

Excel 3: Dynamic Dashboards

Data Analysis and Communications with Excel

Summary

This course provides practical tips and hands-on application to a variety of data management, charting and formatting skills in an Excel environment.

Participants will build a series of charts in order to create a dashboard. A variety of chart types will be explored. Automating titles, creating informative labels and text boxes and learning best practices for dashboard design and construction will be covered.



Prerequisites

The course builds on the Excel tools from “Excel 1: Core Data Analysis” and “Excel 2: Advanced Data Analysis”, including lookup functions, tables and pivot tables. Participants should be comfortable with these skills prior to taking this course.



Timing

This course requires 1 day.

Learning Topics

1. Communicate with the Optimal Chart Type

- ✓ Determine the optimal chart for presenting types of data
- ✓ Learn design ideas for simple and elegant charts: colour, position, size and shape
- ✓ Learn complex chart structures such as bubble charts, and multiple chart styles in a single chart
- ✓ Use slicers and other tools to rapidly create interactive and flexible analyses

2. Data Organization and Manipulation Best Practices

- ✓ Organize and manage data effectively for chart and table creation
- ✓ Employ sophisticated automation techniques to manage data
- ✓ Use pivot tables to build powerful data analysis capabilities and link them to charts
- ✓ Learn pivot table formatting techniques to enable their use in reports and dashboards

3. Powerful Formatting and Automation Techniques

- ✓ Use formulas to automate titles and labels with special techniques for format control
- ✓ Use conditional formatting for unique data display and highlighting techniques:
 - Turn tables of figures into automated charts
 - Incorporate flexible, rules-based highlighting, ranking and formatting of outputs to draw attention to data points of interest
- ✓ Eliminate footnotes and excess comments by using text functions to automatically create powerful descriptions in charts and tables
- ✓ Learn chart formatting tips to simplify chart creation and to build elegant and easily maintained visual reports