

# FORVIS™

Business Technology Solutions

## Seeing Is Believing With Charts in Solver!

April 20, 2023

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# Meet the Presenter



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# Objectives

- Explain how to create Excel charts in Solver reports
- Identify types of charts that work well for Solver reports
- Describe the differences between Solver report-based dashboards & Power BI dashboards

# Agenda

9:00 a.m. ● An Excel Chart Primer

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9:10 a.m. ● Creating Charts Using Solver Data

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9:45 a.m. ● Now, About Power BI

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# An Excel Chart Primer

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# Creating a Chart in Excel



Create the data



Select Insert



Select the type of chart

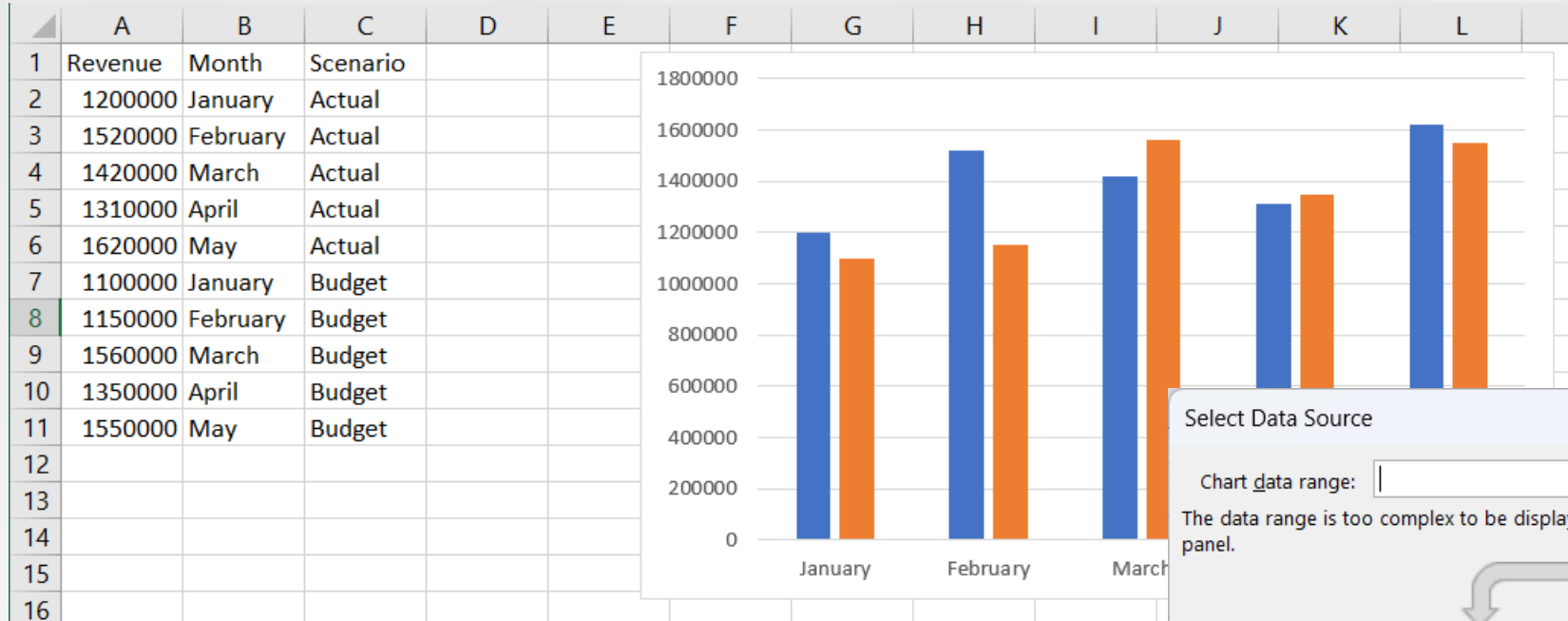


Add your data elements



Add chart elements

# Creating a Chart in Excel



Consider pivoting the above table so that Actual & Budget appear as rows & the months appear as columns

Select Data Source

Chart data range:

The data range is too complex to be displayed. If a new range is selected, it will replace all of the series in the Series panel.

Legend Entries (Series)

- Actual
- Budget

Horizontal (Category) Axis Labels

- January
- February
- March
- April
- May



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# Show Me!

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# Creating Charts Using Solver Data

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# Things to Consider



Data Warehouse & Hybrid Connector data



Expanding rows & columns



Portal limitations



Data on other Sheets



Hide rows you don't need

# Creating a Chart

Create a  
tabular  
report

Test the  
report

Select the  
cells for  
inclusion

Use the  
Insert  
Chart  
option

# Creating a Chart

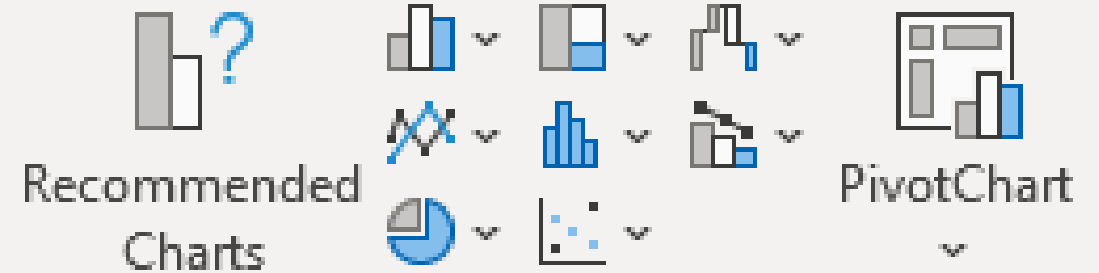
- Add the items to the chart
- Pay attention to X & Y items
- Allow for expanding rows & columns

|   | A      | B                | C |
|---|--------|------------------|---|
| 1 |        |                  |   |
| 2 |        | [FYMonth Label]  |   |
| 3 | Actual | #VALUE!          |   |
| 4 | Budget | [Monthly Amount] |   |
| 5 |        |                  |   |

|   | A      | B         | C         | D         | E         | F         | G         |
|---|--------|-----------|-----------|-----------|-----------|-----------|-----------|
| 1 |        |           |           |           |           |           |           |
| 2 |        | January   | February  | March     | April     | May       | June      |
| 3 | Actual | 1,412,700 | 1,290,538 | 1,317,295 | 1,276,677 | 1,169,111 | 1,710,950 |
| 4 | Budget | 1,825,095 | 1,393,787 | 1,345,874 | 1,207,410 | 1,137,248 | 1,618,544 |
| 5 |        |           |           |           |           |           |           |

# Creating a Chart

- Select the cells to be included
- Select the Insert menu
- Select the chart



# Creating a Chart

- Set up the legend
- Select the categories
- Arrange the chart on the page

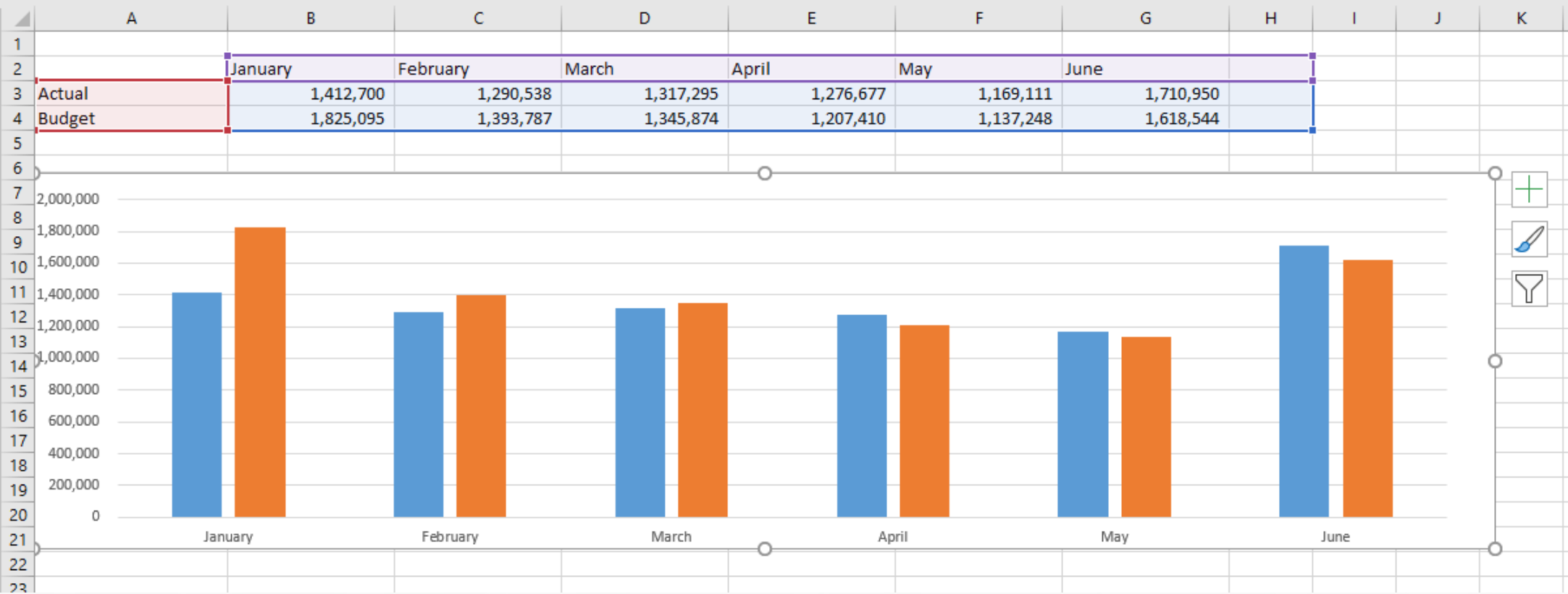
The screenshot shows an Excel spreadsheet with columns A through G and rows 1 through 23. A dashed green box highlights the data range from cell B2 to B4. Cell B2 contains the text "[FYMonth Label]", cell B3 contains "#VALUE!", and cell B4 contains "[Monthly Amount]".

Overlaid on the spreadsheet is the "Select Data Source" dialog box. The "Chart data range" field contains the formula "=Sheet1!\$A\$2:\$C\$4". Below this field is a "Switch Row/Column" button. The dialog has two main sections:

- Legend Entries (Series):** This section contains "Add", "Edit", and "Remove" buttons. Below the buttons is a list of series: "Actual" and "Budget", both with checked checkboxes.
- Horizontal (Category) Axis Labels:** This section contains an "Edit" button and a list of labels: "[FYMonth Label]" with a checked checkbox, and an empty checkbox below it.

At the bottom of the dialog box, there is a checkbox for "Hidden and Empty Cells" and "OK" and "Cancel" buttons.

# Creating a Chart





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# Show Me!

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The background features a complex, abstract design. It includes a grid of thin, parallel lines in shades of blue and yellow, creating a sense of depth and movement. A prominent feature is a series of vertical bars of varying heights, resembling a bar chart, rendered in a light blue color. The overall aesthetic is modern and technological.

# Now, About Power BI

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# Excel Charts

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Can be published to  
non-Solver users

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Uses existing tools  
& knowledge

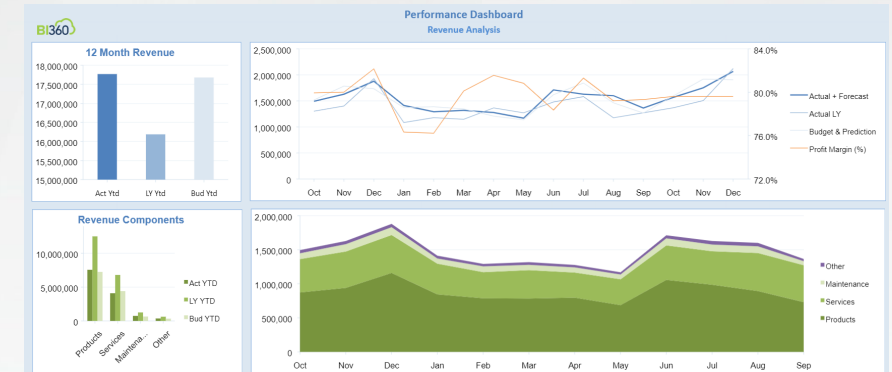
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Utilizes parameters  
to change results

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Can be used  
across devices

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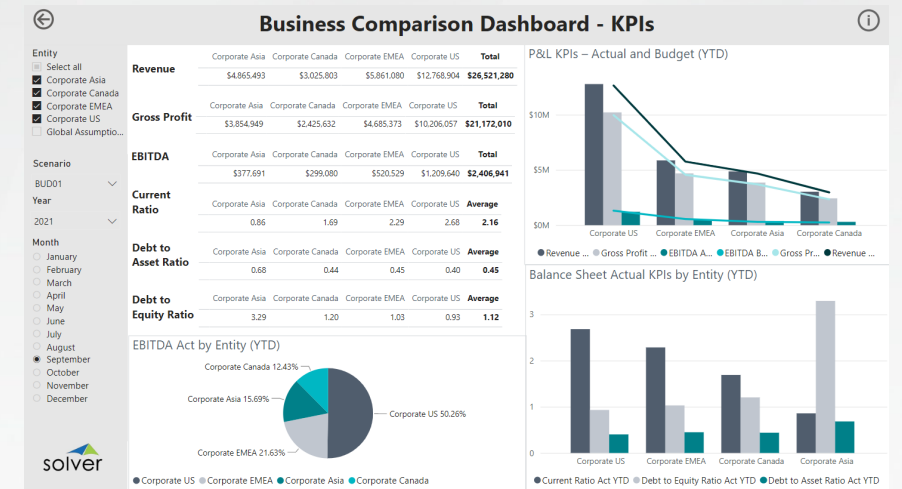
# Power BI Charts

Requires a license  
for online access

Interactive charts

More options

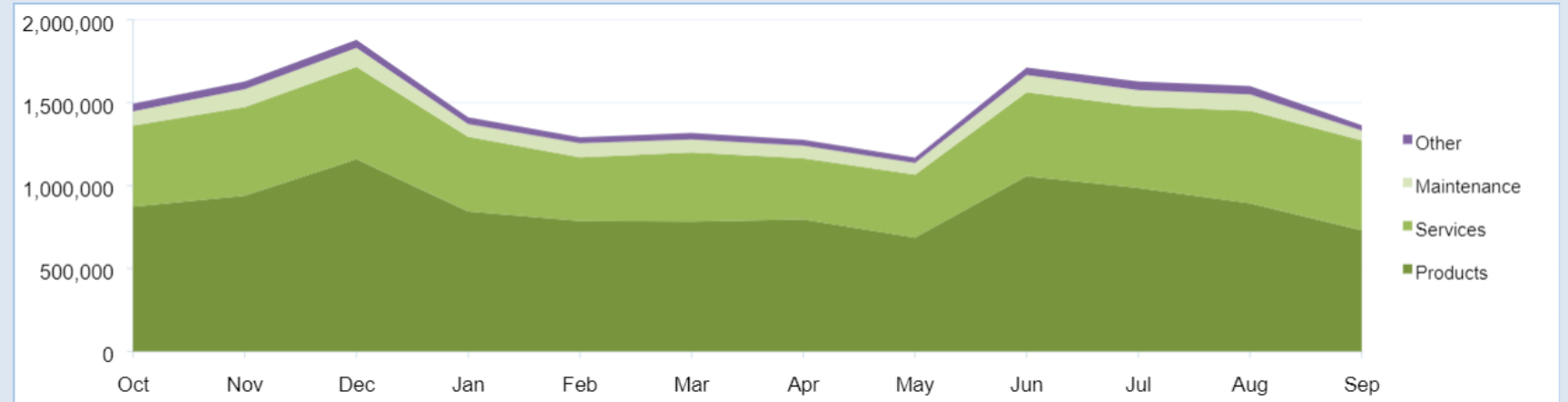
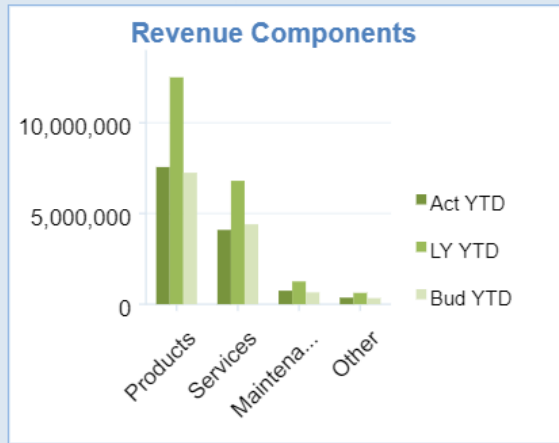
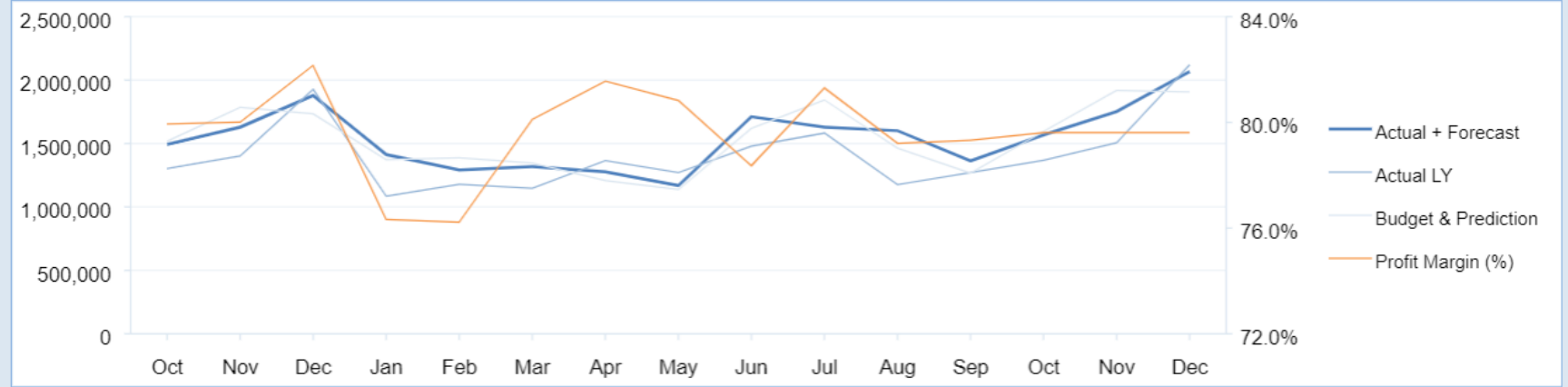
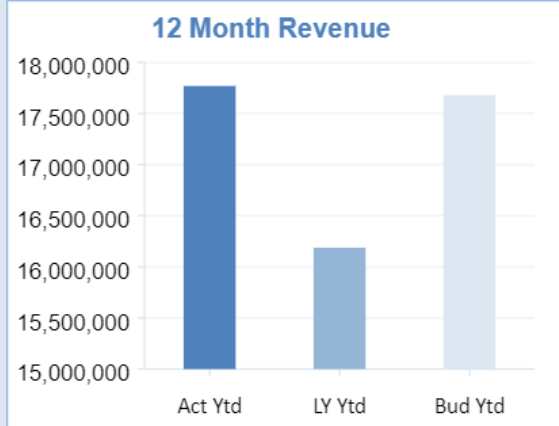
Multiple devices



# Excel/Solver

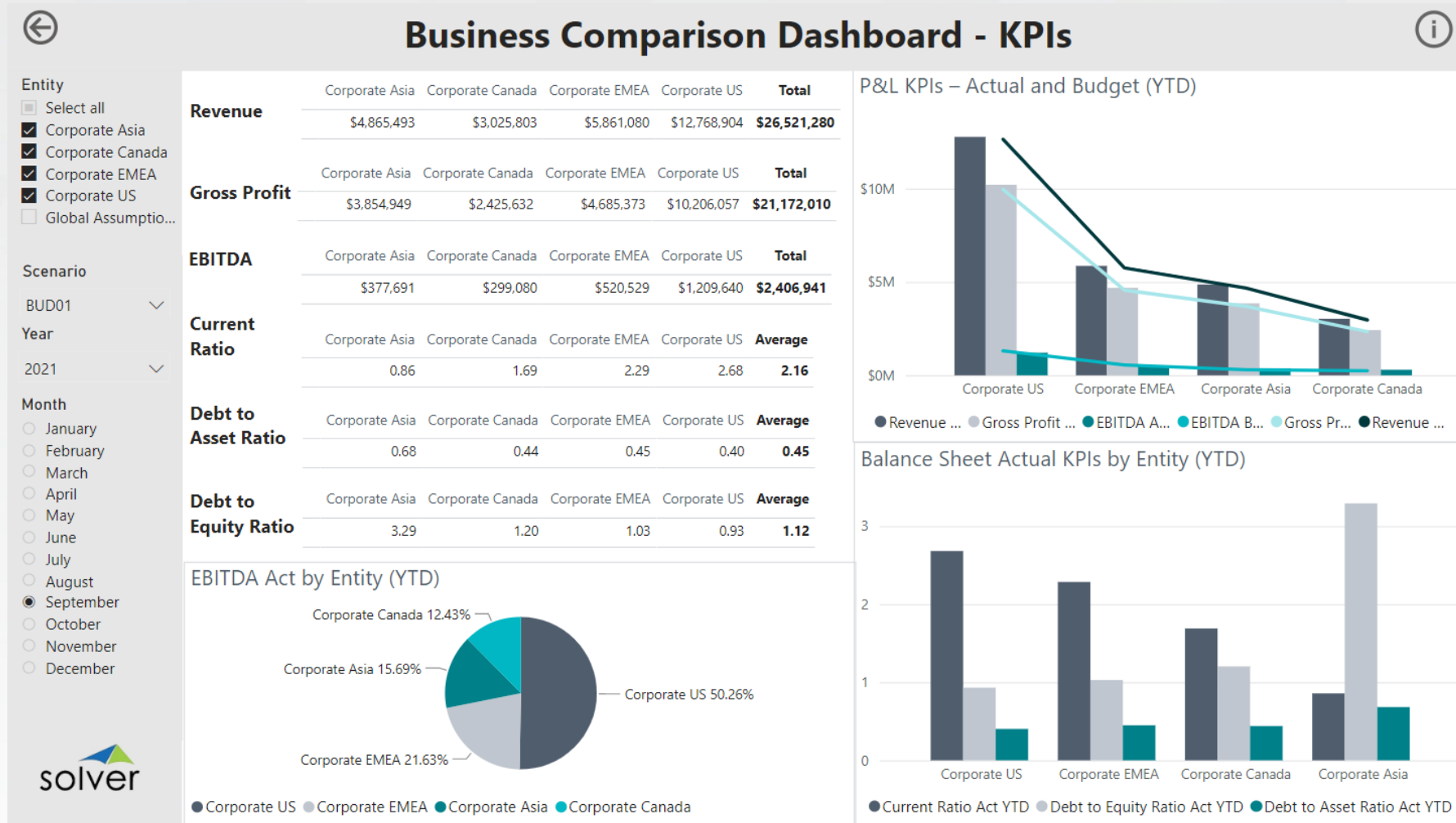


## Performance Dashboard Revenue Analysis



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# Power BI



# Resources

- Solver Academy (<https://learn.solvertraining.com/>)
- Microsoft Support (<https://support.microsoft.com/en-us/office/create-a-chart-from-start-to-finish-0baf399e-dd61-4e18-8a73-b3fd5d5680c2>)
- Solver Support Site (<https://support.solverglobal.com/hc/en-us>)

# Q&A



Use the Q&A tool to submit any questions you may have.

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