



-Microsoft Excel-

Review of Microsoft Excel:

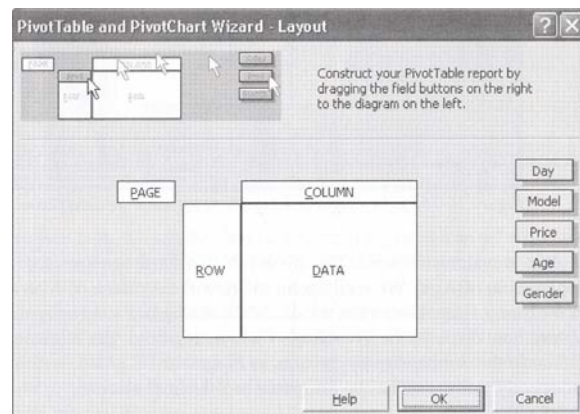
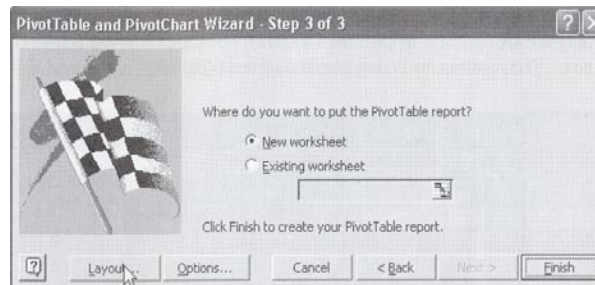
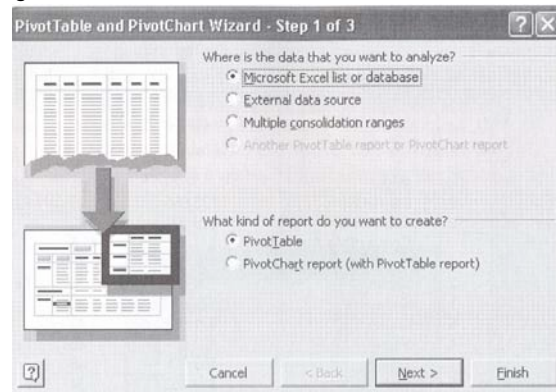
- Creating a chart, making the graph interesting, and importing a chart into other documents

Pivot Tables:

- Often it is difficult to see patterns within a large Excel document that contains lots of data
- Using a pivot table allows us to summarize the data

Creating a Pivot Table

- Make sure that the "Worldwide Candy Distributors" file is open and the "Data" Worksheet
 - We begin with a large list of candy stores: the days of the week, store locations, seller, candy bar type, total units sold, and some other data
1. Begin by placing the cursor in the data somewhere, thus making it active
 2. Select Data > Pivot Table and Pivot Chart
 - The first screen offers the option of a Pivot chart or table, we want the table here
 3. The first step the Wizard asks the source of the data for the pivot table, select Microsoft Excel...
 - Select "Next" and continue to the next step of the wizard
 4. In the second step the PivotTable and PivotChart Wizard guess upon the location of the list of data
 - If necessary we can correct the guessed location of the list by clicking on the icon and dragging
 - Once the correct data is chosen select "Next" and continue on to the third step of the wizard
 5. The third step of the Wizard is where all the work is done
 - The initial screen is where we decide if we want the PivotTable in a new worksheet or not
 - We want a new worksheet so the one clicked is ok
 - The checkered flag indicates that this is the final step, but the work is yet to be done
 - We still have to specify which data we want to analyze in the PivotTable and how to analyze it
 - Click on the "Layout" button in the bottom left hand corner of the dialogue box
 - This brings up a new dialogue box
 - The different fields or variables (from the top of your Worksheet) are on the right side of this dialogue box
 - The idea is to drag those variables to the proper locations for the pivot table
 - Compare: Seller (Row) vs. Hershey (Data) and then click "Ok" > "Finish"
 - The PivotTable should appear in a new screen in a new worksheet



Microsoft Excel Micro-Workshop #4

- PivotTables take a lot of time to get used to and a lot of it is coming up with the right combination of data to look at to receive the data that you want to pull out
- To complete another PivotTable with the same data:
 1. Complete the first steps of the Wizard and after step number two is completed a box will appear asking you if: "You want to generate a report from the same set of data as the first table"
 2. We do so click "Yes" and then click "Next" on the new screen that comes up
 3. Then you will proceed through the rest of the steps as above
- To create another PivotTable with a more complicated set of data
 1. Move to the Next Worksheet Titled: "Data Complicated"
 2. Data > PivotTable and PivotChart
 3. Follow the same steps as above
 - Compare: Day of the Week (Row) vs. Store Location (Column) vs. Hershey (Data)
 4. If we do not want the count (total number of Hershey sold on those days but instead want the average over the four days:
 - Double click on "Average of Hershey"
 - Select "Average" and click "OK"
 - The data will change automatically

AutoFilters

- Used to find records that match only certain criteria

To Use AutoFilters

1. Place the active cell somewhere within the data
2. Select "Data" > "Filter" > "AutoFilter"
3. Small boxes, called pull-down menus, appear next to column names in the top row of the list
4. If we click on the arrow we see lots of options: All, Top 10, Custom, and lots of numbers
 - Click on the "Day of the Week" and Sort by "Friday"
 - That is all the records of Candy sold on Friday
 - After viewing click "All" in the pull-down menu
 - Click on "Seller" and Sort by "Randy"
 - That is all the records of Candy sold by Randy
 - After viewing click "All" in the pull-down menu
 - Click on "Hershey" and Sort by "Top 10"
 - A new dialogue box appears asking us to show the "Top 10" What?
 - We want the "Top > 10 > Items"
 - Click "OK"
 - We have the Top 10 Selling days and locations for Hershey
 - After viewing click "All" in the pull-down menu
 - Click on "Snickers" and Sort by "Custom"
 - A totally new dialogue box appears
 - Click under Price to "is greater than" and choose "269"
 - Other options under this menu
 - Click "OK"
 - After viewing click "All" in the pull-down menu
5. After done with AutoFilter
 - Select "Data" > "Filter" > "AutoFilter"
 - This will deselect and the pull-down menus will appear

Questions?

- Refer to the "Help" in Excel: *It is a lot more helpful than you think!*

Images from:

Gips, James. Mastering Excel: A Problem-Solving Approach (Second Addition). New York: John Wiley & Sons, Inc.