



Excel 365 Introduction

Sample manual - first two chapters



Wise Owl
Training

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CHAPTER 1 - THE OFFICE INTERFACE

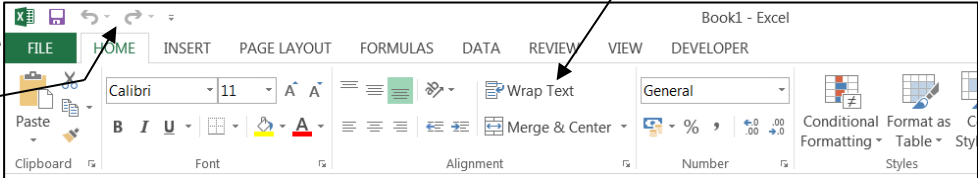
1.1 Interacting with Office

At the top of the screen you will see the ribbon which operates using a system of tabs and buttons:

The **FILE** tab lets you perform common tasks such as opening/saving files and printing.

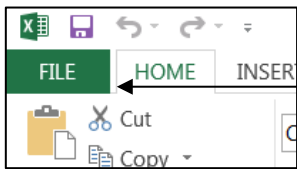
The *Ribbon* is the main way you control Office. The icons available depend on which *tab* is currently selected.

You can customise the *Quick Access Toolbar* to include frequently used tools.



The File Tab

The **FILE** tab is where you'll find the menu options for all the common tasks like printing, saving files, opening files and changing the defaults (standard settings) for a program like Excel.

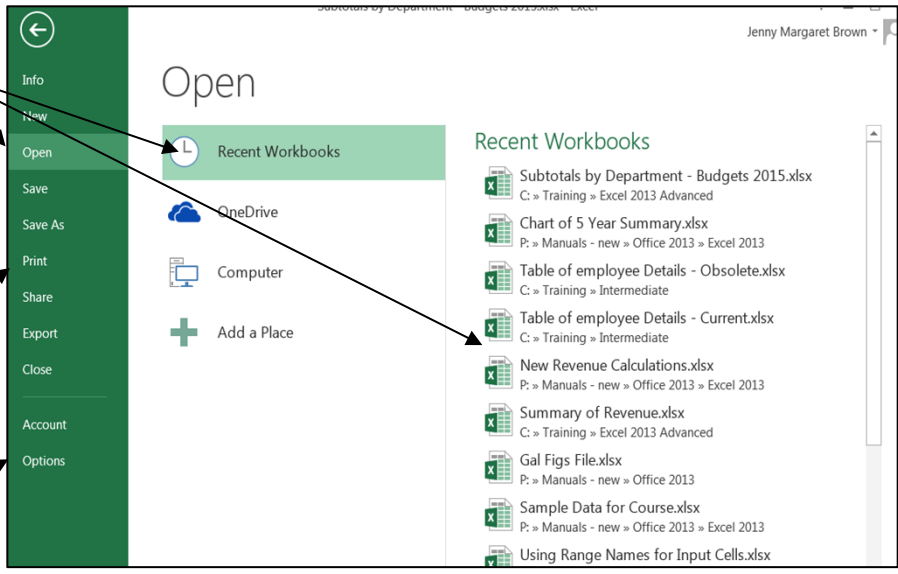


a) The **FILE** tab is at the top left of the screen. It always appears in green (unless you have changed the colour scheme). Simply click on the tab to see the options below.

b) Click on **Open** and then **Recent Workbooks** to see the list of files you have been working with recently.

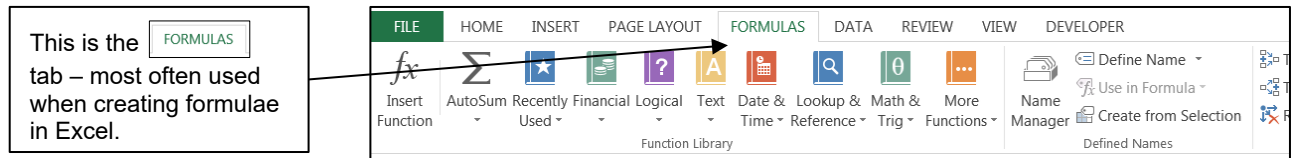
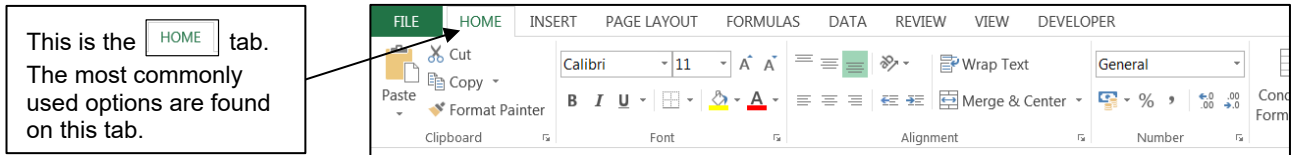
Click on any title here to see the choices for that menu option.

Click on **Options** to see the default settings.



The Ribbon

The *Ribbon* is the name for the area at the top of the screen where you will find all the menus; Windows calls these *Tabs*. Each time you click on a Tab the Ribbon icons will change.



The Mini Toolbar

The *Mini Toolbar* appears automatically when you select data in some Windows software. In Excel, you need to right-click.

- 1) First select the cells you want to change:

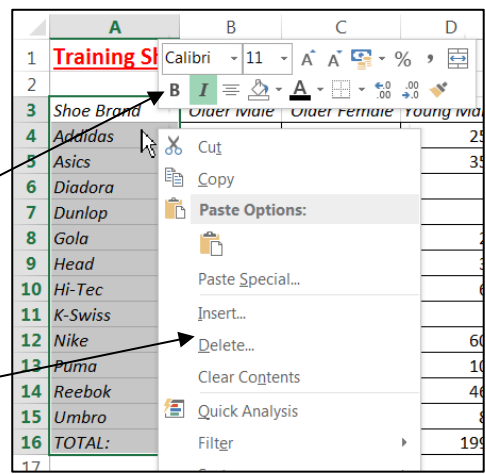
We want to change these cells here containing the shoe brand names.

	A	B
1	Training Shoe Preference	
2		
3	Shoe Brand	Order Made
4	Addidas	Older Male
5	Asics	36
6	Diadora	5
7	Dunlop	3
8	Gola	2
9	Head	8
10	Hi-Tec	5
11	K-Swiss	3
12	Nike	53
13	Puma	12
14	Reebok	63
15	Umbro	2
16	TOTAL:	206
17		

- 2) Keep your mouse over the selected cells and click the right mouse button to display the mini-toolbar (the shortcut menu will also appear):

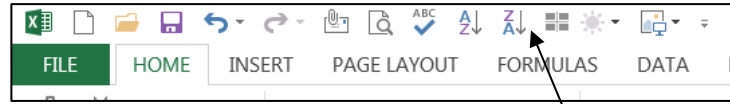
The mini toolbar appears with a selection of the most popular commands from the Ribbon.

The shortcut menu also appears. The options will vary according to what is selected.



The Quick Access Toolbar

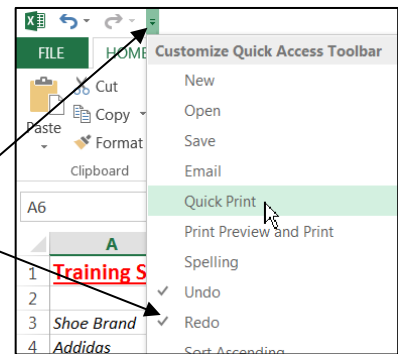
The Quick Access Toolbar is at the top left of your screen. It is one of the few areas of the screen that you can customise to suit your own use of Excel. You can add icons for tasks that you regularly perform every day.



The Quick Access Toolbar usually has only 4 commands to begin with... but you can add many more!

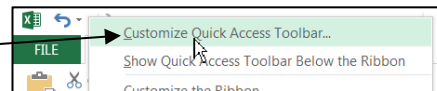
You can add the common icons for tasks like re-saving files, opening files etc to the Quick Access Toolbar very quickly:

Click on the drop-list at the end of the Quick Access Toolbar and click on the tool you'd like to add. Those with ticks are already present on your Quick Access Toolbar.



To fully customise the Quick Access Toolbar:

a) Right-click anywhere on the Quick Access Toolbar and then choose this option.

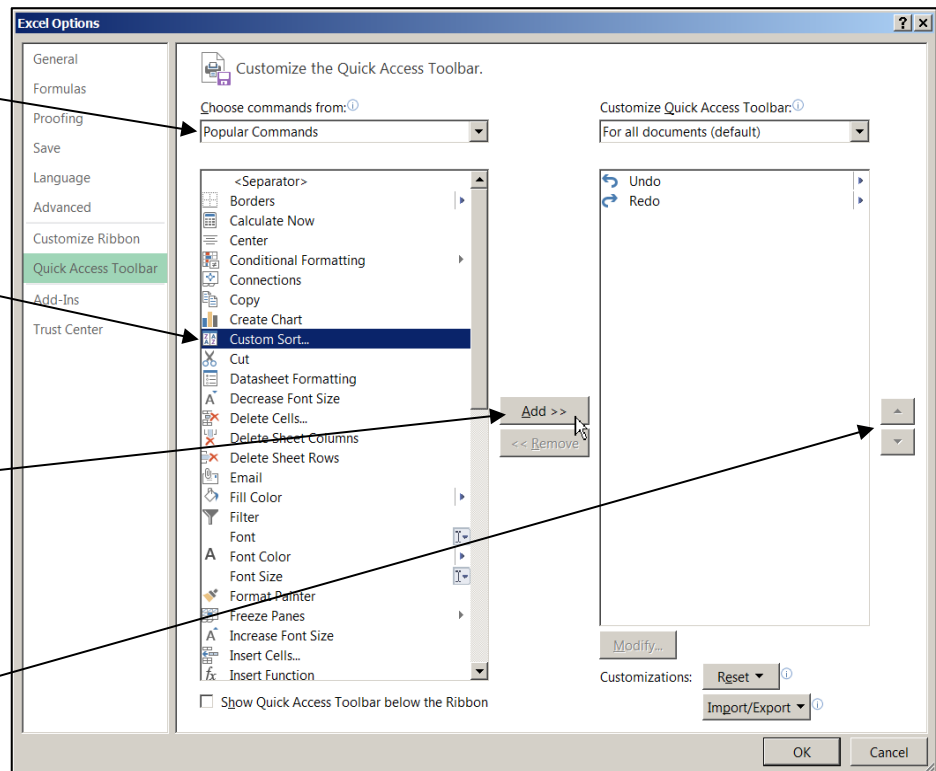


b) Choose a Category of commands from here (*Commands Not in the Ribbon is a good choice*).

c) Scroll down the list of available commands and click on the required one.

d) Click the **Add >>** button to add the icon to your list of icons on the right.

e) To change the order of your icons, use these buttons: . Click **OK** to exit.



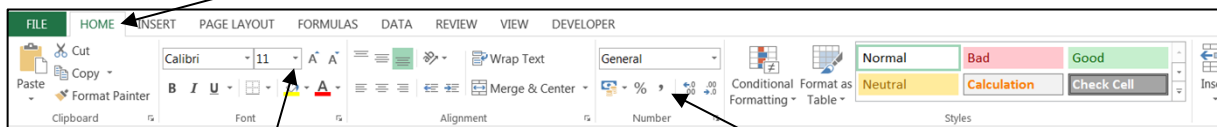
1.2 Using the Ribbon

The *Ribbon* is the main way to ask Excel to perform tasks for you. The Ribbon changes the icons displayed according to the *Tab* that is selected as shown below.

Tabs, Groups and Commands

The Ribbon is divided into *Tabs*, *Groups* and *Commands*. The diagram below shows an example of each:

Each **Tab** has a collection of related icons. This is the **HOME** tab. The most commonly used options are found on this tab. To see what's on a Tab, just click on it.



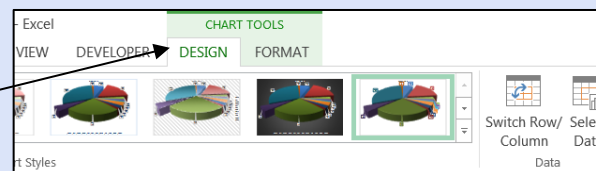
A **Command** is the individual items within each Group. This can be a button, icon, option or drop-down list.

A **Group** holds a mini-collection of related icons. All the items in this group are related to formatting your numbers.



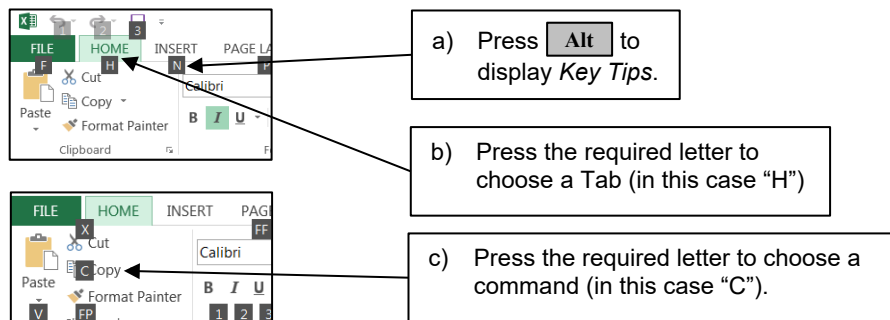
Extra Tabs will appear on the Ribbon when you do certain operations like add Charts or Pivot Tables:

You will only see the **Chart Tools** Tabs on the Ribbon when you have created a chart.



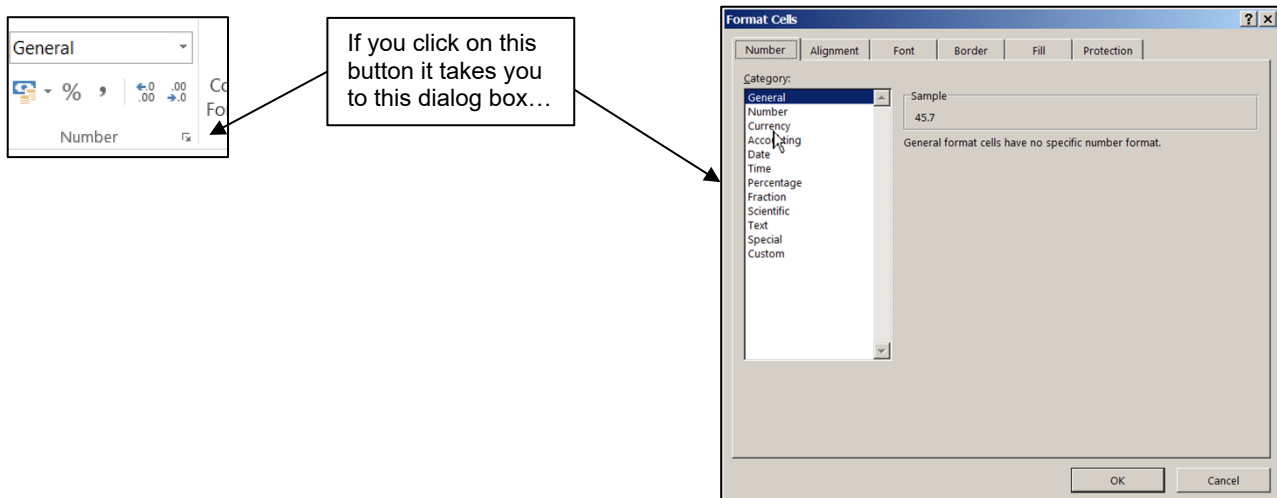
Using Quick Keys

You can use the keyboard to access the Ribbon by using Quick keys. The diagram below shows how to use the keyboard instead of the mouse to select the *copy* command:



Seeing More Options

Some groups within a Tab have further options that you can access by clicking on the *Dialog Box Launcher* button:



CHAPTER 2 - EXCEL BASICS

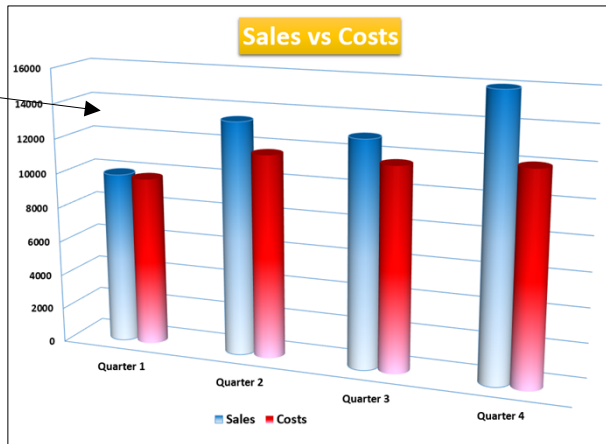
2.1 What is Excel Used for?

Microsoft® Excel has grown from a fairly simple spreadsheet into a complex program capable of doing much more than just calculate figures. Below are some of the uses of Excel:

A *spreadsheet* allows you to add up columns of figures and to calculate values by creating formulae.

	A	B	C	D
1				
2	Month:	May		
3				
4		Actual	Budget	Variance
6	Overheads:	£5,865	£6,000	£135
7	Materials:	£1,578	£1,500	-£78
8	Other Goods/Services:	£1,079	£1,000	-£79
9	Salaries:	£3,451	£4,000	£549
10	Depreciation:	£527	£700	£173
12	Total:	£12,500	£13,200	£700

You can present the figures from your spreadsheets in a graphical way using *charts*.



When you have a large *Table* you can ask Excel to sort your items into any order and be selective about which data you want to view.

Wise Owl Database of Rollercoasters						
Roller Coaster	Amusement Park	Type	Design	Status	Open	Speed (mph)
Stealth	Thorpe Park	Steel	Sit Down	Operating	2006	80.00
Pepsi Max Big One	Pleasure Beach, Blackpool	Steel	Sit Down	Operating	1994	74.00
Oblivion	Alton Towers	Steel	Sit Down	Operating	1998	68.00
Jubilee Odyssey	Fantasy Island	Steel	Inverted	Operating	2002	63.00
Rita - Queen of Speed	Alton Towers	Steel	Sit Down	Operating	2005	61.10
Speed: No Limits	Oakwood Theme Park	Steel	Sit Down	Operating	2006	59.00
Millennium Roller Coaster	Fantasy Island	Steel	Sit Down	Operating	1999	55.90
Kumali	Flamingo Land Theme Park & Zoo	Steel	Inverted	Operating	2006	54.90
Velocity	Flamingo Land Theme Park & Zoo	Steel	Sit Down	Operating	2005	54.00
Shockwave	Drayton Manor Park	Steel	Stand Up	Operating	1994	53.00
Nemesis	Alton Towers	Steel	Inverted	Operating	1994	50.00
Ultimate	Lightwater Valley	Steel	Sit Down	Operating	1991	50.00
Infusion	Pleasure Beach, Blackpool	Steel	Inverted	Operating	2007	49.70
Megafobia	Oakwood Theme Park	Wood	Sit Down	Operating	1996	48.00
Nemesis Inferno	Thorpe Park	Steel	Inverted	Operating	2003	47.80
Boomerang	Pleasure Island Family Theme Park	Steel	Sit Down	Operating	1993	47.00

2.2 Opening and closing Excel

There might be several different ways to open and close Excel on your computer.

Opening/Starting Excel

Two common methods for opening Excel are shown below:

In Windows 10, click on the search tool (the magnifying glass), and type in some or all of the word **Excel**. An icon for Excel should appear in the list, which you can then click on to launch the application.

Alternatively, if you have an icon for Excel in the taskbar you can click on this to run the program.

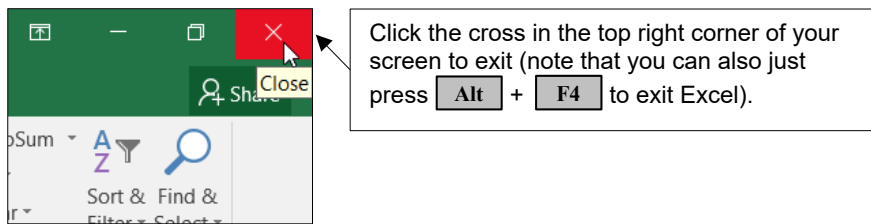
You then need to tell Excel if you want to open an existing workbook (file) or use a brand new blank workbook:

Click here to start a brand new blank workbook.

Or click here to ask to open an existing workbook (see later in this chapter for more details).

Closing/Ending Excel

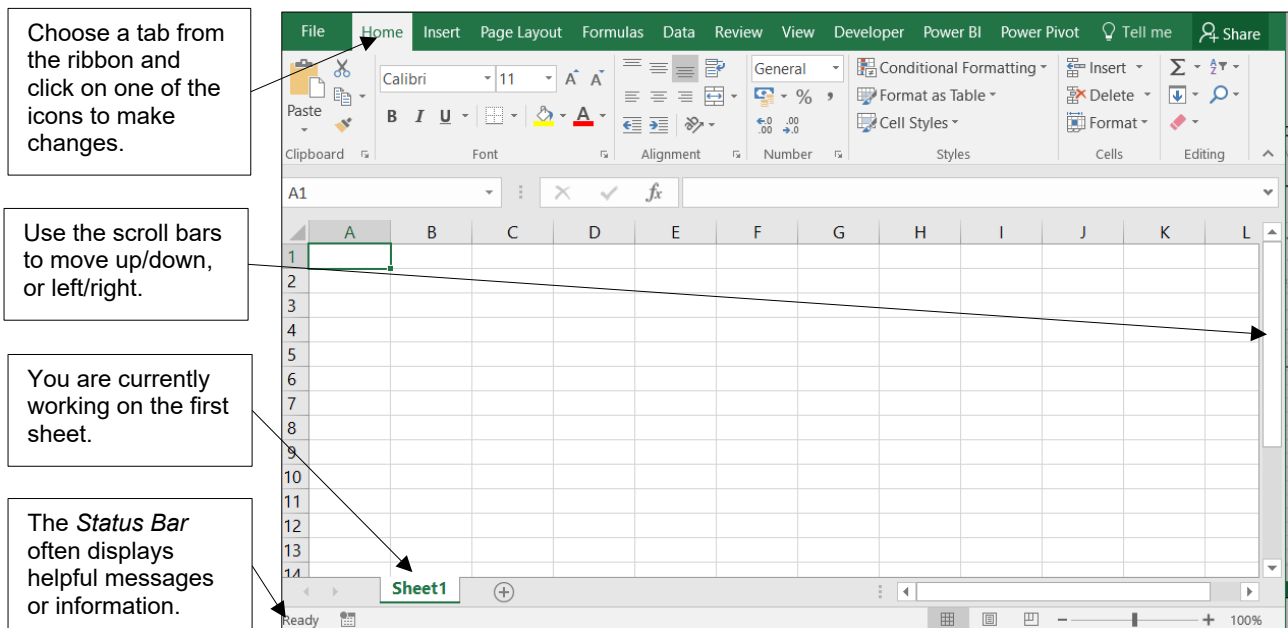
The easiest way to close Excel is as follows:



Note that you can no longer choose **Exit** from the **File** Tab (this has been removed from Excel). If this really annoys you, you can add an **Exit** icon to the Quick Access Toolbar (covered in a different chapter).

The Screen Layout

When you enter Excel, you need to either ask to open an existing workbook, or ask for a brand new blank worksheet, as described on the previous page.

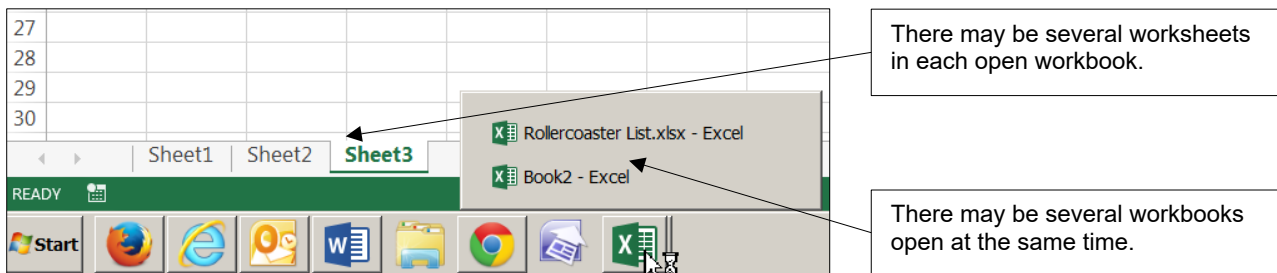


2.3 Structure of a Workbook

Before you start to create a spreadsheet, it is well worth understanding the different parts of an Excel file.

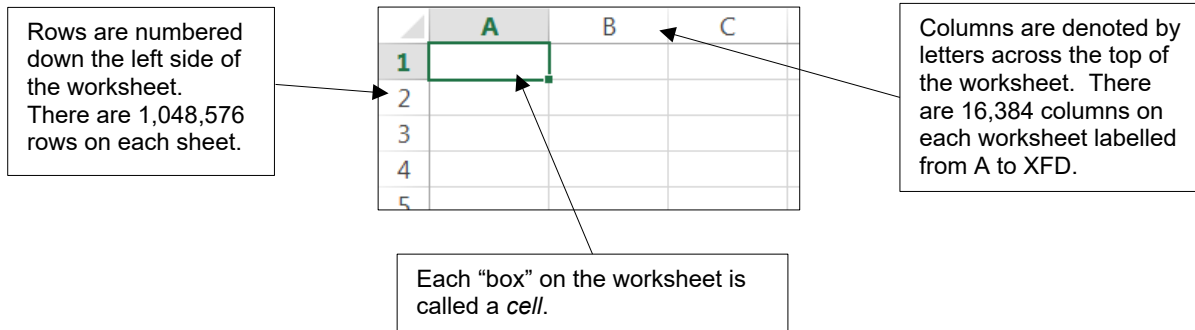
Workbooks and Worksheets

Each Excel file is referred to as a *workbook*. Within each workbook there may be many worksheets.



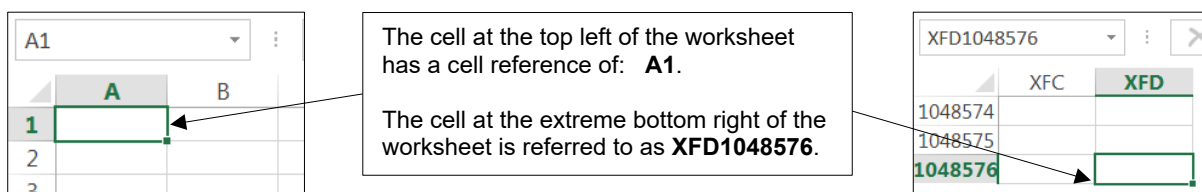
Cells, Rows and Columns

Worksheets are divided into *cells*, *rows* and *columns*.







Cell References

Each cell on the worksheet is referenced by its' column and row number. Excel calls this the *cell reference*.



WHAT WE DO

					
	ONLINE TRAINING	MANCHESTER OR LONDON	AT YOUR OFFICE	BESPOKE CONSULTANCY	
OFFICE 365	Microsoft Excel	✓	✓	✓	✓
	VBA macros	✓	✓	✓	✓
	Office Scripts	✓		✓	
	Microsoft Access				✓
POWER PLATFORM	Power BI and DAX	✓	✓	✓	✓
	Power Apps	✓		✓	
	Power Automate	✓	✓	✓	✓
SQL SERVER	Reporting Services	✓	✓	✓	✓
	Report Builder	✓		✓	✓
	Integration Services	✓	✓	✓	✓
	Analysis Services	✓		✓	
CODING LANGUAGES	SQL	✓	✓	✓	✓
	Visual C#	✓	✓	✓	✓
	Python	✓	✓	✓	✓



