

Getting started with Excel



Trust for London
Tackling poverty and inequality



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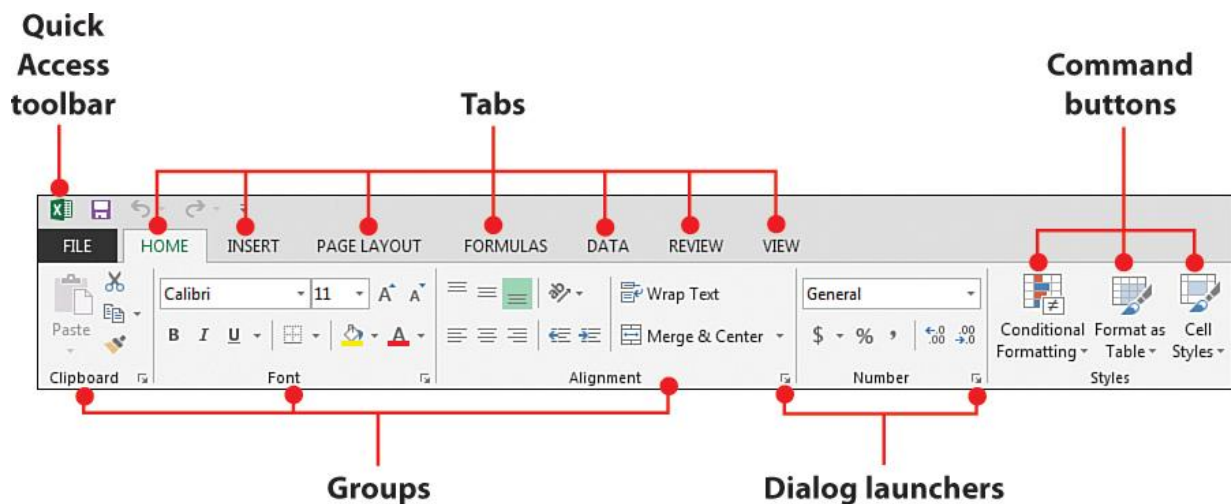
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Working with Excel

1. Understanding the Ribbon

It really helps to get to grips with the Excel terminology as it makes like a lot easier to find things & understand instructions when using the Microsoft Excel help feature or the internet for help.

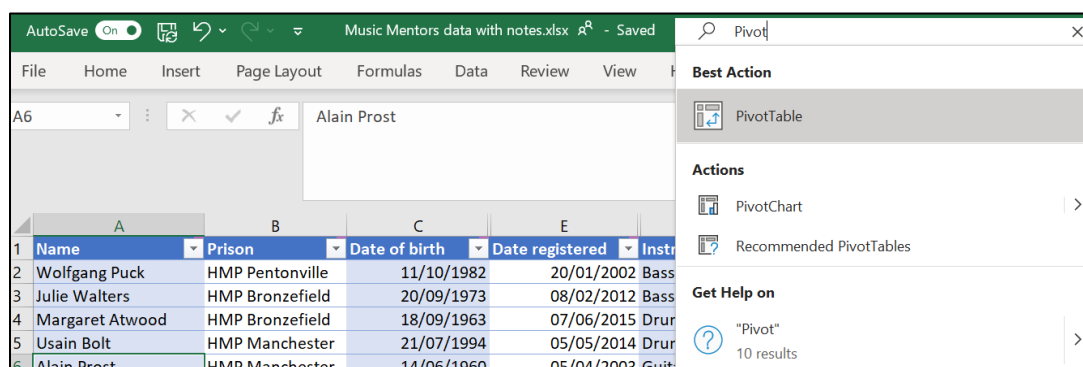


The Ribbon is made up of five basic components: the Quick Access Toolbar, tabs, groups, command buttons, and dialog launchers.

- The **Quick Access Toolbar** is essentially a customizable toolbar to which you can add commands that you use most frequently.
- **Tabs** contain groups of commands that are loosely related to core tasks. It helps to think of each tab as a category.
- **Groups** contain sets of commands that fall under the umbrella of that tab's core task. Each group contains buttons, which you click to activate the command you want to use.
- **Dialog launchers** are activated by clicking the small arrow located in the lower-right corner of certain groups. Clicking any dialog launcher activates a dialog box containing all the commands available for a given group.
- **Command buttons** when clicked launch a macro which perform a specified action in Excel.

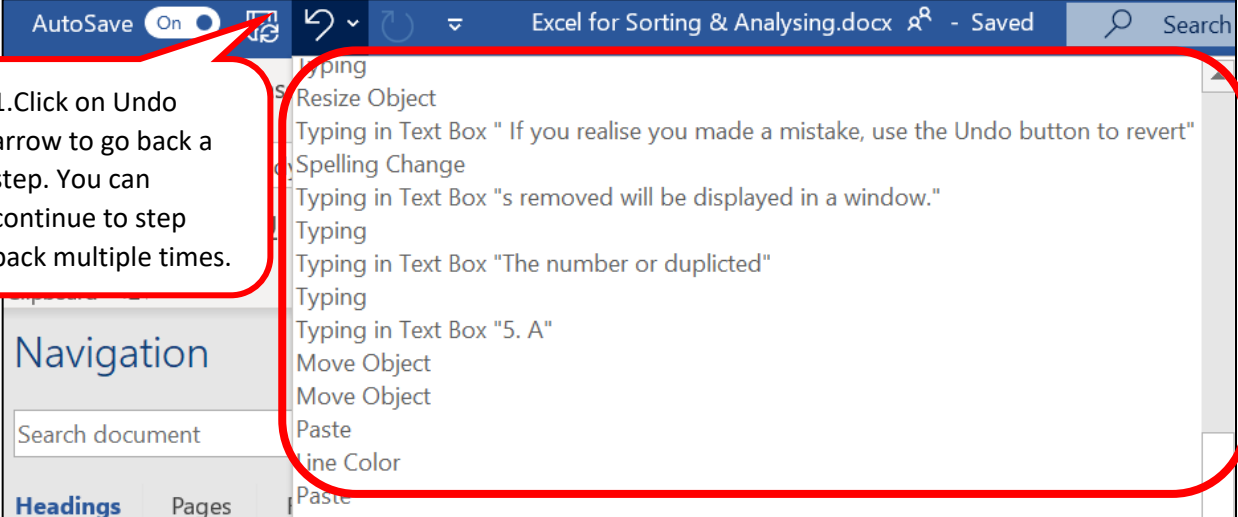
2. Getting help

If you can't remember where to find a function in Excel, use the search function at the top to get assistance.



3. Correcting mistakes

Microsoft Excel tracks all the changes you make to a file, if you make a mistake (or two!) you can step yourself backwards through the changes you made to reverse anything you did wrong.



1. Click on Undo arrow to go back a step. You can continue to step back multiple times.

4. Different Versions of Excel

There are several different versions of Microsoft Excel, be aware that different versions offer different features and existing features might be accessed via different means.

These different versions & how they look on a laptop versus a PC means that the screen prints in this document might not always look exactly the same as the screen in front of you. But the features will be there so look for the icons which remain consistent or use the search feature to find them.

Microsoft 365

The Business Premium Licence is donated (10 licences per registered charity) and comes with the Microsoft office suite, including Excel, to download.

Microsoft Office 2016 & later

Previously you could buy a discounted licence if you are a registered charity from Charity Digital for £33 for Microsoft Office 2019. These products are no longer available, you would need to pay full price for a local standalone desk top option.

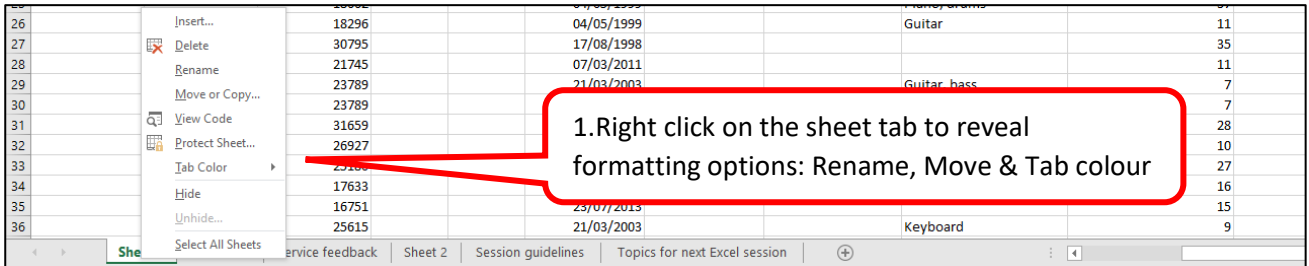
Microsoft licencing is often included on a 2 year open licence which means you get upgrades during this period, so if using an older version, check before buying anything in case you are eligible for an upgrade rather than paying for a new product.



Viewing Spreadsheets

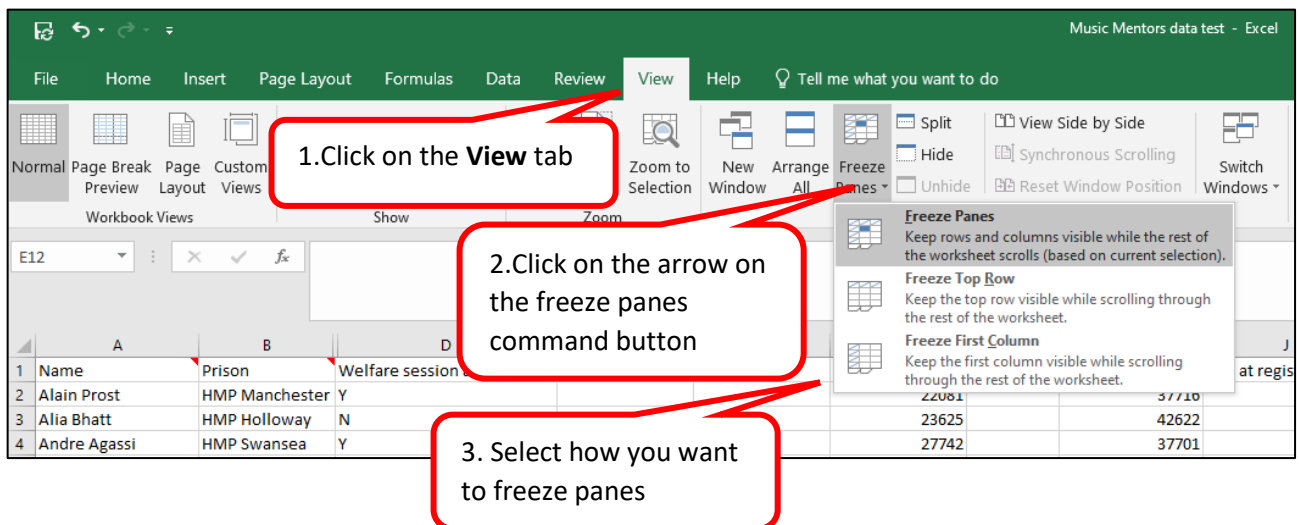
Working with workbooks with large amount of data in each sheet can be very unwieldy. Before starting it's worth getting your view sorted out so that you can easily move around between worksheets.

5. Format tabs

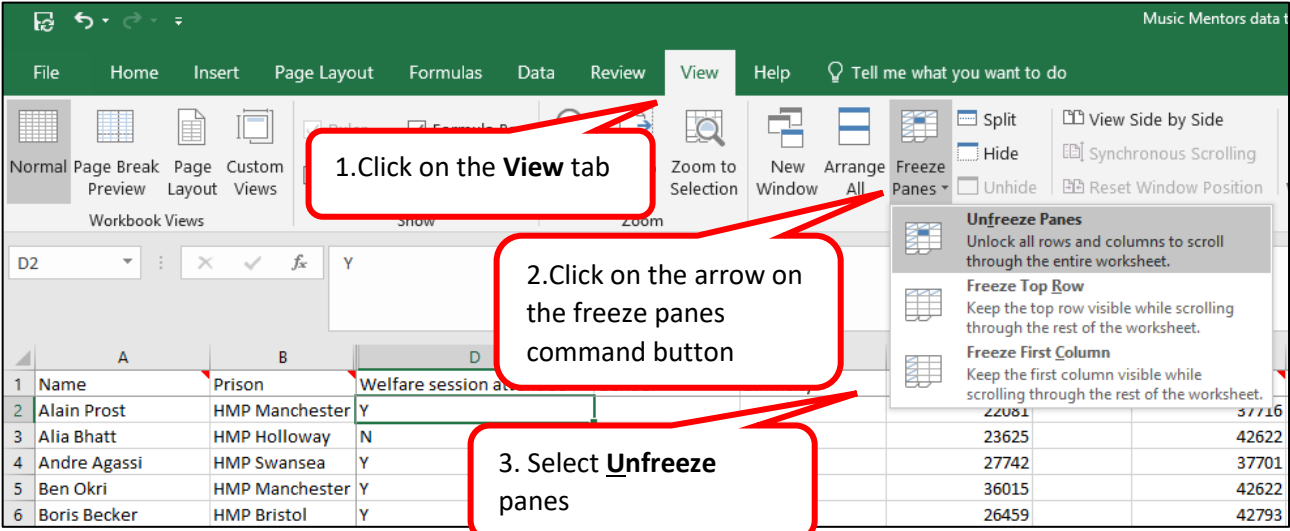


6. Freeze panes

Allows you to control areas of the spreadsheet to be fixed as you scroll.



7. Unfreeze panes



1. Click on the **View** tab

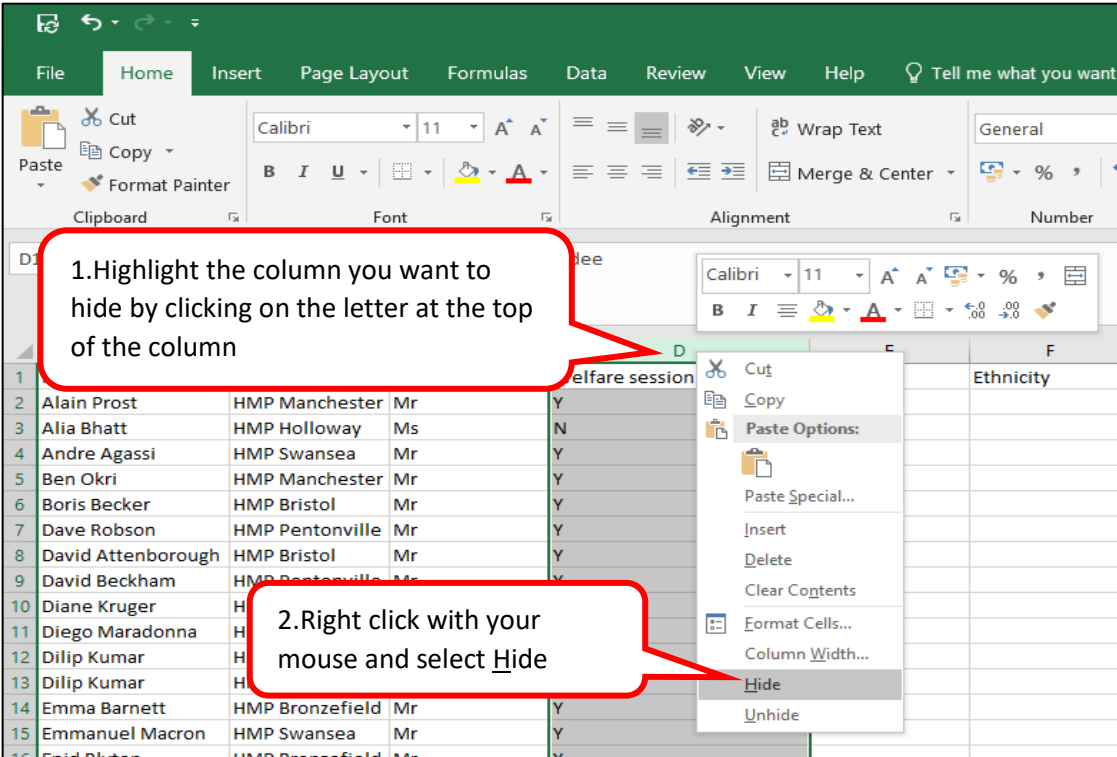
2. Click on the arrow on the freeze panes command button

3. Select **Unfreeze panes**

Name	Prison	Welfare session attended	22081	37716
Alain Prost	HMP Manchester	Y	23625	42622
Alia Bhatt	HMP Holloway	N	27742	37701
Andre Agassi	HMP Swansea	Y	36015	42622
Ben Okri	HMP Manchester	Y	26459	42793
Boris Becker	HMP Bristol	Y		

8. Hide columns

Hiding columns from view can be very useful when working with big spreadsheets so that you only work with the columns you need.



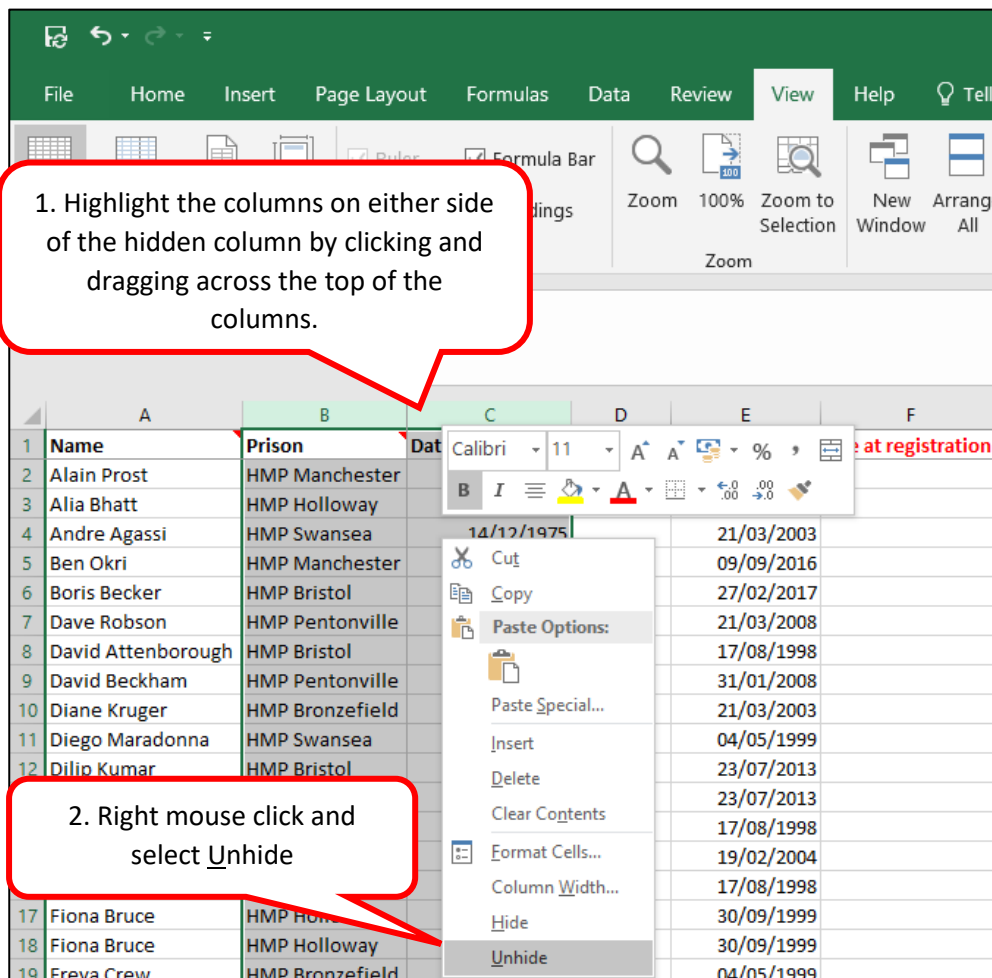
1. Highlight the column you want to hide by clicking on the letter at the top of the column

2. Right click with your mouse and select **Hide**

	D	E	F
1	Welfare session attended		Ethnicity
2	Alain Prost	HMP Manchester	Mr
3	Alia Bhatt	HMP Holloway	Ms
4	Andre Agassi	HMP Swansea	Mr
5	Ben Okri	HMP Manchester	Mr
6	Boris Becker	HMP Bristol	Mr
7	Dave Robson	HMP Pentonville	Mr
8	David Attenborough	HMP Bristol	Mr
9	David Beckham	HMP Pentonville	Mr
10	Diane Kruger	HMP Pentonville	Ms
11	Diego Maradona	HMP Pentonville	Mr
12	Dilip Kumar	HMP Pentonville	Mr
13	Dilip Kumar	HMP Pentonville	Mr
14	Emma Barnett	HMP Bronzefield	Mr
15	Emmanuel Macron	HMP Swansea	Mr
16	Epid Blpton	HMP Bronzefield	Mr



9. Unhide Columns

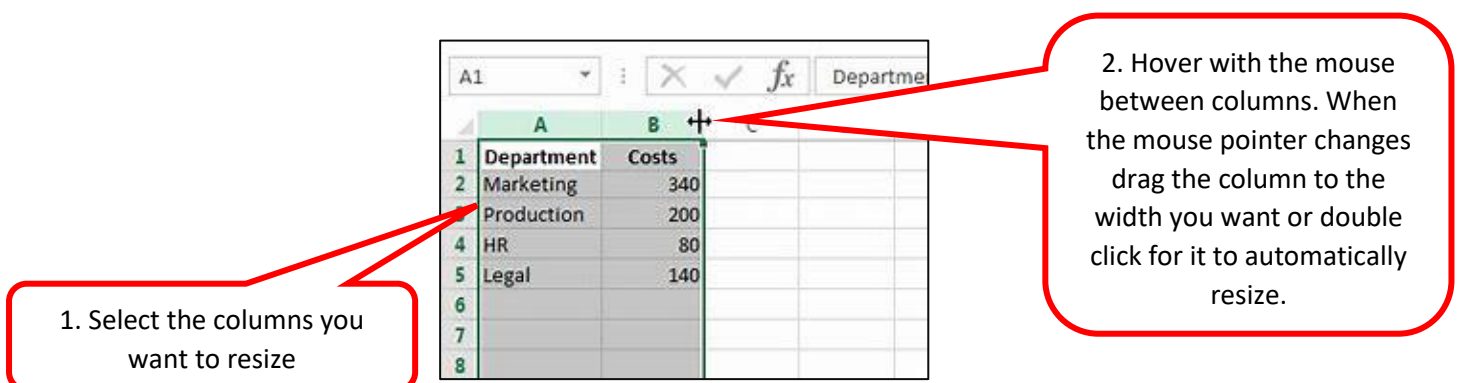


1. Highlight the columns on either side of the hidden column by clicking and dragging across the top of the columns.

2. Right mouse click and select Unhide

	A	B	C	D	E	F
1	Name	Prison	Date			at registration
2	Alain Prost	HMP Manchester				
3	Alia Bhatt	HMP Holloway				
4	Andre Agassi	HMP Swansea			21/03/2003	
5	Ben Okri	HMP Manchester			09/09/2016	
6	Boris Becker	HMP Bristol			27/02/2017	
7	Dave Robson	HMP Pentonville			21/03/2008	
8	David Attenborough	HMP Bristol			17/08/1998	
9	David Beckham	HMP Pentonville			31/01/2008	
10	Diane Kruger	HMP Bronzefield			21/03/2003	
11	Diego Maradona	HMP Swansea			04/05/1999	
12	Dilip Kumar	HMP Bristol			23/07/2013	
17	Fiona Bruce	HMP Holloway			23/07/2013	
18	Fiona Bruce	HMP Holloway			17/08/1998	
19	Ereva Crew	HMP Bronzefield			19/02/2004	

10. Resize columns



1. Select the columns you want to resize

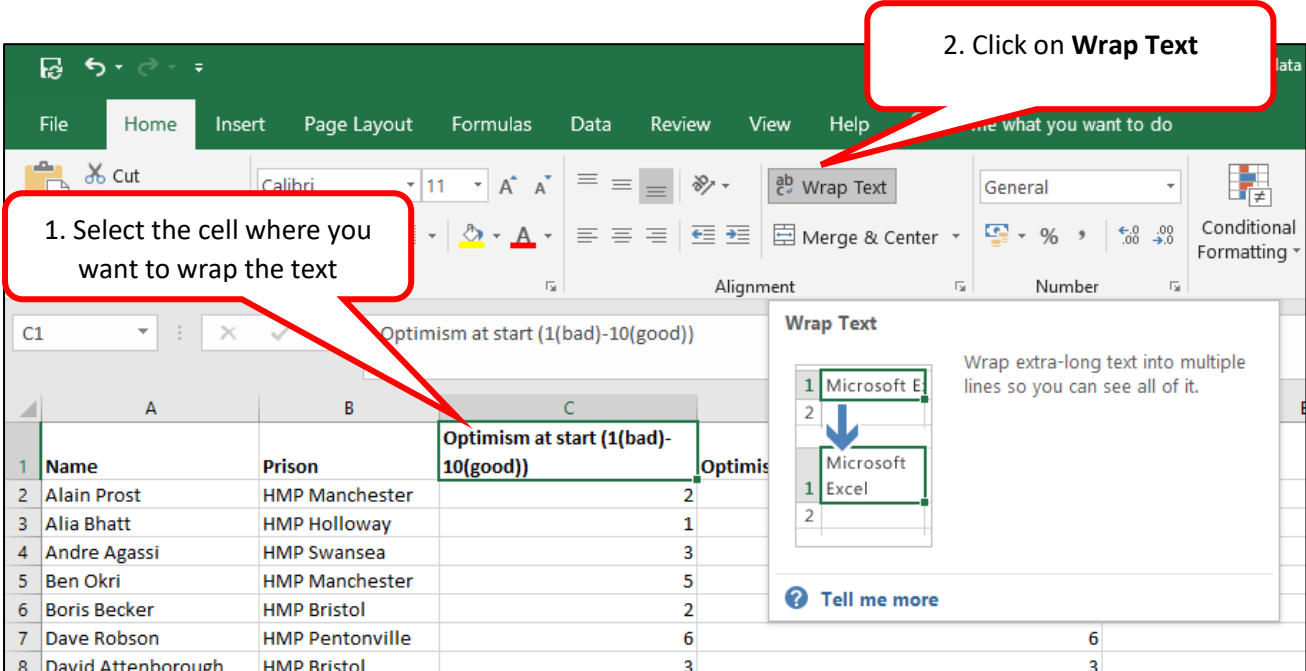
2. Hover with the mouse between columns. When the mouse pointer changes drag the column to the width you want or double click for it to automatically resize.

	A	B
1	Department	Costs
2	Marketing	340
3	Production	200
4	HR	80
5	Legal	140
6		
7		
8		



11. Wrap text

Wrap text allows you to display a long line of text on multiple lines so that it can all fit in one cell.



2. Click on **Wrap Text**

1. Select the cell where you want to wrap the text

	A	B	C	
1	Name	Prison	Optimism at start (1(bad)-10(good))	Optimis
2	Alain Prost	HMP Manchester		2
3	Alia Bhatt	HMP Holloway		1
4	Andre Agassi	HMP Swansea		3
5	Ben Okri	HMP Manchester		5
6	Boris Becker	HMP Bristol		2
7	Dave Robson	HMP Pentonville		6
8	David Attenborough	HMP Bristol		3

Wrap Text

Wrap extra-long text into multiple lines so you can see all of it.

1 Microsoft E
2
1 Microsoft
2 Excel

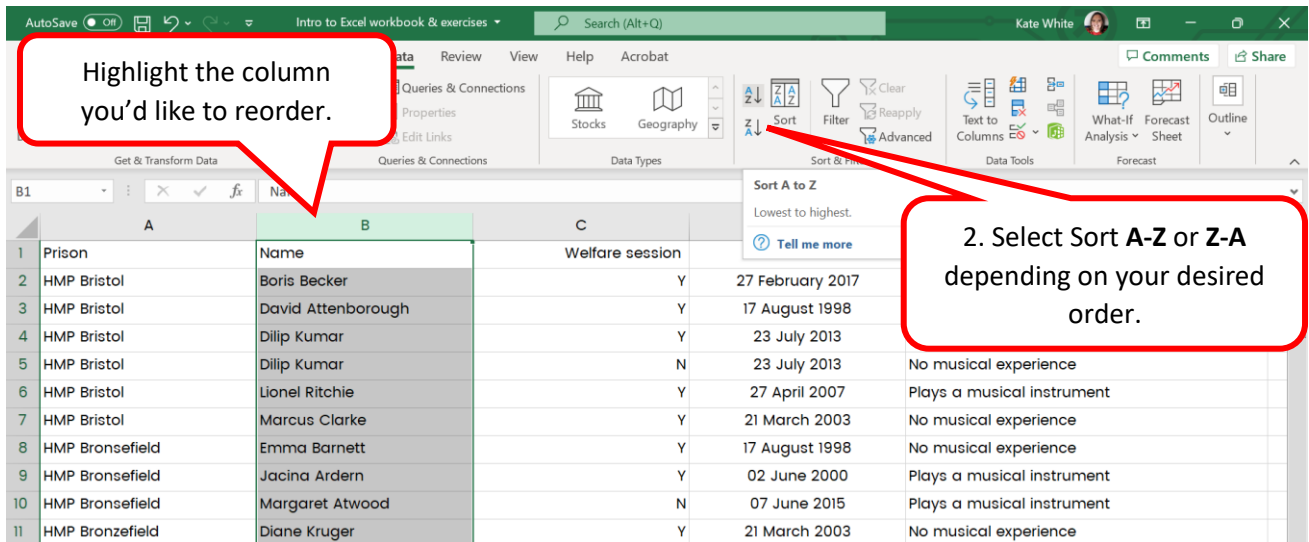
[Tell me more](#)



Sorting your data

12. Sorting (Single level)

Simple sorting can be done by highlighting the column you want to reorder and using the options available in each column header.

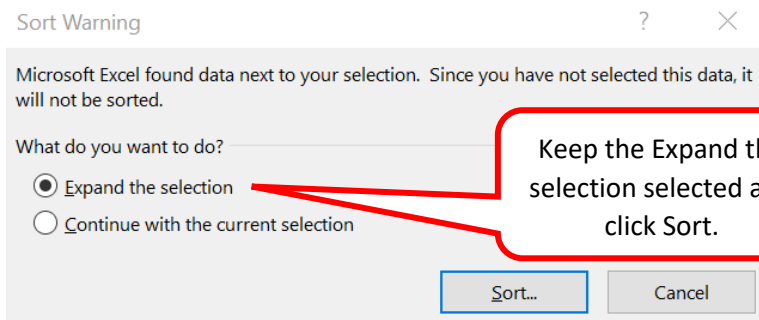


Highlight the column you'd like to reorder.

2. Select Sort A-Z or Z-A depending on your desired order.

	A	B	C		
1	Prison	Name	Welfare session		
2	HMP Bristol	Boris Becker	Y	27 February 2017	
3	HMP Bristol	David Attenborough	Y	17 August 1998	
4	HMP Bristol	Dilip Kumar	Y	23 July 2013	
5	HMP Bristol	Dilip Kumar	N	23 July 2013	No musical experience
6	HMP Bristol	Lionel Ritchie	Y	27 April 2007	Plays a musical instrument
7	HMP Bristol	Marcus Clarke	Y	21 March 2003	No musical experience
8	HMP Bronsefield	Emma Barnett	Y	17 August 1998	No musical experience
9	HMP Bronsefield	Jacina Ardern	Y	02 June 2000	Plays a musical instrument
10	HMP Bronsefield	Margaret Atwood	Y	07 June 2015	Plays a musical instrument
11	HMP Bronzeifield	Diane Kruger	Y	21 March 2003	No musical experience

A Sort Warning dialogue box should pop up, checking that you want to reorder the rows in full, rather than just that column in isolation.



Sort Warning

Microsoft Excel found data next to your selection. Since you have not selected this data, it will not be sorted.

What do you want to do?

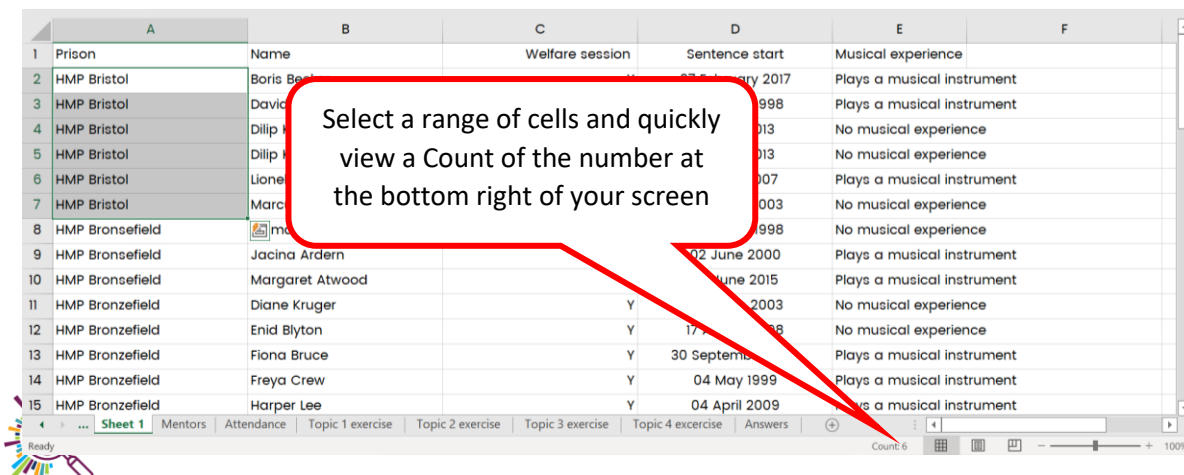
Expand the selection

Continue with the current selection

Keep the Expand the selection selected and click Sort.

Sort... Cancel

13. Quick Count view



Select a range of cells and quickly view a Count of the number at the bottom right of your screen

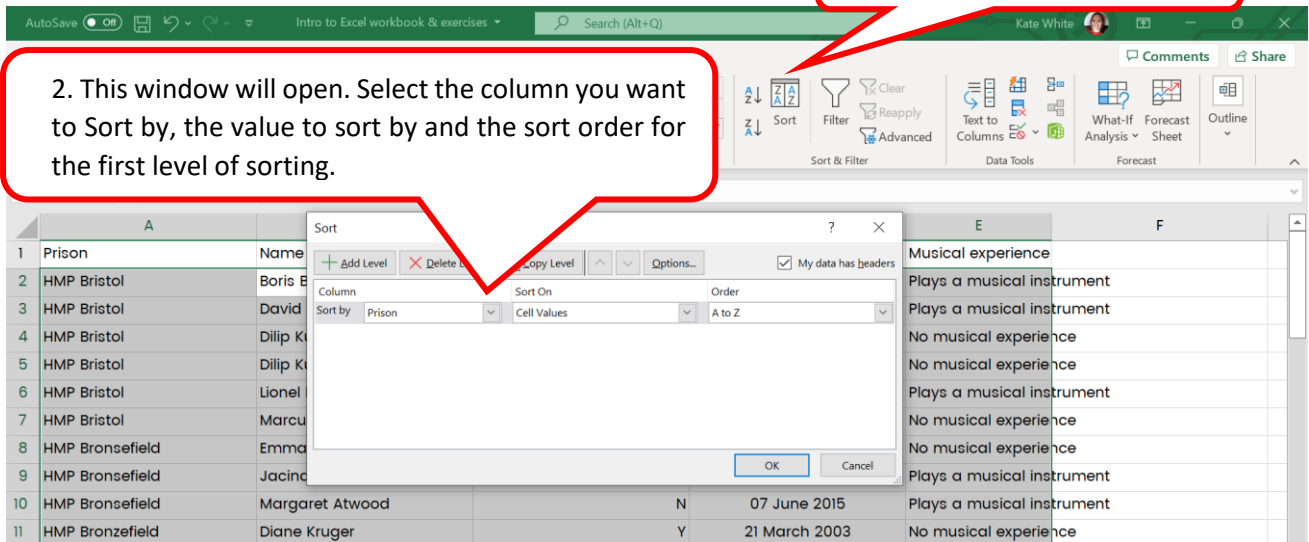
	A	B	C	D	E	F
1	Prison	Name	Welfare session	Sentence start	Musical experience	
2	HMP Bristol	Boris Becker	Y	27 February 2017	Plays a musical instrument	
3	HMP Bristol	David Attenborough	Y	17 August 1998	Plays a musical instrument	
4	HMP Bristol	Dilip Kumar	Y	23 July 2013	No musical experience	
5	HMP Bristol	Dilip Kumar	N	23 July 2013	No musical experience	
6	HMP Bristol	Lionel Ritchie	Y	27 April 2007	Plays a musical instrument	
7	HMP Bristol	Marcus Clarke	Y	21 March 2003	No musical experience	
8	HMP Bronsefield	Emma Barnett	Y	17 August 1998	No musical experience	
9	HMP Bronsefield	Jacina Ardern	Y	02 June 2000	Plays a musical instrument	
10	HMP Bronsefield	Margaret Atwood	Y	07 June 2015	Plays a musical instrument	
11	HMP Bronzeifield	Diane Kruger	Y	21 March 2003	No musical experience	
12	HMP Bronzeifield	Enid Blyton	Y	17 August 1998	No musical experience	
13	HMP Bronzeifield	Fiona Bruce	Y	30 September 2015	Plays a musical instrument	
14	HMP Bronzeifield	Freya Crew	Y	04 May 1999	Plays a musical instrument	
15	HMP Bronzeifield	Harper Lee	Y	04 April 2009	Plays a musical instrument	

14. Sorting (Multi-level)

More complex sorting options are available via the Home tab

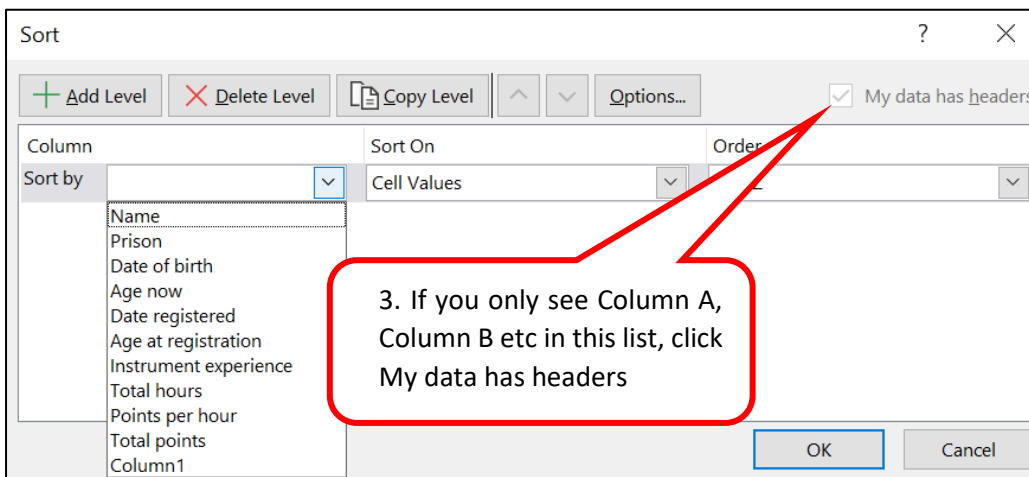
1. Click on the Sort option

2. This window will open. Select the column you want to Sort by, the value to sort by and the sort order for the first level of sorting.

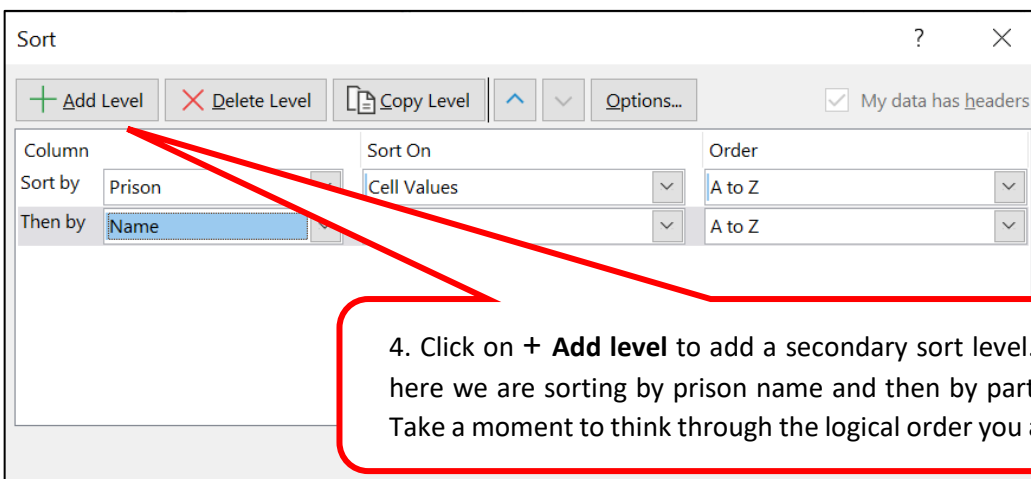


	A		E	F
1	Prison	Name		
2	HMP Bristol	Boris B	Musical experience	
3	HMP Bristol	David	Plays a musical instrument	
4	HMP Bristol	Dilip K	Plays a musical instrument	
5	HMP Bristol	Dilip K	No musical experience	
6	HMP Bristol	Lionel	No musical experience	
7	HMP Bristol	Marcu	Plays a musical instrument	
8	HMP Bronsefield	Emma	No musical experience	
9	HMP Bronsefield	Jacinc	No musical experience	
10	HMP Bronsefield	Margaret Atwood	Plays a musical instrument	
11	HMP Bronsefield	Diane Kruger	Plays a musical instrument	
			No musical experience	

3. If you only see Column A, Column B etc in this list, click My data has headers



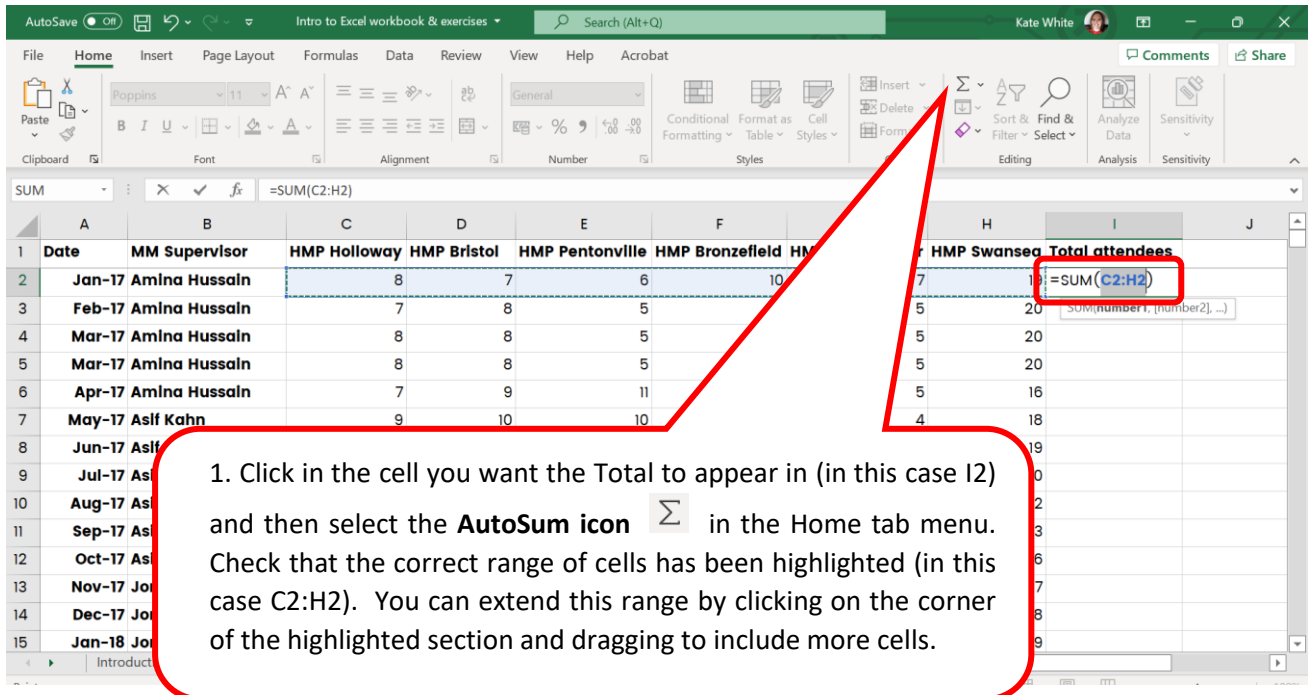
4. Click on + Add level to add a secondary sort level. For example, here we are sorting by prison name and then by participant name. Take a moment to think through the logical order you are sorting on.




Using Formula

15. Auto sum

Automatically add up a range of values to arrive at the Total.

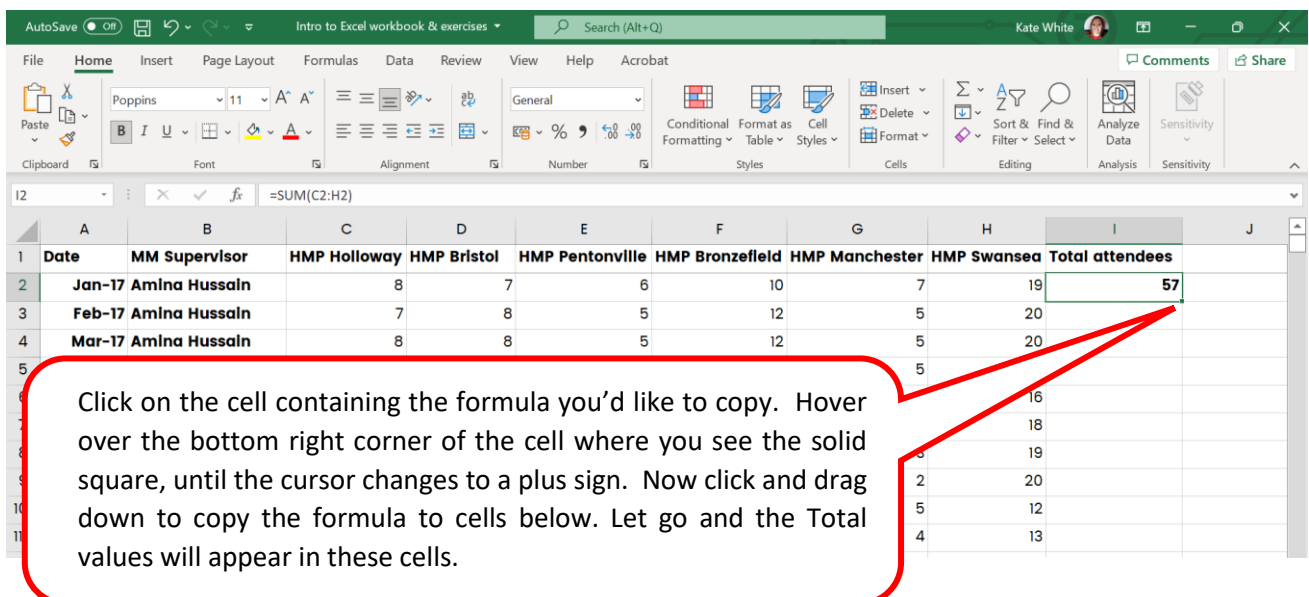


1. Click in the cell you want the Total to appear in (in this case I2) and then select the **AutoSum icon** Σ in the Home tab menu. Check that the correct range of cells has been highlighted (in this case C2:H2). You can extend this range by clicking on the corner of the highlighted section and dragging to include more cells.

Date	MM Supervisor	HMP Holloway	HMP Bristol	HMP Pentonville	HMP Bronzefield	HMP Manchester	HMP Swansea	Total attendees
Jan-17	Amlna Hussaln	8	7	6	10		7	19
Feb-17	Amlna Hussaln	7	8	5			5	20
Mar-17	Amlna Hussaln	8	8	5			5	20
Apr-17	Amlna Hussaln	8	8	5			5	20
Apr-17	Amlna Hussaln	7	9	11			5	16
May-17	Asif Kahn	9	10	10			4	18
Jun-17	Asif							
Jul-17	Asif							
Aug-17	Asif							
Sep-17	Asif							
Oct-17	Asif							
Nov-17	Jo							
Dec-17	Jo							
Jan-18	Jo							

16. Copying formula

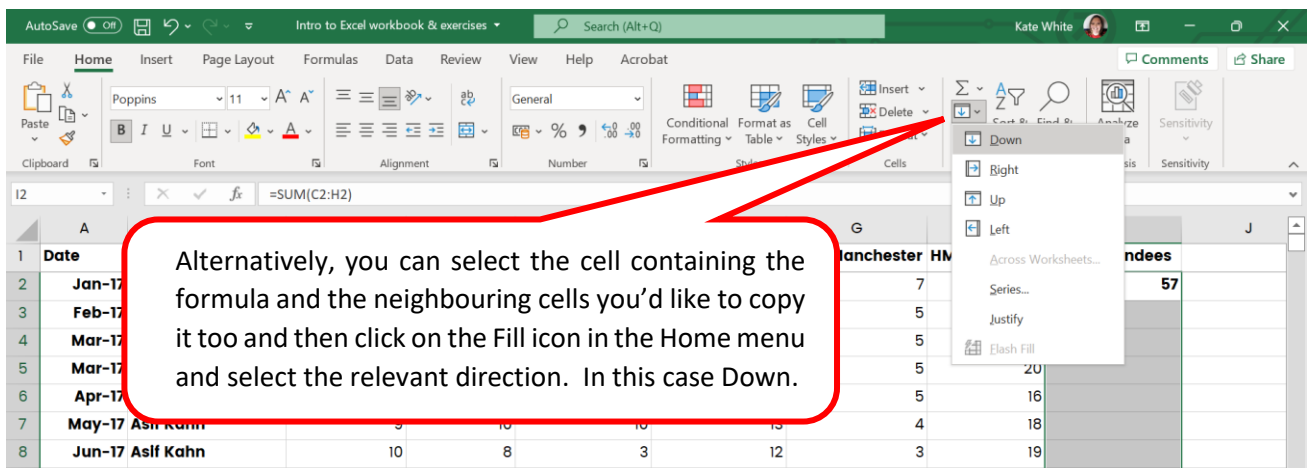
Once a formula has been entered into a cell, instead of recreating this formula in a neighbouring cell, you can 'copy' this formula to other cells so the equivalent calculation is made.



Click on the cell containing the formula you'd like to copy. Hover over the bottom right corner of the cell where you see the solid square, until the cursor changes to a plus sign. Now click and drag down to copy the formula to cells below. Let go and the Total values will appear in these cells.

Date	MM Supervisor	HMP Holloway	HMP Bristol	HMP Pentonville	HMP Bronzefield	HMP Manchester	HMP Swansea	Total attendees
Jan-17	Amlna Hussaln	8	7	6	10		7	57
Feb-17	Amlna Hussaln	7	8	5	12		5	20
Mar-17	Amlna Hussaln	8	8	5	12		5	20
							5	
								16
								18
								19
								2
								20
								5
								12
								4
								13



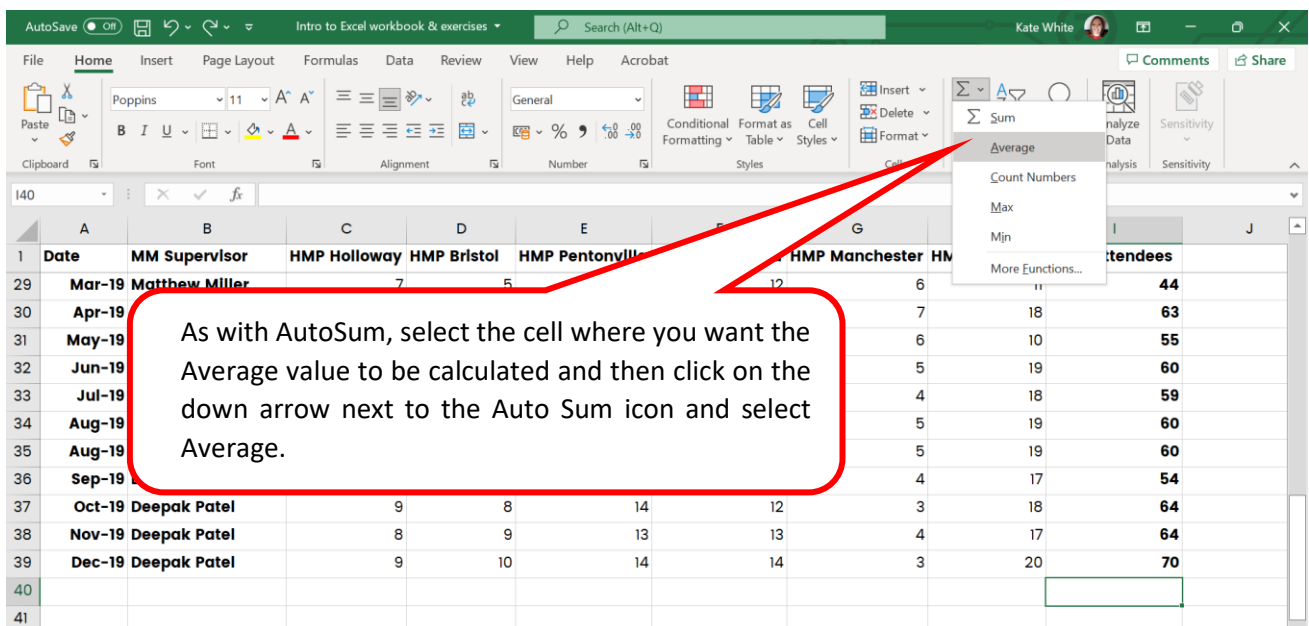


Alternatively, you can select the cell containing the formula and the neighbouring cells you'd like to copy it too and then click on the Fill icon in the Home menu and select the relevant direction. In this case Down.

Date	MM Supervisor	HMP Holloway	HMP Bristol	HMP Pentonville	HMP Manchester HM	Attendees
Jan-17		7				
Feb-17		5				
Mar-17		5				
Mar-17		5				
Apr-17		5				
May-17	Asif Kahn	4				
Jun-17	Asif Kahn	3				

17. Average

Similar to AutoSum, the Average function will automatically calculate the average for a range of values.

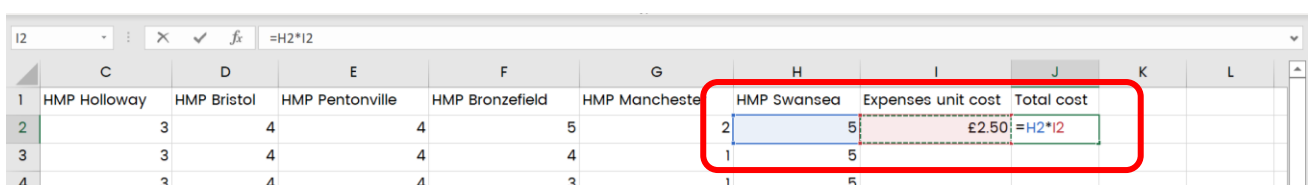


As with AutoSum, select the cell where you want the Average value to be calculated and then click on the down arrow next to the Auto Sum icon and select Average.

Date	MM Supervisor	HMP Holloway	HMP Bristol	HMP Pentonville	HMP Manchester HM	Attendees
Mar-19	Matthew Miller	7	5		12	44
Apr-19					7	63
May-19					6	55
Jun-19					5	60
Jul-19					4	59
Aug-19					5	60
Aug-19					5	60
Sep-19					4	54
Oct-19	Deepak Patel	9	8	14	12	64
Nov-19	Deepak Patel	8	9	13	13	64
Dec-19	Deepak Patel	9	10	14	14	70

18. Adding a simple multiplication

When adding a formula to calculate a multiplication, first enter the = equals sign. Then instead of typing in the values, select the cell containing the first value; add the * sign (Shift key and number 8 key), and then select the cell containing the second value. Then click Enter.



	C	D	E	F	G	H	I	J	K	L
1	HMP Holloway	HMP Bristol	HMP Pentonville	HMP Bronzefield	HMP Manchester	HMP Swansea	Expenses unit cost	Total cost		
2		3	4	4	5	5	£2.50	=H2*I2		
3		3	4	4	4	1	5			
4		3	4	4	3	1	5			



