

Using Excel for Data Management

How to use Excel to manage ginormous amount of data
and turn it into information

*APICS Falls Cities Chapter
Professional Development Meeting*

May 27, 2010



SCHOOL OF BUSINESS

INDIANA UNIVERSITY SOUTHEAST

APICS Falls Cities Chapter – Professional Development Meeting

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Welcome and Introductions

- Ranida Harris
Assistant Professor of Management Information Systems
- Accounting degree (Undergrad & Masters)
PhD in Business (MIS) from Florida State University in 2004
- Current courses taught:
Computer in Business (Excel & Access)
Systems Analysis and Design
Database Management

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About You...

- Who do you work for?
- What are the types of data your company cares about? Examples?
- How much data that you handle each week/month (i.e., volume)?
- What are the current resources that you have to get that information (i.e., software package, IT personnel)?

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Data vs. Information

Name	ID	Major	GPA
Baker, Kenneth D.	324917628	MGT	2.9
Doyle, Joan E.	476193248	MKT	3.4
Finkle, Clive R.	548429344	PRM	2.8
Lewis, John C.	551742186	MGT	3.7
McFerran, Debra R.	409723145	IS	2.9
Sisneros, Michael	392416582	ACCT	3.3

Total Number of Students = 6

Average GPA

% of students in each major

Etc.

Percent Enrollment by Major (200X)

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Data Management Using Excel

How many rows & columns in Excel?

2003: 65,536 rows x 256 columns (A to IV) = 16,777,216 cells

2007: 1,048,576 rows x 16,384 columns (A to XFD)
= 17,179,869,184 cells

Excel tools for data management

- Filtering Data
- Excel Table
- PivotTable & Pivot Chart
- Subtotals

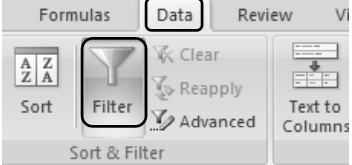
Getting Started

- Log in to your computer (IU conference account)
- Download the data file
 - <http://sites.google.com/site/apics0527>
- Save and open the data file
 - 3 worksheets
 - Sales
 - Employee List
 - Invoice – Self-practice

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Filtering Data

- AutoFilter

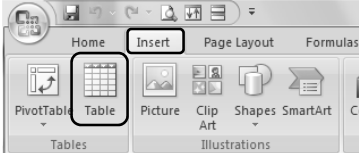


- Sales worksheet
- Click inside the data area
- Data tab → Sort & Filter group → Filter
- Examples
 - Memphis Sales In December
 - 2007 Sales exceed \$4.5 mil.

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Excel Table



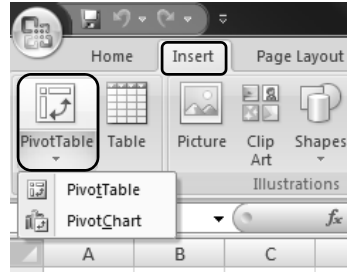
- aka “List”
- Manage and analyze the data in that table independently of data outside the table

- Sales worksheet
- Click inside the data area
- Insert tab → Tables group → Table

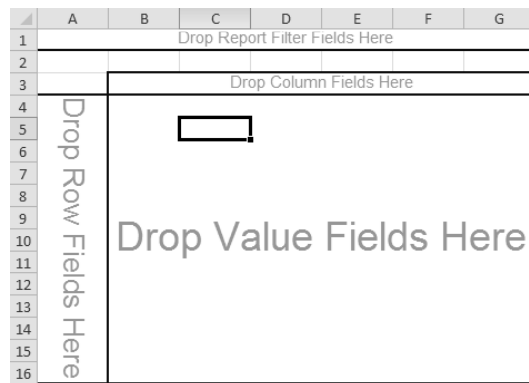
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PivotTable

- Summarize, analyze, explore, and present a summary data
- Sales worksheet
- Click inside the data area
- Insert tab → Tables group → PivotTable



Classic PivotTable Layout (Excel 2003)

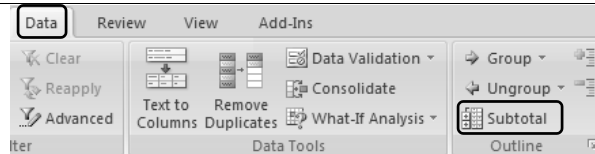


Pivot Chart

- Create interactive Pivot Chart using data from Pivot Table to help with comparisons and visualizing patterns, and trends
- Click inside a PivotTable (data source)



Subtotals



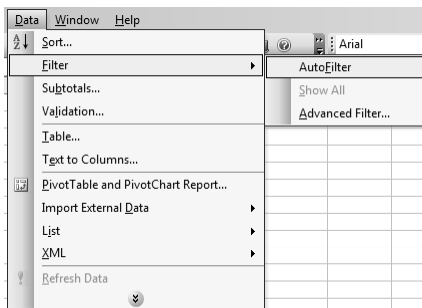
- Automatically calculate subtotals and grand totals in a list for a column
- Do not work with Excel Table
- Data must be properly sorted
- EmployeeList worksheet
- Click inside the data area
- Data tab → Outline group → Subtotals

Questions?

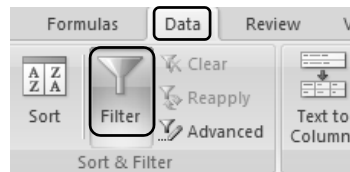
Ranida Harris
rbharris@ius.edu
(812) 941-2324

Reference: Filtering Data

Office 2003



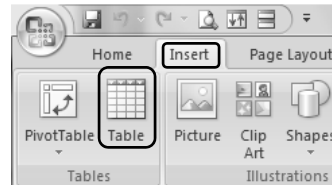
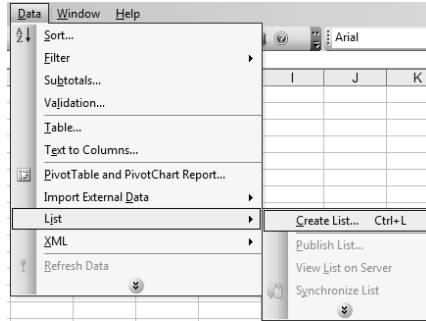
Office 2007



Reference: Excel Table

Office 2003 (Excel List)

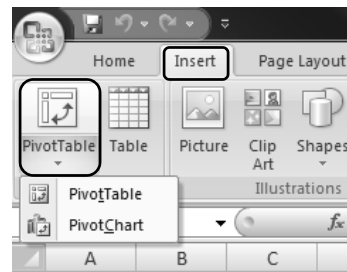
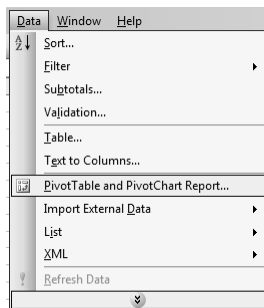
Office 2007



Reference: PivotTable & PivotChart

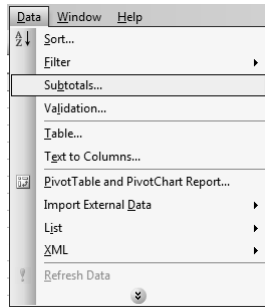
Office 2003

Office 2007



Reference: Subtotals

Office 2003



Office 2007

