

## *Scorecards with Excel Workshop Details*

### Description

Will demonstrate various graphical tools available in Excel, using data extraction from other sources linked to Excel charts, manipulating and merging data with Excel formulas and features, using Pivot Tables to provide tabular summaries.

Recommended Prerequisite Knowledge: Basic Use of Excel. **Duration - 8 hours.**

### Goal

Understand basic data manipulation features of Excel and formatting of data tables to create various types of Scorecards.

### Outline / Topics

#### **Formulas**

- Relative, Absolute, Mixed References
- Across Worksheets / Workbooks
- Paste vs Paste Special

#### **Graphing in Excel**

- Chart Wizard
- Right Mouse Button
- Including / Reducing Data in Graph
- Secondary Axis Graphs
- Disjoint Data in Graph

#### **Manipulating Data**

- Key Strokes
- Sorting
- Transposing
- Converting Numeric Data to Numeric

#### **Scorecard Case Studies**

- Point in Time
- Trend
- Likert
- Pareto
- Pivot Tables

### Results

Upon successful completion of the training, participants will have demonstrated the ability to:

1. Understand the difference between absolute, relative and mixed references in Excel and how to make effective use of each type of reference.

2. Convert data into different data formats as well as different tabular formats without rekeying the data.
3. Use the Chart Wizard to create basic Excel charts, use rubberbanding to update the data range reflected in an existing chart and use a Secondary Axis in a graph.
4. Create Scorecards representing point in time information, trends, Likert scaled data and Pareto Charts.
5. Create Pivot Tables and Charts based on Pivot Table summaries.