Topic Summary Cheat Sheet: Filter

What: A Filter is a feature that allows the user to temporarily hide certain rows from a table or range of data.

Why: A filter is a powerful data analysis tool, allowing users to temporarily remove potentially hundreds or even hundreds of thousands of rows of irrelevant information for the specific task at hand.

When: Apply a filter to temporarily remove irrelevant information from view, help find the answer to specific questions, help create data for a report or chart, etc. (e.g. only show rows for items in "blue" instead of all colors).

How:

1. Add Filter
    a. Select desired table or range containing the data you want to filter.
    b. Click the "Data" tab on the Ribbon.
    c. Click the "Filter" option.
    d. Click the dropdown button for the desired column.
    e. Click on checkboxes for list values to uncheck them and temporarily hide all rows with those values.
    f. Press "OK" button.
    g. Repeat steps d-f as needed to apply additional filters to other columns.

2. Clear Individual Filter
    a. Click the dropdown button for the column that has the filter you want to clear.
    b. Click the "Clear Filter From [Field_Name]" option.

3. Clear All Filters
    a. Click the "Data" tab on Ribbon.
    b. Click the "Clear" option (right next to "Filter" option).

4. Turn Off Filter (i.e. Remove the ability to filter data)
    a. Click the "Data" tab on Ribbon.
    b. Click the "Filter" option to turn off the filter.

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Topic Summary Cheat Sheet: Pie Chart

What
A Pie Chart is a visual representation of information, in which individual values are shown to be sections of a circle (i.e. "slices of a pie").

Why
A Pie Chart is a powerful data visualization tool, allowing users to convey information in a concise and compelling manner.

When
Use a Pie Chart to show parts as they relate to the whole (e.g. quarterly sales, as they relate to annual sales).

How
1. Prep Chart Data
   a. Ensure all columns have clear & succinct headers.
   b. Ensure no empty rows or columns within the desired chart data.

2. Create Chart
   a. Select desired range (including headers) containing the data you want to use for the Pie Chart.
   b. Click the "Insert" tab on the Ribbon.
   c. Click the "Insert Pie or Doughnut Chart" option (pie icon).
   d. Click the desired Pie Chart type (2-D Pie is recommended)

3. Format Chart
   a. Ensure the chart is highlighted (small white circles on corners and edges). If not highlighted, click anywhere on the chart to highlight it.
   b. Click the "Chart Design" tab on the Ribbon.
   c. Click the desired style from "Chart Styles" section.
   d. Press CTLR + 1 to open Format pane on right of screen.
   e. Click on different components of the chart (e.g. Chart Title, Data Series, Legend, etc.) to update the Format pane with options for that specific chart component.

4. Add Chart Elements
   a. Ensure the chart is highlighted (small white circles on corners and edges). If not highlighted, click anywhere on the chart to highlight it.
   b. Click the "Chart Design" tab on the Ribbon.
   c. Click the "Add Chart Element" option.
   d. Select the desired chart element (e.g. "Legend" --> "Right").
   e. Repeat steps a-d as needed to add more Chart Elements.

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Topic Summary Cheat Sheet: Column Chart

What
A Column Chart is a visual representation of information, in which individual values are shown to be vertical columns alongside a vertical Y Axis.

Why
A Column Chart is a powerful data visualization tool, allowing users to convey information in a concise and compelling manner.

When
Use a Column Chart to show precise numerical values (e.g. sales per region).

How
1. Prep Chart Data
    a. Ensure all columns have clear & succinct headers.
    b. Ensure no empty rows or columns within the desired chart data.

2. Create Chart
    a. Select desired range (including headers) containing the data you want to use for the Column Chart.
    b. Click the "Insert" tab on the Ribbon.
    c. Click the "Insert Column or Bar Chart" option (column cluster icon).
    d. Click the desired Column Chart type (2-D Clustered Column is recommended)

3. Format Chart
    a. Ensure the chart is highlighted (small white circles on corners and edges). If not highlighted, click anywhere on the chart to highlight it.
    b. Click the "Chart Design" tab on the Ribbon.
    c. Click the desired style from "Chart Styles" section.
    d. Press CTLR + 1 to open Format pane on right of screen.
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    d. Select the desired chart element (e.g. "Legend" --> "Right").
    e. Repeat steps a-d as needed to add more Chart Elements.

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Topic Summary Cheat Sheet: VLOOKUP Function

What
The VLOOKUP Function is a Lookup & Reference Function, which allows the user to look up a specific value from the leftmost column of a table, and return a different value in the same row of the table, from a column chosen by the user.

Why
The VLOOKUP Function eliminates the need to manually look up additional information about a specific record of data. When set up correctly, VLOOKUP is instantaneous, effortless, 100% accurate, and dynamic (result of VLOOKUP is updated if the data is updated).

When
Use a VLOOKUP Function to automatically look up additional information about a specific record of data (e.g. look up a product's color based on its Product ID).

How
1. Function Syntax (Arguments)
    a. **lookup_value** - the value you want to look up.
    b. **table_array** - where you want to look for the value.
    c. **col_index_num** - the column number in the range containing the value to return.
    d. **[range_lookup]** - return an Exact Match (FALSE or 0) or Approximate Match (TRUE or 1).

2. Notes
    a. Prep data to ensure the lookup value is contained within the leftmost column of the source data table.

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Topic Summary Cheat Sheet: Pivot Table

What: A Pivot Table is a tool that summarizes data in a dynamic & customizable way.

Why: A Pivot Table is one of the most powerful spreadsheet features, allowing users to quickly & effortlessly summarize hundreds of thousands of rows or more of data into a concise, dynamic, and completely customizable format.

When: Use a Pivot Table to summarize data, help answer a specific question, discover trends or insights, and create reports or dashboards (e.g. show a breakdown of total sales by region, year, and product type).

How:
1. Prep Data for Pivot Table
    a. Within the data for Pivot Tables, ensure all columns have clear & succinct headers.
    b. Within the data for Pivot tables, ensure no empty rows or columns.

2. Insert/Create Pivot Table
    a. Select desired range (including headers) or table containing the data you want to use for the Pivot Table.
    b. Click the "Insert" tab on the Ribbon.
    c. Click the "Pivot Table" dropdown option and then click the "From Table/Range" option.
    d. In the "PivotTable from table or range" pop-up window, choose where you want the PivotTable to be placed (New Worksheet or Existing Worksheet).
    e. Click the "OK" button.

3. Build/Modify Pivot Table
    a. Ensure the blank Pivot Table is selected to see "PivotTable Fields" pane on the right of the screen.
    b. Experiment with different Pivot Table layouts by clicking and dragging desired fields to the 4 boxes at the bottom of the "PivotTable Fields" pane: Rows, Columns, Values, and Filters.
    c. Experiment with various options in the "PivotTable Analyze" and "Design" tabs on the Ribbon.

4. Understand Pivot Table Builder Boxes
    a. Rows - Group the data (displayed in rows).
    b. Columns - Group the data (displayed in columns).
    c. Values - Summarize the data (e.g. Sum, Average, Count, etc.).
    d. Filters - Exclude/Include parts of the data based on desired criteria.

5. Explore Value Field Settings
    a. Click on the dropdown of the desired field inside the "Values" box of the "PivotTable Fields" pane on the right of the screen.
    b. Select the "Value Field Settings..." option.
    c. Summarize values by desired type of calculation (e.g. Sum, Average, Count, etc.).
    d. Click the "Number Format" button.
    e. Select the desired Number format to best represent the current data.
    f. Click the "OK" button of the "Format Cells" window.
    g. [Optional: Assign a different Custom Name of the current field.]
    h. Click the "OK" button of the "Value Field Settings" window.

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