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| Excel Lab 2: Summary | | |
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| Startup Checklist | | |

# Descriptive Analytics Part 1: Expense Tracker

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|  | 1. Create an Excel Workbook file and copy the information into a Table | |
|  | 1. View and clean the data | |
|  |  | * 1. Do any Cell Ranges need their “Cell Display Format” changed? |
|  |  | * 1. Resize the Table as needed |
|  |  | * 1. Set Table style to most readable (for you) |
|  | 1. What field is missing to determine what our available savings are? Add it and set its type. | |
|  | 1. We will calculate the values using the Formula Bar and Simple Math w/Cell referenced variables | |
|  | 1. You will add 2 more columns (Gains, Losses) and calculate their values | |

# Descriptive Analytics Part 2: The Year

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|  | 1. Ensure you can: reference a cell in a formula and complete basic math | |
|  | 1. Determine: Are we in the red (negative savings) or black (positive savings) and what the “break even” point is? | |
|  | 1. Determine: if we are doing well (over a paycheck average in savings) or poorly (less than) so far this year? | |
|  | 1. Analyze (Hypothesis): What trends to you see in the data that might be time based (monthly, certain seasons, certain months)? | |
|  | 1. Analyze: Recommend based on Descriptive Analytics | |
|  |  | * 1. Any changes to bill due dates that you feel will benefit the person |
|  |  | * 1. What category should be investigated more in the diagnostic phase? (why?) |
|  |  | * 1. Based on the amount of savings 2014 to 2019 – how are we doing as of 11/01? |