

The background of the slide is a grayscale image of the Microsoft Excel interface. The top portion shows the 'Font' ribbon with options for 'Calibri', 'B', 'I', 'U', and 'Font' size set to '750'. Below the ribbon, a spreadsheet grid is visible with columns labeled 'C', 'D', and 'E', and a row labeled 'MAR'. The bottom right corner shows a detailed view of a spreadsheet with numerical values and a currency symbol, including '6,200', '3,300', '1,800', '\$ 20,55', '750', '200', '600', '100', '200', '800', '11,000', '2,000', '325', '450', '\$ 16', and '16,425'.

## **Excel for Microsoft 365/2021 – Level 4 – Extracting, Analyzing, and Visualizing Data: Instructor Setup Guide**

- **General System Requirements for Microsoft 365 (Business and Enterprise)**
  - **Software Setup Notes**
  - **Classroom Data**
  - **Courseware Timing**
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## 1.1 General System Requirements for Microsoft 365 (Business and Enterprise)

### ■ Workstation

<b>COMPONENT</b>	<b>DESCRIPTION</b>
<b>Operating system</b>	Windows 11, Windows 10, Windows 8.1, Windows Server 2019 or Windows Server 2016.
<b>Processor</b>	1.6 GHz or faster, 2-core processor. 2.0 GHz or greater is recommended for Skype for Business.
<b>Disk space</b>	4.0 GB of available disk space
<b>Memory</b>	4 GB RAM; 2 GB RAM (32-bit)
<b>Display</b>	1280 x 768 screen resolution.
<b>Graphics Hardware</b>	Graphics hardware acceleration requires DirectX 9 or later, with WDDM 2.0 or higher for Windows 10 (or WDDM 1.3 or higher for Windows 10 Fall Creators Update). Skype for Business requires DirectX 9 or later, 128 MB for the graphics memory, and a 32-bits-per-pixel-capable format.
<b>Browser</b>	Current version of Microsoft Edge, Safari, Chrome, or Firefox.
<b>.NET version</b>	Windows OS: Some features may require .NET 3.5 or 4.6 or higher to be installed. Microsoft Teams requires 4.6 or higher.
<b>Video calls &amp; meetings</b>	For an improved experience with video calls and online meetings, Microsoft recommends using a computer that has a 2.0 GHz processor and 4.0 GB RAM (or higher).  Teams requires a USB 2.0 video camera, a microphone, and an audio output device to utilize its full range of calling and meeting features.

## 1.2 Software Setup Notes

### ■ Workstation

This course was developed using Windows 10 Enterprise as the operating system and a default installation of the Microsoft 365 desktop applications.

Other operating systems described above may be used and should not impact the flow of the course.

Configure the workstation:

- with an Internet connection. Required for the exercise “**Working with Web Data**” on page 72.
- with a printer driver.

## 1.3 Classroom Data

If desired, run the class data archive **S1M34Een\_data.exe** for this course to install the class data to the **C:\S1M34Een\_data** folder.

Alternatively, copy the **S1M34Een\_data** folder for this course to **C:\** or another location to manually locate the data files. Remember to direct class participants to this location as they work through hands-on exercises.

**TECH NOTE!**

The Dashboard\_3 and Dashboard\_4 workbooks referenced below contain a static connection to the Data for Merged\_2 workbook, specifically located in the C:\S1M34Een\_data. If it is stored in a different location, the connection path must be updated manually before performing the associated exercises. See “Course Data Folder Location” on page 134.

Delete the **S1M34Een\_data** folder after the class.

The table below lists the classroom data files and the section where the file is open for use.

<b>DATA FILE</b>	<b>FILE TYPE</b>	<b>USED IN</b>
<b>Table-CO-clean_2</b>	<b>.xlsx</b>	<b>Section 2.1 Understanding the Extract, Transform, and Load Process</b> , in the exercise <b>Transforming Worksheet Data Manually</b>
<b>New Tours_2</b>	<b>.txt</b>	<b>Section 2.3 Getting Started with Power Query</b> , in the exercise <b>Working with a Tab Delimited Text File</b>
<b>Table-CO-pivot_2</b>	<b>.txt</b>	<b>Section 2.5 Reorganizing Data</b> , in the exercise <b>Pivoting Data</b>
<b>Summary-single_2</b>	<b>.xlsx</b>	<b>Section 2.5 Reorganizing Data</b> , in the exercise <b>Unpivoting Data</b>
<b>Summary-multiple_2</b>	<b>.xlsx</b>	<b>Section 2.5 Reorganizing Data</b> , in the exercise <b>Unpivoting Data</b>
<b>Data for Append_2</b>	<b>.xlsx</b>	<b>Section 2.6 Combing Data</b> , in the exercise <b>Appending Data</b>
<b>Ontario Sales_2</b>	<b>.xlsx</b>	<b>Section 2.6 Combing Data</b> , in the exercise <b>Appending Data</b>
<b>Data for Merge_2</b>	<b>.xlsx</b>	<b>Section 2.6 Combing Data</b> , in the exercise <b>Merging Data</b>
<b>Dashboard_3</b>	<b>.xlsx</b>	<b>Section 3.2 Getting Started with Dashboards</b> , in the exercise <b>Getting Started with Dashboards</b>
<b>Dashboard_4</b>	<b>.xlsx</b>	<b>Section 4.1 Working with Slicers in Dashboards</b> , in the exercise <b>Inserting and Formatting Slicers</b>

## 1.4 Courseware Timing

The following table lists an estimated time allocated per chapter and section based on a seven-hour training session.

The time required for pre-class introductions or greetings has not been included. Please note that these are estimates only and that other variables may dictate the time you spend on each chapter and section.

<b>CHAPTER/SECTION</b>	<b>ESTIMATED TIME</b>
<b>Course Overview</b>	<b>20 min</b>
1.1 Course Flow	10 min
1.2 Course Flow Graphical Objectives	10 min
<b>Working with Data Extraction, Transformation, and Loading</b>	<b>215 min</b>
2.1 Understanding the Extract, Transform, and Load Process	30 min
2.2 Power Query Overview	10 min
2.3 Getting Started with Power Query	45 min
2.4 Managing Query Results	20 min
2.5 Reorganizing Data	40 min
2.6 Combing Data	40 min
2.7 Working with Web Data	30 min
<b>Working with Data Analysis and Dashboards</b>	<b>140 min</b>
3.1 Data Analysis and Dashboard Overview	15 min
3.2 Getting Started with Dashboards	20 min
3.3 Data Analysis for Dashboard Objects	60 min
3.4 Completing and Using Dashboards	45 min
<b>Supplemental Topics</b>	<b>45 min</b>
4.1 Working with Slicers in Dashboards	30 min
4.2 Course Data Folder Location	15 min

