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# Course Information

**Course Title:** *Excel Charts and Visualizations* #371924

**Number of continuing education credit hours recommended for this course:**

**CPA:** **2** (All states)

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

National Registry of CPE Sponsors ID Number: 107615.

Sponsor numbers for states requiring sponsor registration

Florida Division of Certified Public Accountancy: 0004761 (Ethics #0011467)
Hawaii Board of Accountancy: 14003
New York State Board of Accountancy: 002146
Ohio State Board of Accountancy: CPE .51PSR
Pennsylvania Board of Accountancy: PX178025
Texas State Board of Accountancy: 009349

## Course Description

It can be difficult to convey the meaning derived from a spreadsheet, especially when there are large amounts of data involved. An excellent solution is to use the charts and other data visualization tools contained within Excel. In the *Excel Charts and Visualizations* course, we discuss how to create and modify charts, the many types of charts and when they are most applicable, advanced charting practices, sparkline graphics, custom formatting codes, shapes, icons, and dashboard concepts – everything you need to achieve the best possible presentations.

## Course Content

Publication/Revision date: 2/20/2024.
Author: Steven M. Bragg, CPA.
Final exam (online): Ten questions (multiple-choice).

**Program Delivery Method:** NASBA QAS Self-Study (interactive)

## Subject Codes/Field of Study

NASBA (CPA): Computer Software & Applications

## Course Level, Prerequisites, and Advance Preparation Requirements

Program level: Overview
Prerequisites: None
Advance Preparation: None

## Instructions for Taking This Course

- **Log in to your secure account at www.bhfe.com. Go to "My Account."**
- **You must complete this course within one year** of purchase (If the course is "Expired," contact us and we will add the latest edition of the course to your account (no charge).
- **To retain the course-PDF after completion (for future reference) and to enable enhanced navigation:** From "My Account," Download and save the course-PDF to your computer. This will enable the search function (Menu: Edit>Find) and bookmarks (icon on left side of document window).
- **Complete the course by** following the learning objectives listed for the course, studying the text, and, if included, studying the review questions at the end of each major section (or at the end of the course).
- **Once you have completed studying the course** and you are confident that the learning objectives have been met, answer the final exam questions (online).

## Instructions for Taking the Online Exam

- **Log in to your secure account at www.bhfe.com. Go to "My Account."**
- A passing grade of at least **70%** is required on the exam for this course.
- You will have three attempts to pass the exam (call or email us after three unsuccessful attempts for instructions).
- The exam is not timed, and it does not need to be completed in one session.
- For a printed copy of the exam questions, open the exam and press "Print Exam."
- Once you pass the exam, the results (correct/incorrect answers) and certificate of completion appear in "My Account." A confirmation email is also sent.
- CFP Board and IRS credit hours, if applicable, are reported on Tuesdays and at the end of the month.

**Have a question?** Call us at 800-588-7039 or email us at contact@bhfe.com.

# Learning Assignment & Objectives

- Explain the nature of the ribbon system and how it is used.
- Describe the purposes to which the different types of charts can be put.
- Identify the characteristics of a chart sheet.
- Specify the commands used to adjust charts.
- Identify the characteristics of each type of chart.
- Describe how a data series used in a chart is manipulated.
- Identify the formatting options for sparkline graphics.
- Specify the formatting codes needed for different types of numeric presentations.

# About the Author

**Steven Bragg, CPA,** has been the chief financial officer or controller of four companies, as well as a consulting manager at Ernst & Young. He received a master's degree in finance from Bentley College, an MBA from Babson College, and a Bachelor's degree in Economics from the University of Maine. He has been a two-time president of the Colorado Mountain Club, and is an avid alpine skier, mountain biker, and certified master diver. Mr. Bragg resides in Centennial, Colorado. He has written more than 250 books and courses, including *New Controller Guidebook*, *GAAP Guidebook*, and *Payroll Management*.

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