

Mann Judd Excel Night: Forms & Excel

Below, are the steps we took to generate an online custom form that users can input data to. The data was stored in an Excel file which we then connected Power BI to so we could perform analysis.

This is useful for collecting data in a structured way e.g. client/employee surveys, leave forms, expense claims, application forms, phone call logs, new client/customer/patient forms, job completion checklists, volunteer availability, exit interviews, legal forms, online quizzes, travel declaration forms, vaccination forms, lunch orders, event registrations & feedback forms ...

We didn't cover this on the night, but the submission of a form can also be used to trigger [PowerAutomate](#) flows to do things like automatically email some PDF instructions, generate a calendar invite with a series of automated email reminders, post a message in Teams, or even use AI to analyse the sentiment expressed in the text of the form and generate a positive or negative score.

- SharePoint Folder > New > Forms for Excel
- Questions:
 - What night of the week would you prefer to have these Excel nights on? (choice)
 - How much do you love Mann Judd? (star rating)
 - What do you love best about Excel? (long answer)
- Theme: cosmic exploration
- Settings:
 - Anyone can respond
- Collect responses: QR code

From SharePoint:

- Open Excel file to see responses
- Editing > Open in Desktop App
- File > Info > Copy Path

Power BI

- Get data > Other > Web
- Paste URL & remove "?web=1"
- Select Table1 > Transform Data
- Add a column to calculate completion time (duration subtraction)
- Remove unnecessary columns

Analyse

- Most popular night of the week (chart), average rating (card)
- Average completion time (card)
- Correlations between rating & time taken
- Word cloud (custom visual) with Excel terms

Publish to web & setup automated refresh

- Power BI > dataset for report > Refresh > Scheduled Refresh

If you'd like to find out more, just contact Jeff Robson on 0412 581 486 or jrobson@accessanalytic.com.au