

# 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 8 hours.

## 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