M 365 Excel Class Video 01: Introduction to Excel by excelisfun

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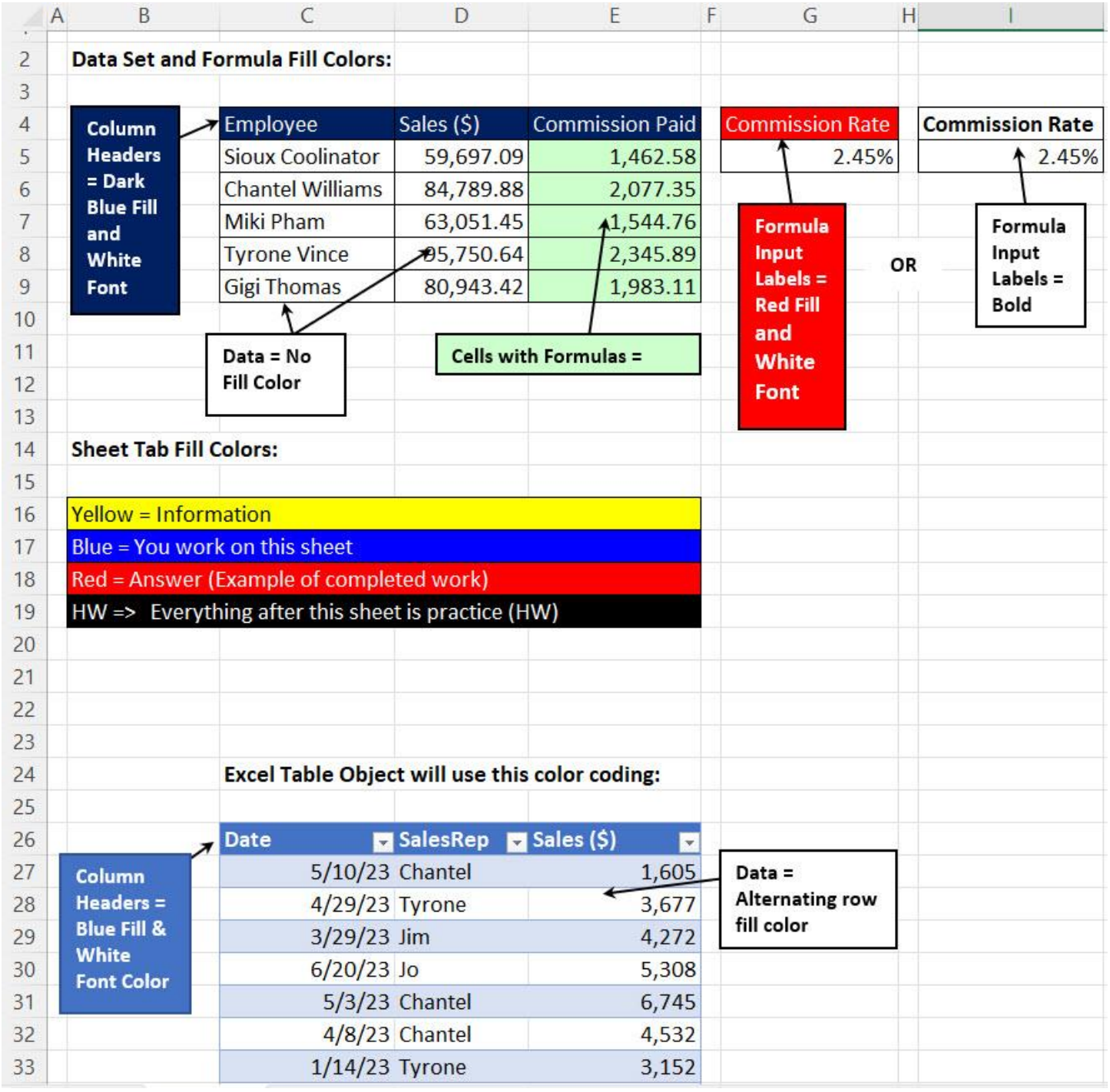
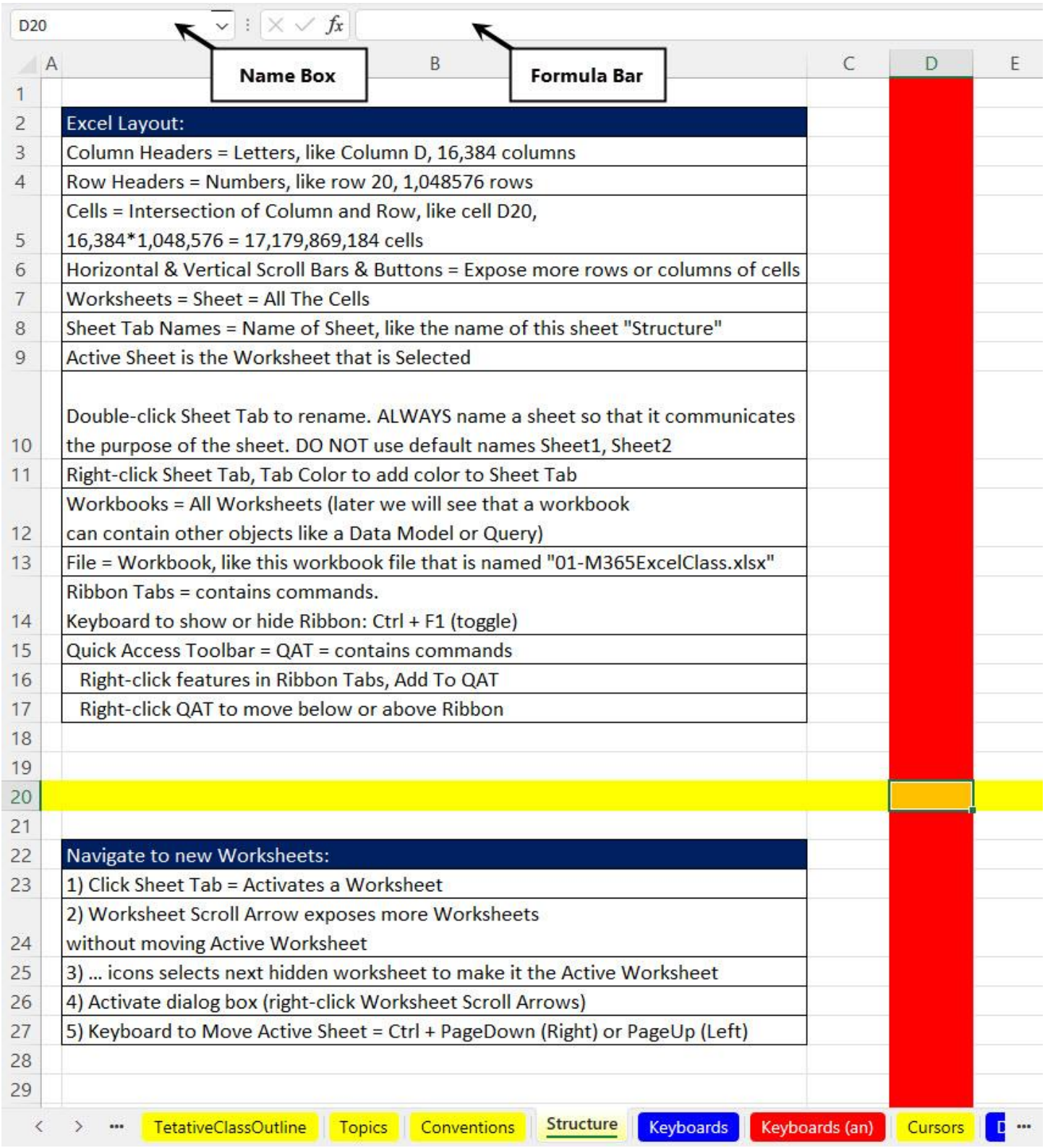
Download files and save to folder

1. Right-click file link
2. Click on Save As
3. In the Save As Dialog box, create a folder where you can save all class files. Cytl + Shift + N is keyboard to create a new folder
4. Save files to the folder that you created

Conventions used for the Excel files



Structure and Layout of Excel Workbook File



Keyboards and Keyboard Shortcuts

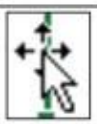
Keyboard Shortcuts are Fast! Some useful Keyboard Shortcuts:
Jump to end of current region => **Ctrl + Arrow**
Highlight to end of current region => **Ctrl + Shift + Arrow**
Sum Function => **Alt + =**
Open Format Cells dialog box if cell or range is selected => **Ctrl + 1**
Open Chart Format Task Pane if chart is selected => **Ctrl + 1**
Many, many more that we will learn in class …
Entering Data & Formulas into Cells:
Ctrl + Enter = Puts the content into active cell and keeps active cell selected. Use this when your goal is to put the content into the active cell and immediately do something to the active cell, like copy or format it.
Enter = Puts the content into active cell and moves the selected cell down by one row. Use this when your goal is to put the content into the active cell and immediately do something in the cell below, like enter more content.
Shift + Enter = Puts the content into active cell and moves the selected cell up by one row. Use this when your goal is to put the content into the active cell and move the selected cell up by one row, like when you need to enter a formula but the worksheet screen does not show the active cell.
Tab = Puts the content into active cell and moves the selected cell to the right by one column. Use this when your goal is to put the content into the active cell and immediately do something in the cell to the right, like enter more content.
Shift + Tab = Puts the content into active cell and moves the selected cell to the right by one column. Use this when your goal is to put the content into the active cell and immediately do something in the cell to the left, like enter more content.

** Shift + Tab moves to left (not right).

Selection keyboards
Ctrl + Shift + Arrow = Selects a range of cell content in the direction of the arrow, stops when it bumps into the first empty cell. Use this when you want to quickly highlight a column or row of cell content. If there is no content when you invoke this keyboard, then this keyboard jumps all the way to the edge of the worksheet.
Ctrl + * (Number Pad) = Ctrl + Shift + 8 (Standard Keys) = Selects the current region, which means everything in all directions from the active cell, up to the first complete row or column of empty cells, or it bumps into the worksheet row numbers or column letters. This is the keyboard shortcut to instantly select a whole table.
Shift + Arrow = Highlights one cell at a time in the direction of the arrow, incrementing slowly on each click of the arrow. The trick is to hold the Shift key and then tap the arrow key, once for each character that you want to select. This is useful when you have a small selection to make within a larger block of cells.
Navigation Keys
Ctrl + Home = Jumps the active cell to cell A1. This is convenient when you want to jump to the very top of the worksheet.
Ctrl + End = Jumps the active cell to last cell used in entire worksheet. You can use this to jump to the very bottom of your work area.
Ctrl + Arrow = Jumps the active cell to last cell with content, in the direction of the arrow, stopping when it bumps into the first empty cell. This keyboard is great when you want to jump to the last bit of data in a row or a column.
Ctrl + . (period or Decimal key) = Jumps the active cell to next corner in a selected range. This keyboard only jumps between the four corners of a selected range. It is useful for navigating the four corners of a large table.
Ctrl + Backspace = Jumps the screen back to the active cell. This keyboard works whether or not the active cell is in edit mode or the cell is just selected. It is a great keyboard when the active cell is off screen, but you need to instantly jump back to the active cell.
Other Keyboards
F2 = put cell in edit mode.
F4 = Toggles between the different types of cell references in a formula.
F7 = Spell Check.
F9 = Evaluate Formula Element.
Ctrl + C = Copy.
Ctrl + V = Paste.
Ctrl + X = Cut.
Ctrl + Shift + Arrow = Select everything up to the first empty cell.
Alt + = (Equal Sign) = Insert SUM function into cell.
Ctrl + Backspace = Jump Back to Active Cell.
Shift + Enter = Puts the content into active cell and moves the selected cell up by one row.
Alt, N, V, T = Open Create PivotTable dialog box.
Alt, N, V = Open Create PivotTable dialog box if you do not have a Power BI Account or you are not logged in.
Alt, P, S, P = Open Page Setup dialog box.
Alt, A, M = Remove Duplicates.
Alt, A, D, M = Open Data Model.
Right-Click Key, B, V = Convert Excel Table to Range.
Alt, "Position of Item in QAT" = Invoke button from QAT based on position of button in QAT.
Ctrl + F1 = Toggles Tabs in Ribbon to Show or Hide.
Laptop Keyboards:
Fx (Fn) + F12 = Save As when keyboards require the Fx Function Key.
Fx (Fn) + Esc = Sets the option on your laptop so that you can access the F keys directly without using the Fx (Fn) key.

F Key Keyboards:
F1 = Opens Help Task Pane.
Ctrl + F1 = Toggles the Ribbon between Collapsed and Showing.
Alt + F11 = Insert new Default Chart on the Active Worksheet.
F2 = Puts Cell in Edit Mode.
F3 = Opens Paste Name dialog Box (When Defined Names exist).
Ctrl + F3 = Opens Defined Name Manager dialog box.
Ctrl + Shift + F3 = Opens Create (Defined Names) From Selection dialog box.
Shift + F3 = When Cell is in Edit Mode, opens Insert Function dialog box.
Alt + F3 = selects Name Box in Formula Bar.
F4 = Repeats Last Action.
F4 = When Cell is in Edit Mode, toggles between the different types of Cell References in a formula.
F4 = When in the VBA Editor Window, opens Properties Pane.
F5 = Opens Go To dialog box.
F6 = Activates Sheet Tab so you can use the Right-Click Key.
F7 = Spell Check.
F8 = Toggles Select Range between two clicks.
Shift + F8 = Toggles Select Noncontiguous Range option.
Alt + F8 = Opens up Run Macro dialog box.
F9 = Evaluate Key = Calculates all worksheets in all open workbooks.
F9 = When Cell is in Edit Mode and a Formula Element is selected, it will evaluate the Formula Element.
Shift + F9 = Calculates the active worksheet.
Ctrl + Alt + F9 = Calculates all worksheets in all open workbooks, regardless of whether they have changed since the last calculation.
F10 = Shows Alt Key Keyboard Screen Tips.
F11 = Insert new Default Chart as a new Worksheet.
Shift + F11 = Insert new Worksheet.
Ctrl + F11 = Insert new Excel 4.0 Macro Worksheet.
Alt + F11 = Opens VBA Editor Window.
F12 = Opens Save As dialog box.

Mouse Cursors in Excel

Selection Cursor:		**Used to select a cell or range of cells in worksheet or formula.**
Move Cursor:		**Used to move a cell or range of cells.**
Fill Handle:		**Allows you to increment data or copy cell content such as text or formulas.**
Angry Rabbit (Cross Hair) Cursor:		**Grab Fill Handle to increment data or copy cell content.**
Change Column Width Cursor:		**Changes width of column.**
Change Row Height Cursor:		**Changes height of row.**
Selection Row or Column Cursor		**Selects entire row or column.**
Select Command Button		**Selects commands buttons and other objects.**
I Beam Cursor		**Allows you to click in a cell that is in Edit Mode.**
Insertion Point Cursor		**Shows position where you can type when in cell is in Edit Mode.**

Data and Alignment in Worksheet

Data Types in Excel	Default Alignment	Example1	Example2
Text	Left	Excel	
Numbers	Right	43	
Logical/Boolean (TRUE or FALSE)	Center and All CAPS	TRUE	FALSE
Errors	Center	#DIV/0!	#VALUE!
Empty Cells			

43..69	12/244/2022	8:00:00AM
43.69	12/24/22	8:00 AM

** In Excel Dates and Times are Numbers

<<== Not really a Data Type, but it is a "thing" in Excel that can sometimes cause problems.

**Refer to Empty Cells as "Empty Cells", not blanks.

Why is Default Alignment important:

Answer: It helps to track down errors.

Example 1: We download these numbers from company web site:

	Sales
	326.82
	446.39
	474.74
	233.21
	488.01
Total	1969.17

<<== Excel sees these as Numbers

Example 2: We download these numbers from company database:

Sales
326.82
446.39
474.74
233.21
488.01
Total 0

<<== Excel sees these as Text

*The immediate visual cue is that the numbers are NOT aligned right

Important Rule for entering data: 1) Don't use Alignment. Always keep Default Alignment.

Common mistake made in the working world:

Date	Units Purchased	Cost	Units Sold	Price	Running Balance
Balance Forward:					159
1/5/22			48	$25.50	111
1/6/22	144	$11.55			255
1/7/22			190	$24.35	65
1/7/22	39		24	$27.00	80
1/8/22	192				272

SUM:
231

What Excel Does do?

1) Hold data

Date	SalesRep	Sales ($)
5/10/23	Chantel	1,605
4/29/23	Tyrone	3,677
3/29/23	Jim	4,272
6/20/23	Jo	5,308
5/3/23	Chantel	6,745
4/8/23	Chantel	4,532
1/14/23	Tyrone	3,152
1/21/23	Chantel	1,609
1/13/23	Jim	679
1/6/23	Jim	4,829
4/15/23	Chantel	2,981
6/5/23	Tyrone	6,269
6/18/23	Tyrone	6,948
6/1/23	Tyrone	7,224
4/30/23	Chantel	1,856
4/11/23	Jim	3,939
6/25/23	Chantel	3,835
3/9/23	Jo	2,201
6/12/23	Jim	6,083
2/7/23	Jim	67
4/29/23	Tyrone	6,476
3/27/23	Tyrone	2,860
5/23/23	Jo	6,305
5/3/23	Tyrone	3,621
6/12/23	Tyrone	6,344
2/3/23	Chantel	1,797
1/25/23	Tyrone	2,385
4/9/23	Jim	2,322
3/2/23	Jim	1,778
5/9/23	Jo	3,161
4/3/23	Jo	1,617
5/18/23	Tyrone	4,894
5/22/23	Tyrone	4,069
4/4/23	Jim	2,321

2) Make calculations

Average Sale	$3,660.16

3) Perform data analysis

Converting data into useful information to gain insight and make decisions

Report = all the detail

Month	Total Sales ($)
Jan	62,630
Feb	68,069
Mar	58,847
Apr	112,048
May	111,955
Jun	186,719
Grand Total	**600,267**

Report in a Table

Visualization = quick visual impression

Chart for visualizing data

Examples of Calculations:

Goal: Calculate the deduction amount

Gross Pay	2,154.75
Tax Rate	7.65%
Deduction	164.84

=ROUND(C6*C7,2)

Number Formula

Goal: Extract First Name

Full Name	Chantel Mims
First Name	Chantel

=LEFT(C12,SEARCH(" ",C12))

Text Formula

Goal: Did Employee get bonus?

Gross Pay	2,154.75
Bonus Hurdle	2,000.00
Get Bonus?	TRUE

=C17>=C18

Logical (Boolean) Formula

Example of Data Analysis

Survey Data
Yes
Yes
No
Yes
No
No
No
Somewhat
Yes
Yes
Yes
Yes
Somewhat
No
Somewhat

Data Into Information to make decisions

Report with all the detail

Survey Data	Number Responses	% Responses
No	77	48%
Somewhat	35	22%
Yes	47	30%
Total	**159**	**100%**

Chart to visualize report and give a quick visual impression