

Beginner Excel Training: Participant Guide

For a complete explanation of each topic, see the page references in parentheses below to the complete Excel Training Participant Guide (PDF)

Green – Excel feature, keyboard command, or icon

Blue – Parts of our dataset

ACTIVITY 1 // Excel Tour

Excel tour (p. 5): Get to know the parts of an Excel workbook

Zooming in and out (p. 10): Zoom to make your data easier to see and work with

- Use the **zoom bar** on the bottom-right of your worksheet OR
- Click the “**View**” ribbon and use the buttons on the “**Zoom**” group

Making selections in Excel (p. 10-11): Select the parts of your data you wish to work with

- **Select cells & cell ranges**
 - o Select a cell by left-clicking with your mouse or move cells using arrow keys
 - o Select multiple cells with a left-click and drag of the mouse, or use **SHIFT** + arrow keys
- **Select rows or columns**
 - o Select a letter (vertical column) or number (horizontal row)
 - o Select more than one row or column with a left-click and drag of the mouse, or use the **SHIFT** + arrow keys to select adjacent cells
- **Select non-adjacent cells, rows or columns**
 - o Hold the **CTRL** key and select the desired cells, rows or columns
- **For example:** Highlight rows of data we need to review
 - o Select two nonadjacent rows (**3 & 14**) on the sheet (hold **CTRL** and click on each row #)
 - o Click the “**Home**” ribbon and then the “**paint bucket**” icon to color those rows

Moving Around a Workbook (p. 7): Other ways to navigate your workbook



ACTIVITY 2 // Worksheet Formatting & Data Entry


This section involves spacing and formatting the spreadsheet to make it easier to see and work with our data.

Organizing and spacing columns, text and rows (p. 18-21)

- **Adjusting one or multiple column widths (3 ways) (p. 18)**
 - o 1) Drag column border to change width – do this for all columns showing “#####”
 - o 2) Auto-adjust column width by double-clicking on the border; OR
 - o 3) Set column width by right-clicking and selecting “Column Width” from the pop-up menu
- **Inserting new columns or rows (p. 20)**
 - o Select the column where you want to insert (Column F)
 - o Click on the “Home” ribbon tab
 - o Click the “Insert” button and then “Insert Sheet Columns” from the “Cells” group
- **Deleting columns (p. 19)**
 - o Select the column you want to delete (Column F)
 - o Right click on the letter and select “Delete”
- **Insert column to add more data**
 - o Insert two column to the right of “Ind. ID”
 - o Name the first column “County” and the second column “State”
- **Copy, Paste & Move Columns/Rows:**
 - o For example: Move the “Individual ID” column next to our “Case ID” column
 - o There are TWO ways to do this:
 - 1) Insert a blank column
 - Right-click on the column to the right of “Case ID” and click “Insert”
 - Select the “Ind. ID” column and right-click, then “Cut” from the menu
 - Select the first cell in the column you created
 - Paste the “Ind. ID” into that column using “Ctrl + v” or by clicking the “Paste” icon in the “Home” ribbon
 - 2) Cut and insert cut columns
 - Select the “Ind. ID” column and right click; select “Cut”
 - Select the column to the right the “Case ID” column. Right-click on the letter of that column and select “Insert Cut Cells”

Format a spreadsheet (p. 24-28)

- **For example: Add bottom border to first header row**
 - o Select the first row of headers
 - o Click on the “Home” ribbon tab and find the “Borders” icon
 - o Select a bottom line to create a border between the headers and your data
- **Cell text formatting (p. 25)**
 - o Select Row 1 on the sheet
 - o Pull the border down to make a longer row

- Click on the “B” in the “Home” ribbon to turn the header text **bold**
- Click the  middle text alignment button (in “Home” ribbon) so the text is in the center of the cell
- Then select the “paint can” icon (in “Home” ribbon) to choose a header row color

Freezing rows and columns (p. 17)

- Select cell B2 (all columns to the left and rows above the cell will freeze)
- Navigate to the “View” ribbon
- Click “Freeze panes” button in the “Window” group
- Select “Freeze Panes” from the pop-up menu

ACTIVITY 3 // Data Entry

Simple Data Entry

- Navigate to the “County” column you created
- Type “King” into the first cell
- Push the “Tab” key to move one cell to the right to the “State” column
- Type “WA” into the that cell
- Click “Enter” to move to the next empty open cell
- Try the same thing with the “State” column
- If you want to clear the column, right-click on the top and select “Clear Contents”

Other Data Entry Tricks

- Previously recognized values: Notice that once you start typing the same thing Excel has already seen, it will suggest it; simply press “Tab” to accept the suggestion
- Drag Fill: Instead typing “King” or “State” over and over, try drag fill to fill the rest of the column:
 - 1) Double click on the right-hand corner of the filled cell (you will see a “+”); OR
 - 2) Left-click and hold (+ icon) at the right-hand corner of the cell, then drag down
- Patterns: Excel needs at least 2 cells to recognize a pattern. *Go to Patterns tab*
 - Column A “Full Date”: Select Rows 2 & 3, then drag down to row 15 to continue the pattern
 - Column B “Date”: Double click the + icon to fill numbers to other data
 - Column C “Day”: Double click the + icon to fill days down to other data (notice repeating days)
 - Column D & E “January” and “February”: Select Cells D1 & E1 and drag horizontally to fill to the right

ACTIVITY 4 // Data Manipulation & Cleaning

- Sorting: Helps you put the data in a certain order by date, number, alphabetic order and more
- Filtering: Helps you isolate data based on criteria you choose

Basic sorting & filtering (p. 45)

- Sorting data

- Select the “Service Start” column
- Navigate to the “Home” ribbon and find the “Sort & Filter” dropdown under “Editing” and click on the “Sort & Filter” icon, then the “Sort Newest to Oldest”
- The pop-up will ask if the data in adjacent columns should stay together, and it should! Keep the “Expand the Selection” button checked
- Now we can see members sorted according to the start of their service dates
- **Filtering data**
 - Click any cell on your workbook
 - Navigate to the “Home” Ribbon tab and find the “Editing” group
 - Click “Sort and Filter” and then “Filter” on the dropdown menu
 - Click the arrow that appears to see the list of data categories for “Ind. Language”
 - Click the “Select All” checkbox to deselect the data, and then select one category, like “Spanish” to display only those entries

Data cleaning

- **Sort to catch date discrepancies**
 - Click on the “Birthdate” column
 - Click on the “Home” ribbon, “Editing” group to find the “Sort / Filter” icon
 - Select “Sort Oldest to Newest” and note the four entries with birthdates of 1/1/1900
- **Filter to catch data entry issues**
 - Find the “Gender” column and click the “Filter” icon
 - Note that we have three options, and one is misspelled.
 - Filter the misspelled data and correct them
- **Remove duplicates**
 - Click any cell on the workbook
 - Select the “Data” ribbon, and then the “Remove Duplicates” icon in the “Data Tools” group
 - Make sure the “My data has headers” box is checked, then “Unselect All”
 - Check only the “Ind. ID” box, then click “OK”
 - A pop-up box will show how the number of duplicates removed, and unique entries left

Doing more with your spreadsheet (formulas teaser) (p. 32)

- **First, set up your Calculations area with these categories**
 - Scroll to the right of your data to find an unused area of your sheet & type the following down five rows:
 - “Client Count”
 - “Total Family Members”
 - “Average Family Members”
 - “Max Family Size”
 - “Min Family Size”
- **Simple counting, two ways**
 - 1) In the cell to the right of “Client Count”:
 - Type “=” and then “COUNT” then “(“
 - Either drag your mouse from A2:A88 or type “A2:A88” then “)” OR
 - 2) Select cells A2:A88 (first column minus the header, A1)

- Then look at the bottom menu bar to see the “Count”
- **Simple Summing (Adding)**
 - In the cell to the right of “Total Family Members”:
 - Type “=” and then “SUM” then “(“
 - Drag your mouse down the data in the “Total Family Members” column or type it out then “)”
 - *Remember that you can also look on the bottom menu bar for these simple formulas*
- **Average**
 - In the cell to the right of “Average Family Members”:
 - Type “=” and then “AVERAGE” then “(“
 - Drag your mouse down the data in that column or type it out then “)”
- **Max or Min**
 - In the cell to the right of “Max” or “Min Family Size”:
 - Type “=” and then “MAX” or “MIN” then “(“
 - Drag your mouse down the data in that column or type it out then “)”

How to find help

- Google it: “Why do my cells show pound signs?”
- Youtube it: This can be very helpful if you are a more visual learner
- Use the Microsoft Office Excel Support: Via the “Help” Ribbon, and clicking on the “?” – you can then navigate to a browser if that’s easier.

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