



NEW PERSPECTIVES EXCEL 2010 TUTORIAL 5: CASE PROBLEM 1

HEWART ZOO

SKILLS

- Plan a structured range of data
- Create an Excel table
- Format an Excel table
- Maintain data in an Excel table
- Add records
- Find and edit records
- Sort data
- Filter data
- Create criteria filters to specify more complex criteria
- Use the total row to calculate summary statistics
- Split the worksheet window into panes
- Insert subtotals
- Analyze data with PivotTables
- Create a PivotTable
- Sort PivotTable fields
- Use a slicer to filter a PivotTable

PROJECT OVERVIEW

Marvis Chennard is the director of fund-raising for the Hewart Zoo. The zoo relies on donations to fund operations, temporary exhibits, and special programs. Marvis created an Excel table to track information about donors and their pledges. You will analyze the data in the list.

STUDENT START FILE

NP_Excel2010_T5_CP1a_FirstLastName_1.xlsx (Note: Download your personalized start file from www.cengage.com/sam2010)

Instructions (Omit Steps 6, 10, and 11)

1. Open the file *NP_Excel2010_T5_CP1a_FirstLastName_1.xlsx* and save the file as *NP_Excel2010_T5_CP1a_FirstLastName_2.xlsx* before you move to the next step. Verify that your name appears in cell B4 of the Documentation sheet. (Note: Do not edit the Documentation sheet. If your name does not appear in cell B4, please download a new copy of the start file from the SAM Web site.)
2. In the Pledges worksheet, create an Excel table with the **Medium 7** table style using data in the range **A1:H29**.
3. Rename the table as **PledgeData**. **Hint: Use the Table Name Box**

4. Make a copy of the Pledges worksheet, and then rename the copied worksheet as **Q4-6** (for “Question 4-6”). (*Hint: Press the Ctrl key and drag the sheet tab to the right of the Pledges sheet tab to make a copy of the worksheet.*) In the Q4-6 worksheet, use the **Custom Sort** command to sort by *Donor Type* (A to Z), then by *Fund Name* (A to Z), and then by *Amt Pledged* (Largest to Smallest).
5. In the Q4-6 worksheet, insert a **Total** row. Calculate and display the following:
Hint: To insert the Total Row, click any one cell in the table, and then click the Total Row check box.
 - a) the number (**Count**) of pledges in the Donor Name column;
 - b) the average pledge in the Amt Pledged column;
 - c) the total amount received in the Amt Received column;
 - d) the total owed in the Amt Owed column.
- Omit

 6. ~~In the Q4-6 worksheet, split the worksheet into two horizontal panes at row 23.~~
 - ~~a) In the top pane, make the table header visible as the top row of the top pane.~~
 - ~~b) In the bottom pane, make the Total row visible as the top row of the bottom pane.~~
7. Make a copy of the Pledges worksheet, and then rename the copied worksheet as **Q7**. In the Q7 worksheet:
 - a) Filter the data to display individual donors whose amount owed is greater than zero.
 - a. Hint: Filter first by Donor Type to show Individual**
 - b. Hint: Then, filter by Amount Owed using a Number Filter. Do not use the check boxes.**
 - b) Sort the filtered data by pledge date, with the oldest date displayed first.
8. Make a copy of the Pledges worksheet, and then rename the copied worksheet as **Q8**. In the Q8 worksheet:
 - a) Filter the data to display records that have a pledge date in October through December. **Hint: Filter using the check boxes.**
 - b) Sort the filtered data by amount pledged (largest first).
9. Make a copy of the Pledges worksheet, and then rename the copied worksheet as **Q9**. In the Q9 worksheet:
 - a) Sort the filtered data by fund name in ascending (A to Z) order.
 - b) Convert the table to a range. (*Hint: When you convert your table to a normal range, the filter arrows in each column will disappear.*)
 - c) Filter the data to display only records with an amount received greater than zero. (*Hint: The filter arrows will reappear when you add the filter.*)
Hint: Use the Data tab, click the Filter button to activate the Filter feature.
 - d) Use the Subtotal command to calculate and display the total amount received for each fund.**
Hint: To insert the Subtotals, click any one cell in the data, and then click the Data tab on the Ribbon and click Subtotals.
(Hint: The subtotal should be calculated for each fund name, and the Grand Total should appear at the bottom of the Amt Received column.)
10. Omit
11. Omit

Save your changes, close the workbook and exit Excel. Follow the directions on the SAM Web site to submit your completed project.

See pictures on next page.

Pledges sheet:

NP_Excel2010_T5_CP1a_KimWright_2 - Microsoft Excel								
Table Tools								
Design								
Normal								
Check Cell								
C21 Individual								
Pledge #	Donor Name	Donor Type	Fund Name	Pledge Date	Amt Pledged	Amt Received	Amt Owed	
2101	Bartkus	Individual	General Support	1/10/2013	\$1,000.00	\$1,000.00	\$0.00	
2102	Katz & Doggs	Organization	Children's Zoo	1/15/2013	\$100.00	\$100.00	\$0.00	
2103	Eddie's Animal Care	Organization	Children's Zoo	2/1/2013	\$1,000.00	\$1,000.00	\$0.00	
2104	Diaz	Individual	ZooMobile	2/15/2013	\$100.00	\$100.00	\$0.00	
2105	Gilfix	Individual	Children's Zoo	2/20/2013	\$75.00	\$0.00	\$75.00	
2106	Dutcher	Individual	Children's Zoo	2/23/2013	\$25.00	\$25.00	\$0.00	
2107	Hagopian	Individual	ZooMobile	2/24/2013	\$50.00	\$50.00	\$0.00	
2108	Nicodemus	Organization	ZooMobile	3/11/2013	\$1,000.00	\$500.00	\$500.00	
2109	Chiauzzi	Individual	Children's Zoo	3/30/2013	\$100.00	\$100.00	\$0.00	
2110	Gilfix	Individual	Children's Zoo	4/1/2013	\$75.00	\$75.00	\$0.00	
2111	Bartkus	Individual	Children's Zoo	4/10/2013	\$200.00	\$200.00	\$0.00	
2112	More	Individual	Bird Sanctuary	4/15/2013	\$75.00	\$75.00	\$0.00	
2113	Thompson	Individual	Children's Zoo	4/15/2013	\$150.00	\$100.00	\$50.00	
2114	Pets & Us	Organization	General Support	4/15/2013	\$500.00	\$500.00	\$0.00	
2115	Edgerton & Pell	Organization	Children's Zoo	6/30/2013	\$1,000.00	\$1,000.00	\$0.00	
2116	Nelson	Individual	ZooMobile	6/30/2013	\$50.00	\$50.00	\$0.00	
2117	Loving Animal Spa	Organization	Bird Sanctuary	7/1/2013	\$1,000.00	\$500.00	\$500.00	
2118	Pet Food, Inc	Organization	General Support	7/11/2013	\$1,000.00	\$1,000.00	\$0.00	
2119	Drimusz	Individual	General Support	9/1/2013	\$25.00	\$0.00	\$25.00	
2120	Chang	Individual	ZooMobile	9/15/2013	\$150.00	\$150.00	\$0.00	
2121	Diaz	Individual	Bird Sanctuary	9/30/2013	\$100.00	\$50.00	\$50.00	
2122	Alexander	Individual	Children's Zoo	9/30/2013	\$250.00	\$200.00	\$50.00	
2123	Iwanicki	Individual	Bird Sanctuary	10/1/2013	\$200.00	\$200.00	\$0.00	
2124	Bartkus	Individual	General Support	10/30/2013	\$150.00	\$100.00	\$50.00	
2125	Foster	Individual	General Support	10/31/2013	\$50.00	\$50.00	\$0.00	
2126	Alexander	Individual	General Support	11/1/2013	\$250.00	\$0.00	\$250.00	
2127	Bartkus	Individual	Children's Zoo	12/15/2013	\$150.00	\$0.00	\$150.00	
2128	Kwong	Organization	ZooMobile	12/30/2013	\$750.00	\$0.00	\$750.00	

Q4-6 sheet:

NP_Excel2010_T5_CP1a_KimWright_2 - Microsoft Excel								
Table Tools								
Design								
Normal								
Check Cell								
D13 General Support								
Pledge #	Donor Name	Donor Type	Fund Name	Pledge Date	Amt Pledged	Amt Received	Amt Owed	
2123	Iwanicki	Individual	Bird Sanctuary	10/1/2013	\$200.00	\$200.00	\$0.00	
2121	Diaz	Individual	Bird Sanctuary	9/30/2013	\$100.00	\$50.00	\$50.00	
2112	More	Individual	Bird Sanctuary	4/15/2013	\$75.00	\$75.00	\$0.00	
2122	Alexander	Individual	Children's Zoo	9/30/2013	\$250.00	\$200.00	\$50.00	
2111	Bartkus	Individual	Children's Zoo	4/10/2013	\$200.00	\$200.00	\$0.00	
2113	Thompson	Individual	Children's Zoo	4/15/2013	\$150.00	\$100.00	\$50.00	
2127	Bartkus	Individual	Children's Zoo	12/15/2013	\$150.00	\$0.00	\$150.00	
2109	Chiauzzi	Individual	Children's Zoo	3/30/2013	\$100.00	\$100.00	\$0.00	
2105	Gilfix	Individual	Children's Zoo	2/20/2013	\$75.00	\$0.00	\$75.00	
2110	Gilfix	Individual	Children's Zoo	4/1/2013	\$75.00	\$75.00	\$0.00	
2106	Dutcher	Individual	Children's Zoo	2/23/2013	\$25.00	\$25.00	\$0.00	
2101	Bartkus	Individual	General Support	1/10/2013	\$1,000.00	\$1,000.00	\$0.00	
2126	Alexander	Individual	General Support	11/1/2013	\$250.00	\$0.00	\$250.00	
2124	Bartkus	Individual	General Support	10/30/2013	\$150.00	\$100.00	\$50.00	
2125	Foster	Individual	General Support	10/31/2013	\$50.00	\$50.00	\$0.00	
2119	Drimusz	Individual	General Support	9/1/2013	\$25.00	\$0.00	\$25.00	
2120	Chang	Individual	ZooMobile	9/15/2013	\$150.00	\$150.00	\$0.00	
2104	Diaz	Individual	ZooMobile	2/15/2013	\$100.00	\$100.00	\$0.00	
2107	Hagopian	Individual	ZooMobile	2/24/2013	\$50.00	\$50.00	\$0.00	
2116	Nelson	Individual	ZooMobile	6/30/2013	\$50.00	\$50.00	\$0.00	
2117	Loving Animal Spa	Organization	Bird Sanctuary	7/1/2013	\$1,000.00	\$500.00	\$500.00	
2103	Eddie's Animal Care	Organization	Children's Zoo	2/1/2013	\$1,000.00	\$1,000.00	\$0.00	
2115	Edgerton & Pell	Organization	Children's Zoo	6/30/2013	\$1,000.00	\$1,000.00	\$0.00	
2102	Katz & Doggs	Organization	Children's Zoo	1/15/2013	\$100.00	\$100.00	\$0.00	
2118	Pet Food, Inc	Organization	General Support	7/11/2013	\$1,000.00	\$1,000.00	\$0.00	
2114	Pets & Us	Organization	General Support	4/15/2013	\$500.00	\$500.00	\$0.00	
2108	Nicodemus	Organization	ZooMobile	3/11/2013	\$1,000.00	\$500.00	\$500.00	
2128	Kwong	Organization	ZooMobile	12/30/2013	\$750.00	\$0.00	\$750.00	
Total	28				\$341.96	\$7,125.00	\$2,450.00	

Q7 sheet:

Pledge #	Donor Name	Donor Type	Fund Name	Pledge Date	Amt Pledged	Amt Received	Amt Owed
2105	Gilfix	Individual	Children's Zoo	2/20/2013	\$75.00	\$0.00	\$75.00
2113	Thompson	Individual	Children's Zoo	4/15/2013	\$150.00	\$100.00	\$50.00
2119	Drimusz	Individual	General Support	9/1/2013	\$25.00	\$0.00	\$25.00
2121	Diaz	Individual	Bird Sanctuary	9/30/2013	\$100.00	\$50.00	\$50.00
2122	Alexander	Individual	Children's Zoo	9/30/2013	\$250.00	\$200.00	\$50.00
2124	Bartkus	Individual	General Support	10/30/2013	\$150.00	\$100.00	\$50.00
2126	Alexander	Individual	General Support	11/1/2013	\$250.00	\$0.00	\$250.00
2127	Bartkus	Individual	Children's Zoo	12/15/2013	\$150.00	\$0.00	\$150.00

Q8 sheet:

Pledge #	Donor Name	Donor Type	Fund Name	Pledge Date	Amt Pledged	Amt Received	Amt Owed
2128	Kwong	Organization	ZooMobile	12/30/2013	\$750.00	\$0.00	\$750.00
2126	Alexander	Individual	General Support	11/1/2013	\$250.00	\$0.00	\$250.00
2123	Iwanicki	Individual	Bird Sanctuary	10/1/2013	\$200.00	\$200.00	\$0.00
2124	Bartkus	Individual	General Support	10/30/2013	\$150.00	\$100.00	\$50.00
2127	Bartkus	Individual	Children's Zoo	12/15/2013	\$150.00	\$0.00	\$150.00
2125	Foster	Individual	General Support	10/31/2013	\$50.00	\$50.00	\$0.00

Q9 sheet:

Pledge #	Donor Name	Donor Type	Fund Name	Pledge Date	Amt Pledged	Amt Received	Amt Owed
2112	More	Individual	Bird Sanctuary	4/15/2013	\$75.00	\$75.00	\$0.00
2117	Loving Animal Spa	Organization	Bird Sanctuary	7/1/2013	\$1,000.00	\$500.00	\$500.00
2121	Diaz	Individual	Bird Sanctuary	9/30/2013	\$100.00	\$50.00	\$50.00
2123	Iwanicki	Individual	Bird Sanctuary	10/1/2013	\$200.00	\$200.00	\$0.00
Bird Sanctuary Total						\$825.00	
2102	Katz & Doggs	Organization	Children's Zoo	1/15/2013	\$100.00	\$100.00	\$0.00
2103	Eddie's Animal Care	Organization	Children's Zoo	2/1/2013	\$1,000.00	\$1,000.00	\$0.00
2106	Dutcher	Individual	Children's Zoo	2/23/2013	\$25.00	\$25.00	\$0.00
2109	Chiauzzi	Individual	Children's Zoo	3/30/2013	\$100.00	\$100.00	\$0.00
2110	Gilfix	Individual	Children's Zoo	4/1/2013	\$75.00	\$75.00	\$0.00
2111	Bartkus	Individual	Children's Zoo	4/10/2013	\$200.00	\$200.00	\$0.00
2113	Thompson	Individual	Children's Zoo	4/15/2013	\$150.00	\$100.00	\$50.00
2115	Edgerton & Pell	Organization	Children's Zoo	6/30/2013	\$1,000.00	\$1,000.00	\$0.00
2122	Alexander	Individual	Children's Zoo	9/30/2013	\$250.00	\$200.00	\$50.00
Children's Zoo Total						\$2,800.00	
2101	Bartkus	Individual	General Support	1/10/2013	\$1,000.00	\$1,000.00	\$0.00
2114	Pets & Us	Organization	General Support	4/15/2013	\$500.00	\$500.00	\$0.00
2118	Pet Food, inc	Organization	General Support	7/11/2013	\$1,000.00	\$1,000.00	\$0.00
2124	Bartkus	Individual	General Support	10/30/2013	\$150.00	\$100.00	\$50.00
2125	Foster	Individual	General Support	10/31/2013	\$50.00	\$50.00	\$0.00
General Support Total						\$2,650.00	
2104	Diaz	Individual	ZooMobile	2/15/2013	\$100.00	\$100.00	\$0.00
2107	Hagopian	Individual	ZooMobile	2/24/2013	\$50.00	\$50.00	\$0.00
2108	Nicodemus	Organization	ZooMobile	3/11/2013	\$1,000.00	\$500.00	\$500.00
2116	Nelson	Individual	ZooMobile	6/30/2013	\$50.00	\$50.00	\$0.00
2120	Chang	Individual	ZooMobile	9/15/2013	\$150.00	\$150.00	\$0.00
ZooMobile Total						\$850.00	
Grand Total						\$7,125.00	