

# Microsoft Excel 365: Analysing & Summarising Data

## Welcome

Microsoft Excel 365  
Analysing & Summarising Data

Live Online

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# Welcome

- Please unmute your mic and turn your camera on and say hello.
- Please ask questions.
- Once you have finished a practical activity either raise your hand and keep it raised until I say lower them, or just tell me.

# Course Information

## Objectives

- How to use Microsoft Excel 365 for Analysing and Summarising Data
- Duration
- Delivery Style – demonstrations and practical's

# General Information

- Please fill in the Feedback form at the end of the course <http://feedback.training.cam.ac.uk/uis>
- Please ask questions  
(This is your course and I want you to get as much as you can out of it)
- If you need assistance with the practical's let me know and we can share desktops



Slides



Files



Learning Paths



# General Information

## Course Material

# Course Information

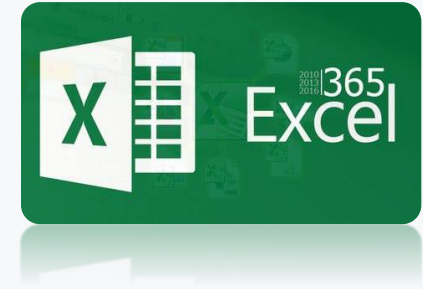
## Related Courses

[www.linkedin.com/learning](http://www.linkedin.com/learning)

[www.training.cam.ac.uk](http://www.training.cam.ac.uk)

# Which version Are you using?

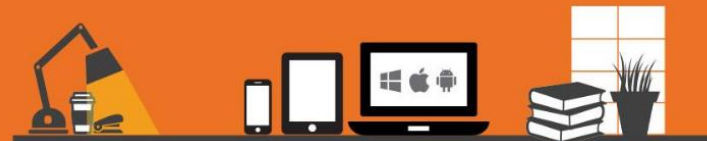
All the exercises will work using the following



Thinking of upgrading?

Staff and students can download Office 365 for free  
via this [link](#)

Get Office 365 ProPlus  
on your personal devices...



All students, and staff from qualifying institutions: download Office 365 ProPlus free on your personal devices to use while you are at Cambridge.  
(Your login will expire 30 days after you leave the University.)

# Microsoft Excel 365: Analysing & Summarising Data

## Course Topics

Creating Charts

Chart Elements

Pivot Tables

Data Consolidation

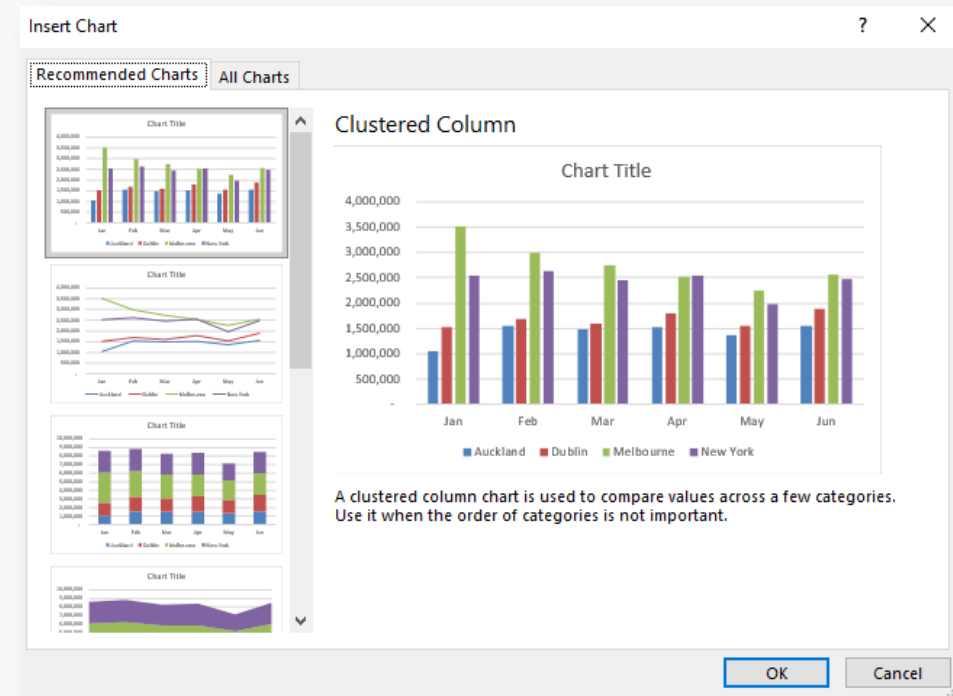
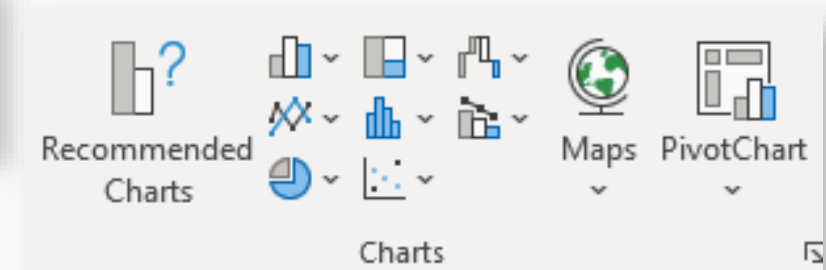
Scenarios



# Microsoft Outlook 365: Creating Charts

## Demo 1: Creating Charts

File 'Charting\_1' - 'Sorting Text' Spreadsheet



# Microsoft Outlook 365: Creating Charts

## Practice Creating A Chart

File '*Charting\_1*' use '*Chart Data*' worksheet

Select range A3:G7

Create a Line Chart from recommended charts

Select range A3:G7 again

Create a Column Chart, move it into position and colour it.

# Microsoft Outlook 365: Creating Charts

## Practice Adding Chart Elements

File '*Charting\_1*' use '*Chart Data*' worksheet

Using the Column Chart add some chart elements

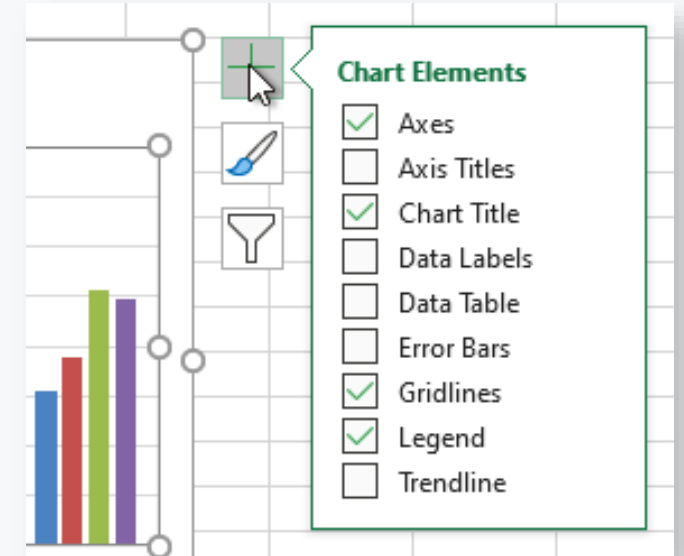
Choose a different design

Change the Colour

Move an Embedded Chart onto its own sheet

# Microsoft Outlook 365: Chart Elements

Demo – File 'Charting\_1'



# Microsoft Outlook 365: Chart Elements

## Practice Adding Chart Elements

File '*Charting\_1*' use '*Chart 1*' worksheet

Add Chart Title and Axis Titles

Reposition Legend

Click the green + label

Choose Legend and move to top

Add some Data Labels

Toggle Grid Lines Off and On

# Microsoft Outlook 365: Chart Elements

## Practice Adding Chart Elements

File *'Charting\_1'* use *'Chart 1'* worksheet

Add a Gradient Fill

Click on the Edge of Chart

Select the Format Tab

Fill dropdown

Gradient Fill

Choose a pre-set

# Microsoft Outlook 365: Chart Elements

## Practice Adding Chart Elements

File '*Charting\_1*' use '*Chart 1*' worksheet

Add a Linear Trendline for each city

Click into Chart

Select 'Chart Design' tab

Click on 'Change Chart Type' button

Choose a 2D chart

Click on + Chart Elements button

Add Trendline for each City

# Microsoft Outlook 365: Chart Elements

## Practice Adding Chart Elements

File '*Charting\_1*' use '*Chart 1*' worksheet

Create a Combo Chart

Select A3:G9

Click 'Insert'

'Recommended Charts'

Choose 'Clustered Column'

Select 'Chart Type' button

Choose 'Combo'

Set 'Total Revenue' to 'Line'

Tick 'Secondary Axis' check box

Press OK



# Microsoft Outlook 365: Chart Elements

## In Your Own Time

[LinkedIn Learning - Excel: Charts in Depth](#)

By Dennis Taylor

Includes:

Chart Essentials

Fine-Tune Your Charts

Adjust Chart Elements

Format Tab Options

Work With Popular Chart Types

Other Specialised Excel Charts

New Excel Chart Types

Change a Charts Data Source

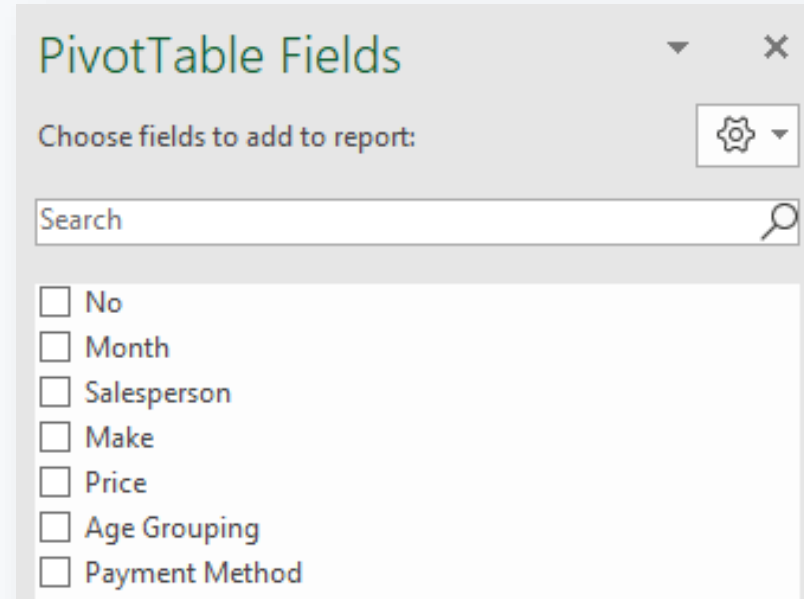
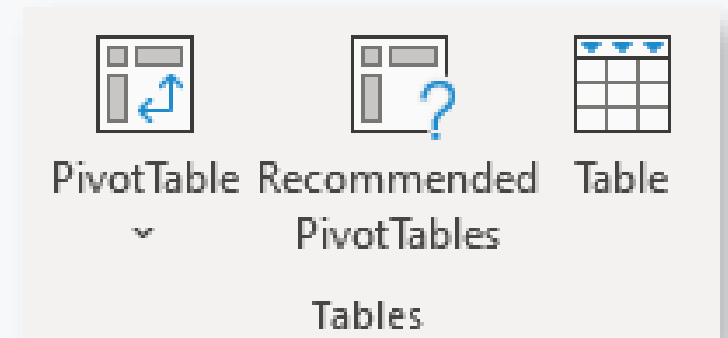
Print and Share Charts

In-cell Chart Alternatives

# Microsoft Outlook 365: Pivot Tables

## Demo 2: Pivot Tables

File 'PivotTables\_2' – 'Data Sheet Spreadsheet'



# Microsoft Outlook 365: Pivot Tables

## Practice Pivot Tables

File '*PivotTables\_2*' use '*Data Sheet*' worksheet

### Using Rows and Columns

Click into Data

Insert Pivot Table

Move:

'Month' into Columns

'Salesperson' into Rows

'Price' into Values

Reverse 'Month' and 'Salesperson' and then change back to how it was

# Microsoft Outlook 365: Pivot Tables

## Practice Pivot Tables

File *'PivotTables\_2'* use *'Data Sheet'* worksheet

### Add additional Fields

Drag 'Age Grouping' into Rows area  
Move 'Age Grouping' out and replace with 'Make'

### Filters

Drag 'Make' into the Filter area  
Filter using 'Toyota' and 'VW'  
Then Select All

Drag 'Make' out of area

Try some others

# Microsoft Outlook 365: Pivot Tables

## Practice Pivot Tables

File '*PivotTables\_2*' use '*Data Sheet*' worksheet

## Formatting A Pivot Table

Click into Pivot Table

From the 'Design' Tab

Tick Banded Rows & Choose a Style

# Microsoft Outlook 365: Pivot Tables

## Practice Pivot Tables

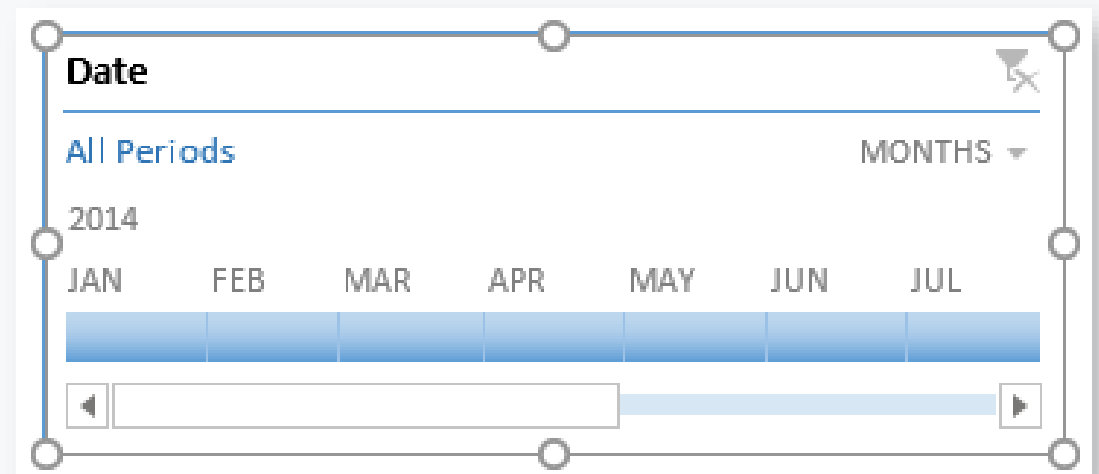
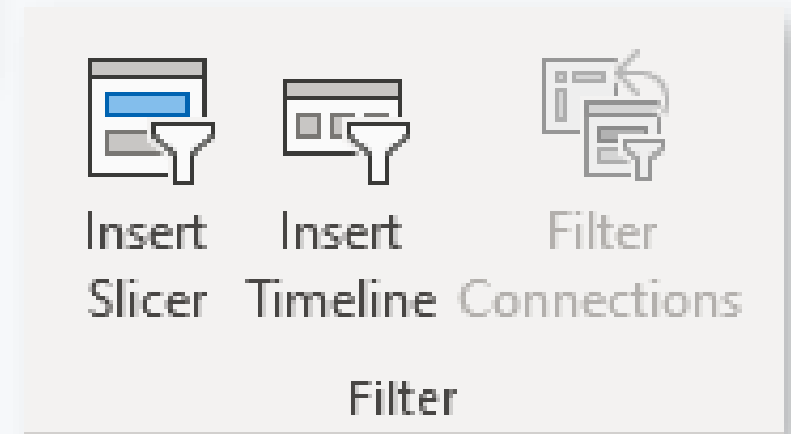
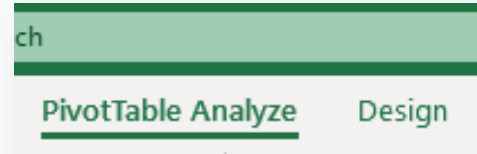
File '*PivotTables\_2*' use '*Data Sheet*' worksheet

### Slicers

Click on PivotTable Analyze Tab  
Insert Slicer  
See how it works and delete it

# Microsoft Outlook 365: Pivot Tables Timeline Slicer

## Demo – File ‘PivotTables\_9’



# Microsoft Outlook 365: Pivot Tables

## Practice Pivot Tables

File '*PivotTables\_9*' use '*PivotTable*' worksheet

### Timeline Slicers

Click on PivotTable Analyze Tab

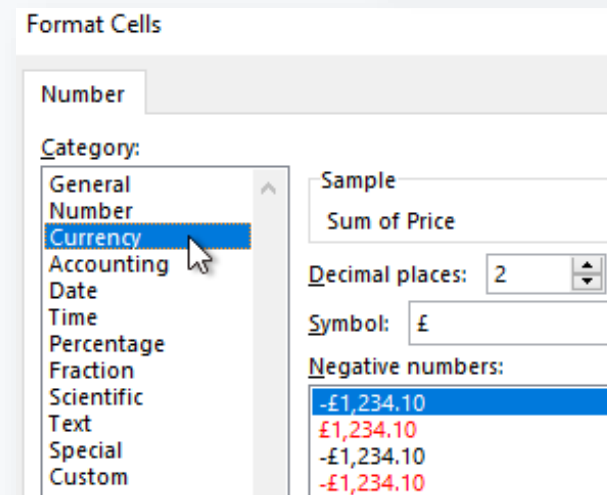
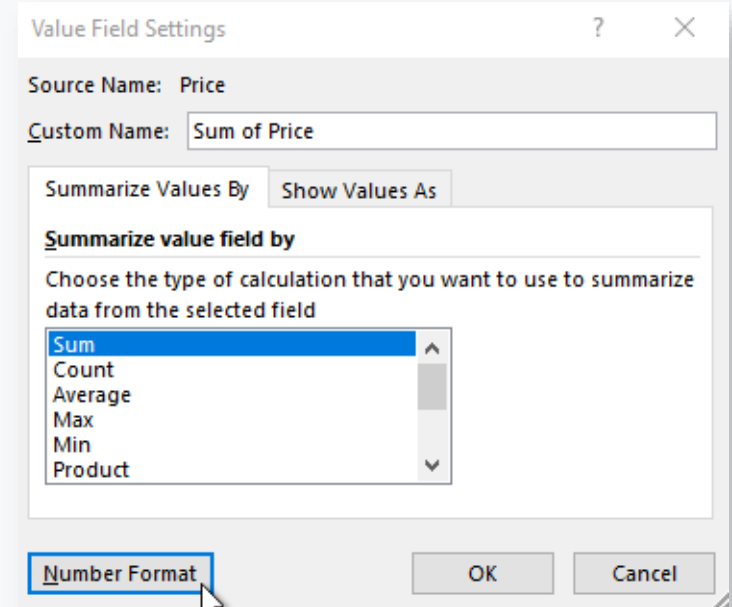
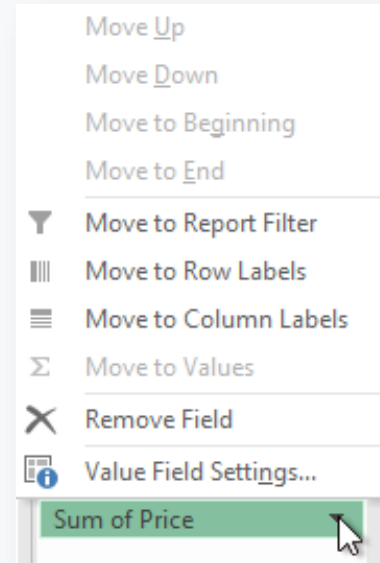
Insert Timeline Slicer

Select the month Data you are interested in



# Microsoft Outlook 365: Pivot Tables Formatting Values

## Demo – File ‘PivotTable Features\_2’



# Microsoft Outlook 365: Pivot Tables

## Practice Pivot Tables

File *'PivotTable Features\_2'* use *'Sheet 1'* worksheet

### Counting

Click on 'Sum of Price' in 'Values' field  
Click 'Value Field Settings'  
Change to 'Count'

# Microsoft Outlook 365: Pivot Tables

## Practice Pivot Tables

File *'PivotTable Features\_2'* use *'Sheet 1'* worksheet

### Formatting Values

Click on 'Sum of Price' in 'Values' field

Click 'Value Field Settings'

Change to 'Sum'

Click on 'Number Format button'

Choose 'Currency'

# Microsoft Outlook 365: Pivot Tables

## In Your Own Time

[LinkedIn Learning - Excel: PivotTables in Depth](#)

By Curt Frye

Includes:

Creating and Pivoting PivotTables

Summarising PivotTable Data

Sorting and Filtering PivotTable Data

Formatting PivotTables

Apply Conditional Formats to PivotTables

Creating and Formatting PivotCharts

Printing PivotTables

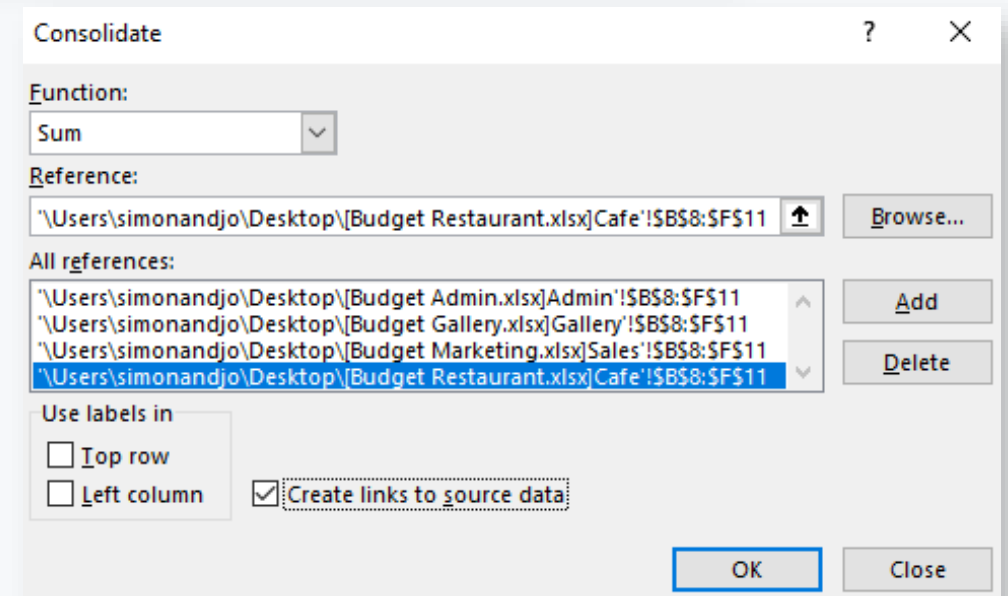
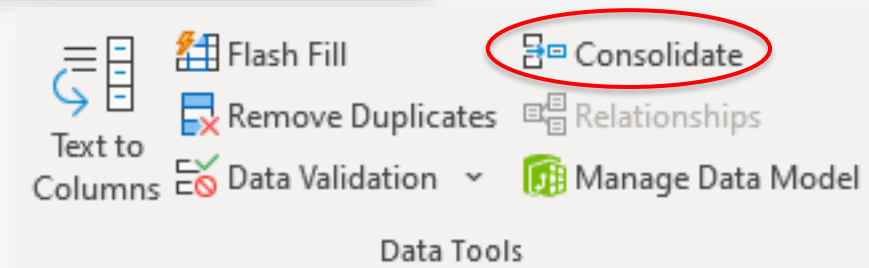
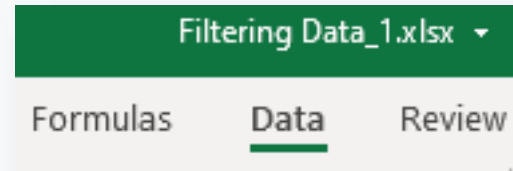
Manipulating PivotTables

Enabling and Adding Tables to the Data Model

# Microsoft Outlook 365: Data Consolidation

## Demo 3: Data Consolidation

File 'Consolidation\_1'



# Microsoft Outlook 365: Data Consolidation

## Practice Data Consolidation

File '**Consolidation\_1**' use '**Consolidation**' worksheet

Open: Consolidation\_1.xlsx

Budget Admin.xlsx

Budget Gallery.xlsx

Budget Marketing.xlsx

Budget Restaurant.xlsx

On Consolidation\_1.xlsx

Click into cell B7

Select the Data Tab / Consolidate button

Highlight B8:F11 in each of the 4 spreadsheets and  
press Add

Tick Create Link & Press OK

# Microsoft Outlook 365: Data Consolidation

## In Your Own Time

[LinkedIn Learning - Cert Prep: Excel Expert - Microsoft Office Specialist for Office 2019 and Office 365](#)

By Jennifer McBee

Includes everything you would need to know to pass the Excel Expert Exam. Worth watching even if you are not considering taking the exam.

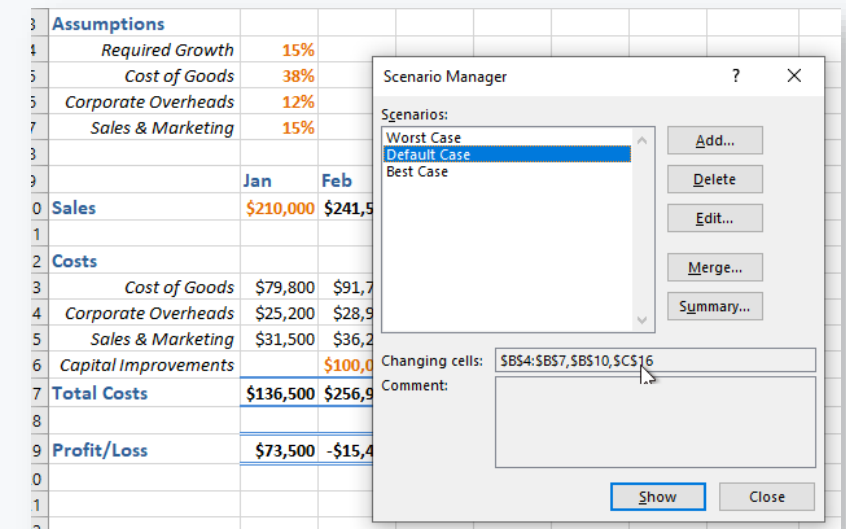
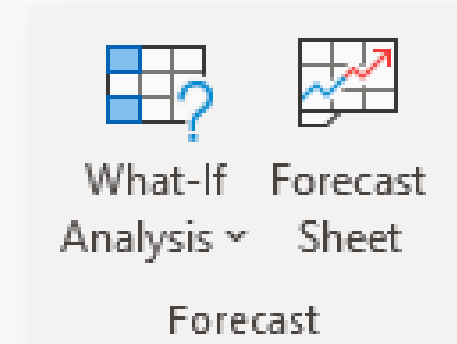
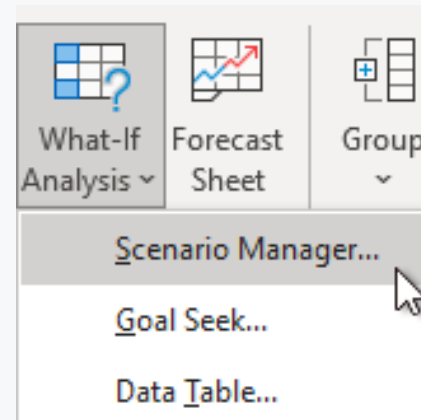
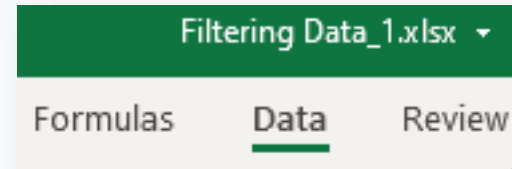
Section 4 Includes:

[Summarize data from multiple ranges by using the Consolidate feature](#)

# Microsoft Outlook 365: Scenarios

## Demo 4: Scenarios

File 'Scenarios\_1'





# Microsoft Outlook 365: Scenarios

## Practice Scenarios

File '*Scenarios\_1*' use '*This Year*' worksheet

Select Data Tab / What-if Analysis

Select 'Scenario Manager'

Click 'Add'

Enter '**Default Case**' in Scenario Name field

Click into 'Changing Cells' field

Select B4:B7 & B10 & C16 (Orange values)

Press OK

Press OK

Press Close

# Microsoft Outlook 365: Scenarios

## Practice Scenarios

File '*Scenarios\_1*' use '*This Year*' worksheet

Select Data Tab / What-if Analysis

Select Scenario Manager

Click 'Add'

Enter '**Worst Case**' in Scenario Name field

Press 'OK'

Type values as below:

1 0.05

2 0.45

3 0.20

4 0.20

5 16500

6 18000

Press 'OK'

Press 'Close'

# Microsoft Outlook 365: Scenarios

## Practice Scenarios

File '*Scenarios\_1*' use '*This Year*' worksheet

Select Data Tab / What-if Analysis

Select Scenario Manager

Click 'Add'

Enter '**Best Case**' in Scenario Name field

Press 'OK'

Type values as below:

1 0.25

2 0.25

3 0.05

4 0.25

5 41000

6 80000

Press 'OK'

Press 'Close'

# Microsoft Outlook 365: Scenarios

## Practice Scenarios

File '*Scenarios\_1*' use '*This Year*' worksheet

### Show the Scenario's

Select Data Tab / What-if Analysis

Select Scenario Manager

Click on a scenario

Press Show

# Microsoft Outlook 365: Scenarios

## In Your Own Time

[LinkedIn Learning - Cert Prep: Excel Expert - Microsoft Office Specialist for Office 2019 and Office 365](#)

By Jennifer McBee

Includes everything you would need to know to pass the Excel Expert Exam. Worth watching even if you are not considering taking the exam.

Section 4 Includes:

[Use What-If Analysis Goal Seek and Scenario Manager](#)

# Thank you



**Trainer: Simon Meaker [ssm38@uis.cam.ac.uk](mailto:ssm38@uis.cam.ac.uk)**  
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**[service-desk@uis.cam.ac.uk](mailto:service-desk@uis.cam.ac.uk)**