

# Excel Essentials

John Stevenson  
"Training – Reap the Rewards"

## Table of Contents

Database Definition.....	2
Excel Layout.....	2
Click and Fill.....	2
Formula Primer .....	3
Formulas vs. Functions.....	3
Using the Sum Button .....	3
Tools for Organization and Layout.....	4
Views .....	4
Printing Tip .....	4
Move or Copy.....	4
Charts .....	4

# Excel Essentials

## Database Definition

Think of a phone book with the following: Use “Field Names” to define the columns and rows to define the “Records”.

*Field Names*

Key	First Name	Last Name	Address	City	State	Zip Code	Phone Number
1	John	Stevenson	PO Box 24	Lincoln City	OR	97516	541-541-5541
2	Benjamin	Franklin	PO Box 1	Philadelphia	PA	99999	999-999-9999

*Records*

The Key should be a “unique” item to identify the record.

## Excel Layout

Excel is laid out in a table (shown above) with Columns and rows. There are over 16000 columns and 1 million rows. There is also a formula bar for editing. The Name Box tells you the active cell and if you want to move anywhere in the spreadsheet you can type it here and press Enter. At the bottom of the page you will notice by default that you have three spreadsheet tabs (you can easily add more if you like).

Use the Tab or arrow key to move to the next cell. Use the Enter or down arrow to move to the cell below.

## Click and Fill

By using the fill handle on the active cell you can use “click and fill” to do many things:



1. Continue a sequence of numbers. As an example –
  - a. Start with 1 in A1
  - b. 2 in A2
  - c. Highlight cells A1 and A2
  - d. Then click the fill handle and drag it down to get a sequence of 1, 2, 3, 4, etc.
2. Days of the week
3. Months of the year
4. Quarters of the year

## ***Formula Primer***

- Use the equal (=) sign to tell excel you are going to calculate something.
- Use the “order of precedence”... These are rules that control the order of sequence in which arithmetic operations are performed. “Multiplication and Division are performed first; then Addition and Subtraction. If there is anything surrounded by a parenthesis then it will be calculated before the rest.” Note as an example that the following formula “Six plus Four, divided by two” would not give you the expected answer:

Formula	Answer
=6+4/2	8

However by using parentheses we can force it to perform the sequence in the order we need.

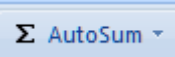
Formula	Answer
=(6+4)/2	5

- Use “point and click” to build your formulas instead of typing in the cell locations.
- Use “click and fill” to copy formulas if they are relative.
- Common Operators are:
  - Multiplication \*
  - Division /
  - Addition +
  - Subtraction -

## ***Formulas vs. Functions***

When creating a formula you will start with the equal sign and figure out the syntax yourself. Functions are pre-designed formulas that are available to you within Excel such as SUM, AVERAGE, IF, VLOOKUP, etc. There are over 300 of these functions available to you through the Formula Tab.

## ***Using the Sum Button***

Click a cell below the column or to the right of the row of numbers you want to evaluate and then click on the Home tab. Find the Sum button  in the Editing group and click on the down arrow next to it. From there you can choose the appropriate function. To use the highlighted cells just press enter or make adjustments to choose the cells you want.

## Tools for Organization and Layout

- **Right-click is where it's at!** – If you don't know where to find what you're looking for... right-click on the item and you'll probably find the answer in the resulting menu.
- **Click and drag (or just double click)** – to resize columns or rows.
- **Use Headings** – When organizing your spreadsheet, make it understandable by using headings. You can merge cells and center the titles simply by using the “merge and center” icon on the ribbon.
- **Chart Wizard**- Charts allow quick evaluation of data for analysis. When using the chart wizard be sure you consider the following points.
  - Only include one row of field names
  - Only include one set of totals from your spreadsheet.

## Views

The view icons located on the right side of the status bar  allow you to choose various views of your worksheet.

1. Normal View – The default view in Excel
2. Page Layout View – See each page and how the document will look when printed
3. Page Break Preview – See and adjust page breaks (Note: If dotted lines remain after leaving page break preview, go to File/Options/Advanced/Display Options and uncheck “Show page breaks”).

## Printing Tip

When printing worksheets from Excel, you will want to adjust the size of your print out from Print Preview. This will allow you to choose Page Layout view and from there you can use the “scaling” settings to choose to print a % of size.

## Move or Copy

Highlight the cells you want to move or copy. To move hover over the edge until you get the 4-headed arrow then click and drag. To copy – hover over the edge until you get the 4-headed arrow then hold down CTRL while you click and drag. Remember... you can do this to text but be careful with formulas.

## Charts

Remember: Don't use more than one set of totals.

1. Highlight the Field Names and the area of the spreadsheet with info you want charted.
2. On the **Insert** Tab under the Illustrations group, choose the **Chart** command.
3. Select your chart type and it is created as shown below.

	Series 1	Series 2	Series 3
Category 1	4.3	2.4	2
Category 2	2.5	4.4	2
Category 3	3.5	1.8	3
Category 4	4.5	2.8	5

