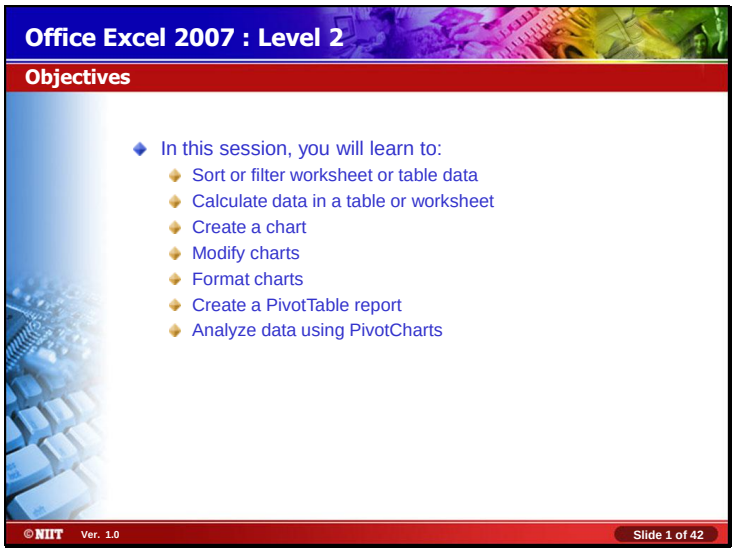
Instructor Inputs

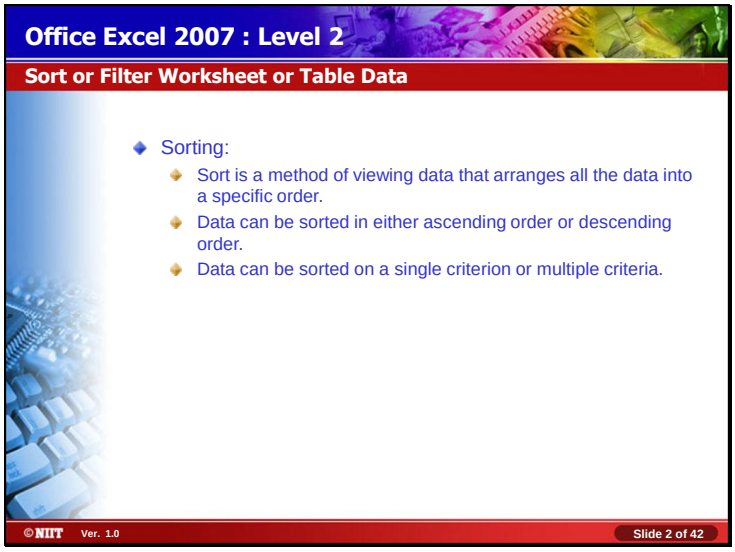
Session 3

Slide 1



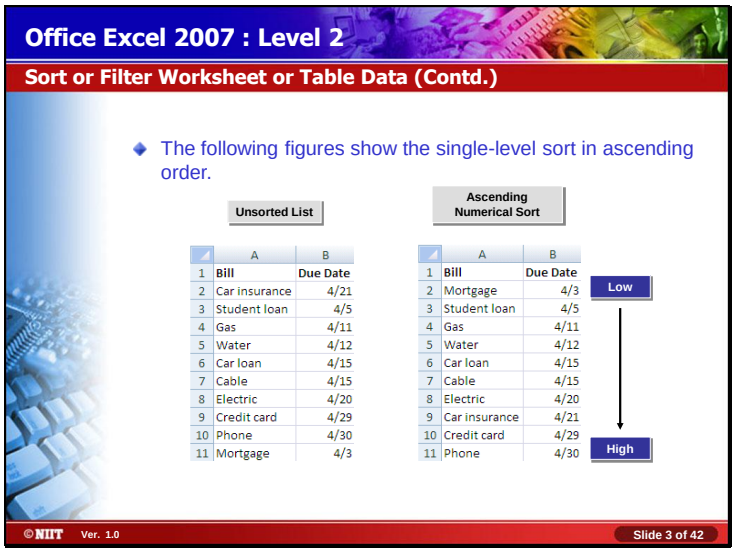
Discuss the session objectives with the students.

Slide 2



Use the slide to explain how a sort method helps to manipulate the table data. When data is sort, it is possible to create different views of the same data without altering its original format.

Slide 3

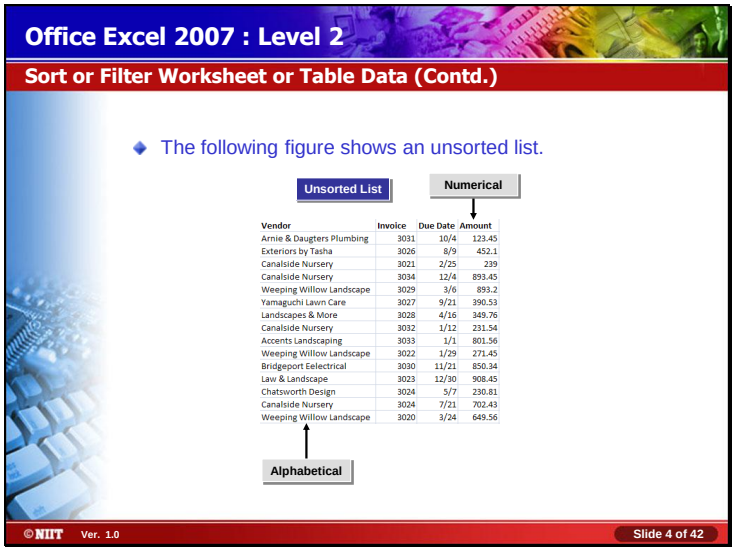


	A	B
1	Bill	Due Date
2	Car insurance	4/21
3	Student loan	4/5
4	Gas	4/11
5	Water	4/12
6	Car loan	4/15
7	Cable	4/15
8	Electric	4/20
9	Credit card	4/29
10	Phone	4/30
11	Mortgage	4/3

	A	B
1	Bill	Due Date
2	Mortgage	4/3
3	Student loan	4/5
4	Gas	4/11
5	Water	4/12
6	Car loan	4/15
7	Cable	4/15
8	Electric	4/20
9	Car insurance	4/21
10	Credit card	4/29
11	Phone	4/30

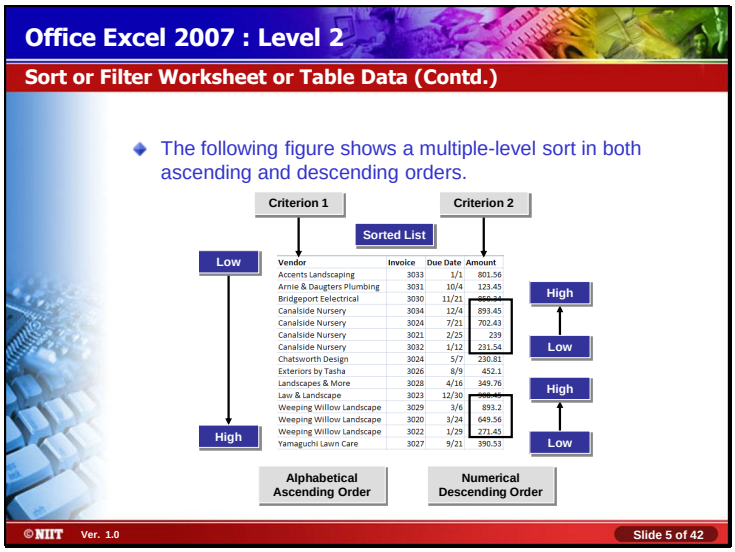
Use the figures given in the slide above to explain the sort method. The sort method is applied to the Due Date column of the unsorted list, shown in the slide.

Slide 4



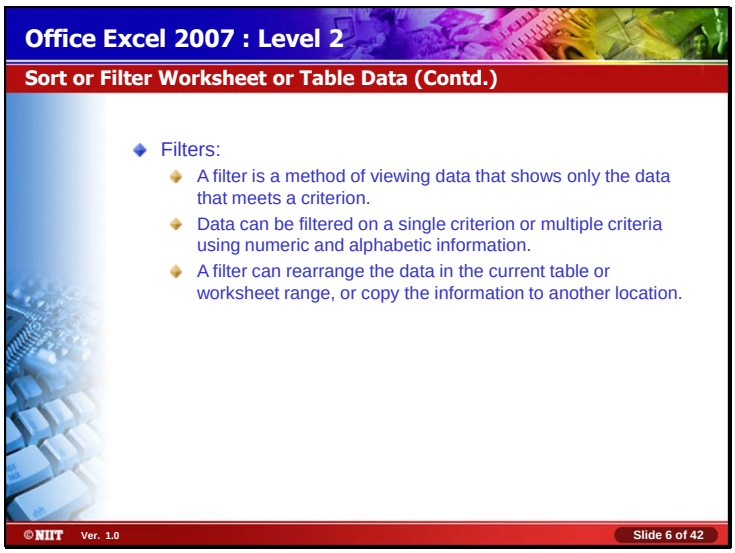
Vendor	Invoice	Due Date	Amount
Arnie & Daugters Plumbing	3031	10/4	123.45
Exteriors by Tasha	3026	8/9	452.1
Canalside Nursery	3021	2/25	239
Canalside Nursery	3034	12/4	893.45
Weeping Willow Landscape	3029	3/6	893.2
Yamaguchi Lawn Care	3027	9/21	390.53
Landscapes & More	3028	4/16	349.76
Canalside Nursery	3032	1/12	231.54
Accents Landscaping	3033	1/1	801.56
Weeping Willow Landscape	3022	1/29	271.45
Bridgeport Eelectrical	3030	11/21	850.34
Law & Landscape	3023	12/30	908.45
Chatsworth Design	3024	5/7	230.81
Canalside Nursery	3024	7/21	702.43
Weeping Willow Landscape	3020	3/24	649.56

Slide 5



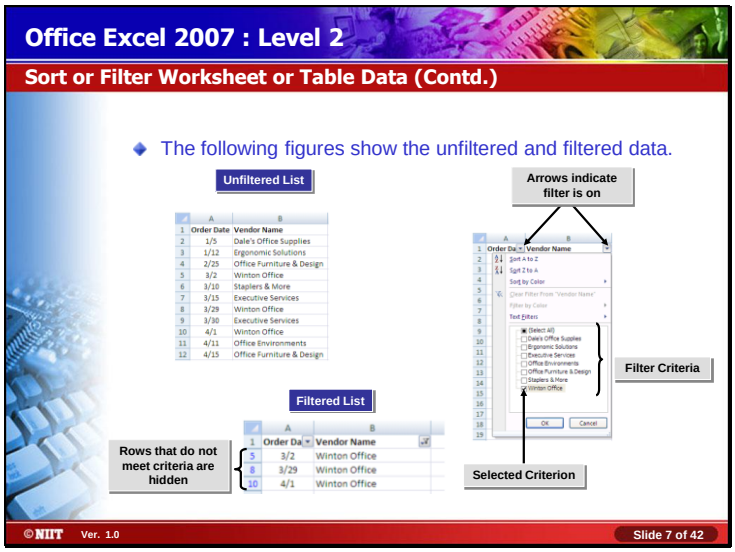
The figure in the above slide shows how two criteria's are applied within a single worksheet on the same table. Criteria 2 has been sorted in descending according to the Vendor column. For example, for Weeping Willow Landscape and Canalside Nursery Vendors, the Amount column is sorted in descending order.

Slide 6



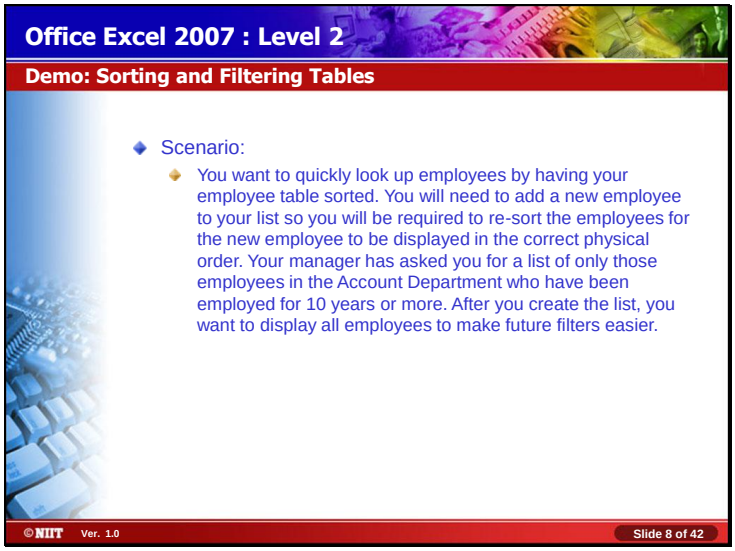
Use the slide to discuss the filter method used to manipulate data.
Refer to Page 47 to discuss about the various filter operators.

Slide 7



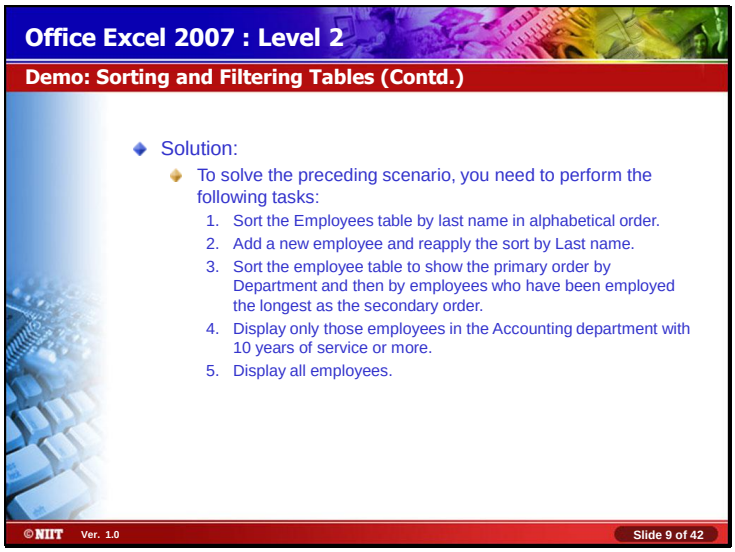
Use the figures given in the slide above to discuss the filter method.

Slide 8



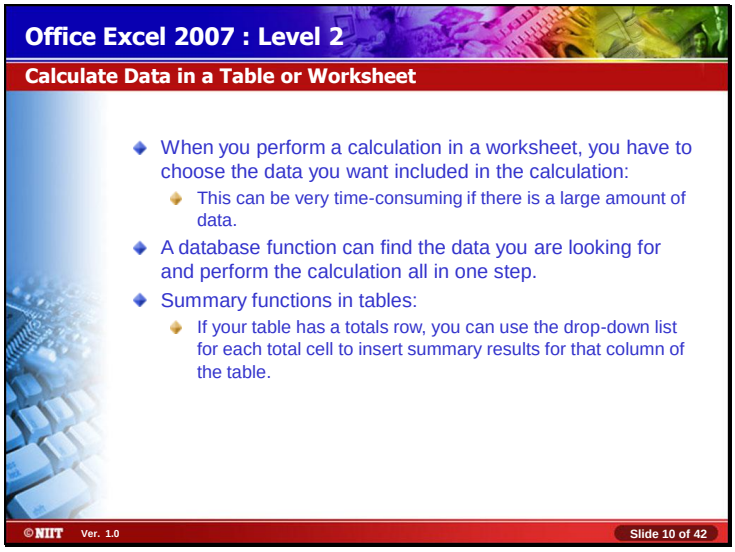
Discuss the scenario of Activity 2-4 of Lesson 2 in the Student Guide with the students.
You can access the data file for this activity from the following path in the TIRM CD:
TIRM\DATAFILES FOR FACULTY\LEVEL 2\Organizing Worksheet and Table Data\Tables.xlsx

Slide 9

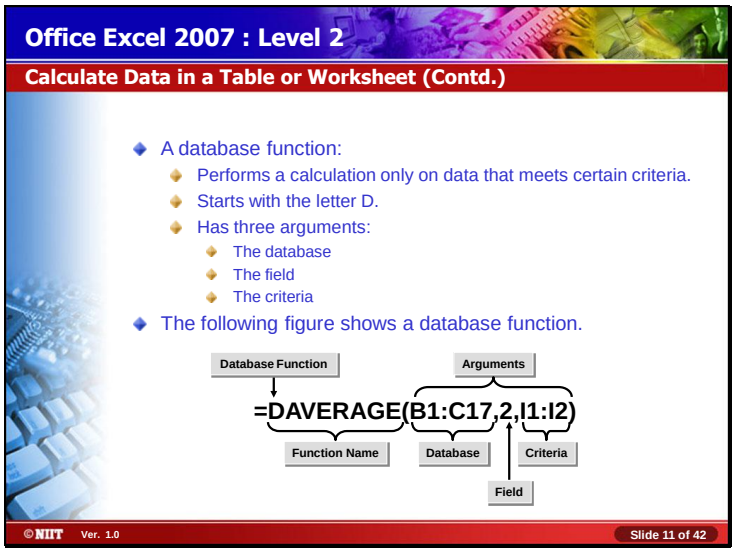


Discuss the solution with the students. To demonstrate the solution, access the file provided at the following path in the TIRM CD:
TIRM\Data Files For Faculty\SOLUTIONS\Level 2\Organizing Worksheet and Table Data\My Tables.xlsx

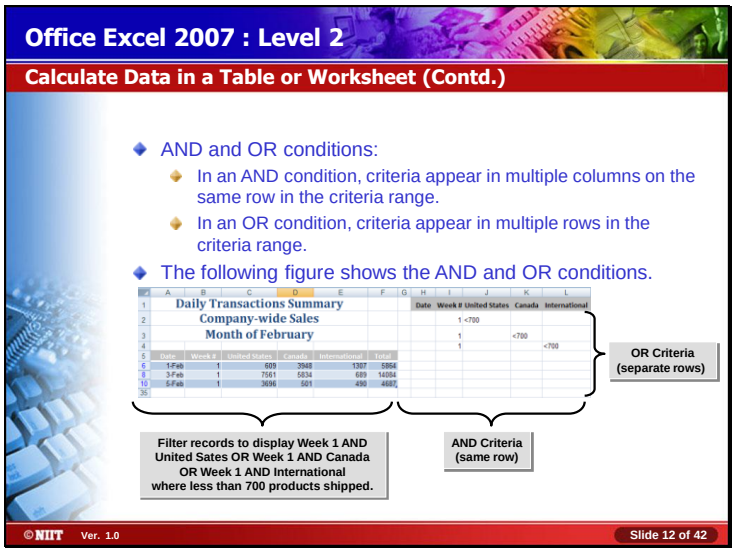
Slide 10



Slide 11

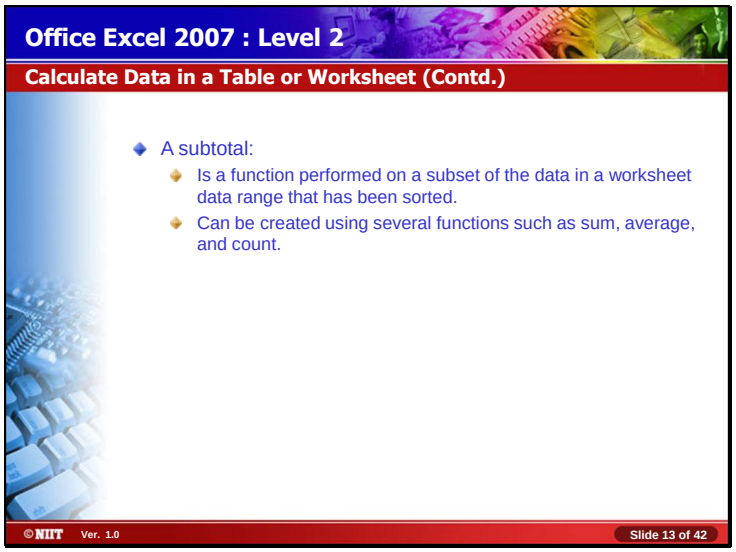


Slide 12



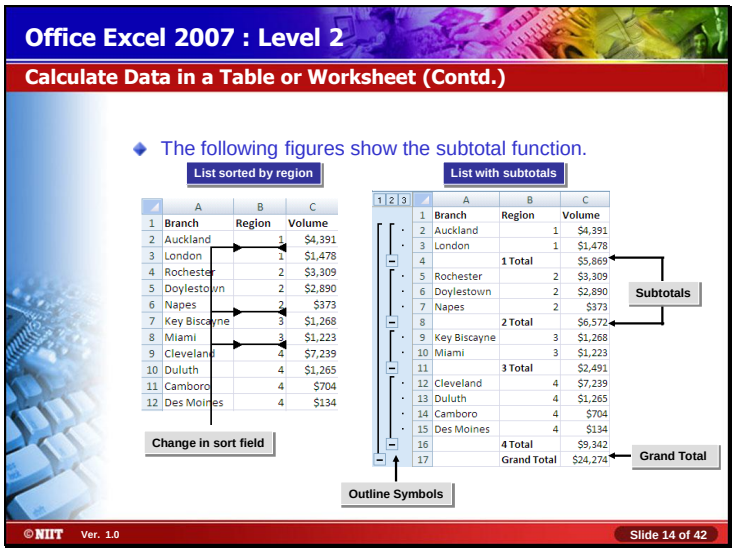
Tell the students that in Excel 2007, the **AND** function can contain a maximum of 255 conditions. For earlier versions of Excel, the limit is 30 conditions.

Slide 13



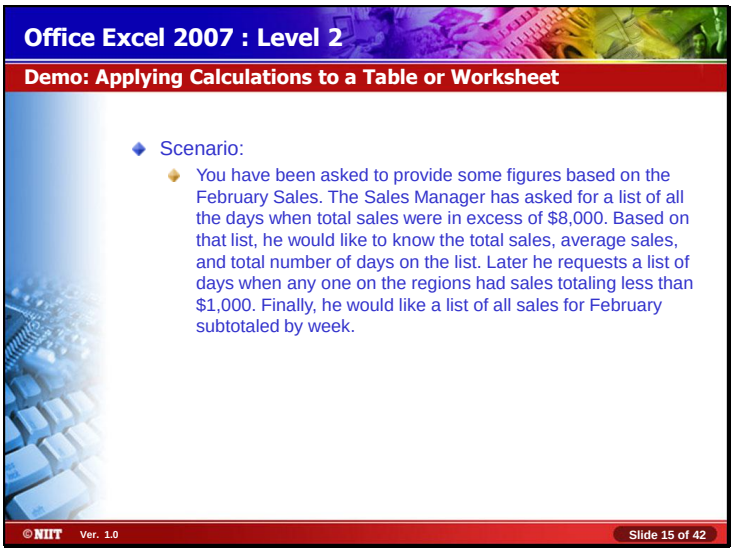
A worksheet can have as many subtotal functions as required. You cannot subtotal tables. If there is a need to subtotal table data, then it is required to convert the table to a data range.

Slide 14



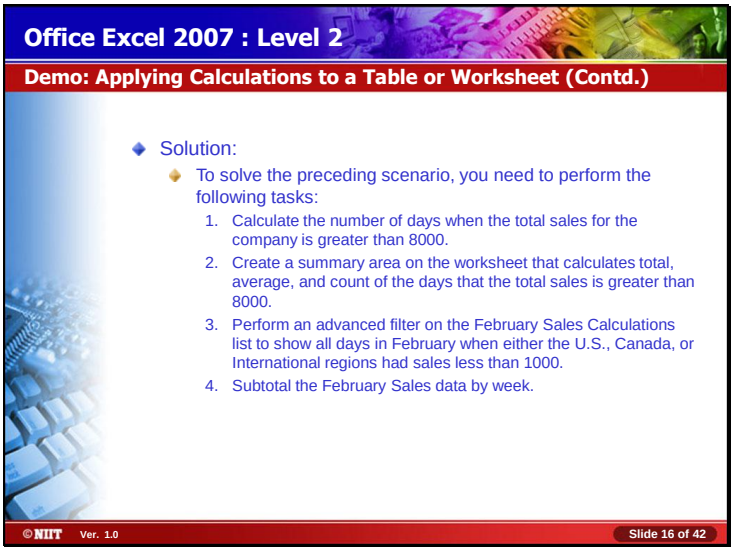
The figures in the above slide consist of two lists, one sorted by region and other consists of subtotals. The second list shows the grand total of all the subtotals.

Slide 15



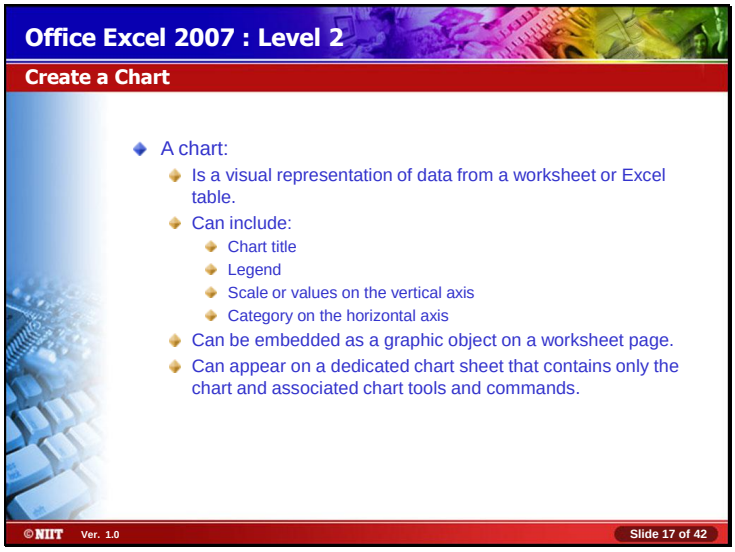
Discuss the scenario of Activity 2-5 of Lesson 2 in the Student Guide with the students.
You can access the data file for this activity from the following path in the TIRM CD:
TIRM\DATAFILES FOR FACULTY\LEVEL 2\Organizing Worksheet and Table Data\Lesson 2\Tables.xlsx

Slide 16



Discuss the solution with the students. To demonstrate the solution, access the file provided at the following path in the TIRM CD:
TIRM\Data Files For Faculty\SOLUTIONS\Level 2\Organizing Worksheet and Table Data\My Tables.xlsx

Slide 17



As an example, show the following file to the students and ask them to analyze Sheet 1 of the file. TIRM\SOLUTIONS\Level 2\Presenting Data Using Charts\Food Habits.xslx

After 15 minutes of discussion, show the second sheet, Chart 1. Discuss the solution with the students. Ask the students to figure out the difference between the two sheets, Sheet 1 and Chart 1.

Slide 18

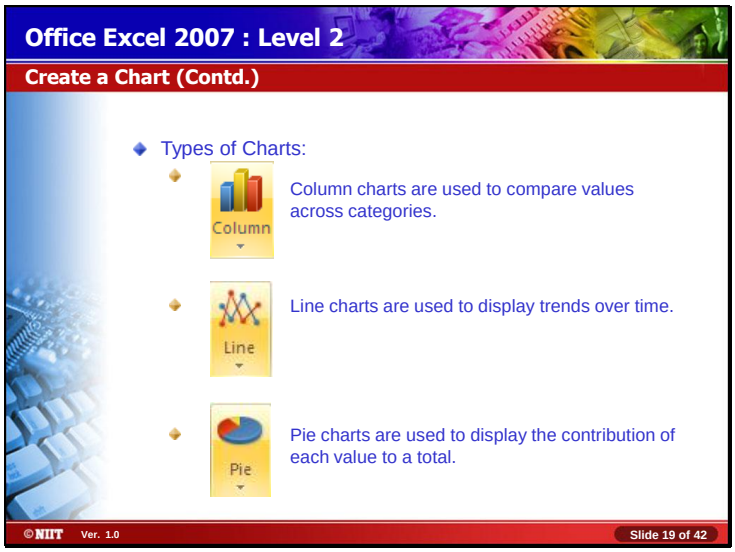
Use the following scenario to discuss the chart given in the slide:

- Residential
- Services
- Big-ticket
- Mortgage
- Development
- Leased space

The Sales department of an organization keeps track of the quarterly profit of the company. In order to show the profit percentage of the company, the Sales department compares the last year's and the current year's earnings from these sectors. Thus, for a better understanding, the Sales department creates a chart to present the data.

For example, as shown in the figure, the company earned $3,000,000 from the Big-ticket sector in the first quarter. But in the second quarter, the amount has gone up to $3,500,000, with a profit of $500,000.

Slide 19

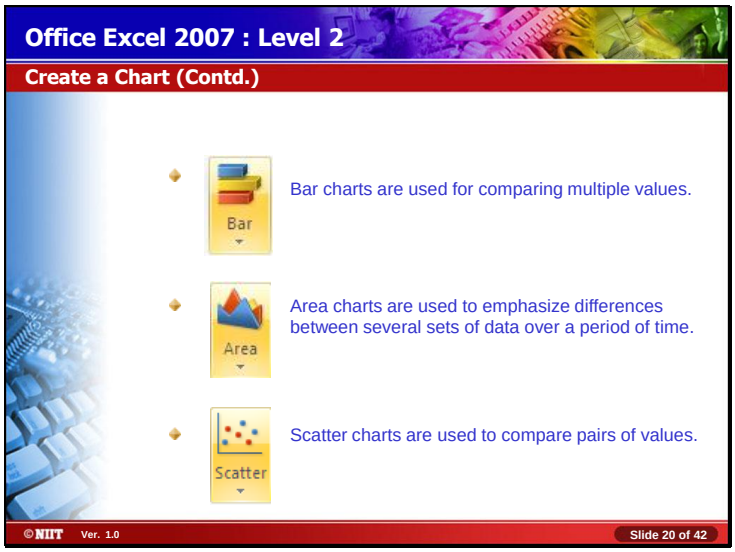


Use the slide to discuss about the different chart types that can be used to create the best representation of a particular data.

Then give a brief overview of the chart insertion methods given in Page 65.

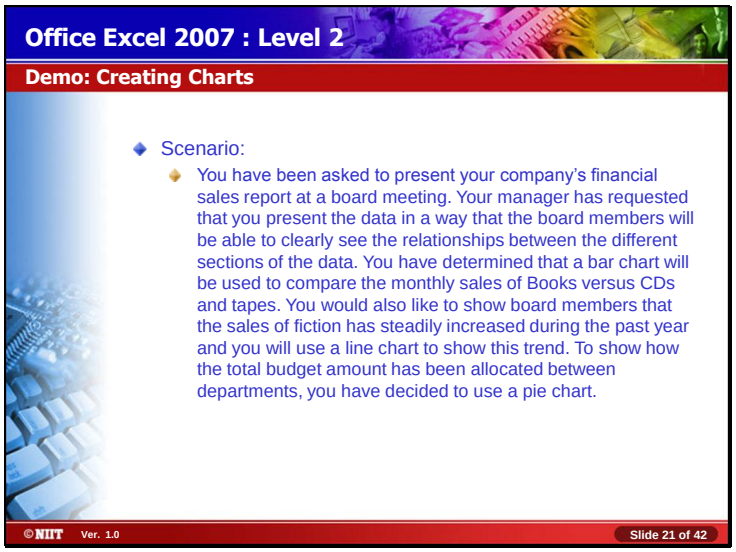
You can also use the following links that discusses the different types of charts that serve different purposes.
http://spreadsheets.about.com/od/c/g/chart_def.htm and
http://office.microsoft.com/en-us/help/HA012337371033.aspx

Slide 20



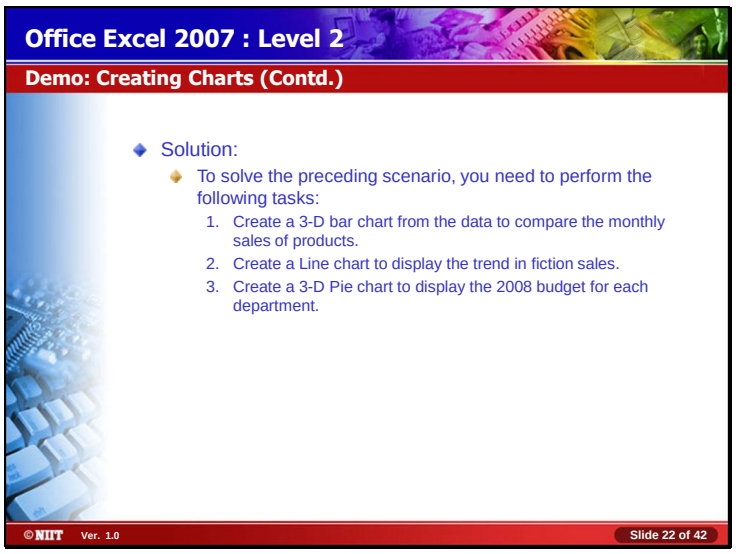
You can also use the following link that provides the step-by-step Excel chart tutorial, starting from entering data into the spreadsheet.
http://spreadsheets.about.com/od/excel101/ss/enter_data.htm

Slide 21



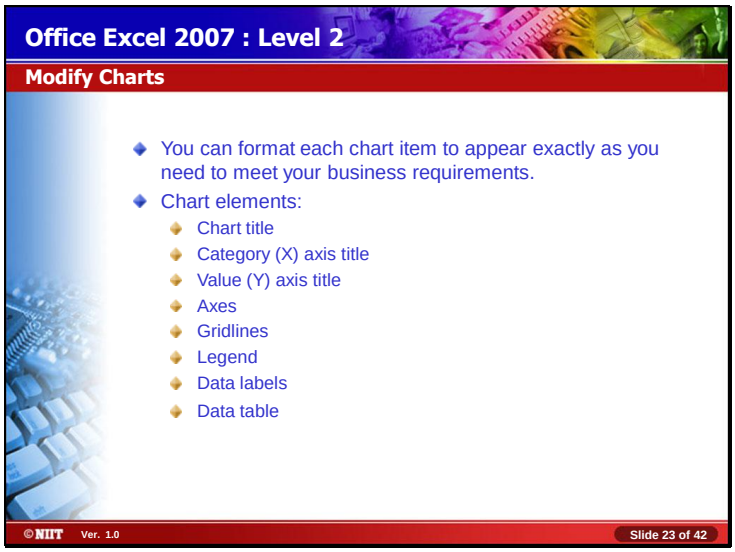
Discuss the scenario of Activity 3-1 of Lesson 3 in the Student Guide with the students. You can access the data file for this activity from the following path in the TIRM CD:
TIRM\DATAFILES FOR FACULTY\LEVEL 2\Presenting Data Using Charts\Charts.xlsx

Slide 22



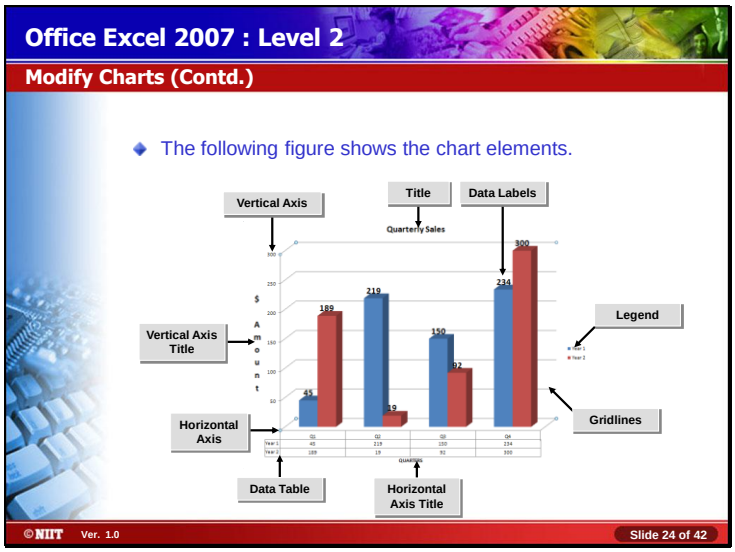
Discuss the solution with the students. To demonstrate the solution, access the file provided at the following path in the TIRM CD:
TIRM\Data Files For Faculty\SOLUTIONS\Level 2\Presenting Data Using Charts\My Charts.xlsx

Slide 23



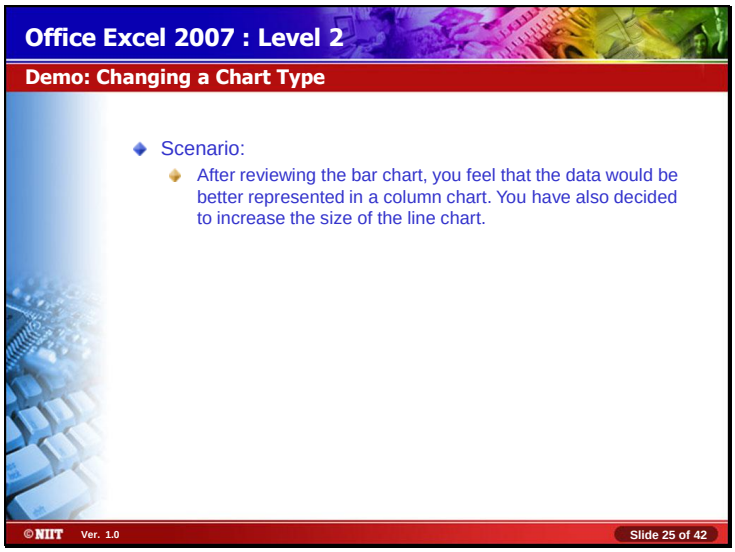
You can use the following link that provides a demo on creating a combination of Chart in Excel 2007. This link also provides examples for the same.
http://examples.oreilly.com/9780596527594/Excel/Chapter18/Combination-Chart.html

Slide 24



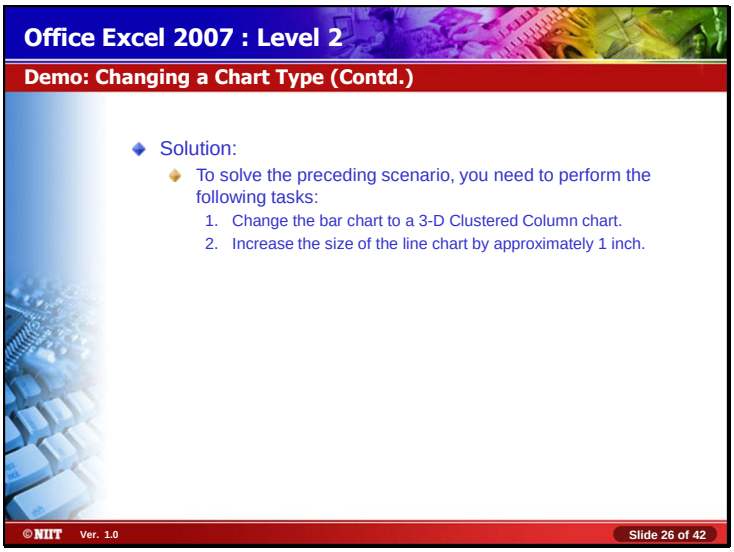
Later, discuss the Chart Tools contextual tabs given in Page 69. These tabs are used to manipulate the appearance and layout of charts.

Slide 25



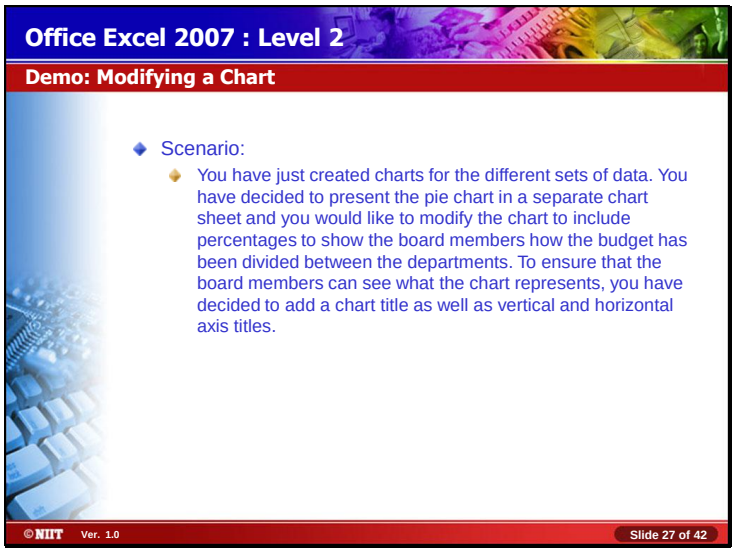
Discuss the scenario of Activity 3-2 of Lesson 3 in the Student Guide with the students.
You can access the data file for this activity from the following path in the TIRM CD:
TIRM\DATAFILES FOR FACULTY\Solutions\LEVEL 2\Presenting Data Using Charts\My Charts.xlsx

Slide 26



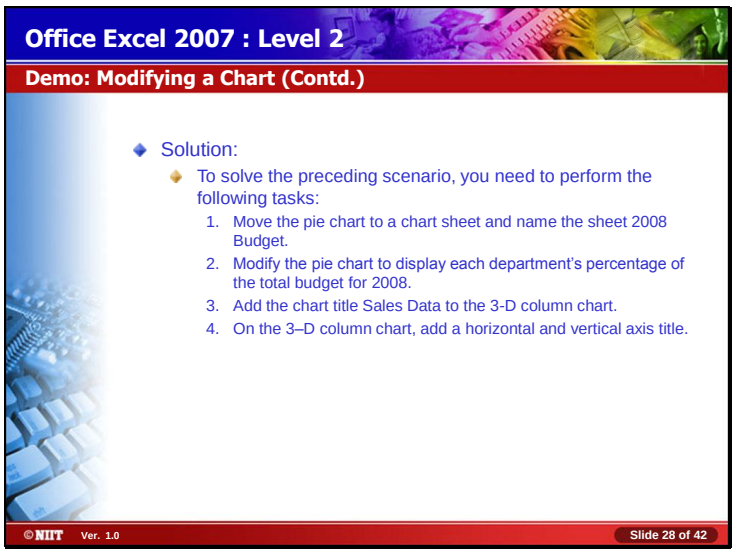
Discuss the solution with the students. To demonstrate the solution, access the file provided at the following path in the TIRM CD:
TIRM\Data Files For Faculty\SOLUTIONS\Level 2\Presenting Data Using Charts\My Charts.xlsx
You tell the students that to use regular text formatting to format the text in chart elements, they can right-click or select the text, and then click the formatting options that they want on the **Mini toolbar**. They can also use the formatting buttons on the Ribbon (**Home** tab, **Font** group of Microsoft Office user interface.

Slide 27



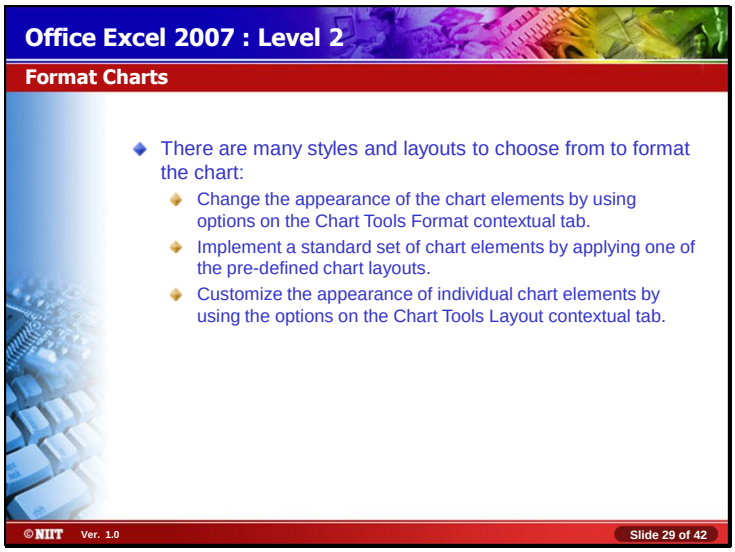
Discuss the scenario of Activity 3-3 of Lesson 3 in the Student Guide with the students.
You can access the data file for this activity from the following path in the TIRM CD:
TIRM\DATAFILES FOR FACULTY\Solutions\Level 2\Presenting Data Using Charts\My Charts.xlsx

Slide 28



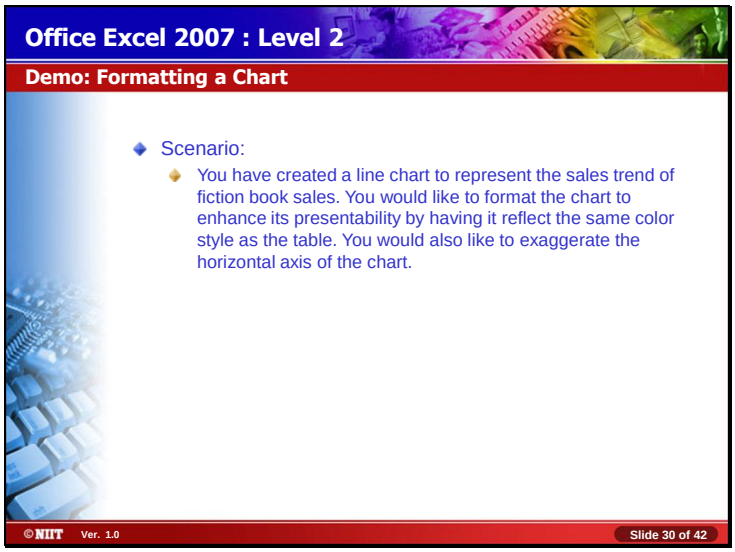
Discuss the solution with the students. To demonstrate the solution, access the file provided at the following path in the TIRM CD:
TIRM\Data Files For Faculty\SOLUTIONS\Level 2\Presenting Data Using Charts\My Charts.xlsx

Slide 29



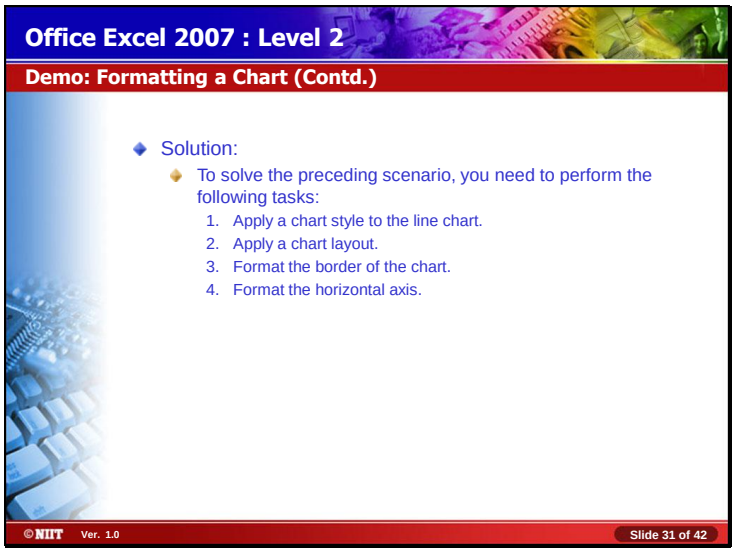
You can use the following link that presents good information about Excel 2007 Formatting options.
http://spreadsheets.about.com/od/excelformatting/a/format_hub.htm

Slide 30



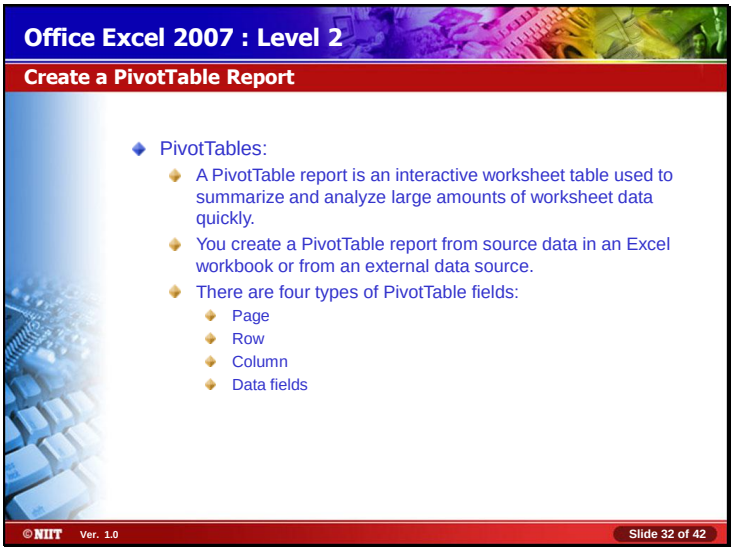
Discuss the scenario of Activity 3-4 of Lesson 3 in the Student Guide with the students.
You can access the data file for this activity from the following path in the TIRM CD:
TIRM\DATAFILES FOR FACULTY\LEVEL 2\Presenting Data Using Charts\Charts.xlsx

Slide 31



Discuss the solution with the students. To demonstrate the solution, access the file provided at the following path in the TIRM CD:
TIRM\Data Files for Faculty\SOLUTIONS\Level 2\Presenting Data Using Charts\My Charts.xlsx

Slide 32



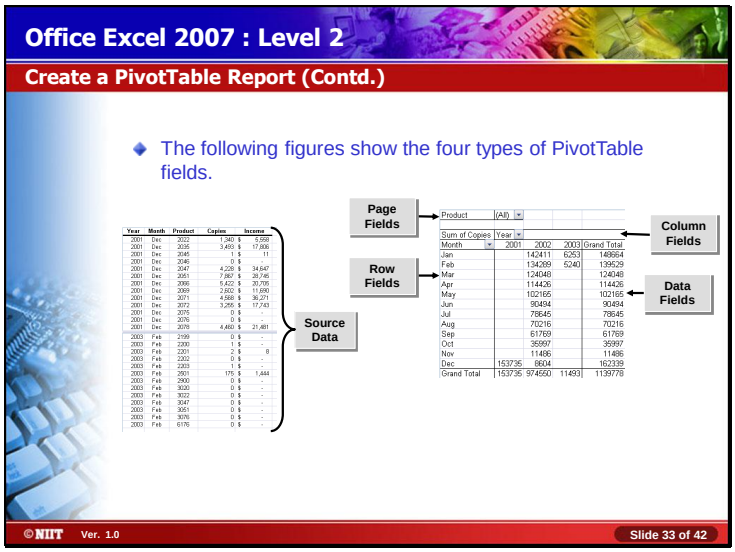
Use the slide to discuss about a PivotTable and its types. A PivotTable can quickly combine and compare data to perform analysis on large amounts of data.
Discuss the Food_Habits scenario as discussed earlier in Slide 2 of this session. Now the comparison has to be made for the past four years of data. Tell the students that since the data to be used is in such a large amount, therefore, the PivotTables are used instead of the Charts.
Discuss the solution with the students. To demonstrate the solution, access the file provided at the following path in the TIRM CD:
TIRM\Data Files For faculty\SOLUTIONS\Level 2\Presenting Data Using Charts\Food Habits.xlsx

You can also tell the student that PivotTables allow rapid, dynamic, flexible data analysis. Pivot charts add to the flexibility of pivot tables, allowing the same rapid analysis of displayed data, while sacrificing substantial flexibility of normal Excel charts.
You can use the following link that provides a demo on building a PivotTable in Excel 2007. This link also provides some examples where PivotTable is used.
http://examples.oreilly.com/9780596527594/Excel/Chapter21/Pivot_Tables.html

Additional Input:
Live Microsoft Dynamics data can be delivered in refreshable Excel spreadsheets, such as PivotTables and Pivot charts, to ensure the entire organization is working with consistent, current, and accurate information. Microsoft Office SharePoint Server 2007 allows the users to share and access their Excel spreadsheets via a Web connection and is supported through automated exports directly from within the context of Microsoft

Dynamics. Microsoft Dynamics forms, data, and information can be exported to Microsoft Excel from the List Pages and Task Page of Microsoft Dynamics.
By accessing Microsoft CRM information in Excel, the user has the ability to visually understand sales information, discover trends and drill into exceptions. For example, the user can understand and visualize the opportunity pipeline of Microsoft CRM using Microsoft CRM with Excel.

Slide 33

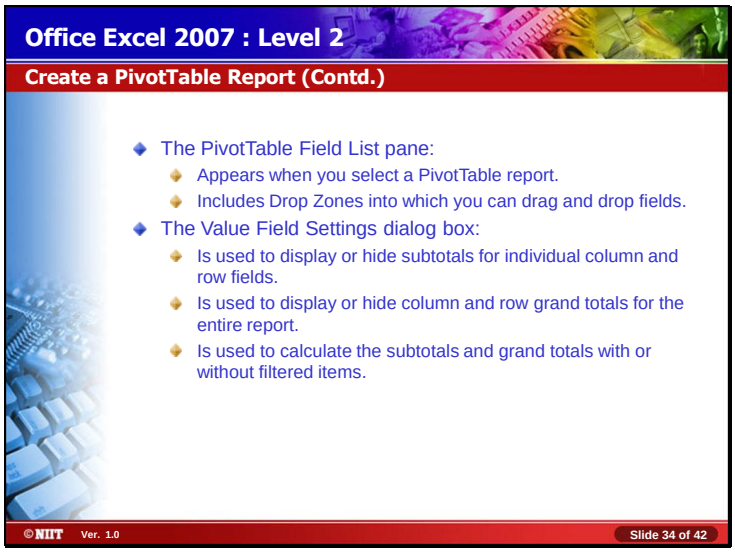


The figures in the above slide consist of the source data from which PivotTable report is generated. The PivotTable report consists of the following four types of PivotTable fields:

- Page field
- Row field
- Column field
- Data field

You can also use the following link for having an overview of PivotTable reports and PivotChart reports.
http://office.microsoft.com/en-us/excel/HP101773841033.aspx#About%20PivotTable%20reports

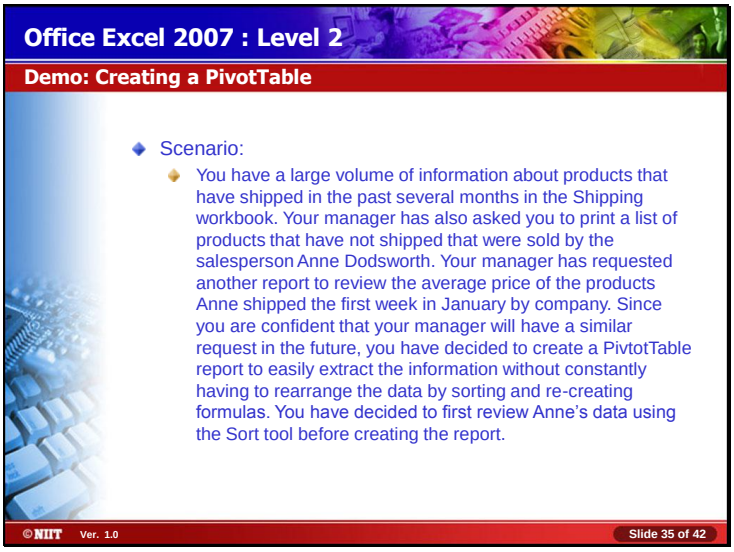
Slide 34



Discuss the PivotTable functions given in Page 83. These functions help to create a formula to work with PivotTable data.

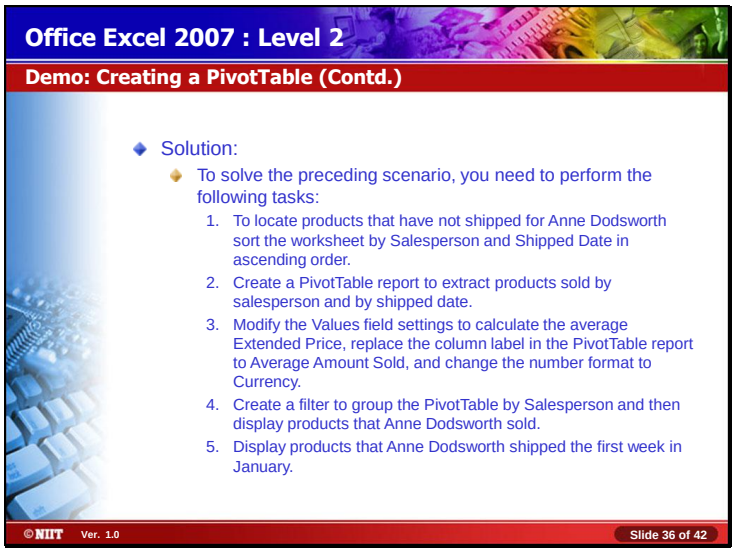
You can use the following link that beautifully demonstrates the use of PivotTable report to analyze product sales.
http://office.microsoft.com/home/video.aspx?assetid=ES102390221033&width=884&height=540&startindex=0&CTT=11&Origin=HA102384511033

Slide 35



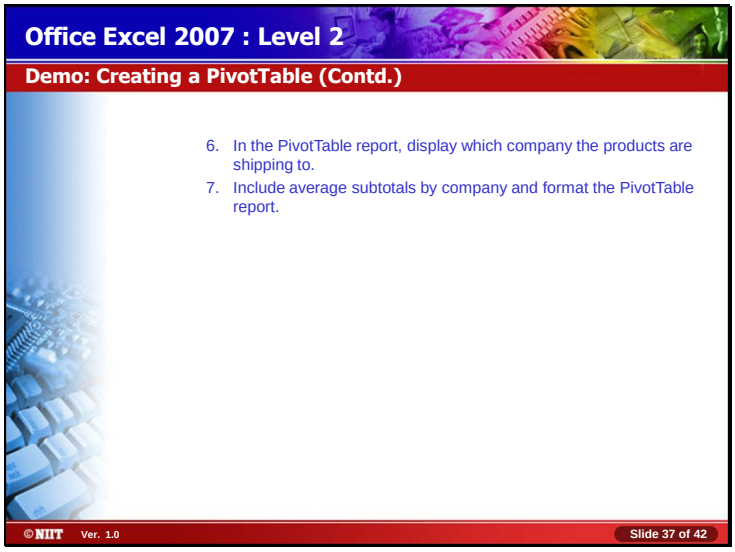
Discuss the scenario of Activity 4-1 of Lesson 4 in the Student Guide with the students. You can access the data file for this activity from the following path in the TIRM CD: TIRM\DATAFILES FOR FACULTY\LEVEL 2\Analyzing Data Using PivotTables and PivotCharts\Shipping.xlsx

Slide 36

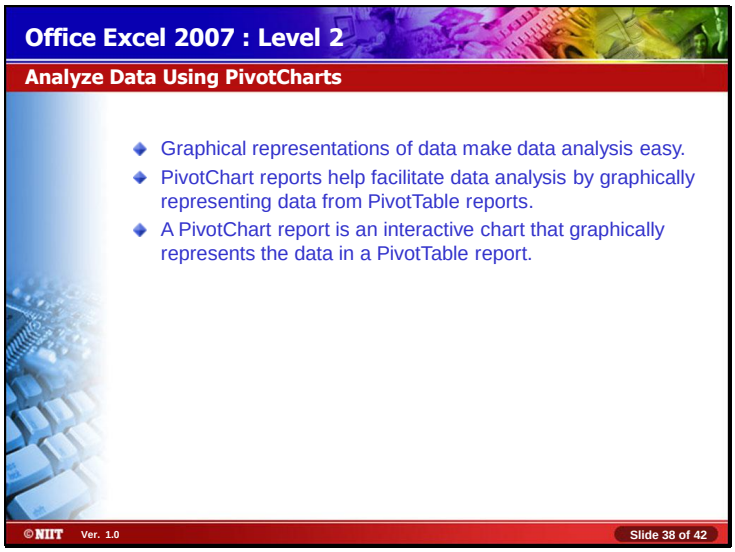


Discuss the solution with the students. To demonstrate the solution, access the file provided at the following path in the TIRM CD:
TIRM\Data Files for Faculty\SOLUTIONS\Level 2\Analyzing Data Using PivotTables and PivotCharts\My Shipping.xlsx

Slide 37



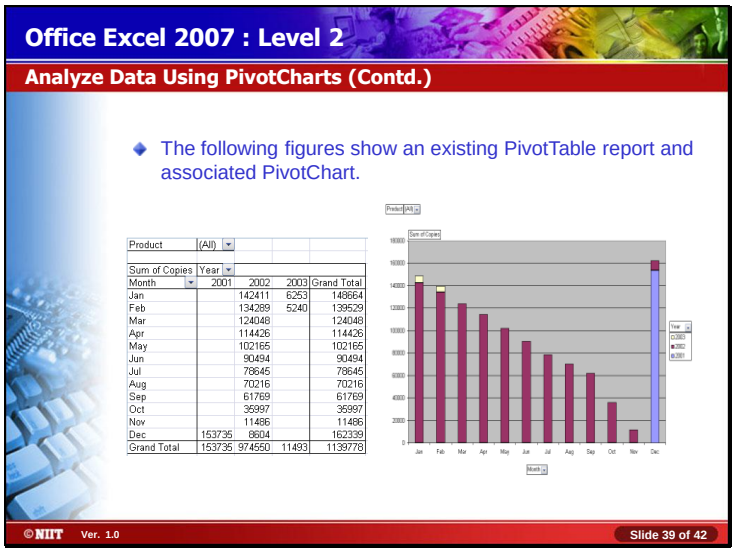
Slide 38



Students have learned to create PivotTables to analyze the data. Now, they will learn to analyze the data using PivotChart. PivotChart reports help to facilitate data analysis by graphically representing data from PivotTable reports. These PivotTable reports and PivotCharts are used in Microsoft SharePoint Services for data analysis.

You can use the following link that provides an overview of PivotTable reports and PivotChart reports.
http://office.microsoft.com/en-us/excel/HP101773841033.aspx#About%20PivotTable%20reports

Slide 39

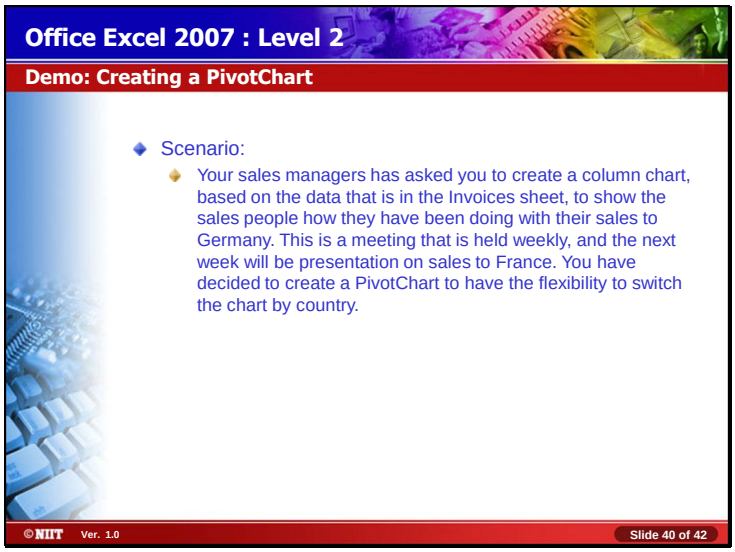


The figures in the above slide show a PivotChart generated from a PivotTable report.

You can use the following link that compares PivotTable report and a PivotChart report. In addition, this link also the difference between PivotChart and standard chart.

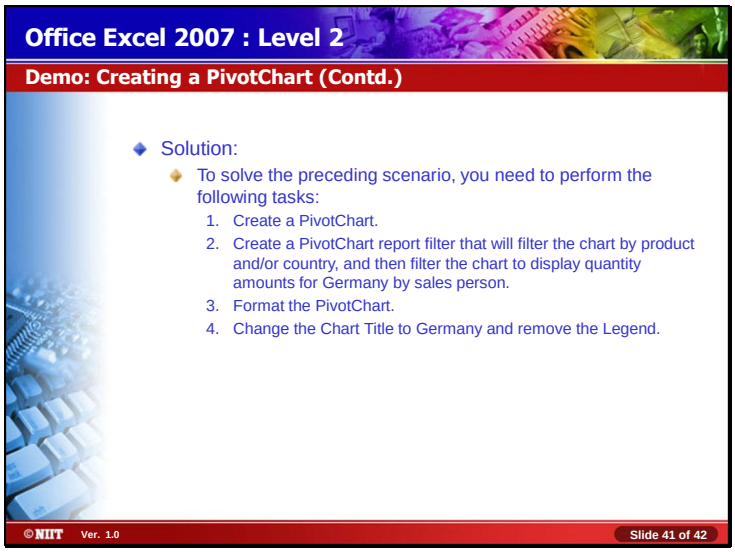
http://office.microsoft.com/en-us/excel/HP101773841033.aspx#About%20PivotTable%20reports

Slide 40



Discuss the scenario of Activity 4-2 of Lesson 4 in the Student Guide with the students.
You can access the data file for this activity from the following path in the TIRM CD: TIRM\DATAFILES FOR FACULTY\LEVEL 2\Solutions\Analyzing Data Using PivotTables and PivotCharts\My Shipping.xlsx

Slide 41



Discuss the solution with the students. To demonstrate the solution, access the file provided at the following path in the TIRM CD:
TIRM\Data Files for Faculty\SOLUTIONS\Level 2\Analyzing Data Using PivotTables and PivotCharts\My Shipping.xlsx

Additional Input:

You can use the following link to know to procedure to delete a PivotTable report or a PivotChart report.
http://office.microsoft.com/en-us/excel/HP100898931033.aspx#Delete%20a%20PivotTable%20report

Slide 42