

PART 1: Navigation & Selection

Moving in Excel

- Ctrl + Home – move to the first box A1
- Ctrl + End – move to the last ACTIVE box

Selecting data

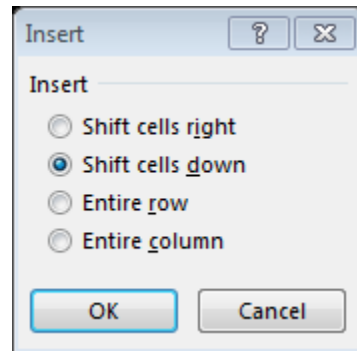
- Click + Shift – selects all boxes in between
- Cursor = Black Arrow – select entire row/column
- Keys
 - Shift + Ctrl + End – selects all cells between current cell and last ACTIVE cell
 - Shift + Ctrl + Home – selects from current cell to first cell A1
- Select All - Entire Worksheet
 - Click Arrow in top left corner
 - Ctrl + A

Undo - Ctrl + Z

PART 2: Clean Up

Managing rows/columns

- Home Ribbon: Clear – Options
- Clear Contents
 - Clears data from selected cells – leaves formatting and column intact
 - Select Row/Column – Right Click – Clear Contents
 - Select Row/Column – Delete (on Keyboard)
- Delete
 - Will remove the entire column/row and shift cells
 - Select Column/Row – Right Click – Delete
 - Click cell – Right Click – Delete – Options box
 - Select Column/Row – Ctrl + (-) Minus sign
- Insert
 - Select Column/Row – Right Click – Insert (to left/above)
 - Click cell – Right Click – Insert – Options Box
- Move a column
 - Select all columns you want to move
 - Hover over border of the selection
 - When pointer becomes black cross with arrows, drag column to new location



View Options

- Adjust width
 - Double click to automatically adjust
 - Select multiple columns and double click to adjust width of all at once

- View Ribbon: Freeze Panes
 - Top
 - First
 - Freeze/Unfreeze
- Hide/Unhide
 - Individual – right click menu
 - Select all – Unhide

Fill Cells

- Drag and Fill or Double Click
 - Auto Fill Options
 - Numbers & Letters
 - Copy Cells or Fill Series
 - Dates
 - Copy Cells
 - Fill Series
 - Fill Days/Weekdays/Months/Years

Sort/Filter

- Home Ribbon: Sort & Filter
 - Click Filter to add Drop down Arrows to Column Headers
 - Can Choose basic Sort options from Sort & Filter
 - Clear all filters from spreadsheet
 - Right Click to Sort/Filter
- Sort
 - Drop down Arrow on Column Header
 - Sort A to Z/Z to A
 - Sort Largest to Smallest/Smallest to Largest
- Filter
 - Drop Down Arrow on Column Header
 - Manual selection
 - “Formula” filtering
- Notes
 - Be aware of what is selected
 - Table format will already contain a drop down arrow – SAFARI

Find Data

- Find & Replace Window
 - Home Ribbon: Find & Select Binoculars
 - Ctrl + F
- Replace

Right Click Mini Menu

- Basics – Font / Color
- Comma Format
- Merge & Center

PART 3: Formulas & Formatting

Basic formulas

- Formulas Ribbon
 - Auto Sum – ALT + (=) Equals sign
 - IF
 - Average, Max, Min
 - Count
- Insert Function or Manual
- Cell references
 - Relative – chosen cells will change if formula is moved to a different cell (A2)
 - Absolute – chosen cell will stay the same even if formula is copied to different cell (\$A\$2)
 - Mixed
- Copying formulas down column
- Combining Cells
 - =D2 & “, “ & E2
 - =(City) & “(Comma Space)” & (State)

VLOOKUP

- Vertical Look Up
 - Look up Value
 - Table Array
 - Column Index Number
 - Range Look up – Closest or exact match
- Use Insert Function to use pop up with more detail

Conditional Formatting

- Home Ribbon – Conditional Formatting
 - Greater Than
 - Equal To
- Use Relative or Absolute Cell References
- Useful for comparing columns – finding differences

PART 4: Get External Data

Text Wizard

- DATA > GET EXTERNAL DATA > FROM TEXT
- Use for CSV or TXT files

Opening a CSV file in Excel

- Step 1 of 3: Delimited or Fixed width
 - CSVs are always **Delimited**
 - Start Import at Row – Useful for AESOP uploads (if you do not need the header row then choose to start at Row 2)
- Step 2 of 3: Set Delimiters for your data
 - CSVs (Comma Separated Values) are separated by **Commas**
- Step 3 of 3: Set the Data Format
 - General – excel will convert based on what it thinks the format should be
 - Text – Will leave the contents exactly as is – use when you need to keep leading zeros on numbers (IDs, SSNs, Account Numbers)
 - Date – will convert to date format – select the corresponding sequence to how the date currently is in your data

Opening a TXT file in Excel - DEDTOT EXAMPLE

- Step 1 of 3: Delimited or Fixed width
 - Fixed Width
- Step 2 of 3: Set Field Widths for your data
 - Click to add Line
 - Double Click to Remove
 - Each line starts new column
- Step 3 of 3: Set the Data Format
 - Text – Will leave the content exactly as is – Deduction Codes
- Clean up
 - Delete unnecessary Rows/Columns
 - Move Report Totals Down
 - Headers
 - Use Auto Sum to Calculate totals – check against report