Introduction to Excel Basics

Excel Basics Tutorial

Getting Starting
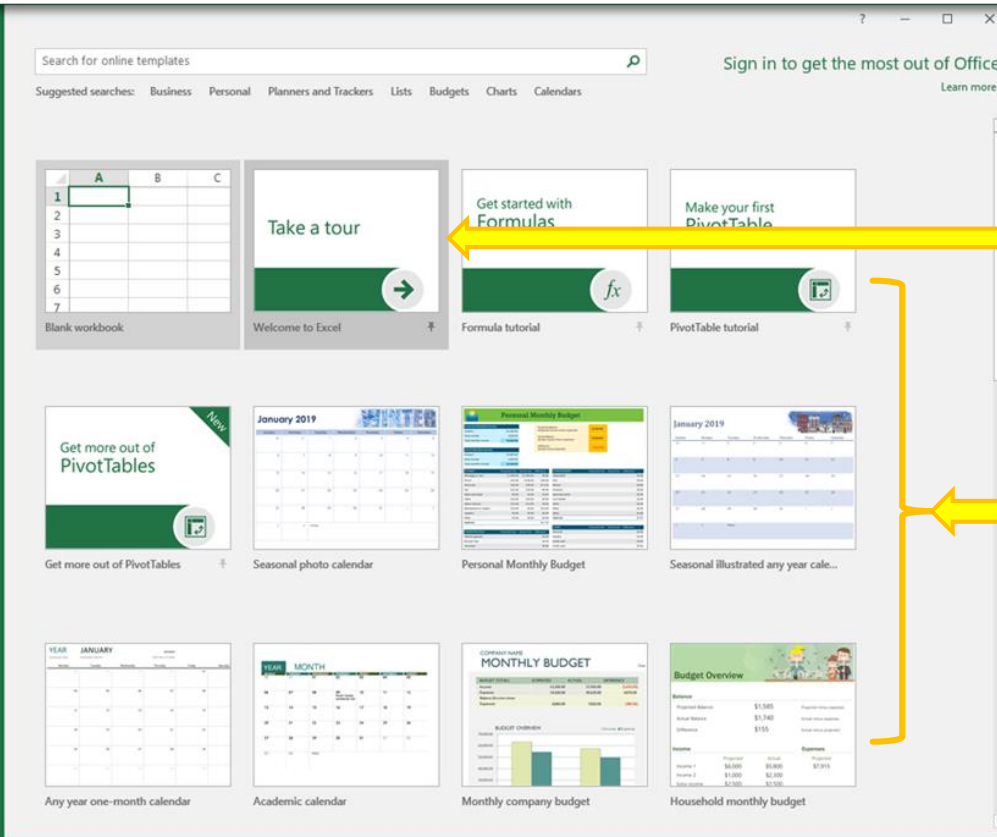
Open Recent - excels files you created or updated

Open Other Workbooks - browse computer files

Take a Tour - an overview of excel you can take on your own

Open Template – predesigned spreadsheet you can use to create new spreadsheets with the same formatting and predefined formulas.

TEMPLATES

Search Keyword – Enter search criteria and categories appear on right

Select category– Groups of related templates based on Keyword

TERMINOLOGY & FUNCTION

Quick Access Tools – frequently used commands

Ribbon – a command bar that organizes a program's features into a series of tabs at the top of a window

Tab – a group of commands broken into categories

Name Box – displays current cell(s) selected
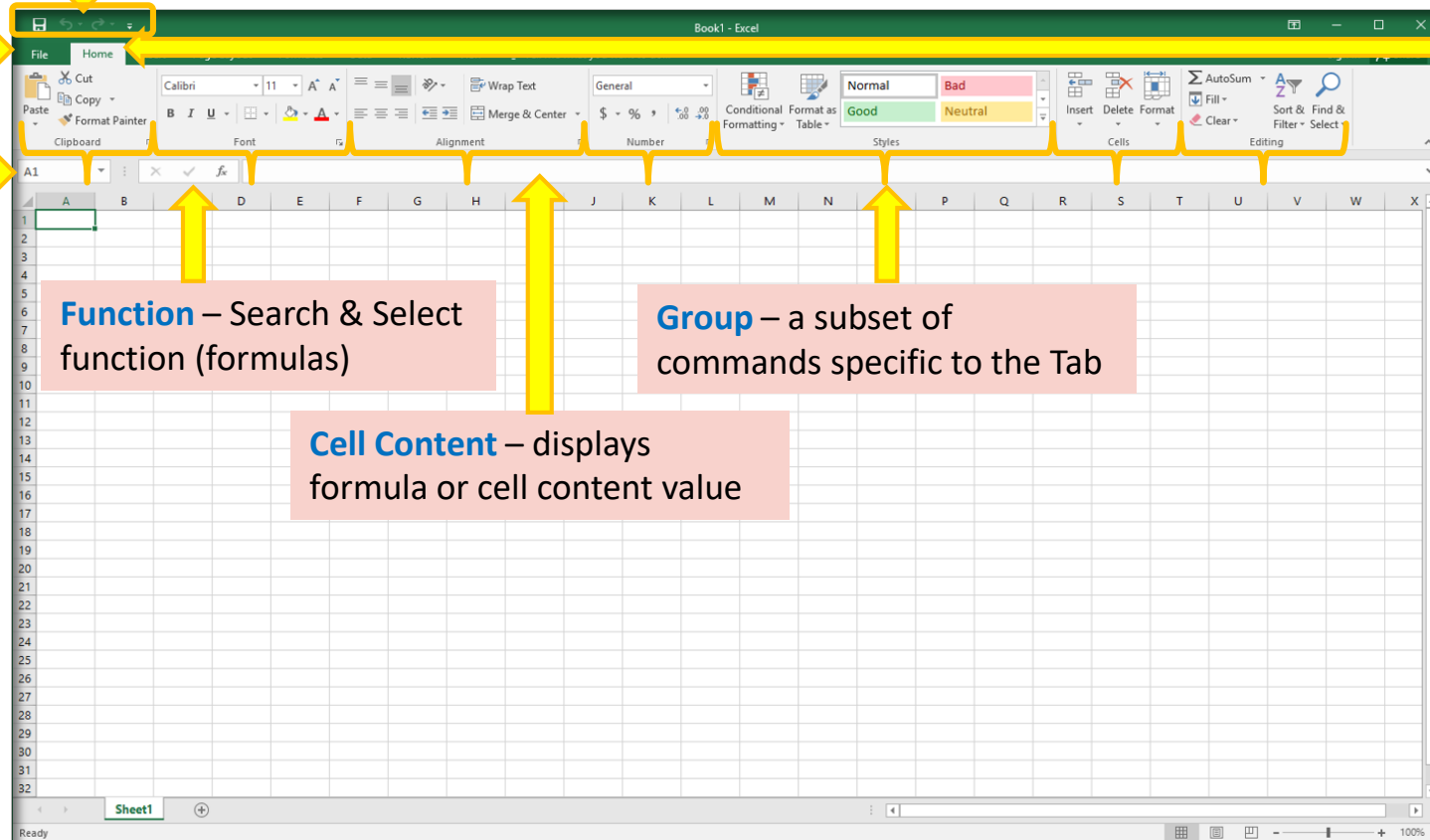
Function – Search & Select function (formulas)

Group – a subset of commands specific to the Tab

Cell Content – displays formula or cell content value

TERMINOLOGY & FUNCTION
-- CONTINUED --
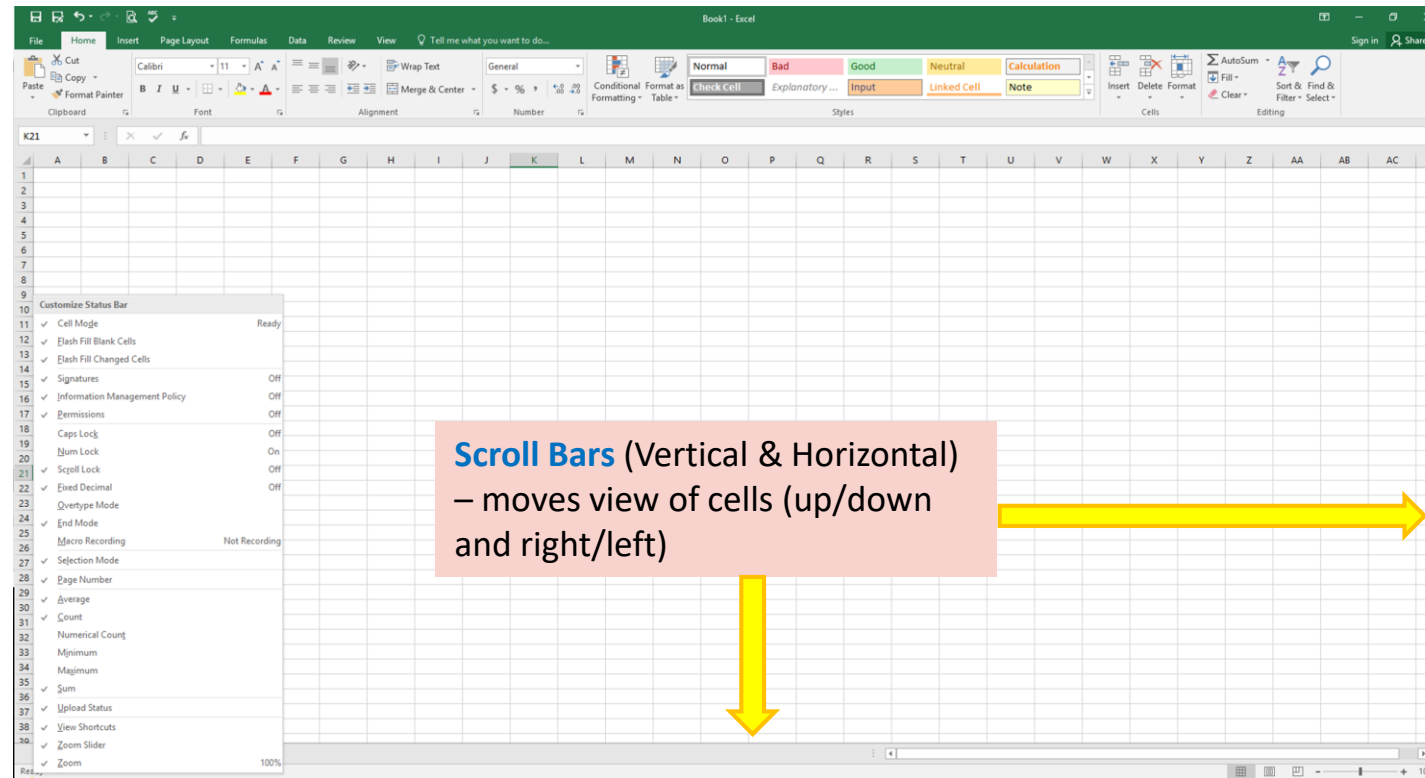
Scroll Bars (Vertical & Horizontal) – moves view of cells (up/down and right/left)

Zoom Bar – Quick Access to Zoom In/Out Spreadsheet

STATUS BAR – Right Mouse on Ready to display worksheet settings

View Options – Quick access to basic views

TERMINOLOGY & FUNCTION
-- CONTINUED --

Workbook (file) - a collection of one or more spreadsheets /worksheets

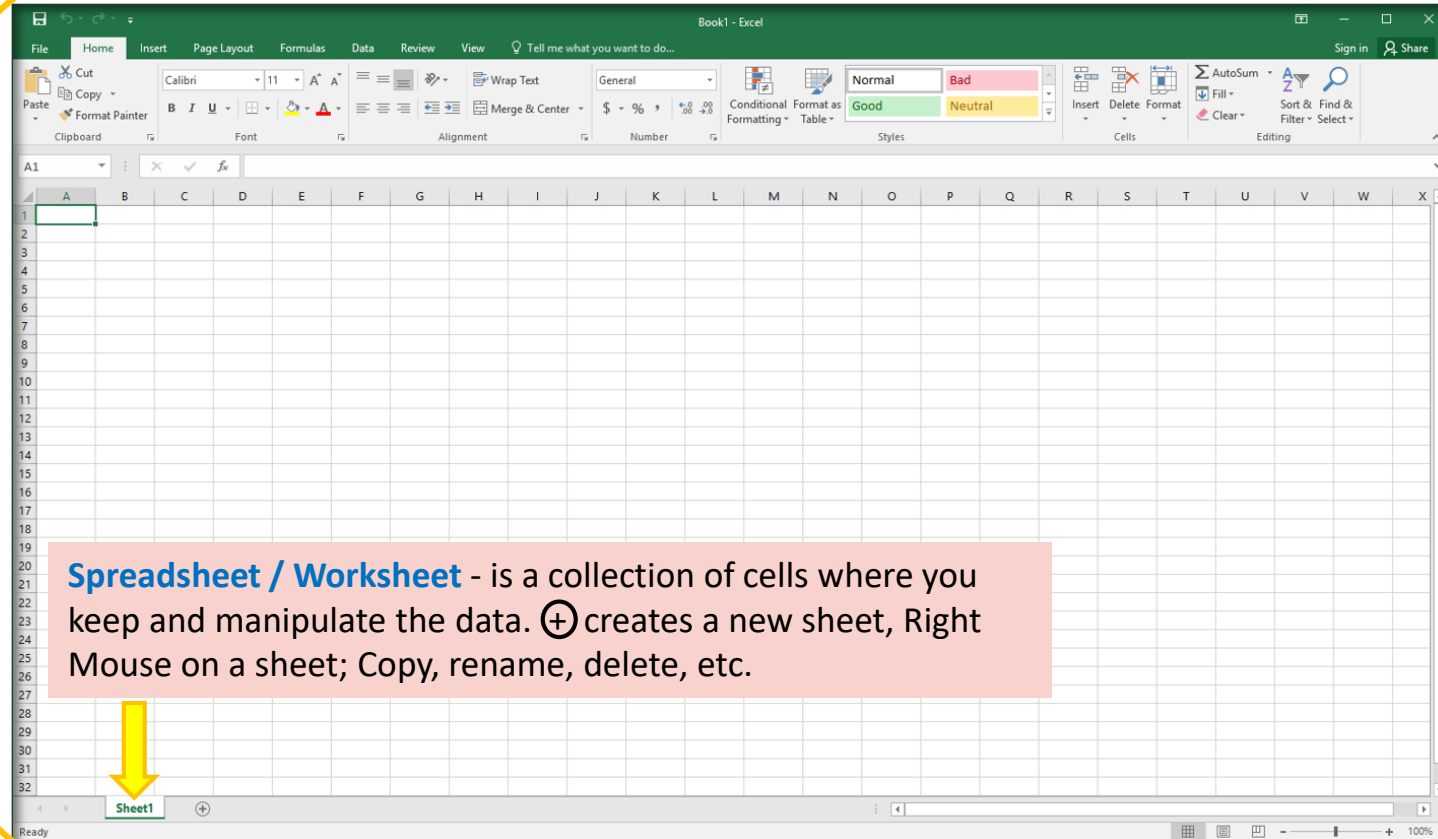**Spreadsheet / Worksheet** - is a collection of cells where you keep and manipulate the data. ⊕ creates a new sheet, Right Mouse on a sheet; Copy, rename, delete, etc.

QUICK ACCESS TOOLBAR

Standard Short cuts to access frequently used commands

New – Create a new workbook

Open – Open an existing workbook

Save – save to same name as opened

Email – send a copy

Quick Print – print with existing settings

Print Preview and Print – preview and allows changes

Spelling – proof-read content

Undo – removes last change made
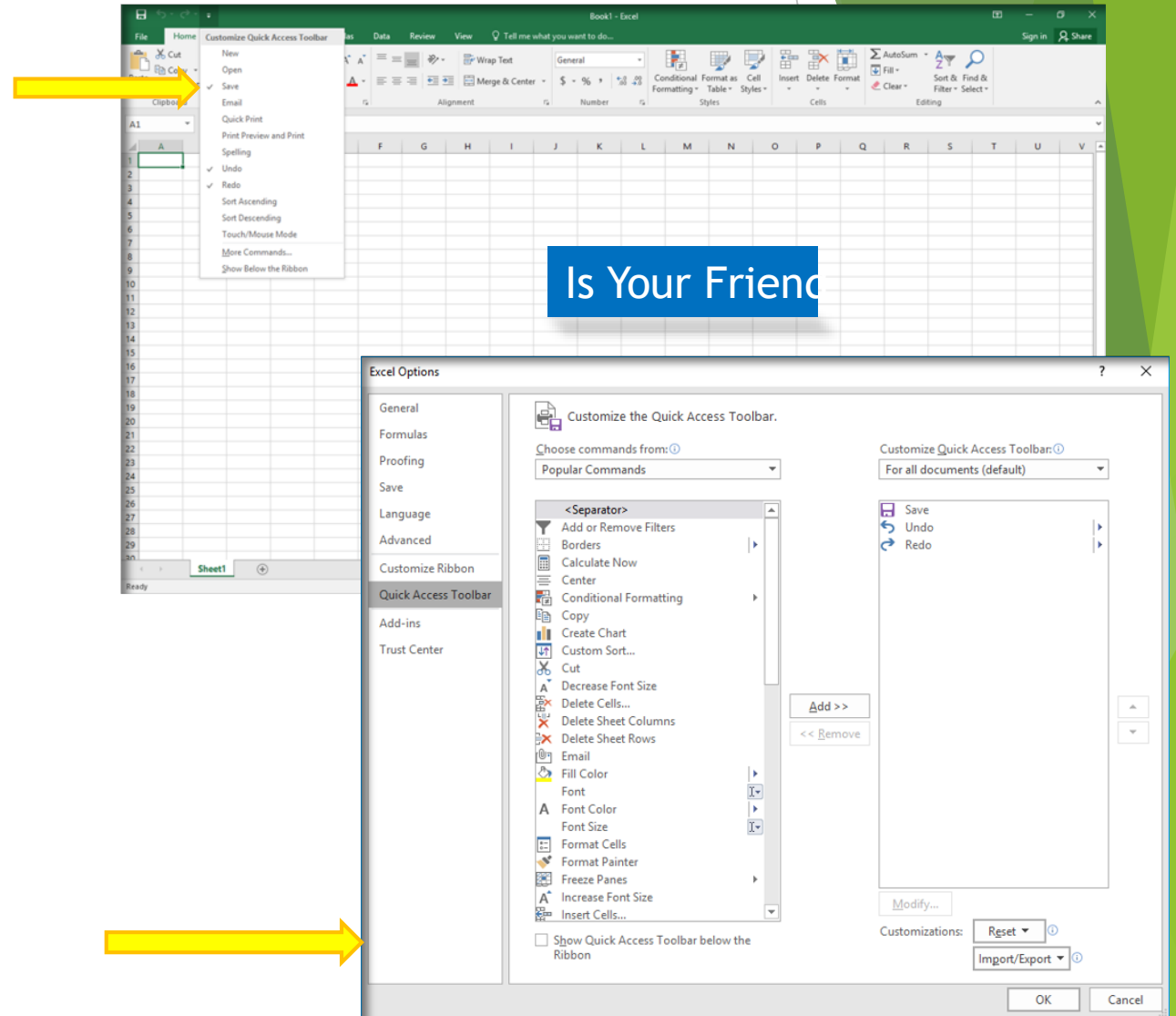
Redo – reinstates removed change

Sort Ascending – lowest to highest

Sort Descending – highest to lowest

Touch/Mouse Mode – Changes spacing for touch usability

More Commands – access to all excel commands / Customization

Show Below the Ribbon – location of quick access bar

Is Your Friend

HOME TAB

the most frequently used options

Clipboard - cutting and pasting text and images
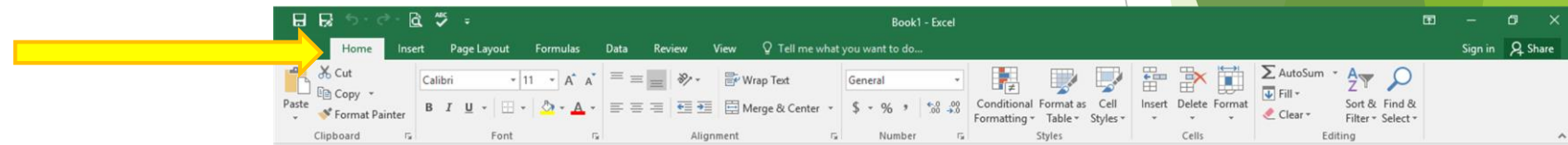
Font - applying Font styles

Alignment - Aligning data

Number - Formatting Numbers

Styles - Applying conditions & styles to table elements

Cells - Adding, deleting and formatting cells

Editing - Sorting, filtering, editing multiple cells

INSERT TAB

add objects into Excel

Tables - advance

Illustrations – Medium

Add-ins – Advance
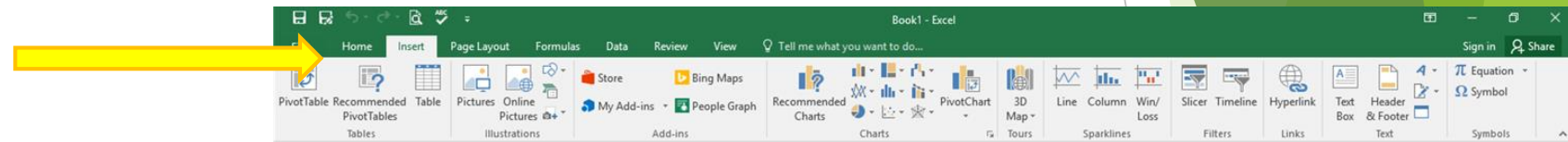
Charts – Medium

Sparklines – Advance

Filters – Advance

Links – Quick access to Web pages, files and worksheet locations

Text – Medium

Symbols - Advance

More advance functionality and not covered in this class, but will touch base on Links

Page Layout TAB

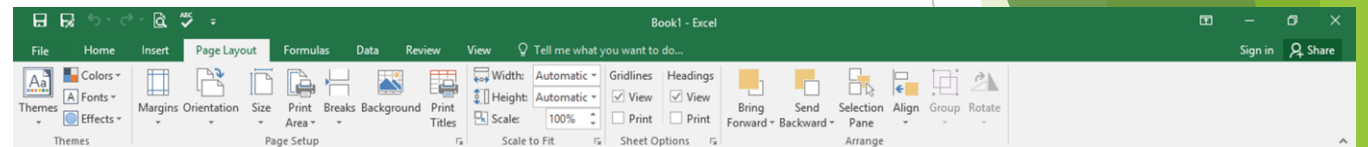arrangement of text, images, and other objects on a page

Themes - Changes Default Colors, Fonts, Effects

Page Setup – Basic (Printing) - Medium

Scale to Fit – Advance

Sheet Options – Medium

Arrange – Advance

More advance functionality and not covered in this class

Formulas TAB

Application of functions to cells to create dynamic reports.
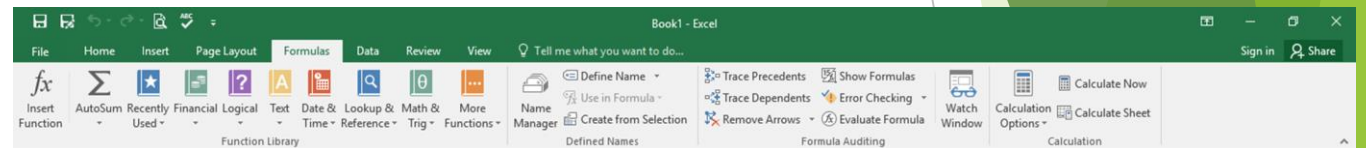
Function Library - Basic -> advance

Defined Names – Advance

Scale to Fit – Advance

Formula Auditing – Advance

Calculation – Settings (Auto vs. Manual)

Note: There are 461 functions. there is no need to learn every formula for we can find formulas category wise such as: Financial, Logical, Text, Date & Time, Lookup & Reference, Math & Trig, and many more.

More advance functionality but will touch base on a few of its capabilities

Data TAB

Connecting with large amounts of data

External Data - advance

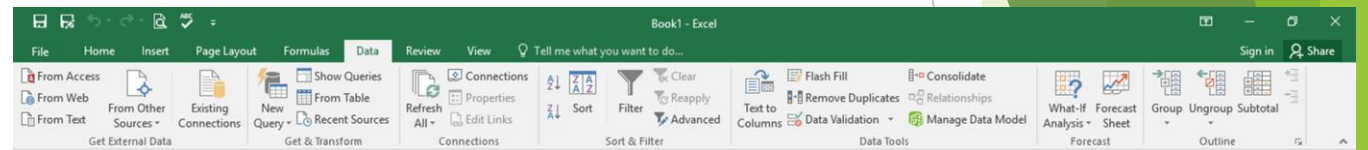Get & Transform – Advance

Connections – Advance

Sort & Filter – Advance, Basic covered on Home Tab

Data Tools – Medium -> Advance

Forecast – Advance

Outline - Medium

More advance functionality and not covered in this class

Review TAB

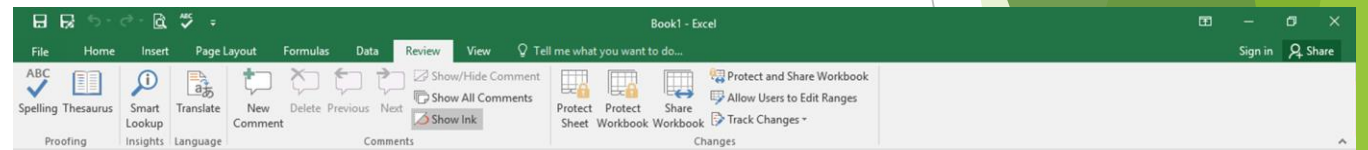sharing data with the proper information whilst ensuring security of data

Proofing - Spell Check and Thesaurus suggestions

Insights – Advance

Language – Medium

Comments – Medium

Changes – Advance

More advance functionality but will touch base on a few of its capabilities

view TAB

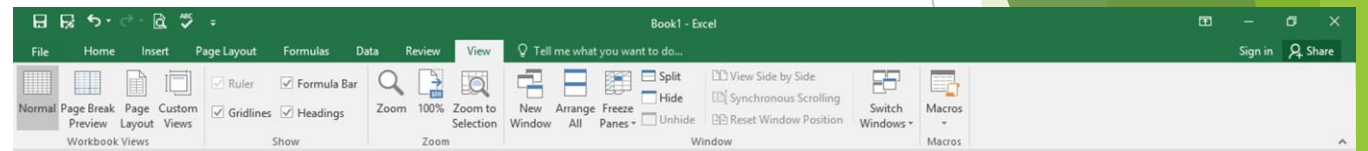change the data View; useful in preparing the workbook for printing

Workbook views - Setup Print pages and custom Views

Show – worksheet setting options

Zoom – increase size of text viewing area

Window – Basic (Freeze/ Hide) -> Medium

Macros – Advance

More advance functionality but will touch base on a few of its capabilities
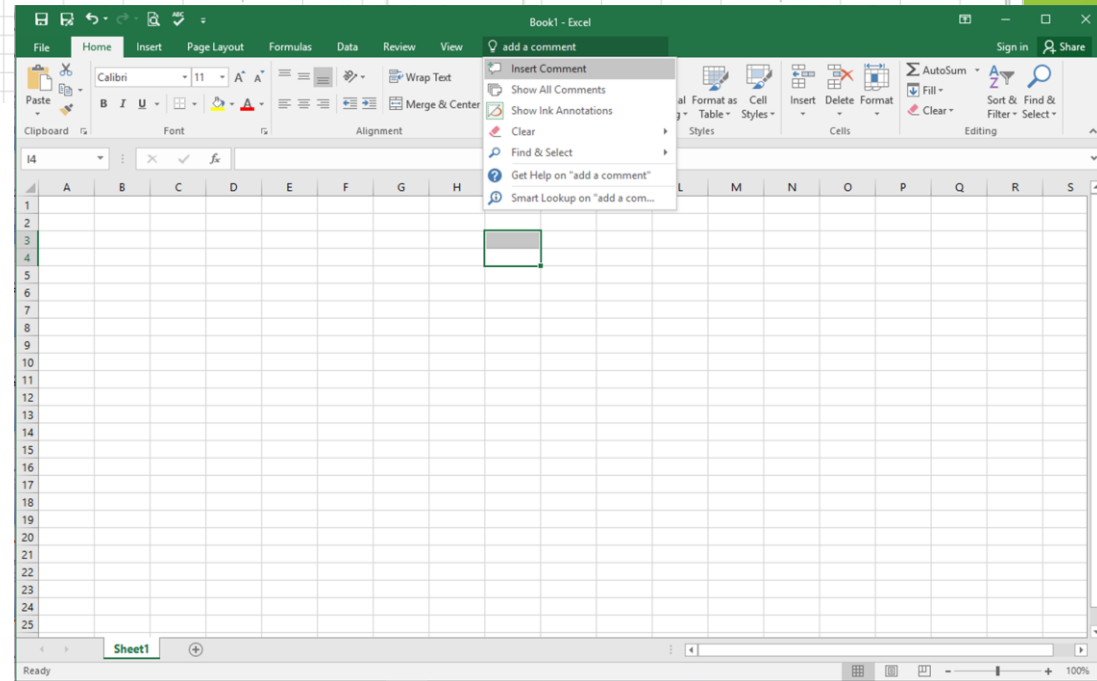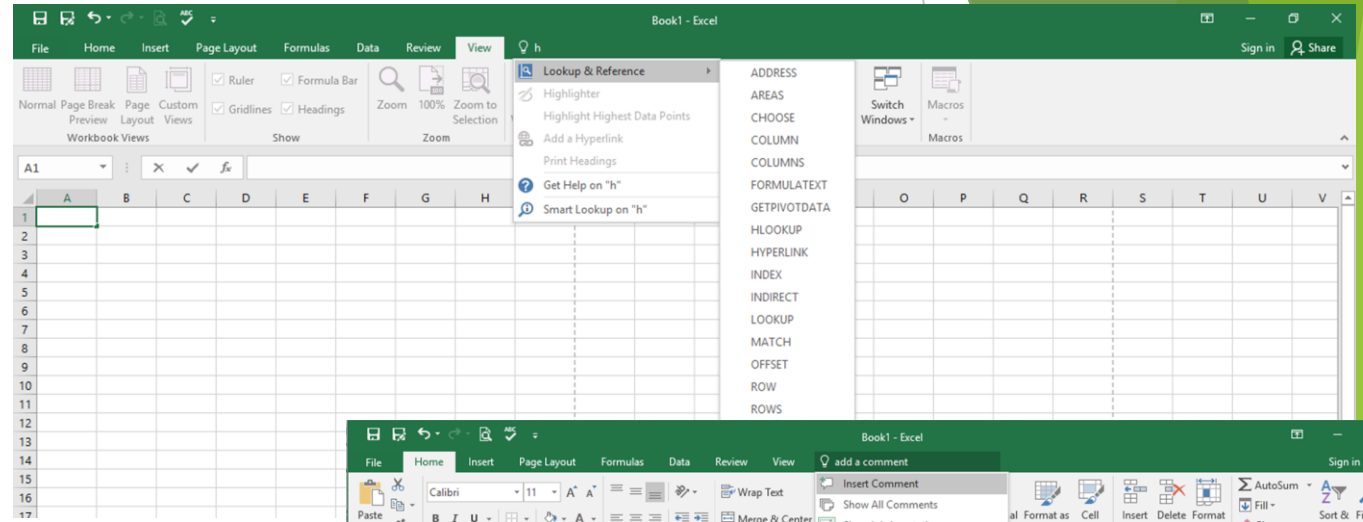
Tell me what … TAB

New Help functionality

Double click on tab - text box & drop down appears

suggested topics – recently used

additional suggestions – start typing

Click on a suggestion - automatically executes

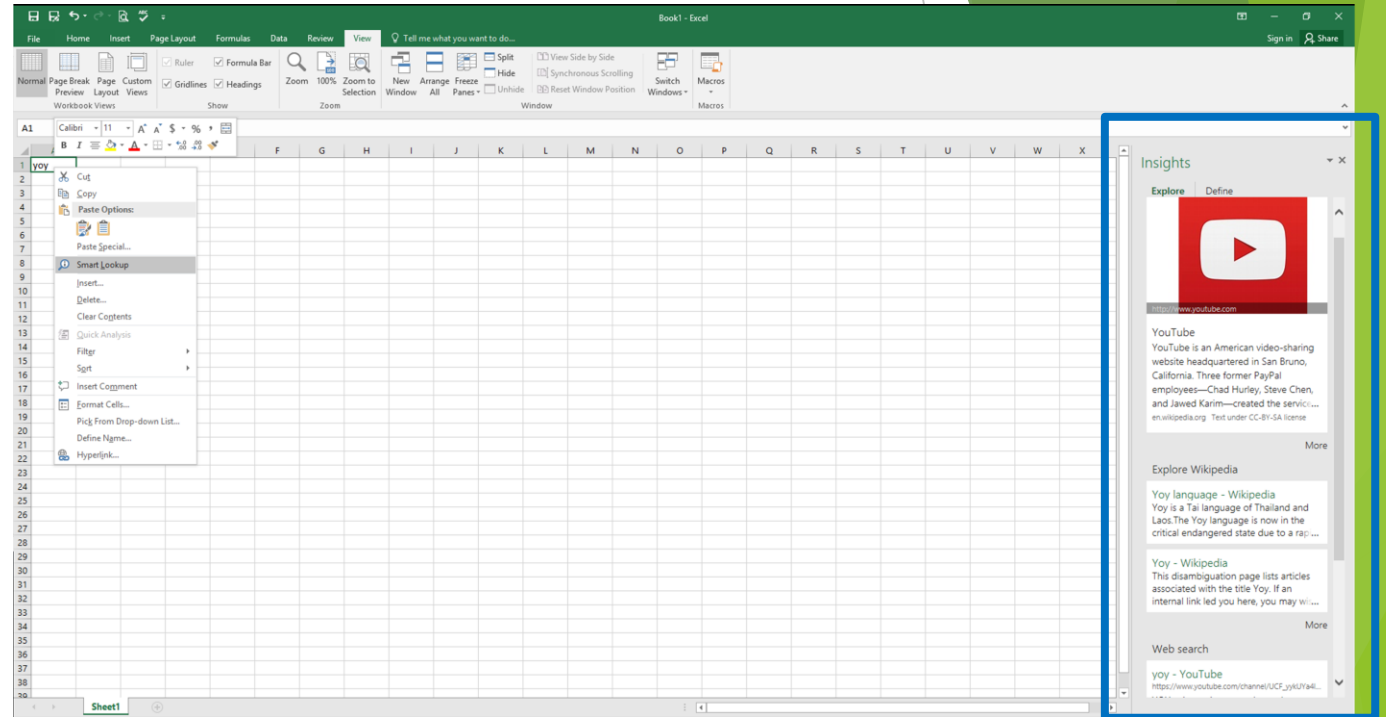# Smart Lookup

New functionality

Right Mouse – Click on Smart Lookup

Tell me What… Tab – type cell content and Smart Lookup is an option

Displays insights for what the content of a cell could represent

Powered by Bing – Microsoft's Search engine

File TAB

gives you access to file functions
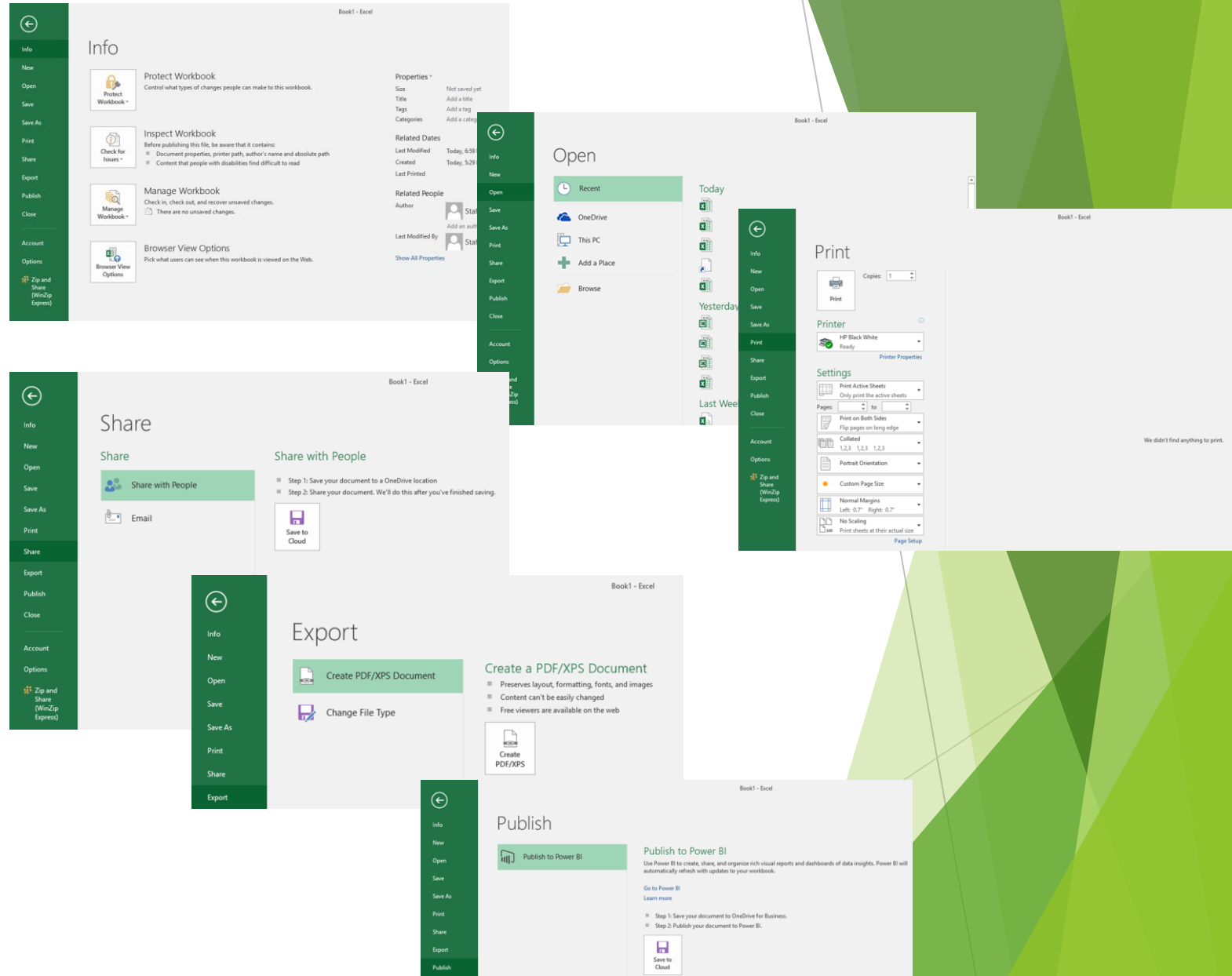
Info – Advance

New – Create a new workbook

Open – access an Existing workbook

Print – Ctrl printing options

Share – Medium

Export – Change file type
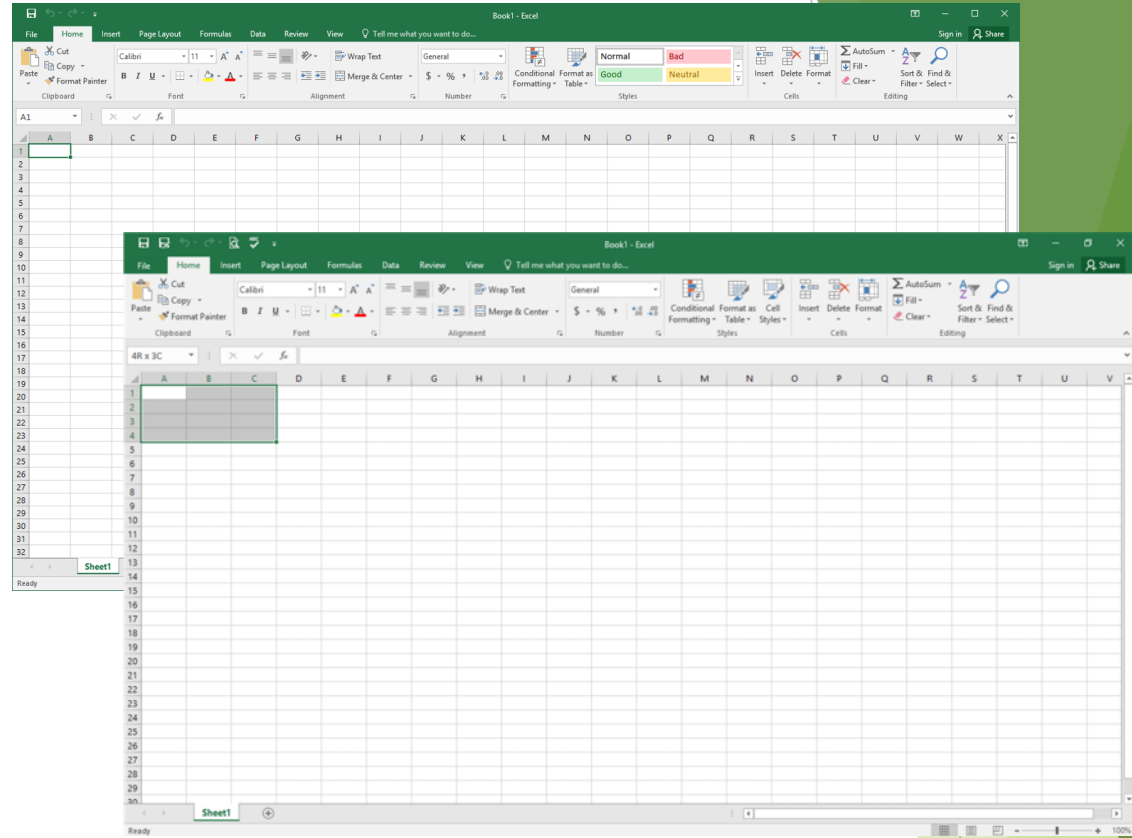
Publish - Advance

Excel content

Column - a vertical series of cells (labeled A -> …)

Row - a horizontal series of cells (labeled 1 -> …)

Cell - the intersection between a row & a column (A1)

Range - a collection of selected cells (A1:C4)

Short cuts

- **Arrows**: right, left, up, down
- **Ctrl arrow**: Moves to max cell
- **Shift arrow**: Multiple cells
- **Enter** – Right one cell
- **Shift enter** – Left   one cell
- **Tab** – Right one cell
- **Shift Tab** – left one cell
- **F2** – positions to end of cell content
- **F12** – Save AS (note the many file types)

- **CTRL Z**: UNDO
- **CTRL C**: COPY
- **CTRL P**: PASTE
- **CTRL X**: CUT
- **CTRL D**: DUPLICATE
- **CTRL ENTER** – KEEP YOU IN CURRENT CELL
- **CTRL N** – NEW WORKBOOK
- **CTRL O** – OPEN EXISTING
- **CTRL S** – SAVE FILE

Hover over elements in Ribbon for more available short cuts

Create A Worksheet

References

Beginners: https://www.youtube.com/watch?v=rwbho0CgEAE
https://www.youtube.com/watch?v=tuk99Sgc6Fw