89
Excel 2010 Review	88
KPI Dashboards	87

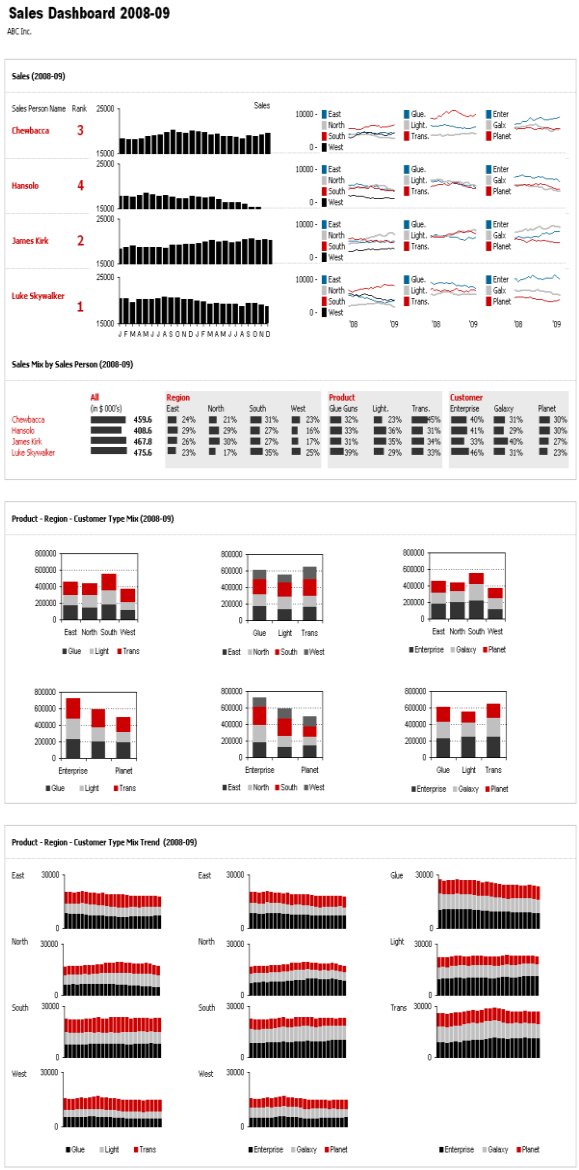
Commenters	
Chandoo	1396
Jon Peltier	228
Hui...	186
Jeff Weir	148
Robert	138
Jp	62
Rick Rothstein (Mvp - Excel)	60
Martin	58
Daniel Ferry	54
Dan L	53

Comments by Length	Words
Stef@N on 22Feb10	900
Gert-Jan on 4Apr10	740
Daniel Ferry on 18Jun10	704
Chandoo on 21Jun09	700
Jeff Weir on 9Jul09	641
Jeff Weir on 13May09	626
Abdul on 8Jul08	606
Chandoo on 17May09	572
Vivek on 30Aug08	561
Jeff Weir on 17Jul09	530

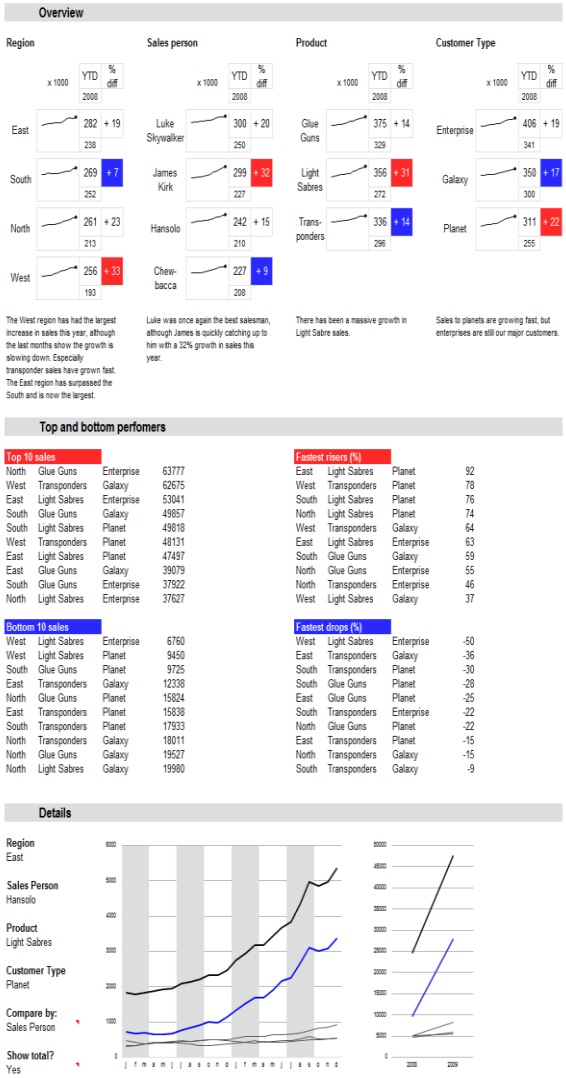
Proximity

- Related Ideas
- Messages
- Data

CRAP at Work – Example 1



CRAP at Work – Example 2



Overview

Region

	x 1000	YTD 2008	% diff
East		282	+ 19
		238	
South		269	+ 7
		252	
North		261	+ 23
		213	
West		256	+ 33
		193	

The West region has had the largest increase in sales this year, although the last months show the growth is slowing down. Especially transponder sales have grown fast. The East region has surpassed the South and is now the largest.

Sales person

	x 1000	YTD 2008	% diff
Luke Skywalker		300	+ 20
		250	
James Kirk		299	+ 32
		227	
Hansolo		242	+ 15
		210	
Chew-bacca		227	+ 9
		208	

Luke was once again the best salesman, although James is quickly catching up to him with a 32% growth in sales this year.

Product

	x 1000	YTD 2008	% diff
Glue Guns		375	+ 14
		329	
Light Sabres		356	+ 31
		272	
Trans-ponders		336	+ 14
		296	

There has been a massive growth in Light Sabre sales.

Customer Type

	x 1000	YTD 2008	% diff
Enterprise		406	+ 19
		341	
Galaxy		350	+ 17
		300	
Planet		311	+ 22
		255	

Sales to planets are growing fast, but enterprises are still our major customers.

Top and bottom perfomers

Top 10 sales

North	Glue Guns	Enterprise	63777
West	Transponders	Galaxy	62675
East	Light Sabres	Enterprise	53041
South	Glue Guns	Galaxy	49857
South	Light Sabres	Planet	49818
West	Transponders	Planet	48131
East	Light Sabres	Planet	47497
East	Glue Guns	Galaxy	39079
South	Glue Guns	Enterprise	37922
North	Light Sabres	Enterprise	37627

Fastest risers (%)

East	Light Sabres	Planet	92
West	Transponders	Planet	78
South	Light Sabres	Planet	76
North	Light Sabres	Planet	74
West	Transponders	Galaxy	64
East	Light Sabres	Enterprise	63
South	Glue Guns	Galaxy	59
North	Glue Guns	Enterprise	55
North	Transponders	Enterprise	46
West	Light Sabres	Galaxy	37

Bottom 10 sales

West	Light Sabres	Enterprise	6760
West	Light Sabres	Planet	9450
South	Glue Guns	Planet	9725
East	Transponders	Galaxy	12338
North	Glue Guns	Planet	15824
East	Transponders	Planet	15838
South	Transponders	Planet	17933
North	Transponders	Galaxy	18011
North	Glue Guns	Galaxy	19527
North	Light Sabres	Galaxy	19980

Fastest drops (%)

West	Light Sabres	Enterprise	-50
East	Transponders	Galaxy	-36
South	Transponders	Planet	-30
South	Glue Guns	Planet	-28
East	Glue Guns	Planet	-25
South	Transponders	Enterprise	-22
North	Glue Guns	Planet	-22
East	Transponders	Planet	-15
North	Transponders	Galaxy	-15
South	Transponders	Galaxy	-9

Details

Region
East

Sales Person
Hansolo

Product
Light Sabres

Customer Type
Planet

Compare by:
Sales Person

Show total?
Yes

CRAP at Work – Example 3

