

# Data Visualization in Excel

## Course Description

In the Data Visualization in Excel Boot Camp, Microsoft MP and charting expert Jon Peltier will cover both the theory and practice of charting in Microsoft Excel through hands-on learning. It will start off by diving into charting theory, including such topics as data, chart types, and formatting. The practice portion of the course will cover combination charts, conditional formatting of charts, custom chart types, dynamic charts, and interactive charts, with numerous tricks sprinkled in.

This is an intermediate level course with topics ranging from basic to advanced. Attendees should have good Excel skills including formulas and data management techniques, and at least a passing familiarity with creating charts in Excel and general formatting in Office programs.

Attendees will learn to craft effective charts. They will gain an understanding of what makes efficient chart data, and how to manipulate data and formatting to achieve desired chart styles. Chart types and formatting will be covered - not only the *how*, but the *what and why*.

Participants will also learn how to work with the different elements of charts. They'll be able to leverage worksheet formulas and controls to make dynamic charts that reflect changing data and interactive charts that reflect user selections.

While not focused on dashboard reports, the course will include dashboard-related topics such as small multiples and non-chart visuals.

## Target Audience:

Anyone who needs to create charts and other data visualizations in Excel. Attendees should be experienced in working in Excel, including formulas and data management techniques. Familiarity with charting an asset but not required.

## Software Requirements:

You must bring a laptop with Excel 2016 or higher installed (Office 365 recommended).

### Notes on Software Requirements

1. Don't have Excel 2016 or higher? You can sign up for a free one-month trial of Office 365 Business Premium. ([Click here to learn more.](#))
2. If you are running Excel 2016, please go to Windows Update -> Advanced and make sure you've checked the box to receive updates for other products when you update Windows!

## Time Commitment:

This course is 1 day of hands-on, in person training. It will run approximately 7 hours in length, depending on the class size and attendees' experience in working with the tools.

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## Course at a Glance

*Topics that will be covered include:*

### Chart Data

- Layers: Data, Analysis, Presentation
- Parsable Data
- Modifying Chart Data

### Creating Charts

- Shortcuts
- Ctrl+Shift+Alt Drag
- Ctrl+D

### Chart Types

- Readability and Meaning
- Combination Charts
- Custom Chart Templates

### Formatting Charts

- Colors
- Effects (3D, Gradients, Shadows, etc.)
- Styles

### Dynamic Charts

- Tables, Pivot Tables, Dynamic Arrays
- Old-School Names

### Interactive Charts

- Controls
- Data Validation
- Slicers

### Non-Chart Visualizations

- Sparklines, Heatmaps, Icon Sets
- Formula Charts

### Small Multiple Techniques

- Copy Chart, Change Data
- Uniform Axis Scales

### Miscellaneous

- Geography: Filled Map Charts
- Pivot Charts
- Tips and Tricks/Best Practices