# **Excel 365 Intermediate**

## Sample manual - first two chapters



Manual 1180 - 149 pages -

## TABLE OF CONTENTS (1 of 5)

1	FORMULAE AND FUNCTIONS	Page
1.1	Basic Formulae	7
	Operators Brackets in Formulae	7 7
1.2	Creating Formulae	8
1.3	Editing Formulae	9
1.4	Copying Formulae	10
	The Easiest Way to Copy a Formula Other Ways to Copy a Formula How Relative Cell Referencing Works	10 11 11
1.5	Functions	12
	Basic Functions Structure of a Function Typing a Function Using AutoSum to Create Quick Totals, Averages, Etc. The Quickest Way to Sum The Function Wizard	12 12 13 13 13 14
1.6	Status Bar Calculations	16

2	MOVING AND SELECTING IN EXCEL	Page
2.1	Moving Around in Excel	17
	Using the Mouse to Move Around	17
	Keyboard Shortcuts for Moving Around	18
	Zooming the View	18
2.2	Selecting Cells	19
	Selecting Single Cells	19
	Selecting a Range of Cells	19
	Selecting a Large Range of Cells	20
	Selecting Multiple Ranges	20
	Selecting Entire Rows and Columns	21
	Selecting an Entire Worksheet	21
	De-Selecting Cells	22
	Using the Keyboard to Select Cells	22

3	ABSOLUTE AND RELATIVE REFERENCES	Page
3.1	Relative Referencing	23
3.2	Absolute References	24
	When Relative Referencing doesn't Work The Solution – Use Absolute References Fixing Just the Row or Column	24 24 25

4	RANGE NAMES	Page
4.1	What are Range Names?	26
	Going to a Range Name	26
4.2	Creating Range Names	27
	Creating Range Names using the Name Box	27
	Defining Range Names	27
4.3	Creating Formulae using Range Names	28
	Creating Formulae using Range Names (General)	28
	Creating Formulae using Range Names for Single Cells Editing Range Name Formulae	29 29
4.4	Spill Formulae	30
т.т	Creating Formula using Range Names for	30
	a Group of Cells - SPILL	
	How Spill Formulae Work Preventing Excel using SPILL	31 31
	Implicit Intersection	32
	Opening Old Excel Workbooks using Implicit Intersection	32
4 5	Dealing with #SPILL Errors	33
4.5	Changing Range Names	34
	Editing and Deleting Range Names Avoiding the Need to Change Range Names	34 34
4.6	Creating Range Names from Selected Cells	35
4.7	Scope of Range Names	36
	Choosing the Scope of a Range Name Copying Worksheets Copies their Range Names with Local Scope	36 36
4.8	Managing Range Names	37
	Listing out Range Names Applying Range Names	37 37
4.9	Quirks of Range Names	38
	Getting Aggregation Functions to Work Viewing Range Names 3-Dimensional Ranges	38 38 39



## TABLE OF CONTENTS (2 of 5)

5	IF FUNCTIONS	Page
5.1	Overview of IF Functions	40
	Relational Operators	40
5.2	Creating IF Functions	41
	Typing IF Functions	41
	Using the Function Wizard	42
5.3	Nesting IF Conditions	43
	Step 1 – Define the Conditions	43
	Step 2 – Create the Nested IF Function	43
	An Alternative: the IFS function	44
5.4	The SWITCH Function	45
5.5	Combining IF with Other Logical Functions	46

6	CONDITIONAL STATISTICS	Page
6.1	Overview of Conditional Statistical Functions	47
	Using IF instead of Conditional Statistical Functions	47
	The Special Functions Available	47
6.2	SUMIFS, COUNTIFS, etc	48
	Syntax of the Functions	48
	Worked Example	48
	Example with Multiple Criteria and Wildcards	49
	AVERAGEIF, COUNTIF and SUMIF	50
	Using with a Summation Range	50
	Combining the Criteria and Summation Range	50

7	CONDITIONAL FORMATTING	Page
7.1	Creating Conditional Formats	52
	Applying a Pre-set Conditional Format Creating your own Conditional Format – a	52 53
	Case Study	
7.2	Editing and Deleting Conditional Formats	54
	Changing the Order in which Rules Apply	54
7.3	More Sophisticated Rules	55
	Picking out Statistical Trends	55
	Using Formulae in Rules	56
	Using Formulae in Rules to Highlight a Whole Row	57
7.4	Viewing Conditionally Formatted Cells/Rules	58
	Viewing All Conditionally Formatted Cells	58
	Viewing all Conditional Formatting Rules	58

8	TABLES	Page
8.1	Definition of a Table	59
8.2	Creating and Removing Tables	60
	Creating Tables from Existing Data Creating Tables from Scratch Removing Tables	60 60 61
8.3	Sorting Tables	62
	Simple Sorting – 3 Methods Sorting by Two or More Columns Sorting by Colour	62 63 64
8.4	Simple Filtering	65
	Step 1 – Enabling Filtering Step 2 – Filtering by Columns	65 66
8.5	Removing Filters	67
	Clearing a Filter from a Single Column Clearing All Filters Removing Filtering	67 67 67
8.6	Filtering Specific Types of Data	68
	Filtering Numbers Filtering Text Filtering Dates	68 69 69



#### TABLE OF CONTENTS (3 of 5)

9	PRINTING	Page
9.1	Views of a Worksheet	70
	Page Layout View Page Break Preview Print Preview	70 70 70
9.2	Printing	71
	Choosing to Print Print Settings	72 72
9.3	Printing Areas of a Worksheet	72
	Setting a Print Area Setting Multiple Print Areas	73 73
9.4	Page Breaks	73
	Viewing Page Breaks Moving Page Breaks Inserting Page Breaks Removing Page Breaks	74 74 74 75
9.5	Fitting Worksheets to Pages	75
	Page Orientation Page Margins in Excel Changing Margins Using the Ribbon Changing Margins in Print Preview Scaling a Page Using Page Breaks to Scale a Page The Page Setup Dialog Box	76 76 78 78 78 78 79
9.6	Headers and Footers	79
	Adding a Header and Footer Inserting Headers and Footers with the Ribbon	80 80
9.7	Printing Titles	80
	Setting Print Titles	81

10	NUMBER AND DATE FORMATS	Page
10.1	What are Number Formats?	82
	Examples of Number Formats	82
	Examples of Date Formats	82
10.2	Formatting Dates	83
	How Dates and Times are Stored	83
	Quick Ways to Enter Dates and Times	83
	Quick Formatting Dates and Times Selecting Different Date/Time Formats	84 84
	Custom Date Formats	85
	Custom Date Formatting Codes	85
	Custom Time Formatting Codes	86
	Displaying Elapsed Times without Overflow	86
10.3	Standard Number Formats	87
10.0		•
	Standard Number Formats using the Ribbon	87
	More Number Format Options using Format Cells	88
10.4	Custom Number Formats	89
	Creating Custom Number Formats	89
	General Rules for Custom Number Formats	89
	Example of a Typical Custom Number Format	90
	Re-using Custom Number Formats	90
10.5	Tricks with Number Formats	91
	Tricks with Text	91
	Hiding Parts of a Number Format	91
	Colouring Parts of a Number Format	91
	Getting Positive and Negative Numbers to Line Up	92
	Getting Decimal Points to Line Up	92
	Fractions	92
	Scaling Large Numbers	93
	Filling Spaces	93

11	DATE AND TIME FUNCTIONS	Page
11.1	Returning Date Information	94
	Returning Parts of a Date	94
	Returning today's Date/Time	94
	Returning Parts of a Time	95
	Converting Numbers/Text into Dates/Times	95
11.2	Manipulating Dates	96
	Returning Different Dates	96
	Returning the Difference between Dates	96



#### **TABLE OF CONTENTS (4 of 5)**

Page

#### 12 MULTIPLE WORKSHEETS

12.1	Moving between Worksheets	97
12.2	Common Tasks	98
	Selecting and De-selecting Worksheets Renaming Worksheets Changing Worksheet Tab Colours Hiding and Unhiding Worksheets	98 98 99 99
12.3	Inserting and Deleting Worksheets	100
	Inserting Single Worksheets Inserting Multiple Worksheets Deleting Worksheets	100 100 100
12.4	Moving and Copying Worksheets	101
	Moving Worksheets within a Workbook Copying Worksheets within a Workbook Moving and Copying to a Different or New Workbook	101 101 102
12.5	Group Mode	103
12.6	Summing across Sheets	104

#### 14 PROTECTION Page 14.1 Types of Protection 113 14.2 **Protecting Worksheets** 114 Unlocking Cells 114 A Note on Unprotecting Cells using 115 Styles Protecting and Unprotecting Worksheets 115 14.3 Protecting a Workbook's Structure 116 14.4 Password-Protecting Workbooks 117 14.5 Preventing Accidental Changes to a 118 Workbook 14.6 Hiding Worksheets 119 Very Hidden Worksheets 119 14.7 Hiding Cells and Formulae 120 Hiding Cells 120 Hiding Formulae 120

What is Data Validation?	405
	105
Creating Validation Rules	106
Step 1 – Saying what is Allowed Step 2 – Defining your Punishment for Mistakes	106 107
Referencing Formulae in Validation	108
Dropdown Lists	109
Step 1 - Creating a Range Name Step 2 – Setting the List	109 109
Input Messages	110
Copying and Clearing Validation Settings	111
Copying Validation Clearing Validation Settings	111 111
Highlighting Validated Cells	112
Highlighting Cells which have Validation Applied Circling Invalid Data	112 112
	Creating Validation Rules Step 1 – Saying what is Allowed Step 2 – Defining your Punishment for Mistakes Referencing Formulae in Validation Dropdown Lists Step 1 - Creating a Range Name Step 2 – Setting the List Input Messages Copying and Clearing Validation Settings Copying Validation Clearing Validation Settings Highlighting Validated Cells Highlighting Cells which have Validation



## TABLE OF CONTENTS (5 of 5)

15	CHARTS	Page
15.1	Overview	121
15.2	Selecting Data	122
	The Golden Rules for Selecting Chart Data	122
	Selecting a Simple Data Range Selecting Multiple Ranges	122 123
	Selecting Non-Contiguous Ranges	123
15.3	Creating Charts	124
15.4	Chart Location	125
	Embedded Charts	125
	Printing Embedded Charts Separate Sheet Charts	125 126
	Switching between Embedded and	126
	Separate Sheet Charts	
15.5	Chart Types, Templates and Defaults	127
	Changing a Chart's Type (Including Chart Templates)	127
	Creating Chart Templates	127
	Setting the Default Chart	128
15.6	Formatting Charts	129
15.7	Formatting Parts of a Chart	130
	The Parts of a Chart (Chart Elements)	130
	Selecting Part of a Chart Selecting a Data Point or Legend Entry	131 131
	Formatting Part of a Chart	132
	Using the Formatting Task Bar Worked Example: Setting the Gradient	132 133
	Fill for a Chart Title	100
15.8	Showing/Hiding Parts of a Chart	133
15.9	Specific Chart Element Consideration	135
	Working with Data Tables	135
	Data Labels Axes, Scaling, Tick Marks and Gridlines	135 136
15.10	Editing Data	137
15.10	-	
	Changing the Data being Charted Visually	137
	Switching Rows and Columns	137
	Filtering Data and Labels	138

16	EXCEL SHORTCUT KEYS	Page
16.1	CTRL and SHIFT Key Combinations	139
	SHIFT and CTRL keys General CTRL Keys in Excel CTRL Keys with Letters	139 140 141
16.2	Function Keys	142
	F1 to F6 Keys F7 to F12 Keys	142 143
16.3	Other Special Keys	144
	Special Keys – Part 1 Special Keys – Part 2 Special Keys – Part 3	144 145 146



## **CHAPTER 1 - FORMULAE AND FUNCTIONS**

### 1.1 Basic Formulae

You can type a *formula* into a cell to calculate a new value based on data you've already entered:

	А	В	С	D	All formulae begin with an = sign. This takes the
1	Month	Invoices sent	Paid on time	% on time	value in cell <b>C2</b> , and divides it by the value in cell <b>B2</b> .
2	Jan	5810	3977	=C2/B2	, , , , , , , , , , , , , , , , , , ,

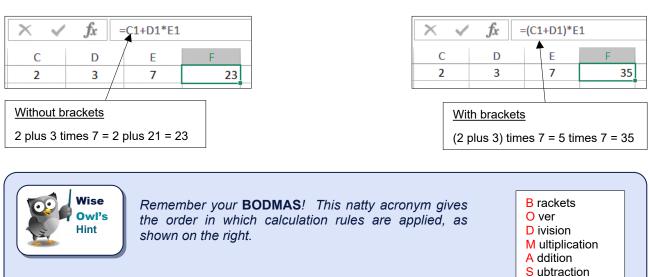
#### **Operators**

Operators are the symbols that tell Excel to add, subtract, etc. The common ones used are:

Symbol	What it means	Example	Result (if B2 = 5 and C2 = 2)
+	To add	= B2 + C2	7
-	To subtract	= B2 - C2	3
*	To multiply	= B2 * C2	10
/	To divide	= B2 / C2	2.5
٨	To take to the power of	= B2 ^ C2	25 (ie 5²)
&	Concatenation (joining)	= B2 & C2	52 (ie 5 and 2 joined together)

#### **Brackets in Formulae**

*Brackets* force Excel to calculate some parts of a formulae first (in Excel multiplication/division normally occur before addition/subtraction, but you can override this). For example:





## 1.2 Creating Formulae

Here's how to create a typical formula, such as the one shown on the previous page:

	А	В	С	D
1	Month	Invoices sent	Paid on time	% on time
2	Jan	5810	3977	=
3	Feb	5233	3881	
4	Mar	4138	3755	
5	Apr	5994	4882	

a) Click in the cell where you want to put your answer, and type an = sign to begin your formula.

D2		- : X	$f_x = c_x$	2/
	А	В	С	D
1	Month	Invoices sent	Paid on time	% on time
2	Jan	5810	3977	=C2/
3	Feb	5233	3881	*

c) Type in an operator (here we type / to show we want to divide by something).

C2			$f_x = C2$	!
	А	В	С	D
1	Month	Invoices sent	Paid on time	% on time
2	Jan	5810	🛪 3977	=C2
3	Feb	5233	3881	

b) Click on the first cell to use in your calculation, or type in its cell reference (here it's **C2**).

IF		r E 🗙 🦄	$f_x = C2$	2/B2
A		В	С	D
1	Month	Invoices sent	Paid on time	% on time
2	Jan	5810	3977	=C2/B2
3	Feb	5233	3881	
4	Mar	4138	3755	

d) Click on the next cell that you want to reference, or type in the cell address (here it's **B2**).

D2		- : X -	$f_x = C2$	/B2
	А	В	С	D
1	Month	Invoices sent	Paid on time	% on time 🔺
2	Jan	5810	3977	68.45%
3	Feb	5233	3881	
-				

e) Press e or click on the tick symbol to confirm your formula (here we've also formatted the cell containing the answer, so that it appears as 68.45% rather than 0.6845).

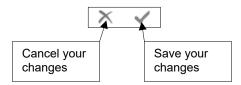


## 1.3 Editing Formulae

After you've created a formula, you can edit it in a couple of ways:

IF	F $\checkmark$ : $\checkmark$ $\checkmark$ $f_x$ =C2/B2					Either click on the cell, then click in this formula bar to make changes to the formula it contains
	А	В	С	D		
1	Month	Invoices sent	Paid on time	% on time		
2	Jan	5810	3977	=C2/B2		
3	Feb	5233	3881			
r					7	
	А	В	С	D		or double-click in the cell to change the
1	Month	Invoices sent	Paid on time	% on time		formula within the cell (you can also press <b>F2</b>
2	Jan	5810	3977	=C2/B2		to do this).
3	Feb	5233	3881			

Whichever method you choose, press when you've finished to save your changes, or to cancel them, or click on one of the tools shown below:





## 1.4 Copying Formulae

When you copy a formula containing cell references to other cells, Excel will automatically update the cell references.



This key feature of spreadsheets is called relative cell referencing, and is explained in more detail overleaf.

#### The Easiest Way to Copy a Formula

You can copy any formula up, down, left or right. Here's an example of copying a formula down.

	Α	В	С	D	
1	Month	Invoices sent	Paid on time	% on time	
2	Jan	5810	3977	68.45%	┡
3	Feb	5233	3881		
4	Mar	4138	3755		
5	Apr	5994	4882		
6	May	6006	4125		
_					

In this example we want to copy this formula down to work for the other four months too.

To copy this formula down:

	Α	В	С	D
1	Month	Invoices sent	Paid on time	% on time
2	Jan	5810	3977	68.45%
3	Feb	5233	3881	<b>T</b>
4	Mar	4138	3755	
5	Apr	5994	4882	
6	May	6006	4125	
-				

a) Position the mouse button at the bottom right corner of the cell that you want to copy, so that it turns into what's called the **AutoFill** handle (a black cross).

	А	В	С	D	
1	Month	Invoices sent	Paid on time	% on time	
2	Jan	5810	3977	68.45%	
3	Feb	5233	3881		
4	Mar	4138	3755		
5	Apr	5994	4882		
6	May	6006	4125		
7				k	+

 b) Click and drag down to highlight the cells beneath – when you release the mouse button, Excel will copy the formula down.

С	D	
l on time	% on time	
3977	68.45%	
3881	74.16%	
3755	90.74%	/
4882	81.45%	
4125	68.68%	

c)	The formula give different
	numbers because they're
	referring to different cells, as
	can be seen from looking at the
	bottom figure of 68.68%.
	-

	А	B C		D
1	Month	Invoices sent	Paid on time	% on time
2	Jan	5810	3977	68.45%
3	Feb	5233	3881	74.16%
4	Mar	4138	3755	90.74%
5	Apr	5994	4882	81.45%
6	May	6006	4125	=C6/B6
7				



Actually, an even easier way to copy a formula down is to double-click when you get the AutoFill handle. Excel will then copy the formula down almost by magic, using the column immediately to the left to determine how far to go. Note that this only works when copying down (you can't use it to copy up, right or left).



#### Other Ways to Copy a Formula

You can, of course, use all of the standard Windows ways to copy formulae too!

	В	C		D	В	$I \equiv \Delta \cdot I$		a)	Right-click on the cell that	at you w	ant to conv a	nd choose
nvoic	es sent	Paid on	time	% on t	tim			aj	°	•		
	5810		3977	6	8.45%				Copy (or press Ctrl +	$\mathbf{C}$ , or cl	ick on the	Copy tool on
	5233		3881		- *	Cu <u>t</u>			the HOME tab of the ribb	on).		
	4138		3755		Ē	<u>C</u> op <b>∳</b>	L					
	5994		4882		ĥ	Paste Options	Г				<u> </u>	D
	6006		4125					b)	The cell or cells that		С	D
									you are copying will	ent	Paid on time	% on time
									get a jazzy line round	810	3977	68.45%
	(	2		D		E			them!	233	3881	
ent	Paid o	n time	% (	on time	_		L			100	2755	
810		3977		68.45	Calib	ri - 11 -	Г					
233		3881	ļ	•	B	$I \equiv \Delta \cdot I$		c)	Right-click on the cells w			
138		3755							formula onto, and choose		· ·	
994		4882							Ctrl + V, or click on the	e tool sl	nown on the r	ght Paste
					Υ (	Cu <u>t</u>			on the HOME tab of the r	ribbon).		-
6006		4125			È (	Copy	L					
					رھر							D
						Paste Options	[	(ام				
								d)	Press Esc to clear the		d on tir	
						- 22			dashed lines if they are		N I	<del>07</del> <b>€ 68.45%</b>
					ŀ	Paste <u>S</u> pecial			you (although they're ha	imiess	). 3	381 74.16%
							· .					accl 00 749/

#### How Relative Cell Referencing Works

When you copy a formula, Excel uses relative cell referencing:

	Α	В	С	D
1	Month	Invoices sent	Paid on time	% on time
2	Jan	5810	3977	=C2/B2
3	Feb	5233	3881	74.16%
4	Mar	4138	3755	90.74%
5	Apr	5994	4882	81.45%
6	May	6006	4125	68.68%
7			/	

The original formula is read by Excel as: "take the cell one to the left on the same row, and divide it by the cell two to the left on the same row".

	А	A B C		D
1	Month	Invoices sent	Paid on time	% on time
2	Jan	5810	3977	68.45%
3	Feb	5233	3881	74.16%
4	Mar	4138	3755	90.74%
5	Apr	5994	4882	81.45%
6	May	6006	4125	=C6/B6
7				

The copied formulae all do exactly the same thing, but give different results because they refer to cells on different rows!



There is a way in Excel to turn this behaviour off and use absolute referencing instead (this is covered in a later courseware chapter, including examples showing why you'd want to do this).



## 1.5 Functions

A function can be used in a formula to perform specialised calculations. Here's an example:

			_	
	А	В		
1	Month	Invoices sent	P	
2	Jan	5810		/
3	Feb	5233	Χ	/
4	Mar	4138/		
5		=B2+B3+B4		
6				

/	You could calculate the total for this column by adding each individual cell together
	but it's more efficient to use the <b>SUM</b> function, which will add together all of the values in a range of cells.

		-	
	A	В	
1	Month	Invoices sent	F
2	Jan	5810	
3	Feb	5233	
4	Mar	4138	
5		=SUM(B2:B4)	
6			



There are hundreds of functions in Excel, covering everything from summing cells through to advanced financial, statistical and mathematical calculations.

#### **Basic Functions**

Here are four of the most commonly used functions in Excel:

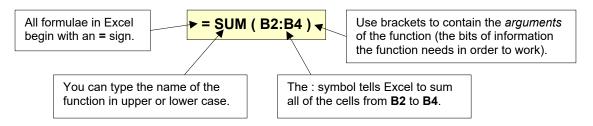
Here we've used four functions to work out the sum and average of the 3 sales figures for **Jan**, **Feb** and **Mar**, and also

	А	В	С				
1	Month	Sales					
2	Jan	5810					
3	Feb	5233					
4	Mar	4138					
5							
6		Month 1-3 statistics					
8		Result	Formula				
9	Total	15,181.00	=SUM(B2:B4)				
10	Average	▶ 5,060.33	=AVERAGE(B2:B4)				
11	Maximum	5810	=MAX(B2:B4)				
12	Minimum	4138	=MIN(B2:B4)				

#### Structure of a Function

the highest and lowest of them.

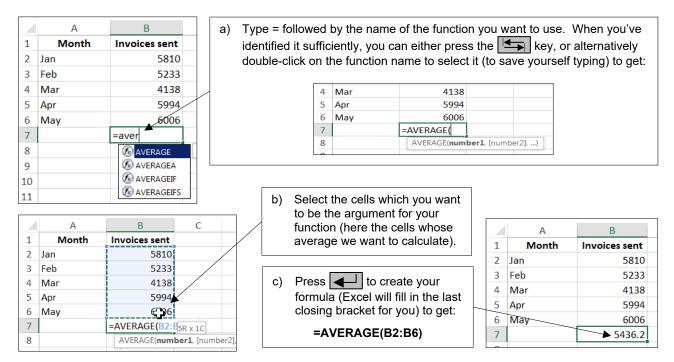
All Excel functions have the same structure:





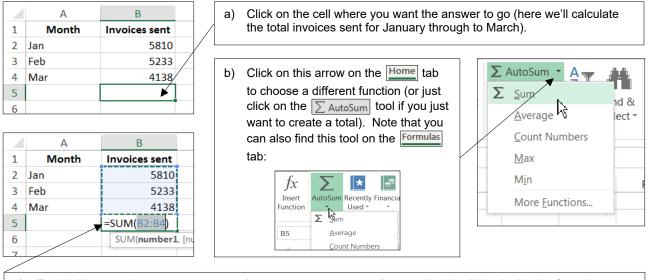
#### Typing a Function

If you know the name of the function that you want to use, you can type it into a cell:



#### Using AutoSum to Create Quick Totals, Averages, Etc.

For the basic functions of summing, averaging, counting and taking the maximum or minimum value in a range, use the  $\sum$  AutoSum tool to speed things up:



c) Excel will guess what you want to sum (or average, or count, etc.) – usually this will be the block of numbers directly above or to the left of the current cell. If Excel has guessed correctly, press to confirm the formula; otherwise select the block of cells you did want to work with, or press to cancel your formula.



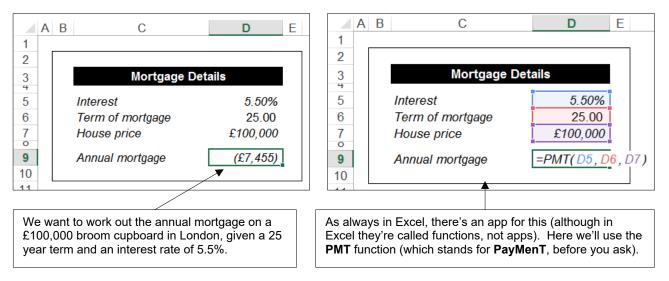
#### The Quickest Way to Sum

People sum so frequently in Excel that there is a short-cut key devoted to it:

	А	В		a)	Select the block of cells you want to sum and	]		A	В
1	Month	Invoices sent	1 /	1 /	the blank cell where the answer should go.		1	Month	Invoices sent
2	Jan	5810	V		5		2	Jan	5810
3	Feb	5233				-	3	Feb	5233
4	Mar	41/38		b)	Type Alt + = to put the sum formula into		4	Mar	4138
5					the blank cell.		5		=SUM(B2:B4)

#### **The Function Wizard**

The best way to choose a function in Excel is to use the *function wizard*. To show how to use this, consider this example:



A B

С

You're unlikely to be able to guess that this function exists, so here's how to find it (or any other function for that matter). First invoke the wizard:

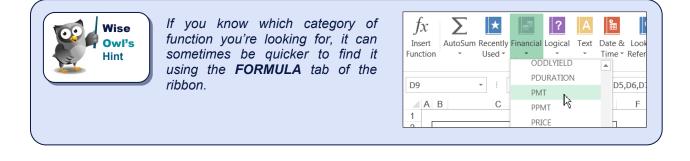
	Mortgage I	Details
Click on the cell where you want your answer to go, then click on this tool (or press $1 + F3$ to invoke the function wizard).	Interest Term of mortgage House price Annual mortgage	5.50% 25.00 £100,000



Inselt Function

You can now choose which function you want to work with:

a)	Type in a description of what you want to do, and press	Insert Function Search for a function: mortgage payment	<u>?</u> ×
b)	See if you can find a function which looks like it will help in the list presented to you.	Or select a <u>c</u> ategory: Recommended          Select a function:         PV         FV         FV         XNPV	<u> </u>
c)	Click on this link to get excellent help on this function – here's how the <b>PMT</b> function help starts:	XIRR CUMIPMT CUMPRINC PMT PMT (rate,nper,pv,fv,type) Calculates the payment for a loan based on constant payments and a constant interest rate	<b>–</b>
	PMT function PMT, one of the financial functions, calculates the payment for a loan based on constant payments and a constant interest rate.		ancel



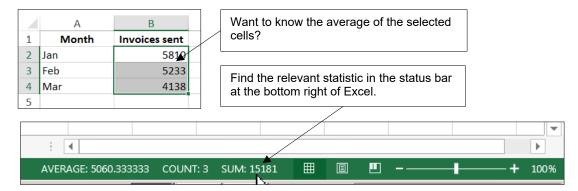
Finally, select **OK** in the above dialog box. You can now complete your function:

Function Arg	juments Rate	D5 0055		a)	Click on these red blobs to choose a cell for each argument.
	Nper				
	Pv	D7 = 100000	r		
	Fv Type	= number		b)	When you click in an argument, Excel tells you how it should be used.
Calculates the	payment for a loan based	= -7454.935295 on constant payments and a constant interest rate.			
	payment for a loan based	Rate is the interest rate per period for the loan. For example, use APR.	6	c)	Arguments shown in faint type (not bold) are optional. For this function you can miss them out
Formula resul	t = (£7,455)				and they will take sensible values, although this isn't
Help on this f	unction				always the case in Excel!

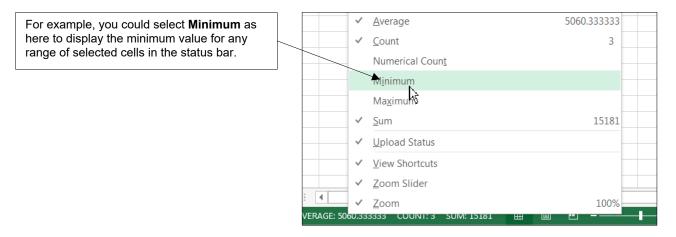


## **1.6 Status Bar Calculations**

A quick way to view the results of formulae is to use the status bar:



You can right-click on the status bar to change the statistics displayed:





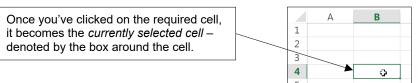
## **CHAPTER 2 - MOVING AND SELECTING IN EXCEL**

#### 2.1 Moving Around in Excel

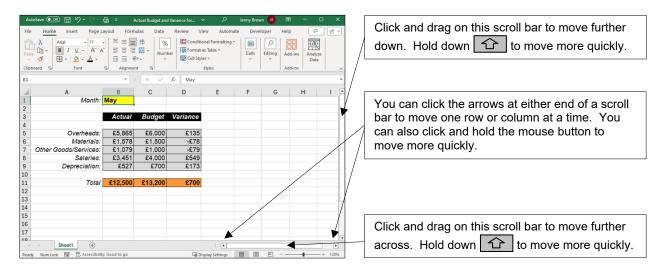
To be able to use the different parts of a workbook, you need to be able to move to them. You can move around a workbook using the mouse or keyboard, or by changing the viewing scale.

#### Using the Mouse to Move Around

You can move to any cell on the worksheet, simply by clicking the 🗘 shaped mouse on the required cell.

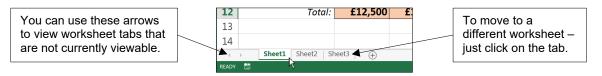


If you can't see the cell you want to move to on the screen then you can use the *scroll bars* to move further down and/or further across the worksheet:



Wise Owl's Hint If you have a mouse with a "scroll wheel", you can use it to scroll up and down on a worksheet.

You can also use the mouse to move to different worksheets:





#### **Keyboard Shortcuts for Moving Around**

There are many keyboard shortcuts that you can use to quickly move around a workbook. The table below summarises the main ones:

Key(s)	What they do
→, ←, ↓, ↑	Moves the cursor one cell in the appropriate direction
$\begin{array}{c} Ctrl + \uparrow \\ Ctrl + \downarrow \\ \hline \\ Ctrl + \downarrow \\ \hline \\ \end{array}, Ctrl + \downarrow \\ \hline \end{array}$	Moves the cursor to the appropriate end of the currently selected block of cells
Home	Moves the cursor to the first column of the current row
Ctrl + Home	Moves the cursor to the first cell of the sheet (A1)
Ctrl + End	Moves the cursor to the bottom right corner of your sheet
Page Down, Page Up	Goes one "screen" down or up
Alt + Page Down	Goes one "screen" right
Alt + Page Up	Goes one "screen" left
F5	Lets you choose a cell reference to go to, then type
Ctrl + Page Down	Go to the next worksheet in the workbook
Ctrl + Page Up	Go to the previous worksheet in the workbook

#### **Zooming the View**

You can see more of your worksheet in the same screen area by using the zoom control tool to zoom out (or in):

Au	toSave 💽 🗄 り・ 🥙	ta	Actual Budget and	d Variance for `	~ >	Jenny Brow	wn JB C	n –	o ×		AutoSave (	•••	<b>9 -</b> 9	- <b>4</b>	Ŧ	Actual B	udget and '	/ariance f	or ~	م	Je	nny Brown	18	▣	- c	×
File	Home Insert Page L	ayout Form	nulas Data	Review V	iew Autom	ate Deve	eloper He	· _	26.		File Ho	ome Ins	ert Pa	ige Layou	ut For	mulas	Data	Review	View	/ Auto	mate	Develo	per	Help	9	) (r -
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L	Month:	May									2		ay Actual Be	_												
2											4															
3		Actual	Budget	Variance							6 7 <i>Other Good</i>	Overheads: Materials:	€1,578	€5,000 €1,500 €1,000	€135 -€78 -€79											
											8	Salaries:	£3,451	64,000	€549											
	Overheads:	£5,865	£6,000	£135							9 0	kantraidebian:	6527	€700	£173											
	Materials: Other Goods/Services:	£1,578 £1,079	£1,500 £1,000	-£78 -£79							1	Total	12,500 61	3,200	£700											
3	Salaries:	£1,079 £3,451	£1,000 £4,000	-£/9 £549							3															
, ,	Depreciation:	£527	£4,000	£349 £173							6															
, 0	Depreciation	2021	~100	~110							8															
1	Total	£12,500	£13,200	£700							9	0	anter 1 Qu	unter 2 G	lumer3 Qu	aner 4										
2											2	Sales	9890	13412	12954	1994										
3											13 14	Costs	9765	11678	11643	12047							_			
4											15												_	700		
5										3	17												_	<mark>70%</mark>	o ZO	om
6										P B	19 10														-	_
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Read	ly Num Lock 🐻 🎲 Accessibilit	ty: Good to go		La Di	isplay Settings	<b>III</b>	─		- + 120%		Ready Num	n Lock 🔞	1 Access	sibility: Go	od to go				G Displ	lay Settings	Ħ		<u> </u>		-	- 70%
								$\nearrow$																_		
	Click and drag the slider or use + / – to zoom in/out.									Her	e zo	oon	n ha	s b	een	se	t to	70%	6 t	o se	ee r	nore	Э.			



If you have a mouse with a "scroll wheel", you can hold **Ctrl** and scroll the wheel to zoom in and out.



## 2.2 Selecting Cells

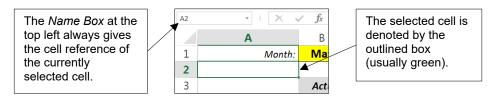
Just about everything you do in Excel requires you to first select the cell or cells that you want to make the changes to.

	А	В	С	D	]	A block of cells is called a <i>range</i> . Here
1	Month:	May				a range of 6 cells has been selected.
2						
3		Actual	Budget	Variance	1	The selected range has a different coloured border (usually green) and the
4						
5	Overheads:	£5,865	£6,000	🛉 £135		bottom right corner has this icon:
6	Materials:	£1,578	£1,500	-£78	1	
7	Other Goods/Services:	£1,079	£1,000	▲ -£79		To reference this range you use:
8	Salaries:	£3,451	£4,000	£549		The reference for this range is <b>B5:C7</b>
9	Depreciation:	£527	£700	£173		
Th	e first cell you click or					

The first cell you click on when you select a range will be a different colour to the rest (remains white if no cell background shading has been added). This is called the *active cell*.

#### **Selecting Single Cells**

To select a single cell:



#### Selecting a Range of Cells

The easiest way to select a range is by simply clicking and dragging with the mouse:

	Actual	виадет	variance
eads:	C£5,865	£6,000	£135
erials:	£1,578	£1,500	-£78
vices:	£1,079	£1,000	-£79
aries:	£3,451	£4,000	£549
ation:	£52入	£700	£173

a) Move the cursor over a corner of the range you want to select (usually top left corner). Make sure the mouse changes to this shape:

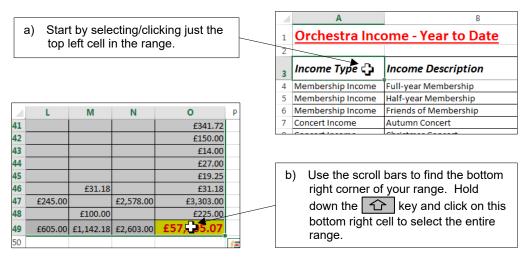
eads:	£5,865	£6,000	£135
erials:	£1,578	£1,500	-£78
vices:	£1,079	£1,000	-£79
aries:	£3,451	£4,000	£549
ation:	£527	£700⁄	<b>£</b> 173

b) With the improvement mouse shape, click and hold the left mouse button down and drag the mouse to the opposite corner of the range (usually bottom right). Release the mouse button to select the range.



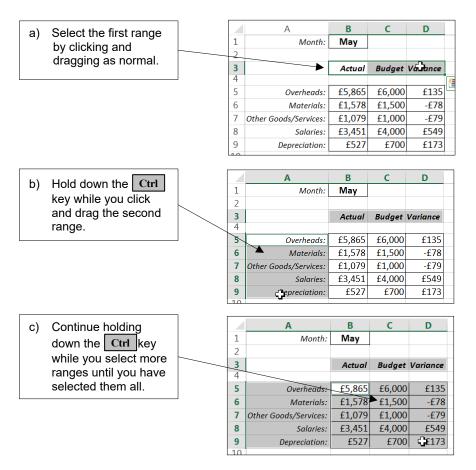
#### Selecting a Large Range of Cells

It is often tricky to select a large range by dragging the mouse, so instead you can use the key as shown below:



#### Selecting Multiple Ranges

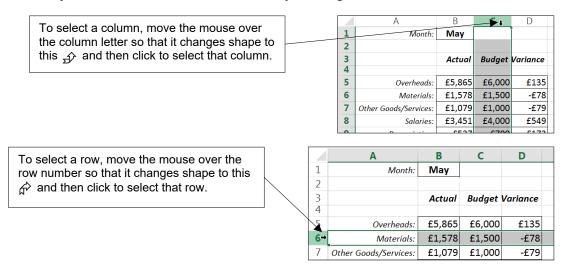
You can select several separate ranges by holding down the **Ctrl** key for each range you want to add whilst you click and drag the extra ranges.





#### **Selecting Entire Rows and Columns**

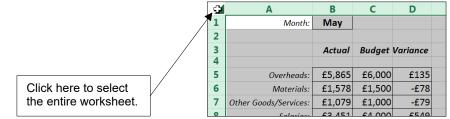
You can easily select entire rows and columns by clicking the row numbers or column letters.

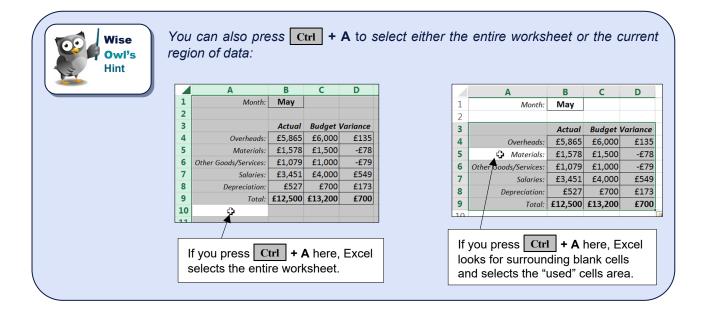


To select multiple adjacent rows/columns, click and drag across the column letters/row numbers. To select multiple non-adjacent rows/columns, hold down Ctrl while you click on the column letter/row number.

#### **Selecting an Entire Worksheet**

You can select every cell on a worksheet (including all the blank cells) by clicking at the top left corner:







#### **De-Selecting Cells**

To de-select, all you have to do is click the mouse on a different worksheet cell or press one of the cursor movement keys like  $\longrightarrow$ ,  $\checkmark$ ,  $\checkmark$  or  $\uparrow$  to move to a different cell.

	Α	В	С	D					
1	Month:	May							
2									
3		Actual	Budget	Variance					
4			-						
5	Overheads:	£5,865	£6,000	£135					
6	Materials:	£1,578	£1,500	-£78					
7	Other Goods/Services:	£1,079	£1,000	-£79					
8	Salaries:	£3,451	£4,000	£549					
9	Depreciation:	£527	£700	£173					
10									
11	Total:	£12,500	£13,200	£700					
12			<u> </u>						
_									
	These 3 ranges are currently selected								

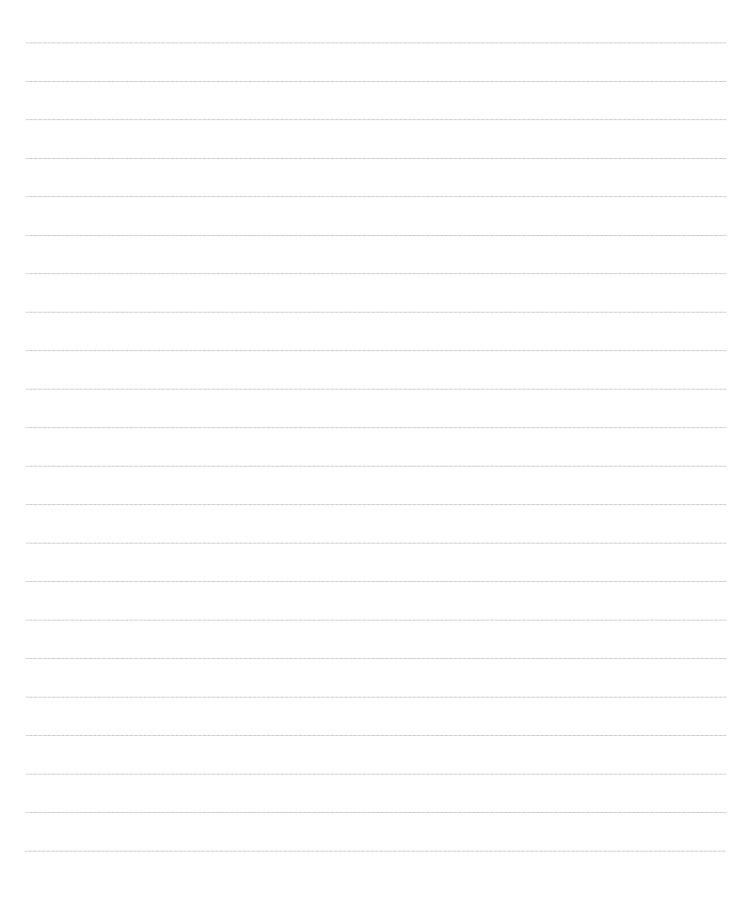
	Α	В	С	D				
1	Month:	May						
2								
3	¢.	Actual	Budget	Variance				
4								
5	Overheads:	£5,865	£6,000	£135				
6	Materials:	£1,578	£1,500	-£78				
7	Other Goods/Services:	£1,079	£1,000	-£79				
8	Salaries:	£3,451	£4,000	£549				
9	Depreciation:	£527	£700	£173				
10	\							
11	Total:	<b>£12,500</b>	£13,200	£700				
10								
	by clicking here, they are de-selected.							

#### Using the Keyboard to Select Cells

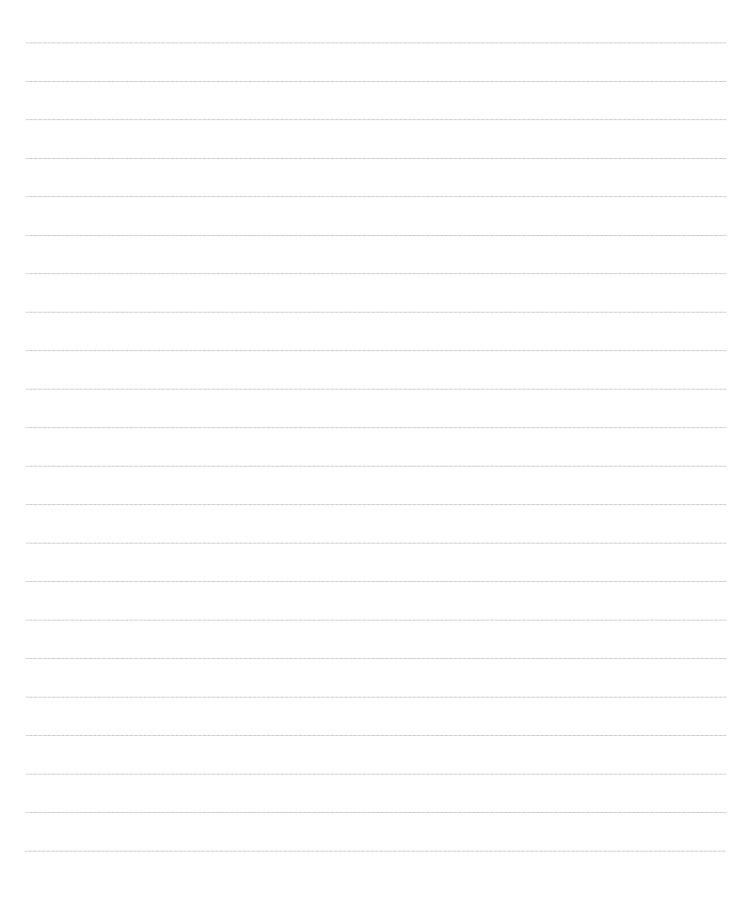
There are many keyboard shortcuts for selecting cells. The table below summarises the main ones:

Key(s)	What they do
िटे + any of the arrow keys	Extends the current selection one row or column in the appropriate direction.
Ctrl     +     1       of the arrow keys	Selects from the active cell to the end of the current region of cells in the appropriate direction.
Ctrl + Space Bar	Selects an entire column.
+ Space Bar	Selects an entire row.
Ctrl + A	Selects all the cells in the current region – if you have a cell selected within a block of data this will select the whole block of data, otherwise it will select all the cells on the worksheet.

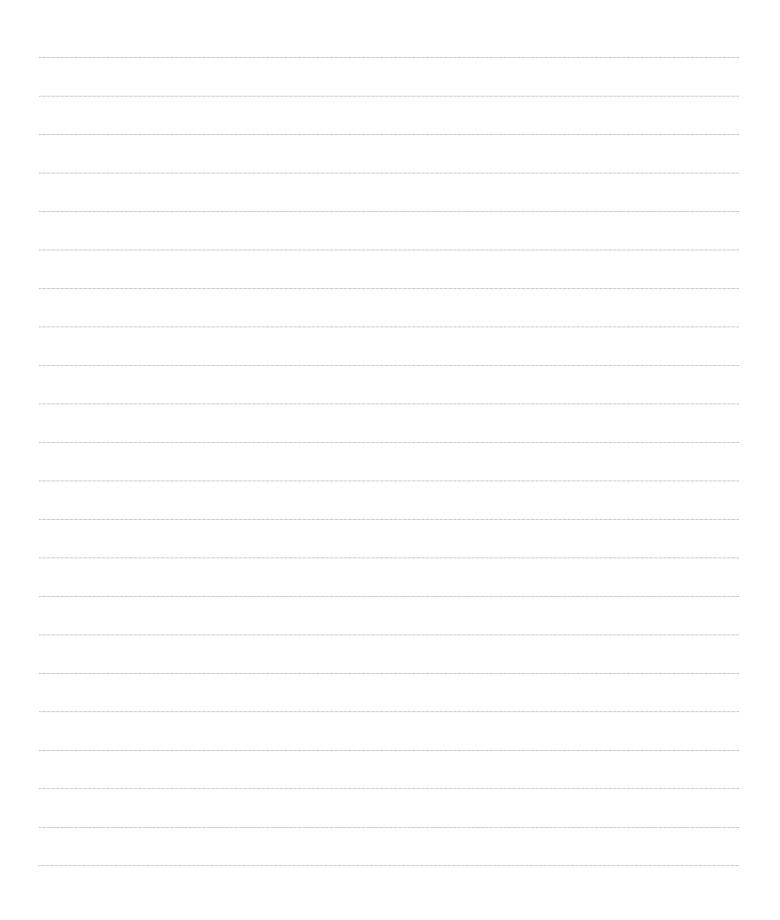




























## What we do!

		Basic training	Advanced training	Systems / consultancy
	Microsoft Excel	2	2	2
ice ice	VBA macros	2	2	
Office	Office Scripts			
	Microsoft Access			<b>2</b>
etc	Power BI and DAX	<u></u>	<u></u>	
Power BI, etc	Power Apps	<b>2</b>		
Pow	Power Automate (both)	<b>*</b>	<b>*</b>	
	SQL	<u></u>	<u></u>	
/er	Reporting Services	<b>2</b>	2	
SQL Server	Report Builder	<b>*</b>	<b>*</b>	<b>2</b>
SQL	Integration Services	<b>*</b>	<b>*</b>	<b>2</b>
	Analysis Services	2		
	Visual C#	<b>*</b>	<b>*</b>	<b>2</b>
Бu	VB programming			
Coding	MySQL			
	Python	<b>*</b>	<b>*</b>	



