Jerts
Consulting & Services

Communicating Numbers Effectively Using Excel

Course length: 1 day, 8:30am – 4:30pm

Jerts Consulting and Services training courses are designed and facilitated by University educated instructors with diplomas or certifications in Adult and Continuing Education.

Courses are hands-on and participatory. Participants are encouraged to share their techniques, experience and knowledge to the learning environment.

Registration

Contact Jerts Consulting at info@jerts.com or call (416) 479-0125 to arrange this course at your location.

General Description

This course marries Excel functionality with graphic design and data visualisation principals. Participants learn spreadsheet design best practices, how to choose the best visualization (chart, table, etc.) for a job, and how to create that visualization in Excel.

Participants learn about the use of white space, colour and information density and how to effectively combine multiple visualizations onto one page/screen.

Participants learn and apply techniques to dynamically connect visualizations to data, enabling interactivity and/or ease-of-updating.

VBA, macros and programming techniques are not a part of this course.

Prerequisites

Participants should be advanced-level users who have experience with Excel's basic charting functionality, but are looking to move beyond the limitations and documentation.

Course Outline

Morning Session

Spreadsheet Best Practices
- Dedicated worksheets
- Formulae and flow
- Error management
- Documentation

Visual Perception
- Colour theory
- Presenting numbers
- Visual representations of numbers

Displaying Numbers – Tables and Cells
- Custom number formats
- Managing invalid/error values
- Advanced conditional formatting

- Sparklines and in-cell graphics

Displaying Numbers - Charts
- Choosing the right chart for the job
- Manipulating the Excel charting engine
- Multi-axis charts, 2 charts in one
- Highlighting chart data

Afternoon Session

Advanced Charting
- Phantom axes, phantom lines
- Exploiting error bars
- Using images in charting

Making Visualizations Dynamic
- The trouble with pivot tables and charts
- Dynamic charts – enabling user interactivity
- Creating dynamic commentary

Presentation Design (Combining Charts and Tables on one page/screen)
- Layout principles
- Presentation density