

GRAFTON REGIONAL DEVELOPMENT CORPORATION
PRESENTS

ASK THE PROS:



Excel for Beginners



Today's Agenda

Setting Up Your Spreadsheet

- Keystrokes
- Orientation
- Headers/Footers
- Gridlines
- Printing

Formatting Your Cells

- Cell format and alignment
- Wrap Text and Merge
- Borders

Finding and Organizing Your Data

- Filters
- Sorting
- Conditional Formatting

Formulas

- Simple Formulas
- Auto Sum
- Other sheets



KEYSTROKES

PC

CTRL C= COPY

CTRL V= PASTE

CTRL X= CUT

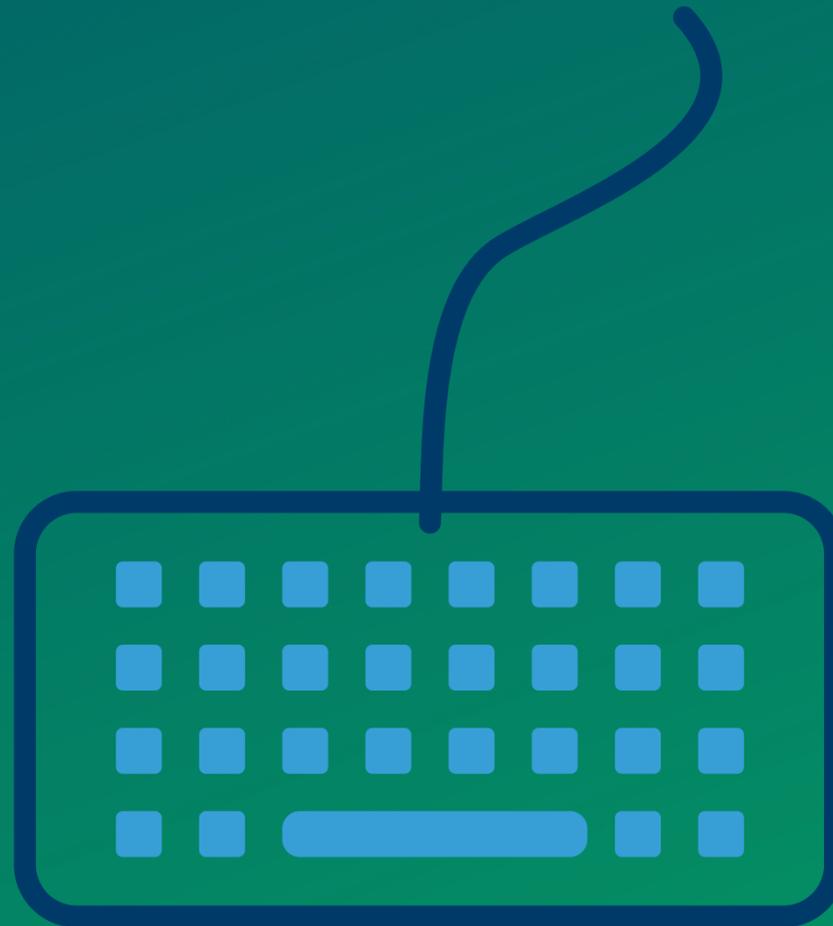
CTRL Z= Undo

CTRL B= Bold

CTRL I= Italics

CTRL S= Save

CTRL P= Print



MAC

⌘ C= COPY

⌘ V= PASTE

⌘ X= CUT

⌘ Z= Undo

⌘ B= Bold

⌘ I= Italics

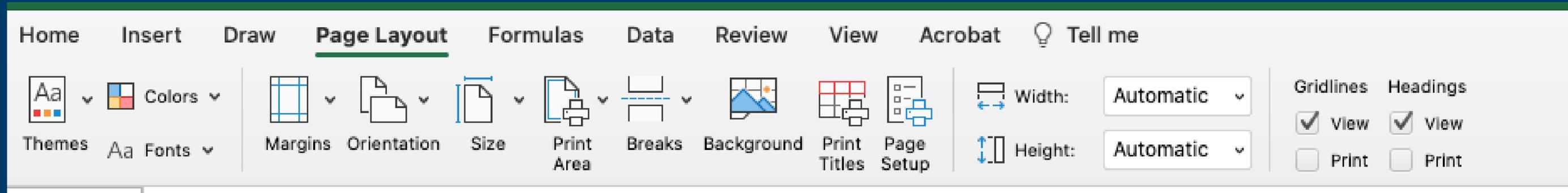
⌘ S= Save

⌘ P= Print



SETTING UP YOUR SPREADSHEET

PAGE LAYOUT



Print Titles

Rows to repeat at top:

Columns to repeat at left:

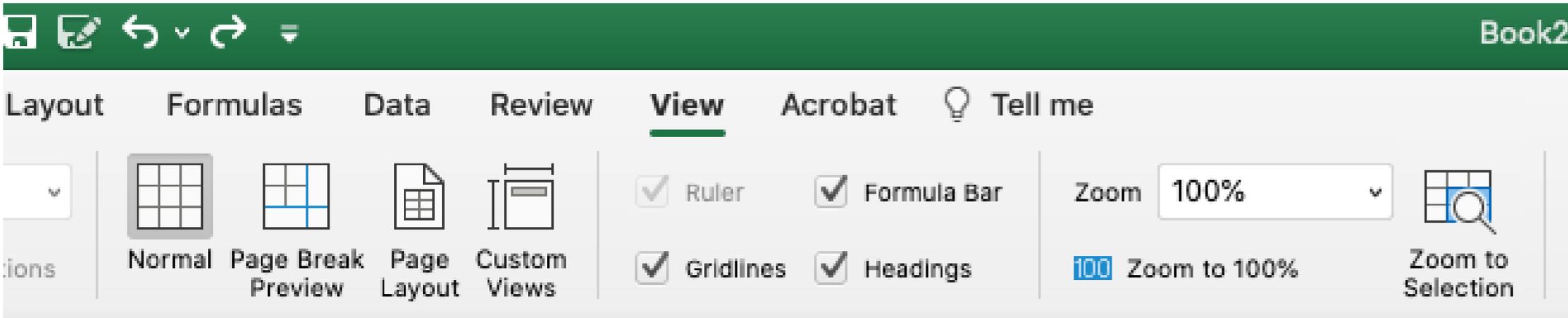
Pro Tip

Use Print Titles to have your spreadsheet repeat rows at the top of each page.

If you've ever struggled to line up cells on one page to the headers on another- you know how difficult it can be. Make it easier on your reader and set this up before you print. I



PAGE LAYOUT



Page Break View

This handy tool lets you determine what data ends up on which page.

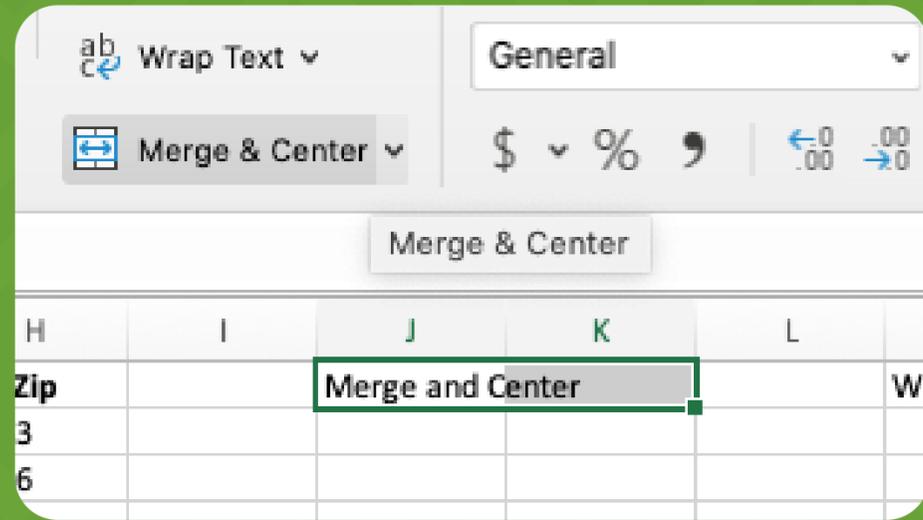
If you're not happy with the automatic breaks, use your mouse and slide the dotted blue line over.

Is it very small? Try clicking "Zoom to 100%"

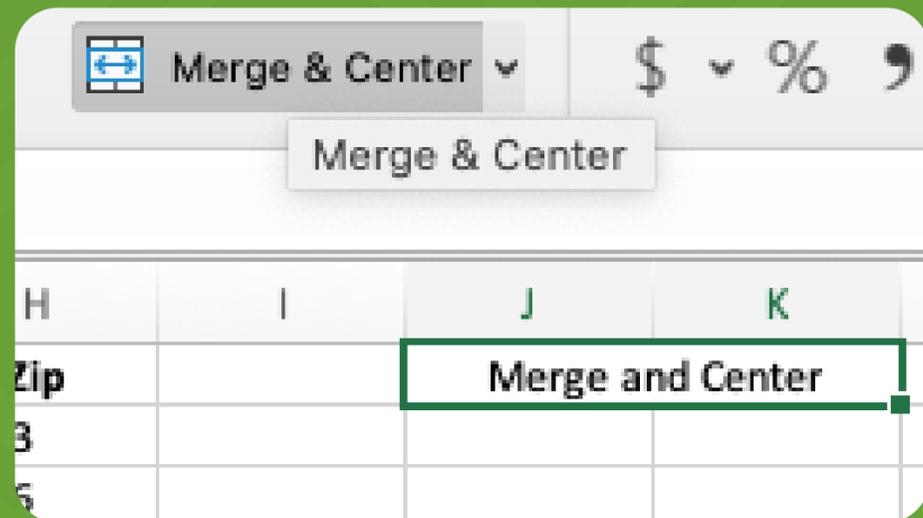


MERGE and CENTER

STEP 1

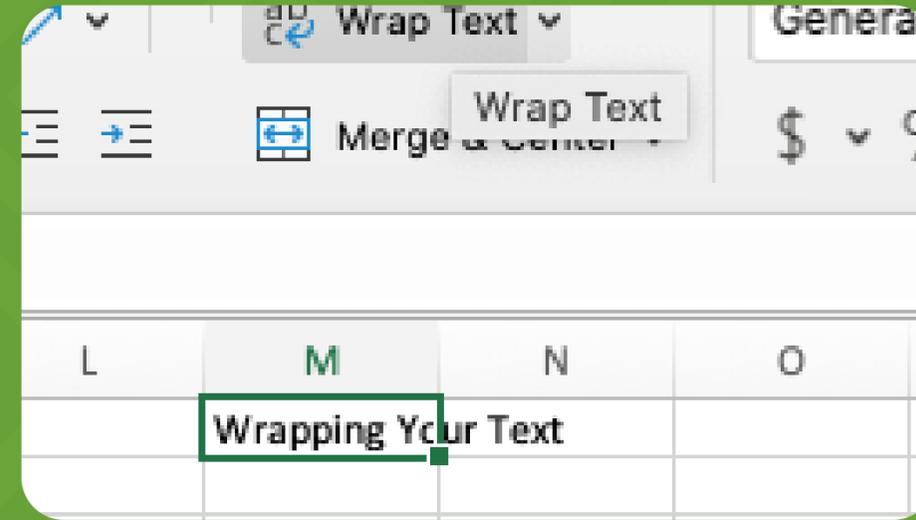


STEP 2

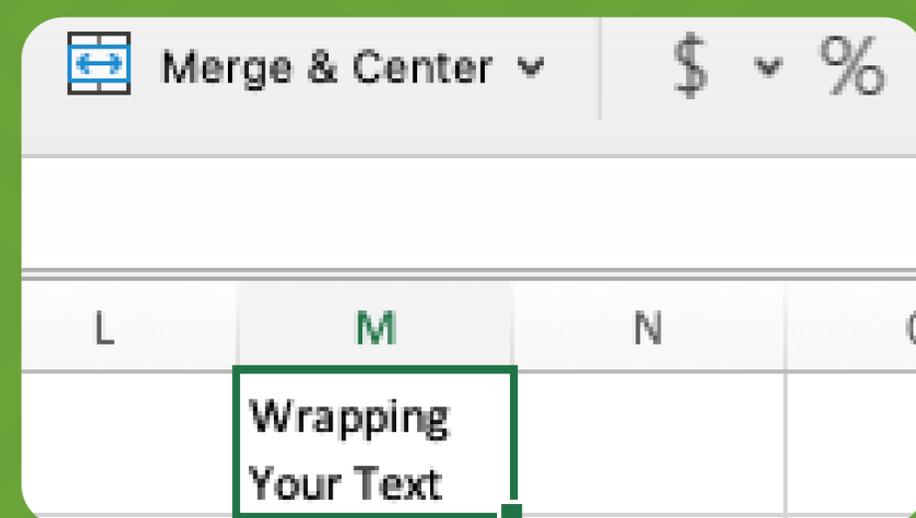


Wrap Text

STEP 1



STEP 2

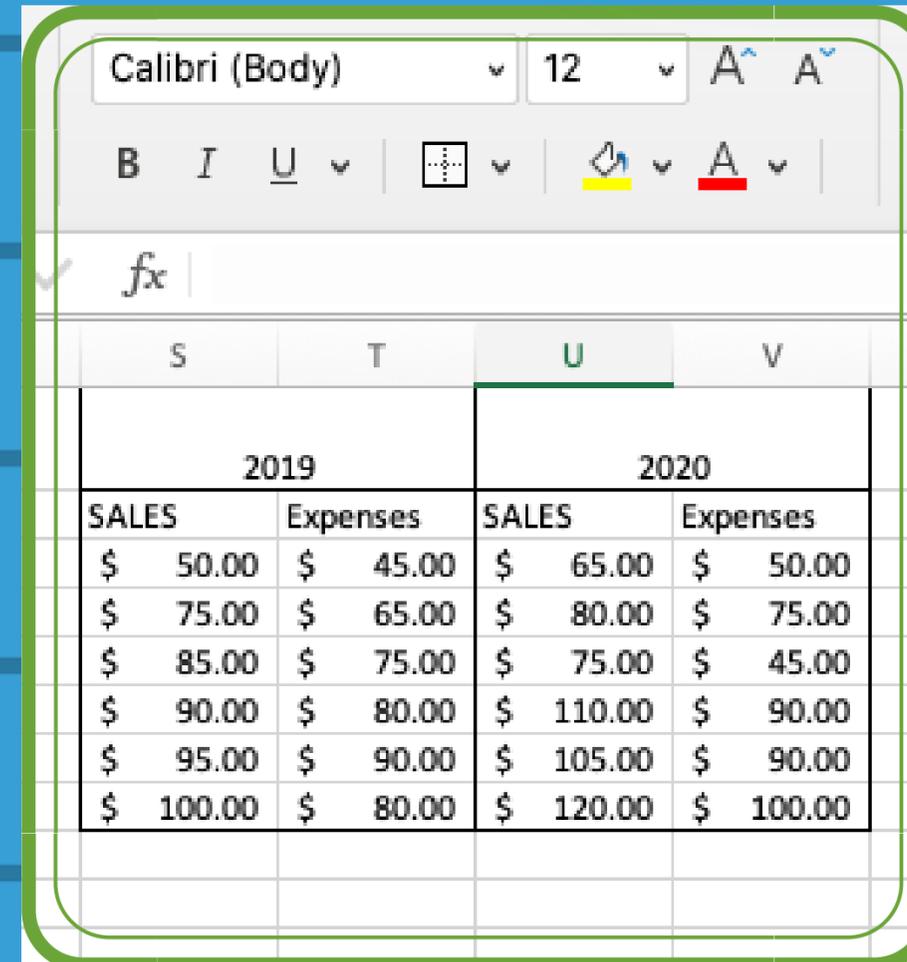


BORDERS

-  Left Border
-  Right Border
-  No Border
-  All Borders
-  Outside Borders
-  Thick Box Border
-  Bottom Double Border
-  Thick Bottom Border
-  Top and Bottom Border
-  Top and Thick Bottom Border
-  Top and Double Bottom Border

Draw Borders

-  Draw Border
-  Draw Border Grid
-  Erase Border
-  Line Color



The screenshot shows the Excel ribbon with the following settings: Font: Calibri (Body), Size: 12, Bold (B), Italic (I), Underline (U), Borders (dropdown), Fill Color (yellow), Text Color (red). The formula bar contains the function fx . The table below is displayed in the worksheet with columns S, T, U, and V. The table has a thick box border and a thick bottom border. The data is as follows:

2019		2020	
SALES	Expenses	SALES	Expenses
\$ 50.00	\$ 45.00	\$ 65.00	\$ 50.00
\$ 75.00	\$ 65.00	\$ 80.00	\$ 75.00
\$ 85.00	\$ 75.00	\$ 75.00	\$ 45.00
\$ 90.00	\$ 80.00	\$ 110.00	\$ 90.00
\$ 95.00	\$ 90.00	\$ 105.00	\$ 90.00
\$ 100.00	\$ 80.00	\$ 120.00	\$ 100.00

PRO TIP!

Want dashes?
How about a red box?

Use Line Color and Style to
customize your borders.

FORMATTING YOUR CELLS

	A	B	C	D	E	F
1	General	Number	Currency	Accounting	Short Date	Long Date
2	1	1.00	\$1.00	\$ 1.00	1/1/00	Sunday, January 1, 1900
3	2	2.00	\$2.00	\$ 2.00	1/2/00	Monday, January 2, 1900
4	3	3.00	\$3.00	\$ 3.00	1/3/00	Tuesday, January 3, 1900
5	4	4.00	\$4.00	\$ 4.00	1/4/00	Wednesday, January 4, 1900
6	5	5.00	\$5.00	\$ 5.00	1/5/00	Thursday, January 5, 1900
7	6	6.00	\$6.00	\$ 6.00	1/6/00	Friday, January 6, 1900
8	7	7.00	\$7.00	\$ 7.00	1/7/00	Saturday, January 7, 1900
9	8	8.00	\$8.00	\$ 8.00	1/8/00	Sunday, January 8, 1900
10	9	9.00	\$9.00	\$ 9.00	1/9/00	Monday, January 9, 1900
11	10	10.00	\$10.00	\$ 10.00	1/10/00	Tuesday, January 10, 1900
12						

ATP Spreadsheet

Tell me

General
No specific format

123 Number

Currency

Accounting

Short Date

Long Date

Time

Percentage

Fraction

Scientific

Text

More Number Formats...

FORMATTING YOUR CELLS

...continued

The screenshot shows the 'Format Cells' dialog box in Excel with the 'Text' category selected. The 'Sample' field shows '11233' and a note: 'Text format cells are treated as text even when a number is in the cell. The cell is displayed exactly as entered.' The background shows a column of zip codes: 11233, 12546, 11031, 3222, 3264, 3458, 3246, 3211, 4857, 3698. The cell containing '3246' is highlighted with a green border.

Zip
11233
12546
11031
03222
03264
03458
3246
3211
4857
3698

Preceding Zeros

Pro Tip: It's best to format these cells BEFORE adding in your data, otherwise you'll need to manually add your "0" back in

SORT AND FILTER

Why Sort?

Maybe you want your fields alphabetical, or maybe by color, or value.

Sorting lets you organize your data easily and in the way you want.

Why Filter?

Maybe you don't want to see ALL of your data. While sorting can be great to organize what you're looking at, you're probably still looking at A LOT. Filtering lets you see just a segment.

Can I Use Both?

OF COURSE!



SORTING

What do you want to sort?

You can sort your data by any column, and then by values, color or even icon.

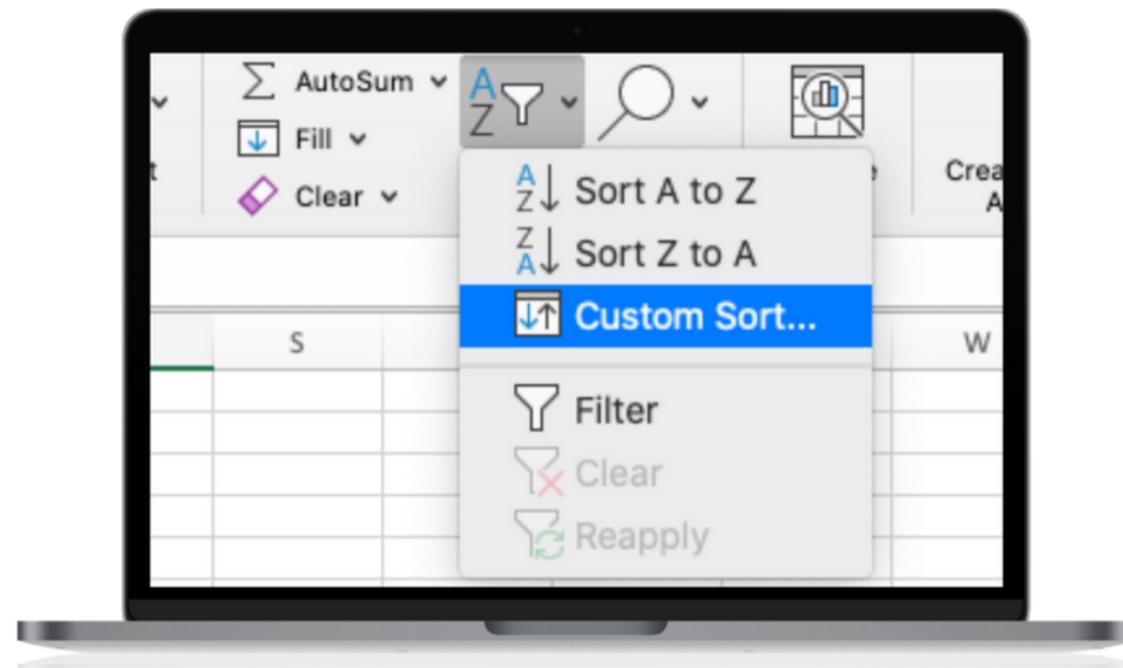
And then what?

Determine the order. Do you want to see your data from smallest to highest, or highest to smaller?

Maybe you want anything with a cell or font color at the top to bottom.

Let's get fancy-

You can also sort by row. In our example here, we've got about 10 different "accounts"- maybe you want to see which month was the most expensive for Office Supplies. In the "Options" button, change the orientation to "Left to Right"- that will let you sort by row instead of column.



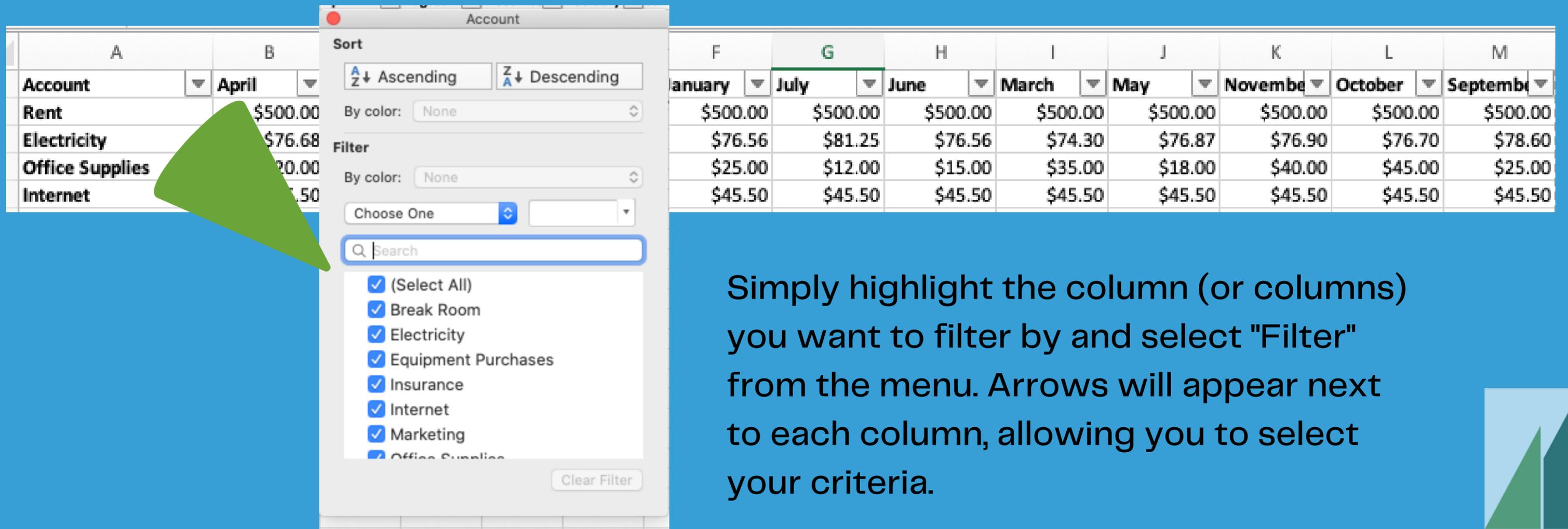
Pro Tip:

Make sure you are sorting your ENTIRE worksheet: if you only highlight one column, you'll sort only that data in that column and will attribute your data to the wrong field.



#NOFILTER

NO! Filters are great, and so easy in excel.



The image shows a screenshot of an Excel spreadsheet with a filter menu open over column G. The spreadsheet has columns labeled with months and values. The filter menu is titled "Account" and has "Sort" and "Filter" sections. The "Filter" section is active, showing a list of categories with checkboxes. A green arrow points to the "Filter" button in the menu.

	A	B	F	G	H	I	J	K	L	M
Account	Account	April	January	July	June	March	May	November	October	September
Rent		\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00
Electricity		\$76.68	\$76.56	\$81.25	\$76.56	\$74.30	\$76.87	\$76.90	\$76.70	\$78.60
Office Supplies		\$20.00	\$25.00	\$12.00	\$15.00	\$35.00	\$18.00	\$40.00	\$45.00	\$25.00
Internet		\$5.50	\$45.50	\$45.50	\$45.50	\$45.50	\$45.50	\$45.50	\$45.50	\$45.50

Sort

Ascending Descending

By color: None

Filter

By color: None

Choose One

Search

- (Select All)
- Break Room
- Electricity
- Equipment Purchases
- Insurance
- Internet
- Marketing
- Office Supplies

Clear Filter

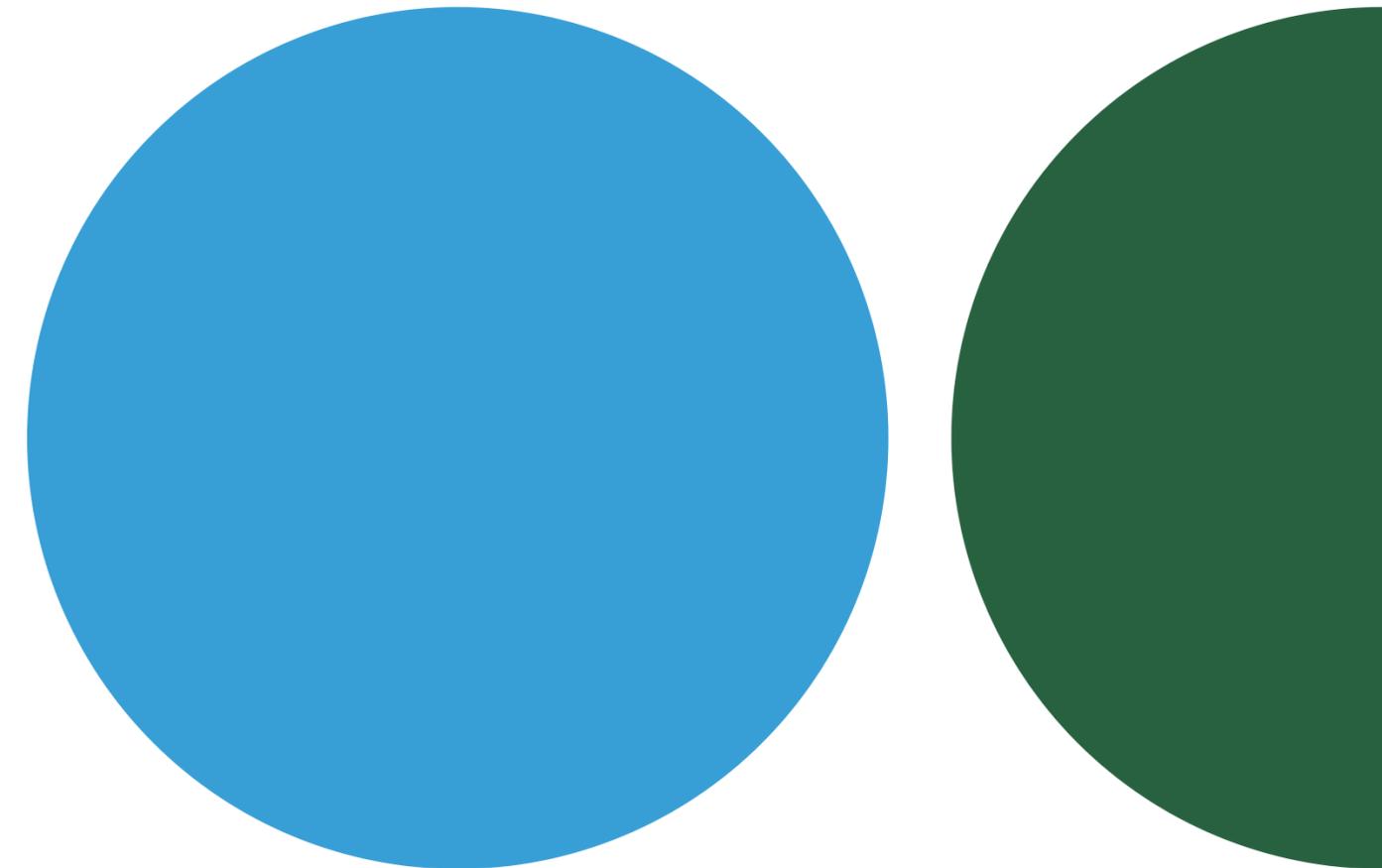
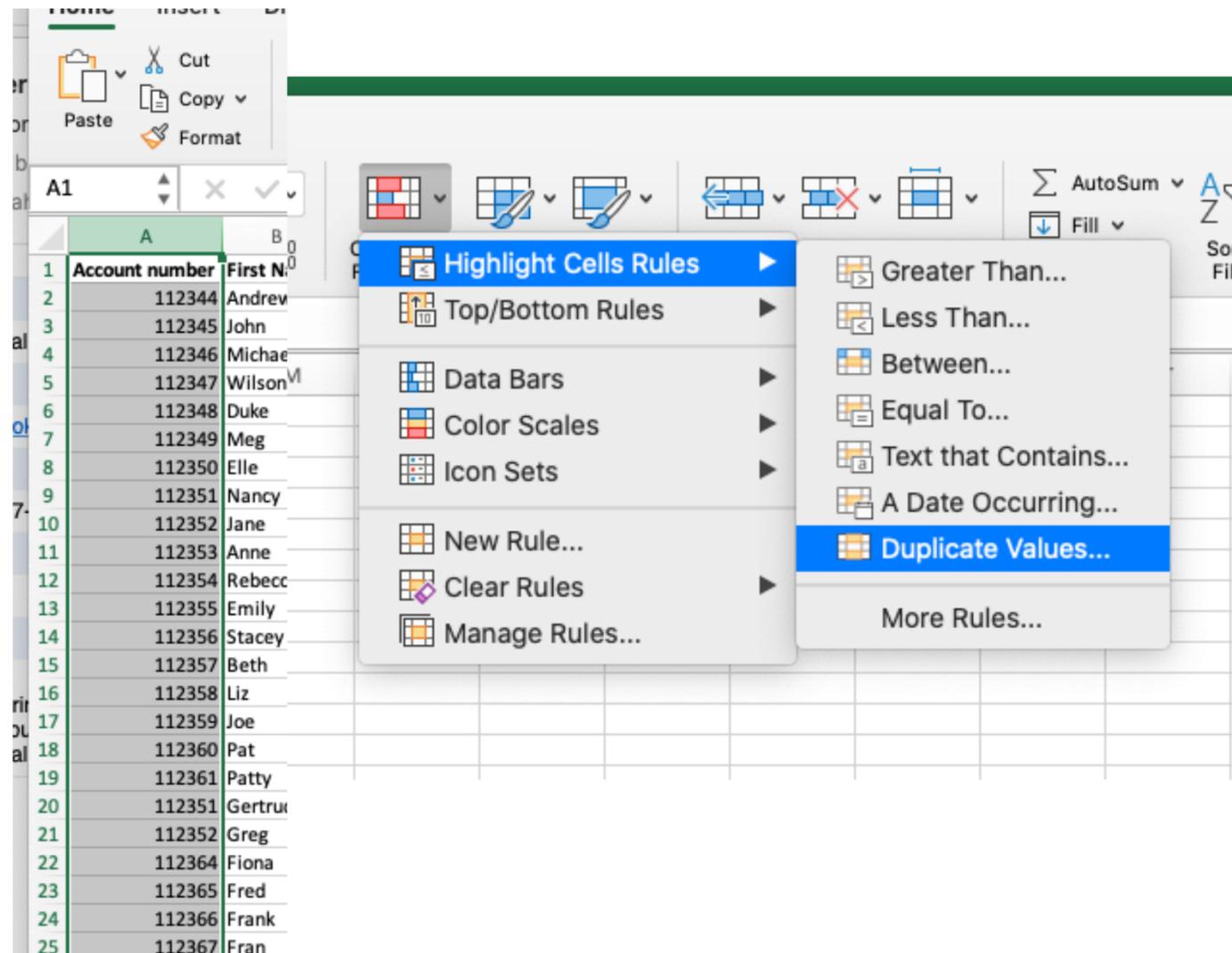
Simply highlight the column (or columns) you want to filter by and select "Filter" from the menu. Arrows will appear next to each column, allowing you to select your criteria.



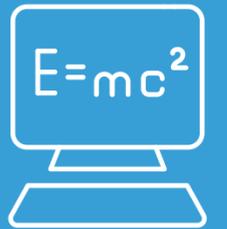
CONDITIONAL

FORMMATING

Conditional Formatting is a quick and easy way to apply formatting to cells using a set of criteria.



FORMULAS: SIMPLE EQUATIONS



	A	B	C	D
1	Account	January	February	March
2	Personnel Expenses	\$30.00	\$45.00	\$60.00
3	Office Supplies	\$25.00	\$15.00	\$35.00
4	Break Room	\$25.00	\$16.00	\$12.00
5	Internet	\$45.50	\$45.50	\$45.50
6	Electricity	\$76.56	\$78.00	\$74.30
7	Marketing	\$96.00	\$220.00	\$850.00
8	Insurance	\$440.00	\$440.00	\$440.00
9	Rent	\$500.00	\$500.00	\$500.00
10	Equipment Purchases	\$0.00	\$0.00	\$0.00
11	Salary	\$3,586.00	\$3,600.00	\$3,500.00
12				
13				
14	Utilities	=B5+B6		
15				
16				
17				

It helps to think of Excel as just a big calculator. Just like on a calculator you can add, subtract, multiply and divide— just in bulk. It's like the Costco of calculators.



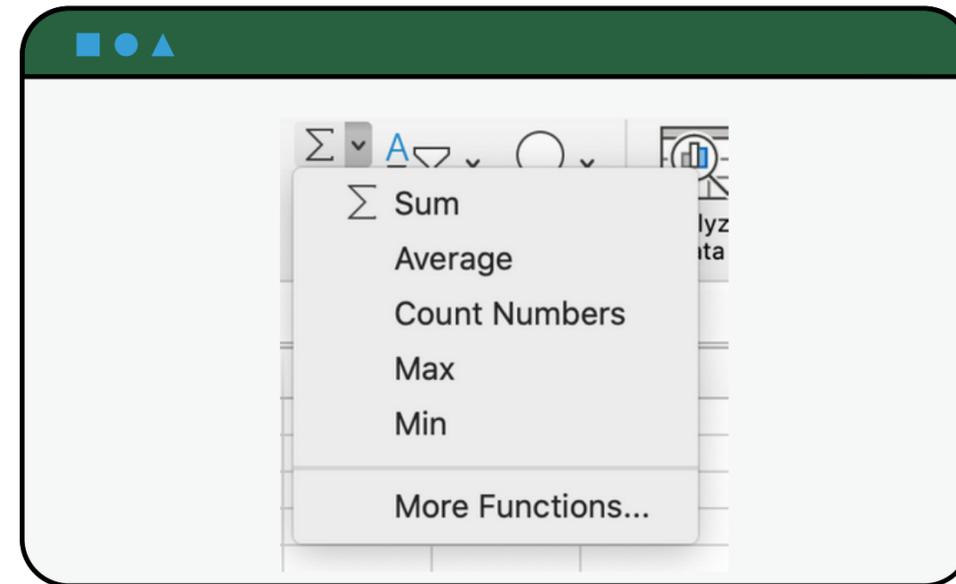


PRO TIP

You can use AutoSum to find averages too!

Account	January	February	M
Personnel Expenses	\$475.00	\$430.00	
Office Supplies	\$175.00	\$150.00	
Break Room	\$300.00	\$300.00	
Internet	\$236.00	\$236.00	
Electricity	\$65.00	\$85.00	
Marketing	\$95.00	\$95.00	
Insurance	\$115.00	\$115.00	
Rent	\$926.00	\$926.00	
Equipment Purchases	\$0.00	\$0.00	
Salary	\$3,875.00	\$3,875.00	
TOTALS	\$6,262.00	\$6,212.00	

Have a LOT of data to add? AutoSum makes it easy.



AUTOSUM

FORMULAS:

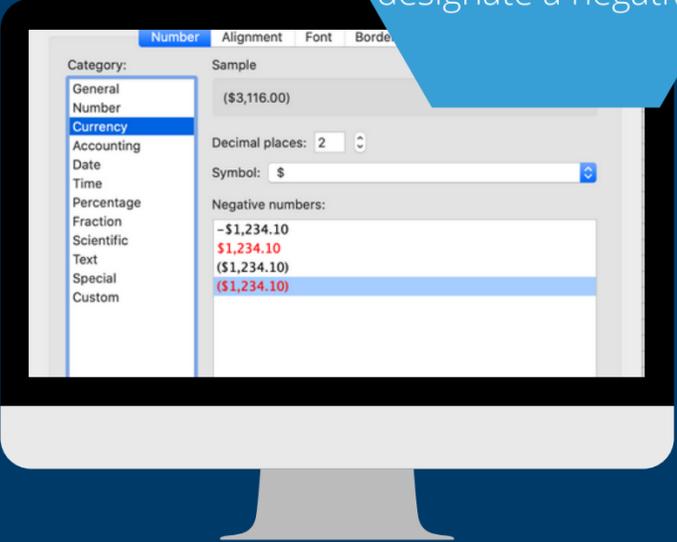
Referencing other sheets



The screenshot shows the Microsoft Excel interface. The ribbon is set to 'Formulas'. The formula bar shows the formula `= '2020 Income'!B11`. The spreadsheet displays a monthly income statement for 2020. The 'Net' row is highlighted in red, indicating negative values.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		January	February	March	April	May	June	July	August	September	October	November	December	
2	Income	\$3,146.00	\$2,925.78	\$3,130.58	\$3,756.70	\$3,506.33	\$3,312.72	\$3,710.76	\$3,606.77	\$3,137.89	\$2,794.50	\$2,413.92	\$2,365.64	
3	Expenses	\$6,262.00	\$6,212.00	\$6,529.00	\$6,142.00	\$5,561.00	\$5,526.00	\$5,546.00	\$5,691.00	\$5,676.00	\$5,710.00	\$5,948.00	\$6,076.00	
4	Net	(\$3,116.00)	(\$3,286.22)	(\$3,398.42)	(\$2,385.30)	(\$2,054.67)	(\$2,213.28)	(\$1,835.24)	(\$2,084.23)	(\$2,538.11)	(\$2,915.50)	(\$3,534.08)	(\$3,710.36)	
5														
6														
7														

Pro Tip!
Format your cells to automatically designate a negative



QUESTIONS?





If GRDC can help you or your business grow, contact us at
connect@graftonrdc.org!



And thank you to our co-presenter!



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