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Learning Solutions

NORTH SHORE  
INNOVATIONS, LTD.

SUMMARIZING MICROSOFT OFFICE EXCEL 2003 DATA TO MAKE BETTER BUSINESS  
DECISIONS

## INTRODUCTION

One of the great challenges business people face today is not collecting information, but making sense of the information they already have. Within the endless rows of Microsoft Excel data is information that can help you make better business decisions, but how can you filter your way through all that information? This course, through hands-on activities, will teach you some of the most effective techniques in data summary and display. It covers the role of business intelligence in today's workplace and introduces the power of Excel in business intelligence analysis. Students also learn how to hone their skills regarding data lists and PivotTables.

## AUDIENCE

This course is designed for experienced Excel users who have a vested interest in analyzing Excel data more effectively. This audience is familiar with tracking project budgets and chart trends, and they have no difficulty using Excel to create formulas, charts, and cell formats.

## AT COURSE COMPLETION

After completing this course, students will be able to:

•	Describe the role business intelligence plays in organizational planning and explain how to extend business intelligence analysis beyond the spreadsheet.
•	Use data lists and SUBTOTAL formulas to summarize their Excel data.
•	Create and use PivotTables to visualize worksheet data.
•	Limit the data displayed in a PivotTable to only the data needed to make a specific decision.

## PREREQUISITES

Before attending this course, students must have:

•	Experience with analyzing business data to make decisions about products, projects, and strategic direction.
•	The ability to create formulas, including advanced formulas using the Insert Function dialog box.
•	The ability to create line graphs and column charts from Excel data.

## COURSE OUTLINE

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**Module 1: Deriving Business Intelligence from Excel Data**

This module introduces the process of deriving business intelligence from spreadsheet data both in general, as presented in the course lecture segments, and in the context of your business environment.

#### Topics and Activities

•	What Is Business Intelligence?
•	The Need for Business Intelligence
•	Discussion: The Need for Business Intelligence
•	Summary of Discovering Business Intelligence in Excel

After completing this module, students will be able to:

•	Describe the business intelligence process.
•	List the needs for business intelligence.
•	Explain how to extend business intelligence analysis beyond the spreadsheet.
•	Summarize business intelligence analysis in Excel.

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#### Module 2: Summarizing Data Using Lists

This module introduces data lists and SUBTOTAL formulas, which you can use to produce meaningful subsets of your Excel data. The exercises in this module ask you to analyze sample data in terms of sample files for a fictitious company.

#### Topics and Activities

•	Demonstration: Revealing Information in Data Lists
•	Walkthrough 1: Creating a Data List
•	Walkthrough 2: Creating a Crosstab Table
•	Walkthrough 3: Creating a SUBTOTAL Formula
•	Walkthrough 4: Filtering a Data List

<ul style="list-style-type: none"><li>• Tips and Tricks for Using Data Lists and SUBTOTAL Formulas</li></ul>
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After completing this module, students will be able to:

<ul style="list-style-type: none"><li>• Create a data list.</li></ul>
<ul style="list-style-type: none"><li>• Filter data lists.</li></ul>
<ul style="list-style-type: none"><li>• Add a Total row to a data list.</li></ul>
<ul style="list-style-type: none"><li>• Summarize data using SUBTOTAL formulas.</li></ul>

### Module 3: Creating a PivotTable

This module introduces PivotTables and shows you how to create them. The information in this module also places PivotTables in the context of analyzing product sales by a store or a product.

#### Topics and Activities

<ul style="list-style-type: none"><li>• The Power of PivotTables</li></ul>
<ul style="list-style-type: none"><li>• Demonstration: Exploring the Capabilities of PivotTables</li></ul>
<ul style="list-style-type: none"><li>• Walkthrough 1: Creating a PivotTable</li></ul>
<ul style="list-style-type: none"><li>• Walkthrough 2: Pivoting a PivotTable</li></ul>
<ul style="list-style-type: none"><li>• Walkthrough 3: Adding Fields to and Removing Fields from the PivotTable</li></ul>
<ul style="list-style-type: none"><li>• Using PivotTables to Reveal Business Intelligence</li></ul>

After completing this module, students will be able to:

<ul style="list-style-type: none"><li>• Describe PivotTable views.</li></ul>
<ul style="list-style-type: none"><li>• Create a PivotTable.</li></ul>
<ul style="list-style-type: none"><li>• Pivot a PivotTable.</li></ul>

•	Add fields to and remove fields from a PivotTable.
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#### Module 4: Fine-Tuning PivotTables

This module extends your knowledge of PivotTables by showing you how to limit the data shown in your PivotTable. You will also learn how to make your data easier to comprehend by formatting your PivotTable, adding or hiding summary rows and columns, and creating dynamic charts based on your data.

#### Topics and Activities

•	Demonstration: Filtering Data in PivotTables
•	Exercise 1: Filtering a PivotTable
•	Walkthrough 1: Filtering a PivotTable by Using Page Fields
•	Walkthrough 2: Formatting a PivotTable
•	Walkthrough 3: Creating a PivotChart
•	Revealing Business Intelligence by Using Excel
•	Discussion: Taking Business Intelligence Outside the Workbook

After completing this module, students will be able to:

•	Filter a PivotTable.
•	Filter a PivotTable using Page fields.
•	Apply an AutoFormat to a PivotTable.
•	Create a PivotChart.