Creating Effective Charts in Excel

Course Description

This course covers the basics of creating, editing and formatting a chart and more. It also shows you how to create a default chart as well as a custom chart. It discusses different chart types such as a combination chart, 2 y axis chart, stock charts, funnel charts and waterfall charts. The course also discusses how to efficiently link your Excel charts into PowerPoint and Word so that your presentations are always up-to-date.

Completion Deadline & Exam: This course, including the examination, must be completed within one year of the date of purchase. In addition, unless otherwise indicated, no correct or incorrect feedback for any exam question will be provided.

Course Level: Overview. This program is appropriate for professionals at all organizational levels.
CPE Credits: 4 (CPA)
Field of Study: Computer Software and Applications
Prerequisite: This course is based on Excel 2019/ Microsoft Office 365 (Excel 2016 is slightly different). A basic understanding of file management (how to open and save files) is assumed. You should be comfortable using Excel at a basic level.
Advanced Preparation: None

Course Learning Objectives

After studying this course you will be able to:

1. Differentiate between the different chart types and recognize their components so that they can select the appropriate chart type to use for a particular presentation.
2. Recognize the different steps involved in creating charts.
3. Recognize how to edit existing charts by resizing, changing chart type, moving chart elements and adding/ deleting data series by using contextual tabs menus and short cut keys.
4. Recognize how to apply formatting techniques, such as colors and inserting objects such as graphics, to a chart.
5. Recognize how to change the default chart type.
6. Recognize the steps required to create custom chart types and how to save them as templates to improve efficiency.
7. Differentiate between the different methodologies of linking Excel data and using static Excel data into PowerPoint presentations.
8. Recognize how fonts, colors, graphics, documentation and printing can impact the professionalism of a PowerPoint presentation.