

091151 Microsoft® Excel® for Office 365/2019/2021: Dashboards Revision 1.01 to 1.1

Released June 2022

Section/Lesson/Topic Section	Name	Change Type
Throughout the course		<ul style="list-style-type: none"> • Changed title to incorporate Office 2021 as a version choice. • Reference to the subscription is changed from “Office 365” to “Microsoft 365”. • Images updated to align with new Office UI. • Data Files updated per changes to course content. • Year values in screenshots, data files, etc., updated to be more recent. • Slides updated to use latest LO widescreen template and updates made per changes to course content.
Frontmatter	Course-Specific Technical Requirements—Software	<ul style="list-style-type: none"> • Office requirement is now more general to include any current version of Office.
	Setting Up the Course	<ul style="list-style-type: none"> • Adjusted setup steps to stay signed into Office when using Microsoft 365. • Added steps to turn on the “new experience” interface for Microsoft 365 versions of Office.
Lesson 1, Topic A	Data Science	<ul style="list-style-type: none"> • Clarified the descriptions of some of the listed tools.
	Data Visualization	<ul style="list-style-type: none"> • Reworded the sentence about humans processing visualizations more quickly than text.
	ACTIVITY: Analyzing Data	<ul style="list-style-type: none"> • Corrected the name of the workbook file in Step 3. • Adjusted the data file so that the Quarterly Sales worksheet is selected by default, as implied by Step 4a. • Moved the questions in Steps 5b, c, and d to their own question step elements. • Removed the worksheet references in the Total Sales column formulas so that the calculations no longer break when sorting by Month.
Lesson 1, Topic B	How to Create and Modify Tables	<ul style="list-style-type: none"> • Specified that the checkboxes are in the Table Style Options tab group for the “Add or Remove Table Components” procedure, Step 2. • Consolidated Steps 2 and 3 in the “Insert Rows or Columns in the Middle of a Table” and “Delete Rows or Columns from the Middle of a Table” procedures.

Lesson 1, Topic C	Sort Data	<ul style="list-style-type: none"> Added image to the “Multi-Column/Multi-Row Sorting” supporting block showing a three-level sort.
Lesson 2, Topic A	Chart Types	<ul style="list-style-type: none"> Clarified how to insert charts. Reordered chart types table to align with how charts are ordered in the Insert Chart dialog box. Reworded the second column for some of the chart types for consistent sentence construction.
	ACTIVITY: Creating Charts	<ul style="list-style-type: none"> Corrected screenshot in Step 4d so that the chart selection does not include the Totals column. Also affects the chart in the solution file. Reworded Steps 5a and 5b to account for the fact that the chart helps you see approximate sales totals for each month; for the precise figures, they should reference the table.
Lesson 2, Topic B	How to Modify and Format Charts	<ul style="list-style-type: none"> Mentioned the context of being in the Alt Text pane in Step 3 of the “Add Alternative Text to a Chart” procedure.
	ACTIVITY: Modifying and Formatting Charts	<ul style="list-style-type: none"> Removed extraneous instructions in Step 5b for selecting a new chart style.
Lesson 2, Topic C	Chart Goal	<ul style="list-style-type: none"> Clarified figure caption.
	Chart Selection—What to Choose	<ul style="list-style-type: none"> Made “heatmap” and “slopegraph” glossary terms as they were not previously defined. Added corresponding definitions to glossary.
	Guidelines for Creating Explanatory Charts	<ul style="list-style-type: none"> Added lead-in sentences.
	ACTIVITY: Applying Best Practices in Chart Design	<ul style="list-style-type: none"> Added image in Step 8f. Removed student note in Step 14e about manually adding line breaks, as this isn’t necessary once you resize and reposition the text box.
Lesson 3, Topic A	Cell and Range Names	<ul style="list-style-type: none"> Added instructor note about emphasizing to students that range names can include both absolute and relative references.
	ACTIVITY: Analyzing Data with Formulas	<ul style="list-style-type: none"> Fixed screenshot in Step 3c to show cell F5 selected, rather than F6. Removed Step 10b and moved its ribbon tab reference to the following step.
Lesson 3, Topic B	Function Categories	<ul style="list-style-type: none"> In the table, for the “Compatibility” function category description, clarified which versions of Excel the compatibility functions pertain to.
	ACTIVITY: Analyzing Data with Functions	<ul style="list-style-type: none"> Added a general instructor note about results differing from the screenshots due to the use of the current date. Removed student note in Step 1c as redundant.

		<ul style="list-style-type: none"> • Changed what students need to select in Step 1d to get the Help docs. • Changed references to “Help” pane to “Search” pane. • Changed tenure result in Step 3h.
	ACTIVITY: Working with Logical Functions	<ul style="list-style-type: none"> • Corrected first sentence of the scenario to say that the goal bonus rate is 1% and not 4% (the commission rate). • Corrected the cell reference in Step 1f to select \$C\$4, the bonus rate (instead of the commission rate). • Added more info after Step 2d explaining that the RepProdSales named range uses both absolute and relative references, as well as why each type is used. • Added an instructor note for Step 2d explaining that instructors can use direct cell references instead of the RepProdSales named range if they prefer.
Lesson 3, Topic C	How to Analyze Data Using Data Validation, Forms, and Controls	<ul style="list-style-type: none"> • Added new Step 1 in the “Add the Form Command to the Quick Access Toolbar” procedure for showing the QAT.
	ACTIVITY: Implementing Forms and Controls	<ul style="list-style-type: none"> • Added steps to show the QAT, as it is hidden by default in the latest versions of Office. • Modified steps to account for the QAT now being below the ribbon. • The instructor note for Step 3 now correctly refers to the Expense field instead of the Order ID field. • For the Step 3c result, made it clearer that the amount was recorded incorrectly beforehand as part of the scenario, rather than the amount shown in the form being incorrect as compared to the worksheet. • In Step 7, changed “North American” to “Miscellaneous”.
Lesson 3, Topic D	Lookup Functions	<ul style="list-style-type: none"> • Corrected salary value in the text based on what’s shown in the figure.
	Vector LOOKUP	<ul style="list-style-type: none"> • Removed table from the figure and made it into an actual table element.
	Array LOOKUP	<ul style="list-style-type: none"> • Tagged “array” as a glossary term. • Corrected the array lookup formulas so that they now return the expected results. Previously they used A1:H4 as the lookup vector, whereas the data actually goes from A1:H5. • Removed table from the figure and made it into an actual table element.
	XLOOKUP	<ul style="list-style-type: none"> • New KB. This function effectively replaces VLOOKUP and HLOOKUP.
	XLOOKUP—Advanced Applications	<ul style="list-style-type: none"> • New KB. Demonstrates using XLOOKUP beyond just a standard VLOOKUP equivalent.

	VLOOKUP	<ul style="list-style-type: none"> Removed KB. Some of the material still lives on in “XLOOKUP” and “XLOOKUP—Advanced Applications”.
	HLOOKUP	<ul style="list-style-type: none"> Removed KB. Some of the material still lives on in “XLOOKUP” and “XLOOKUP—Advanced Applications”.
	The Range Lookup Argument—The Importance of True and False	<ul style="list-style-type: none"> Renamed KB to “The Importance of the Match Mode Argument”. Reworded material to align it with XLOOKUP.
	The INDEX Function	<ul style="list-style-type: none"> Changed the examples in the table to match the examples in the figure.
	The MATCH Function	<ul style="list-style-type: none"> Changed the examples in the table and in the figure so that they match.
	INDEX and MATCH vs. VLOOKUP	<ul style="list-style-type: none"> Removed KB. The material is no longer relevant as XLOOKUP is able to dynamically adjust lookup array and return array range references when new columns are added or deleted. Also, nesting MATCH inside INDEX only supports this behavior if a new column is added to the beginning of the dataset.
	The TRANSPOSE Function	<ul style="list-style-type: none"> Renamed KB to “The TRANSPOSE Function and Dynamic Array Formulas”. Reworded to account for the fact that you no longer need to select the output range and press Ctrl+Shift+Enter. You can just select a single cell where the array should begin, and press Enter. Added more material on dynamic array functions and the concept of spill. Made the former a glossary term.
	How to Use Lookup Functions	<ul style="list-style-type: none"> Adjusted the “Transpose a Dataset Using the TRANSPOSE Function” procedure to account for dynamic array formula behavior.
	ACTIVITY: Using Lookup Functions	<ul style="list-style-type: none"> Added instructor note and student note about XLOOKUP not working in Office 2019, and point to Appendix A, which has an alternative activity that uses VLOOKUP. Changed Step 3 to use XLOOKUP instead of VLOOKUP. Changed Step 6 to use XLOOKUP instead of VLOOKUP + MATCH. Reduced and consolidated Steps 7 and 8. Rather than spend time having students fix absolute vs. relative reference errors, the XLOOKUP formula in Step 6 already uses these references correctly. Added an optional step at the end of the activity for a more advanced application of XLOOKUP, using a right-to-left lookup with a match mode. In the data file, created three new named ranges that work with XLOOKUP: Month, ProdSales, and ProdTotals.

Lesson 4, Topic A	Pivoting	<ul style="list-style-type: none"> Corrected the subtotal and total sale numbers in the figure.
	PivotTable Creation	<ul style="list-style-type: none"> PivotTable creation is now split between multiple dialog boxes, so reworded the material to account for this.
	PivotTable Layout Options	<ul style="list-style-type: none"> Corrected the figure caption.
	How to Create a PivotTable	<ul style="list-style-type: none"> Adjusted steps in several of the procedures to account for changes in the dialog box for creating PivotTables.
	ACTIVITY: Creating PivotTables	<ul style="list-style-type: none"> Reworded Step 6a and Step 8a to ensure the tab is selected.
Lesson 5, Topic B	ACTIVITY: Filtering Data Using Slicers and Timelines	<ul style="list-style-type: none"> Adjusted path to select the “Clear Filters” button in the note in Step 2f. Removed redundant Step 9a.
Lesson 5, Topic C	Refresh Options	<ul style="list-style-type: none"> Changed “Connections” group to “Queries & Connections” group.
	ACTIVITY: Creating a Dashboard in Excel	<ul style="list-style-type: none"> Specified that students should select the drop-down arrow in Step 9b.
Appendix	Using Lookup Functions (NEW)	<ul style="list-style-type: none"> New appendix that includes an alternative activity to the “Using Lookup Functions” activity for students using Office 2019.
Glossary	array	<ul style="list-style-type: none"> Reworded definition to align with how the word is defined in the context of array lookups.
	histogram chart	<ul style="list-style-type: none"> Removed superfluous glossary entry.
	nesting	<ul style="list-style-type: none"> Removed superfluous glossary entry.