

Excel Essentials

Charity Digital Academy



What does Superhighways do?

We help small charities and community groups gain essential digital and data skills, backed by the right tech, to achieve their goals.

We mainly work in London and are a programme of Kingston Voluntary Action



Session agenda

- ✓ Topic 1 – Viewing & formatting your data
- ✓ Topic 2 – Sorting your data

10 min Break!

- ✓ Topic 3 – Splitting columns
- ✓ Topic 4 – Intro to auto & manual formulae
- ✓ Topic 5 – Printing tips
- ✓ Topic 6 – Intro to Tables

10 min Break!

- ✓ Topic 7 – Filters
 - ✓ Topic 8 – Charts & graphs
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- ✓ Demo & exercises for each topic – follow Exercise sheet
 - ✓ Course handbook & recording for reference afterwards



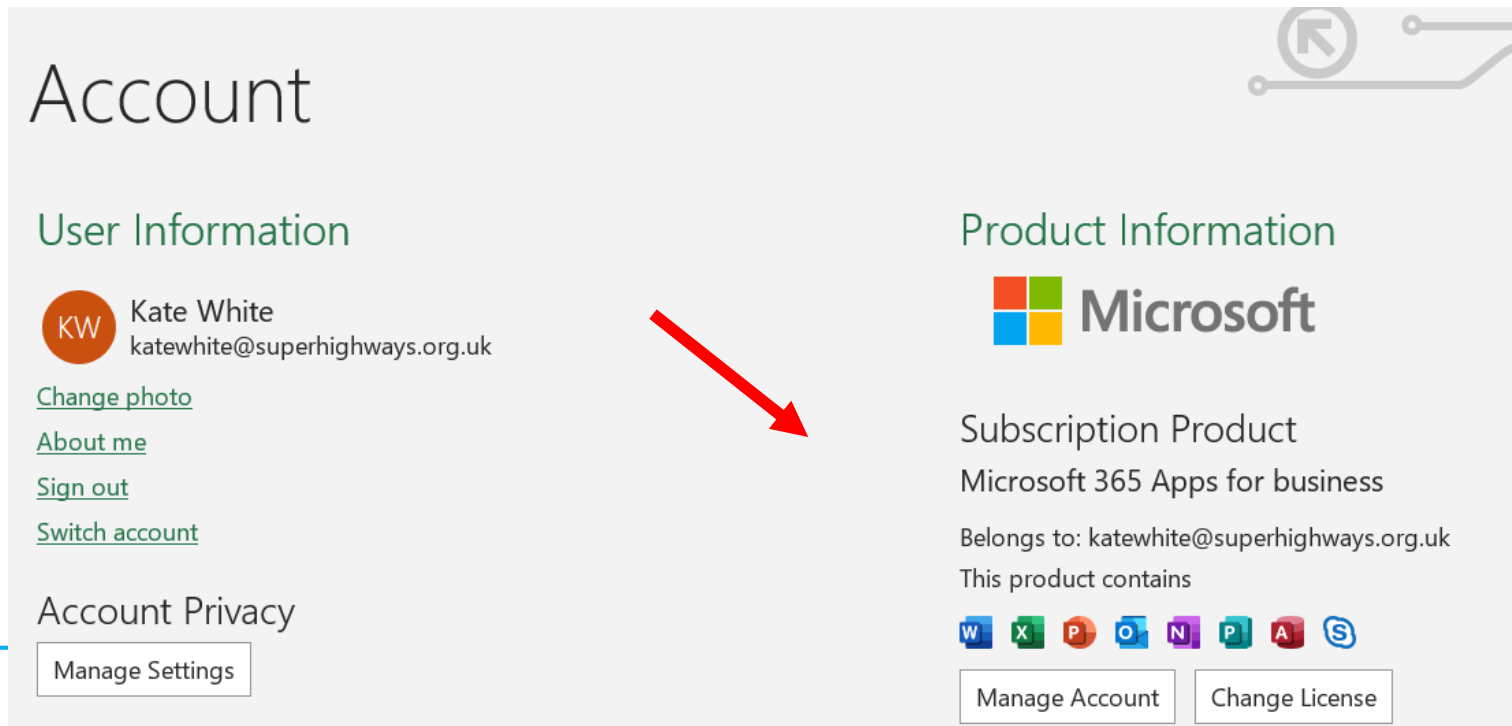
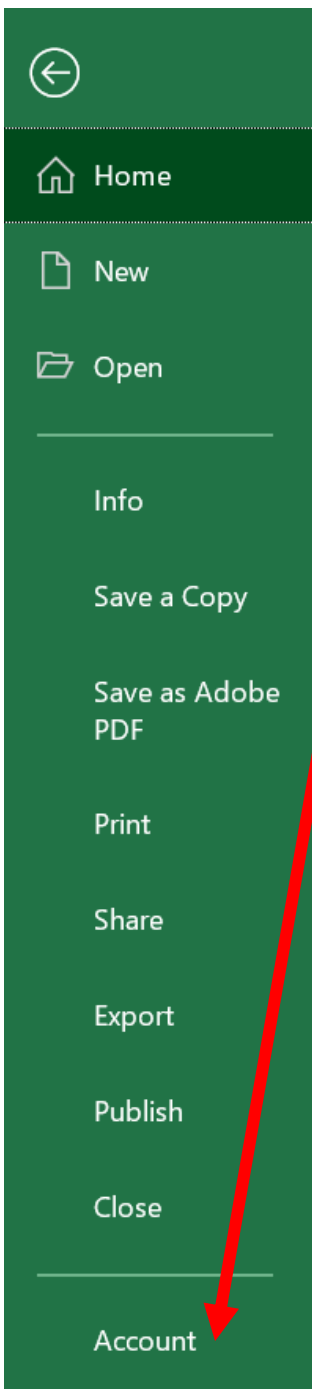
Intro: A quick Excel tour

- ✓ Different versions of Microsoft Excel
- ✓ Understanding the ribbon
- ✓ Getting help
- ✓ Correcting mistakes



What version do you have?

- ✓ Go to File and then Account (you may have to click on More)
- ✓ Here you can see what version you have installed

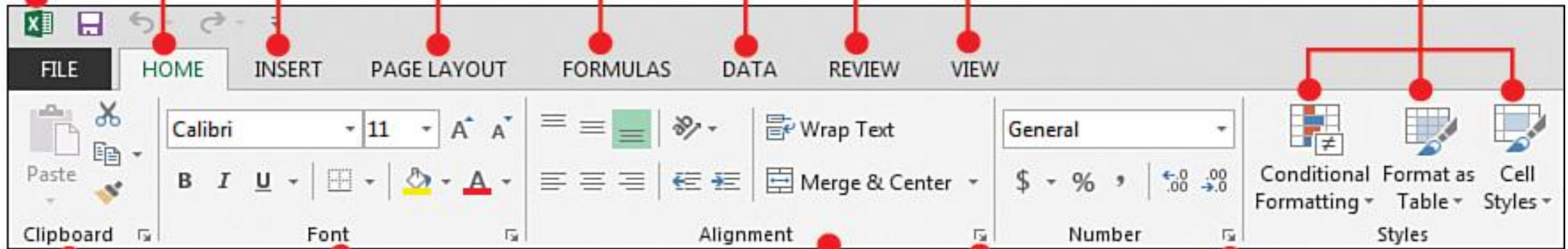


Understanding the ribbon

Quick
Access
toolbar

Tabs

Command
buttons



Groups

Dialog launchers



Today's data

Music Mentors work with young offenders in prisons. People sign up to take part in group sessions where they work together with other offenders and mentors to write, play and record music.

The data we are using today is fictional data for the programme which we have created for training purposes.



Topic 1: Formatting your data

- ✓ Formatting sheet contents – borders, filling, aligning text
- ✓ Adding, renaming & highlighting sheets
- ✓ Freeze panes, wrap text, resizing & hiding columns



Topic 2: Sorting your data

- ✓ Simple sort
- ✓ Multiple level sorting
- ✓ Clearing a sort order
- ✓ Counting cells



Topic 3: Splitting columns

- ✓ Split a column into two (or more) based on criteria you set
- ✓ *(Join two columns together)*



Topic 4: Introduction to formulae

- ✓ Auto sum
- ✓ Copying formula
- ✓ Average
- ✓ Adding a simple multiplication
- ✓ Using the currency cell format



Topic 5: Printing demo

- ✓ Scale to fit a worksheet on to page
- ✓ Add a custom header & footer



Topic 6: Tables

Advantages of Tables

- ✓ **Table Names**

Give a table a name to make it easier to reference in other formulas.

- ✓ **Cleaner Formulas**

Excel Formulas are much easier to read and write when working in tables.

- ✓ **Auto Expand**

Add a new row or column to your data, and the Excel table automatically updates to include the new cells.

- ✓ **Filters & Subtotals**

Automatically add filter buttons and subtotals that adapt as you filter your data.

- ✓ **Dynamic Pivot tables**

If you use an Excel Table for the source data of your pivot table, the data range becomes "dynamic". A dynamic range will automatically expand and shrink the table as you add or remove data, so won't have to worry that the pivot table is missing the latest data. When you use a Table for your pivot table, the pivot table will always be in sync with your data.



Topic 7: Filtering

- ✓ Simple filtering – single or multi level
- ✓ Filtering using Search and keywords
- ✓ Advanced filtering – build multi level sophisticated filters
- ✓ Slicers



Topic 8: Charts & graphs

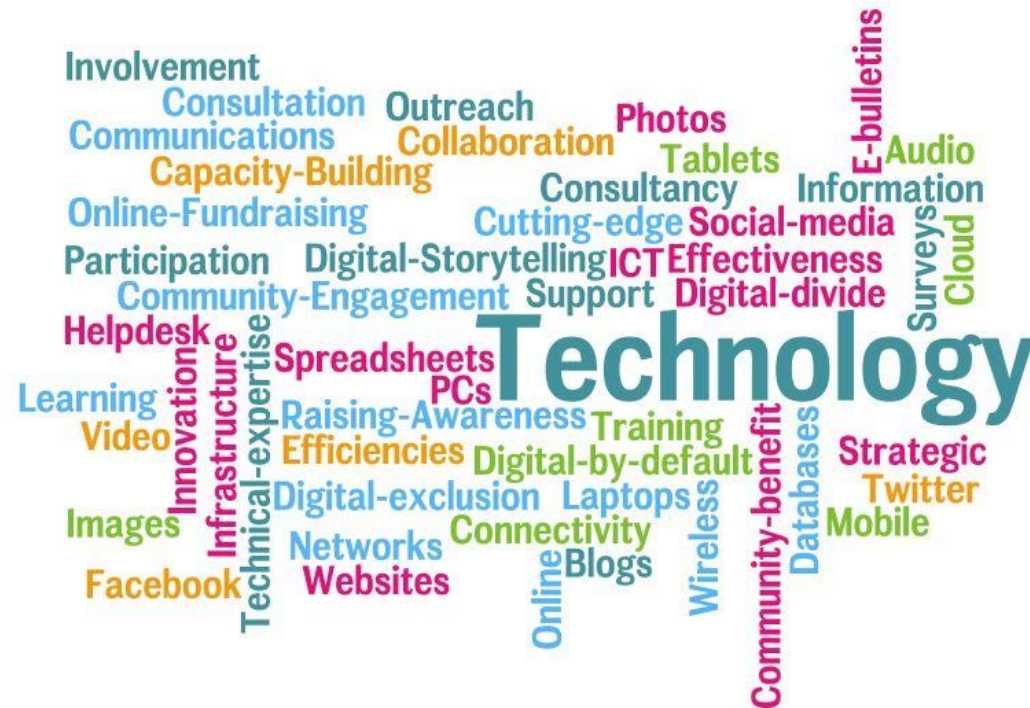
- ✓ Create a clustered Column chart
- ✓ Create a Bar Chart (effectively a pivot chart)



Superhighways

Providing tech, digital & data support to small local charities in London for 25 years

- ✓ Tech Support
- ✓ [Training](#)
- ✓ Consultancy
- ✓ Digital inclusion
- ✓ Data support
- ✓ Digital Foundations
- ✓ Websites



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