



Analytics Canvas Tutorial:

How to create Excel dashboard templates



Overview

Welcome to Analytics Canvas's tutorial. This is one of a number of detailed tutorials in which we explain how each feature within Analytics Canvas works, with additional context to help you understand it better, and to use it to best suit your own needs.

Creating Excel dashboard templates

Analytics Canvas has powerful integration with Excel that allows the creating of template dashboards and automatic generation of Excel reports.

To generate an Excel workbook template:

Step 1. Drag and drop the Excel Workbook Export Block from the Block Library or right-click on the Main Canvas and select “Add Export Block” and then “Excel Workbook Export”.

Step 2. Connect the Excel Workbook Export Block to a block that contains the data that you would like to export.

Step 3. Click on the Excel Workbook Export Block to access its settings, and press on the “New Workbook” button.

Step 4. Select the “Start with a template” option and click the “New” button. Provide a name and a destination folder for the workbook that you will generate from this template. Click “OK”. *Analytics Canvas* will create an empty workbook.

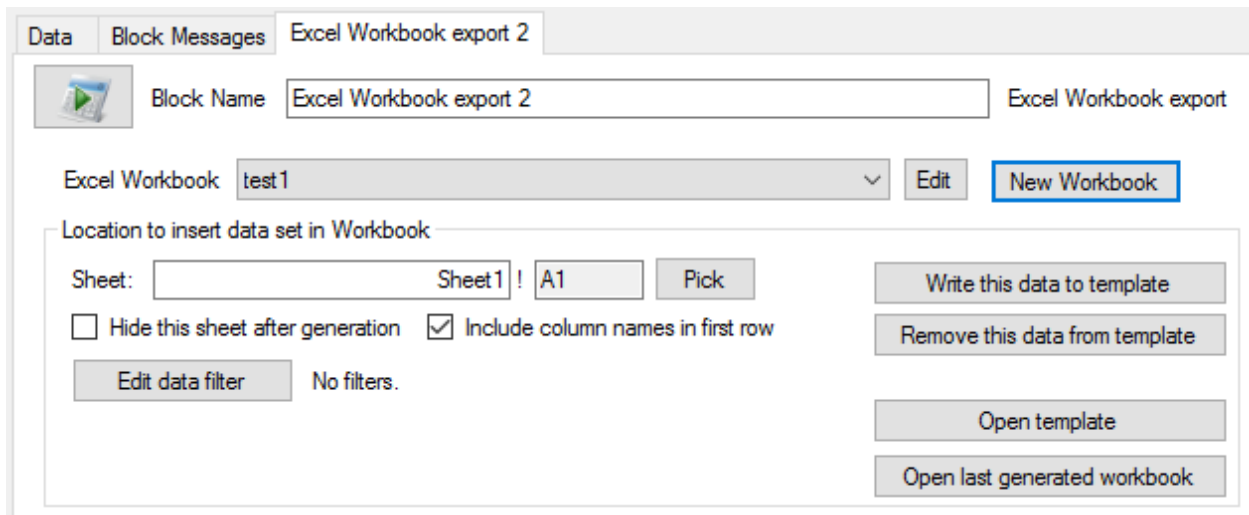


Figure 1 Excel Workbook Export template settings

You can write the data to, and remove it from, your template file using the “Write this data to template” and “Remove this data from template” buttons. You can open your template file to preview and add formatting and graphs, by using the “Open template” button.



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Step 5. Once you are ready, remove the data from the template and press the “Run with outputs” button, to generate an Excel workbook from your new template.

Conclusion

Thank you for reading this tutorial. We invite you to continue with the tutorial training to learn more about using Analytics Canvas.