

Excel for Data Cleaning

Facilitation Guide - 60 minutes

Description

In this module, participants will discuss the best uses for spreadsheet tools and learn data cleaning methods specific to Microsoft Excel. Participants will learn how to import and sort/filter their data in Excel. They will learn to navigate the Data heading to manipulate their data using the Function Wizard, Text-to-Column Wizard, and Function Arguments Wizard.

Learning Objectives

Participants will...

- Learn to import, sort, and filter data in Excel.
- Learn to use built-in functions.
- Learn how to build their own functions

Materials

Presentation

Pre and Post Assessment

Optional: Virtual Question Parking Lot (i.e. Jamboard)

Facilitator Guide

Welcome and Getting Started (Slides 1-2) - Introduce yourself and your role. Share the purpose of the session and discuss the Learning Objectives.

5 Minutes

Tips & Tricks

- Key Ideas to Highlight
 - This is going to be fun! You'll learn a lot.
- Resources to Share
 - Pre-Assessment

- We will...
 - Introduce and discuss the potential uses for a spreadsheet
 - a tool for holding data in rows and columns

- for disposable data-cleanup or visualization

Take a few minutes to go through the pre-assessment and see what you know. If you're unsure/have questions about the content, those are great places to start when engaging with the presentation.

Consider – Using a virtual tool like Jamboard to serve as a question parking lot for participants to share questions that come to mind throughout the module.

Spreadsheet tools (Slides 3-6) - In this section, we'll provide an overview of three common spreadsheet tools and what a spreadsheet can be used for.

5 Minutes

Tips & Tricks

- Key Ideas to Highlight
- Resources to Share

- We will...
 - Provide a comparison of common spreadsheet tools.
 - Provide examples of spreadsheet "Don'ts"
 - Compare the purpose of tables and spreadsheets.

Accessing and Summarizing Data (Slides 7-18) - In this section, we'll cover the process of importing data in Excel. We will also discuss different methods of sorting and filtering data to optimize how it is organized.

20 Minutes

Tips & Tricks

- Key Ideas to Highlight
 - Importing data into Excel.
 - Sorting/Filtering data.
- Resources to Share

- We will...
 - Discuss how to import data into Excel safely.
 - Guide participants through the Text Import Wizard.
 - Look out for mangled data.
 - Discuss how to find sorting/filtering options under the Home or Data tab.

- Example of misordering data by partially selecting it before sorting.

Manipulating Data (Slides 19-28) - In this section, we'll introduce participants to the Data heading to help them carry out cleaning functions. We will help them navigate through the Function Wizard, Text-to-Column Wizard, and Function Arguments Wizard

20 Minutes

Tips & Tricks

- Key Ideas to Highlight
 - CONCATENATE
 - Split Text-to columns
 - Deduplication
 - VLOOKUP
- Resources to Share

- We will...
 - Guide participants through the process of building your own functions.
 - Guide through the CONCATENATE process.
 - Guide through the VLOOKUP process.
 - Guide participants through using built-in functions.
 - Guide through Split Text-to-Columns.
 - Guide through the process of deduplicating.

Getting Data out of Sheets & Recap (Slides 29-31) - In this section, we'll cover how to save a copy of your Excel data. We will also revisit the learning objectives and address participant's questions.

10 Minutes

Tips & Tricks

- Key Ideas to Highlight
- Resources to Share
 - Post Assessment

- We will...
 - Recommend that participants use the "CSV (Comma delimited)" function to download their data file.
 - Revisit the Learning Objectives.

- **Questions?** - Check to see if your audience has any questions about the presentation. If used, refer back to the virtual question parking

lot (i.e. Jamboard) to answer any last questions.

- **Thank you!** – Give yourself a round of applause! Share link to post-assessment for the final Check for Understanding.