

Tools

- VALUE: Changes a value stored as text into a number. Excel will now recognize the value as a number when using any formula.
- =VALUE(text) where text is the value stored as text you want to change to be recognized as text.
- COUNTIF: Returns the number of observations that satisfy a designated criteria.
- =COUNTIF(range,criteria) where range is the group of cells you want to count. Criteria is the statement you want Excel to evaluate and then count the number of cells where the statement is true.
- REMEMBER PROPER REFERENCES!!!!
- NOTE: The criteria must be in quotes if it is not using a cell reference . e.g. ">50" You can also reference a cell containing ">50" and simply use a cell reference for criteria (without quotes).
- Getting Data from the Web: 1)WEBSERVICE: This function grabs real-time weather data from the web.
- =WEBSERVICE("http://w1.weather.gov/xml/current_obs/"&"Station ID"&".xml"). The link will be given to you on the exam but you need to know how to change the link to update for any given Station ID. To change the Station ID replace "Station ID" with the airport code preceded by the letter K, e.g KLEX.
- =FILTERXML(xml,xpath): this function will return a weather description from the xml code. The first input is the xml you pulled using the WEBSERVICE function and the second input is the weather data you want pulled. The weather descriptions will be given. Remember to use "" around the description and it must begin with //. Ex. =FILTERXML("Reference to cell with WEBSERVICE", "//temp_c").
- Can use our previously tool (Concatenate) to use a cell reference to our Station ID. Use & and "" to change the link(which is just text).
- Getting data from the web: 2)Copy and paste Does not update information in spreadsheet but it works for pretty much any data on the web. Remember to paste with match destination formatting to prevent formatting of webpage to be pasted.
- Getting data from the web: 3) Insert Data from the Web. Allows data from the web to update automatically but only works for certain websites.
- Select Cell where you want Table to start → Ribbon → Data → From Web (under Get & Transform Data → Enter URL → Select Desired Table → Load to (use arrow beside load) → Click Existing Worksheet (can change cell if forgot to initially select cell).
- To update a table right click and select Refresh.
- Pivot Table: Allows you to summarize data by the desired field. Select entire table (including headers) → Ribbon → Insert → Pivot Table → Set desired location Existing worksheet and location on existing worksheet (cell) → Menu pops up on the right → Select columns you want to summarize by clicking on box beside header name.
- Pivot Table does not update automatically. You must right-click and refresh.

- Pie Chart: Select data → Insert → Pie Chart (2D is preferred as 3D distorts data)
- Can format chart similarly to previous charts/graphs
- Stock Price Graphs
 - High-Low-Close: Graphs all three components (high, low, close) for each day where the top and bottom of the bar is the high and low stock price of the day. The tab in the middle is where the stock closed.
 - Open-High-Low-Close: Graphs all three components (open, high, low, close) for each day where the box is the open and close. and the line is the high and low. When open is greater than close the box is shaded black. When close is greater than open the box is not shaded (appears white).

Stock Portfolio

Make Table

- Review on general formatting
- Implementing VLOOKUP to find the name and sector of a company using the ticker. VLOOKUP(ticker reference, table reference, column with company name or sector). Remember an absolute reference on the table!

Pivot Table

- Conditional formatting: Review on changing format based on cell values, e.g. make positive values green and negative values red. Can also add up and down arrows using conditional formatting. Arrows are found under Icon Sets in conditional formatting. After inserting must edit rule to reflect correct ranges for numbers to be formatted. Check your arrows to make sure they are working properly
- Implementation of Pivot Table: Know how to insert a Pivot Table (select entire table then ribbon, insert, pivot table) and place it on the existing spreadsheet.
- Implementation of COUNTIF(): Use COUNTIF to calculate number of “Winners” and “Losers” in a stock portfolio. Remember proper references and use of quotes.

Pie Charts

- Graphing portfolio by sector or stock. Remember shares is not a measure of your portfolio! Value is a measure how much you have invested in each stock. Select data and insert pie chart (2D). Remember to select both the identifier (name of company or sector) and the data (values).
- Review of general spreadsheet formatting

What to Know for Exam

- VALUE()
- COUNTIF()
- Getting Data from the Web: 1) WEBSERVICE 2) Copy and Paste 3) Insert Data from the Web
- Remember how to concatenate or join cells for WEBSERVICE function
- Pivot Table
- Pie Chart
- Stock Price graphs (High-Low-Close, Open-High-Low-Close)
- Implementing VLOOKUP to grab company names and sectors using the Ticker
- Using WEBSERVICE to look up weather information using the proper reference to the Station ID
- CLEAN()
- Conditional Formatting
- Remember what column we are referring to when we say fraction of portfolio in each stock. (It is value!)