Factsheet 1: Excel 2016


Excel 2016 makes it easy to crunch numbers. You can streamline data entry with autofill, then get chart recommendations based on your data, then create trends and patterns.

Overview

Name Box
Formula bar
HELP!

Sheet tabs

Active Cell A3

To open: Click on Start Bar and select Excel 2016 or click on .
Creating a workbook

From an existing template
1. Go to file (top RHS) and left click
2. Click on New – this brings up online templates so you don’t have to re-invent the wheel.
3. Click on Create.
4. Fill in your “data”.

Or

Starting from scratch
1. Go to file (top RHS) and left click
2. Click on New –
3. Double Click on Blank workbook
4. Create your worksheet:
   1. In **Cell A1** type YEARLY EXPENSES
   2. Press the enter key and this will move the active cell marker to the row below.
   3. In cell **A3** type ITEM, then enter
   4. In cell **A4** type Stationery, then enter
   5. In cell **A5** type Linen, then enter
   6. In cell **A6** type Journals, then enter
   7. In cell **A7** type Travel, then enter
   8. In cell **A8** type TOTAL
   9. In cell **B3** type 1999

   ![Excel worksheet with data entries]

   **How to use auto-fill** – A series of numbers, labels and dates ie) 1999, 2000, 2001; Mon, Tue, wed, Th, Jan, Feb, Mar
   1. Left click on **B3** (1999); it will then have a border around it as it is an active cell.
   2. Place your curser over the bottom right hand corner of the cell to get a Plus simple
   3. Hold the curser on the + together with the **ctrl button** and drag over to Cell D3.

   **NOTE:** You can do this with any sequential numbers or words (with words you don't need the ctrl key).
4. To expand the column A to fit Stationery in place your curser in between A and B and left click to get a + drag to the right to extend the cell.

5. Finish the table by adding in amounts as below in the shaded area:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YEARLY EXPENSES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ITEM</td>
<td>1999</td>
<td>2000</td>
<td>2001</td>
</tr>
<tr>
<td>1</td>
<td>Stationery</td>
<td>20</td>
<td>30</td>
<td>40</td>
</tr>
<tr>
<td>2</td>
<td>Linen</td>
<td>50</td>
<td>100</td>
<td>150</td>
</tr>
<tr>
<td>3</td>
<td>Journals</td>
<td>10</td>
<td>20</td>
<td>30</td>
</tr>
<tr>
<td>4</td>
<td>Travel</td>
<td>200</td>
<td>400</td>
<td>700</td>
</tr>
<tr>
<td>5</td>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**How to format cells**

1. Highlight the cells you want to format ie) make into $20.00 (put your curser on B4- E8
2. Right click, click on Format Cells go to Number tab; and select currency.
3. By choosing currency it will automatically give you a $ and then you choose if you want decimal points.
4. Click OK

**How to add a formula**

1. Go to cell B8;
2. Go to Top RHS Tool bar and click on This will automatically add the numbers in column B

   ![AutoSum](image)

   We don’t want 1999 to be added so; we need to amend the formula. To =SUM(B4:B7)

   a) Choose the range B4 to B7 by highlighting it or
   b) Go to formula bar and change the B3 to B4.
   c) PRESS ENTER
   d) This adds it automatically and a green triangle is on the top RHS corner to reflect there is a formula in this cell.
6. You can copy this formula across from B8 to D8 by: **placing your curser over the bottom right hand corner of the cell to get a Plus simple** and drag it over to cell D8

<table>
<thead>
<tr>
<th></th>
<th>TOTAL</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>$280.00</td>
<td>$550.00</td>
<td>$920.00</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

These are the arithmetic operators used in Excel.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>Addition (plus)</td>
</tr>
<tr>
<td>-</td>
<td>Subtraction (minus)</td>
</tr>
<tr>
<td>/</td>
<td>Division (divide)</td>
</tr>
<tr>
<td>*</td>
<td>Multiplication (times)</td>
</tr>
<tr>
<td>%</td>
<td>Percentage</td>
</tr>
<tr>
<td>^</td>
<td>Exponentiation is a mathematical operation, written as ( b^n ), involving two numbers, the base ( b ) and the exponent ( n )</td>
</tr>
</tbody>
</table>

The calculation order need to follow the rules of mathematics eg anything in **brackets** will always be calculated first. So if you combine several operations into a single formula, Excel will perform these operations in the order shown below:

- **First** % Percentages
- **Second** ^ Exponentiation
- **Third** * and / Multiplication and Division (are considered to be the same level)
- **Fourth** + and - Addition and Subtraction (are considered to be the same level)

**NOTE:** You can create your own formula by clicking on the formula bar. Example:

1. Your curser needs to be placed in the cell that you want the formula to be in: **Cell E4 and left click to highlight**
2. Go up to the formula bar and left click on \( \text{f}_\text{X} \) which will bring a drop down box of “insert function”.
   **Options are:** SUM, AVERAGE, IF HYPERLINK, COUNT, MAX, SIN, SUMIF, PMT, STDEV (Highlight them for explanations).
3. Choose SUM and double click – it will automatically (B4:D4) and click OK
4. You can copy the formula down by clicking on the box getting the and drag it over to cell E8

For VLOOK UP – ask for help.
How to copy Sheet 1 to Sheet 2
1. Left Click and hold and then press Ctrl on Sheet1 at the same time hold and move to the right to create Sheet1 (2)
2. OR lick on Sheet1 so it is in green right click and choose move or copy; click on create a copy.

How to name sheet 1 and Sheet1(2)
1. Left Click Sheet1 so it is in green
2. Right Click to get a dropdown list: Select Rename and change Sheet1 to Table 1 do the same for Sheet1(2) to name it Table 2.

How to Colour code (Tab Colour) the sheets now named Table 1 and Table 2
1. Left Click Sheet1 so it is in green
2. Right Click to get a dropdown list: Select Tab Colour and select colour; do the same for Table 2 in a different colour.

How to Change the look of your table (Format as table) – Do this for Table 2
1. Now you can make your chart pretty by Highlight the whole table and go to VIEW on the tool bar and press Format as Table

<table>
<thead>
<tr>
<th>YEARLY EXPENSES</th>
<th>Column1</th>
<th>Column2</th>
<th>Column3</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITEM</td>
<td>1999</td>
<td>2000</td>
<td>2001</td>
</tr>
<tr>
<td>Stationery</td>
<td>$20.00</td>
<td>$30.00</td>
<td>$40.00</td>
</tr>
<tr>
<td>Linen</td>
<td>$50.00</td>
<td>$100.00</td>
<td>$150.00</td>
</tr>
<tr>
<td>Journals</td>
<td>$10.00</td>
<td>$20.00</td>
<td>$30.00</td>
</tr>
<tr>
<td>Travel</td>
<td>$200.00</td>
<td>$400.00</td>
<td>$700.00</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$280.00</td>
<td>$550.00</td>
<td>$920.00</td>
</tr>
</tbody>
</table>

How to make your table into a chart.
1. Highlight the information you want charted A3 to D7
2. Right click and press quick analysis; Go to second tab Charts and pick your chart
3. Choose Clustered – Click on Chart Title and rename it to Yearly Expenses
How to copy your chart into a word document or PowerPoint presentation

1. Click on chart to get “Chart Area” –
2. Right Click Copy
3. Open word or PowerPoint (to put it onto a Metro north template – go to metro north webpage and click on templates and download factsheets and flyers/ Presentations (PowerPoint)
4. Rename the template and save it to where you want it.
5. Right Click Paste your chart into this document.

Note: Learn about other ways to Create a chart in Excel 2016 for Windows.

Save your work

1. Press Ctrl+S. If this is the first time you're saving this workbook, in the just-opened Save As Backstage view, select its storage location and give it a name.
2. To move to the Save As location choices, press the Tab key.
3. To select the storage location for the workbook, like OneDrive or This PC, press the Down Arrow key or the Up Arrow key. Or, to open the Save As dialog box, move to Browse and press Enter.
4. To browse to a folder within your selected storage location, press the Tab key.
5. To move to a folder higher in the hierarchy, select Up One Level.
6. To move to the list of folders, repeatedly press the Tab key.
7. To move through the list, press the Tab key or arrow keys.
8. To select a folder, press Enter.
9. Tab to the Enter file name here box, and type a name for your workbook.
10. Tab to the Save button, and press Enter.

Print your work

1. To open the Print Backstage view, press Ctrl+P. (print preview)
2. Tab through the print settings, including Print Properties, Print One Sided, Portrait Orientation, Custom Margins, Page Setup. (Page, Margins, header/footer, Sheet. Then hit ok)
3. Select Print,
4. Your printer prints the workbook.

MORE EXCEL EXAMPLES

Open Excel to an existing NEW Template online

1. Choose Inventory list with reorder highlighting1 and press Create

To sort and filter (this is useful for documents with lots of rows of information (data).

The Filter is the header of the table ROW 3 On this table the filter is already in place.

1. To sort and filter go highlight row 3 and go up to the menu bar Press View and click on sort and filter and choose filter This function will add and take off the filter.
2. When the arrows are on the row that indicates that the filter is in place.
3. To sort using the filter – click on the down arrow in column 2 Name.
4. Tick Select All – this will let you choose only specific lines (ie Item 11)
5. To get them all back again tick select all and the ticks will go against all lines.
To add a row in a table (example)

1. Click on Row 6;
2. Right click; insert; rows above
   OR
3. Go up to the tool bar and press Insert and the rows automatically insert.

To Find and Replace (example)

1. Press Ctrl and F together
2. This brings up the find and replace table:
3. In the find what: type in “Item” find all
4. Then if you want to replace “item”
5. Click on Replace and type in “Part” and replace all
6. Then in your table Item is no longer there but Part is.

NOTE: This is used in all Microsoft packages – and is very Handy when updating years.

To Freeze panes (example)

1. Put your curser on the cell that you want to freeze (CELL C4) Go to menu bar and click on freeze panes
2. If you want to freeze top row (Row 3) and column (B) click on Freeze Panes
3. If you want to only freeze top row (row 3) click on Freeze top Row
4. If you wanted to only freeze first column(B) click on Freeze First column

To spell check your document

1. Go to menu bar and click on REVIEW – then Click on ABC ✓ Spelling

To insert a header and a footer

1. Go to menu bar and click on INSERT – then Click on Header & Footer
2. It will automatically go to Header first. Type in the Centre: “MNHHS”
3. Then click on the menu bar: GO TO Footer ; on the drop down list of footer you will have options:
   Choose: Prepared by ..... Page .
4. Go back to Normal View by clicking on View and Normal.

Other tips

How to lock your work station when you are not there:
- Windows Symbol and then L simultaneously.