



 go skills

# The Absolute Beginner's Guide to Excel

# What is Microsoft Excel?

Excel can be intimidating. Where do you even begin? What should you learn first? These are just two of the questions we set out to answer when creating this comprehensive overview of Microsoft Excel.

Microsoft Excel is the most widely used spreadsheet program in the world. While it's most popularly known for its ability to make use of heaps of data, Excel has an infinite number of capabilities, from making lists and charts to organizing and tracking information.



# Who uses Excel?

Just about everyone, in so many different ways. Here is a short list of jobs that use this spreadsheet program. We're willing to bet a few will surprise you.

## 1 Project managers use Excel

Why would a modern-day project manager use Excel when they could use one of hundreds of project management tools out there today? Well, there are a few reasons.

For one, Excel is light and versatile, meaning you can efficiently customize Excel templates to fit your project's specific needs. Here are a few things project managers use Excel for:

### Project planning

To plan and subsequently report progress with the project environment.

### Gantt charts

The traditional way to plan and track a project

### Project reports/dashboards

Provides a high-level overview of all the most important information about a project.

### Project tracking

Project managers must track a lot of things, which is where tracking templates come in handy. Think timesheets, issue trackers, to do lists, and so on.

### Other charts

Charts help project managers understand how a project is progressing. Some examples include: burndown charts, milestone charts, open vs. closed issue charts and budget charts.

## 2

### Freelancers use Excel

There are nearly 6,000 different marketing tools out there today, and each one comes with its own set of data that marketers need to analyze to make better (data-driven) decisions.

One thing these tools all have in common, for the most part, is Microsoft Excel. In each one, you'll usually notice an "Export" feature that allows you to export your data or information into a CSV or xlsx file.

So, if a marketer is fluent in Excel, they can analyze data from multiple systems in one spreadsheet, enabling themselves to do analysis not possible in any one standalone tool.

Aside from crunching numbers, marketers also use Excel for planning things like: editorial calendars, budgets and SEO projects.

## 3

### Writers use Excel

Yes, even writers use Excel. Granted, they use it less for number crunching and more for planning and organizing information.

If you're a writer, consider using Excel for:

- Outlining your novel
- Planning your editorial calendar
- Outlining your blog posts
- Creating a writing schedule
- Storing an inventory of all of your published content

## 4

### Teachers use Excel

Not only do teachers use Excel for planning and organizing, but they also use it for number crunching. Here are a few ways teachers use Excel:

- Lesson planning
- Gradebooks
- Weekly assignment calendars
- Class schedules
- Class lists

## 5

### Freelancers use Excel

Freelancers don't just get to be creative all day long. They also have to stay on top of their business by tracking income, expenses, payments and much more.

While there are a ton of freelancer management tools on the market, a good, ol' Excel spreadsheet can often do the trick.

Here are a few types of spreadsheets that freelancers use:

- Time sheets
- Invoices
- Work schedules
- Project planning
- Job quotes
- Budgets
- To-do lists
- Client CRMs

## 6

### Entrepreneurs use Excel

One of the biggest reasons companies fail is due to poor financial planning. So even if you're not fundraising to start your company, you'll still need to use Excel to plan and track your financial situation.

Here are some things entrepreneurs must know how to do in Excel:

- Financial forecasting
- Financial modeling
- Budgeting and planning
- Profit and loss statements
- Analyzing revenue



## 7

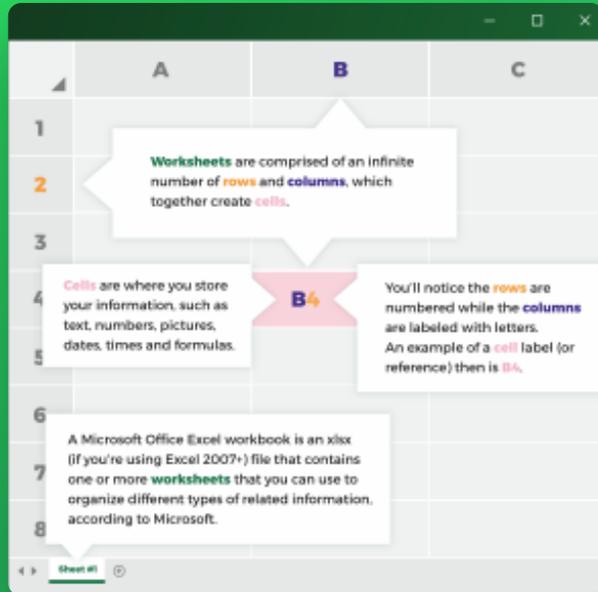
### People use Excel for their personal lives

You'd be surprised how many people use Excel in their personal lives.

I know I was surprised when a former client shared his personal vacation spreadsheet with me. Turns out, people actually plan ahead – sometimes years at a time.

Here are some cool Excel use cases for your personal life:

- Personal finances
- Lists
- Agendas
- Job search



## The Basics

A Microsoft Office Excel workbook is an xlsx (if you're using Excel 2007+) file that contains one or more worksheets that you can use to organize different types of related information, according to Microsoft.

Worksheets are comprised of a near infinite number of rows and columns, which together create cells.

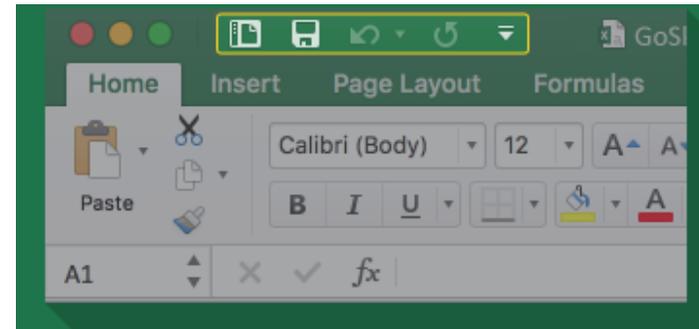
Cells are where you store your information, such as text, numbers, pictures, dates, times and formulas.

You'll notice the rows are numbered while the columns are labeled with letters. An example of a cell label (or reference) then is: A2, H5, etc.

## Quick Access Toolbar

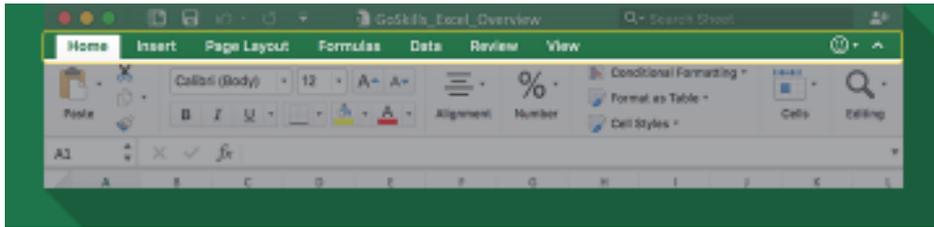
Excel's quick access toolbar (see screenshot below) gives you one-click access to the tools you use the most in Excel.

You can customize what appears here by clicking on the arrow icon furthest to the right in the left-hand corner.

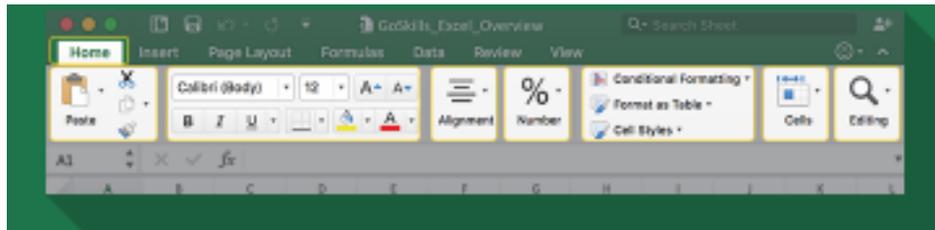


# The Ribbon

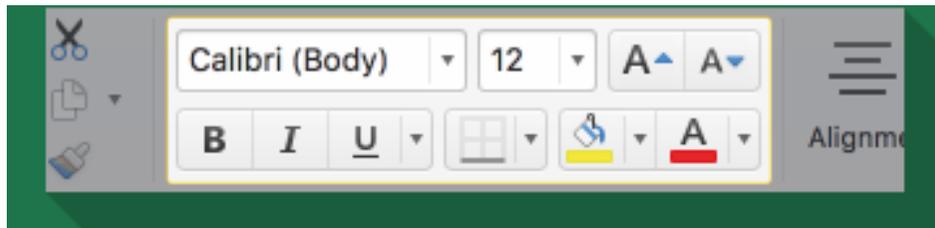
The ribbon is simply the collection of icons at the top of your workbook. Think of the ribbon like a hierarchy:



Each tab contains groups of commands



Groups of commands are comprised of buttons and other controls



# Tabs

The ribbon is where you find commands. It's broken down into clickable tabs, where you'll find groups of related commands.

It's important to note that your Excel Ribbon may appear different from my Excel Ribbon. There are a few reasons this could be.

1

## Add-ins

Add-ins extend Microsoft Excel's capabilities, and therefore, require a new tab.

3

## Customization

To make Excel work for you, you can customize your Ribbon, adding and/or removing different tabs.

2

## Contextual Tabs

There are also contextual tabs – or a tab that appears automatically when you do something specific in Excel.

# Command Groups

Depending on which tab you click – home, insert, page layout, etc. – different command groups will appear below.

# Most common, essential Microsoft Excel tasks you should know how to do

Using spreadsheets is usually a three-step process:



Enter data



Do something with the data



Interpret the data

And occasionally, there is a step four:



Automating the process

## Do something with data

Before doing something with your data, try stylizing your spreadsheet so it's easier to navigate. Here are a few things you should know how to do in Excel.

## Apply conditional formatting

While formatting is essential for easy reading, it's not the only benefit of the feature.

Ever heard of conditional formatting? Conditional formatting turns things up a notch by styling cells based on what's in them.

For example, in the example above, we have a spreadsheet with a list of distilleries and the dates they were founded. If I'm interested in visiting the oldest distilleries, I can use the conditional formatting feature to highlight the oldest three in my sheet

**Note:** If you don't see the conditional formatting command in your Ribbon, then visit the top, left-hand corner of your screen. Click on the downward arrow button, and click "More Commands." Find the "Conditional Formatting" option in the scrolly list, and click the arrow to add it to your Ribbon or Quick Access Toolbar. Then you can use the command from there.

## Freeze panes

We actually touched on this in a former blog post. Here's an excerpt:

There's nothing worse than scrolling through a huge spreadsheet that requires you to continuously go back up to the top to see what your column headers are.

Fortunately, you can make your column headers and your row numbers stay right where they are – meaning you can always see them, no matter how far down the spreadsheet you go. You can do this by using Excel's handy "freeze panes" feature.

Here's how you do it:

- Click on the row underneath your column headers.
- Click on the "View" tab.
- Click the "Freeze Panes" button.

Scroll down and across your spreadsheet, and you'll see that the information you need is always right there within view!

# Formulas & functions

One of the reasons Excel is so widely used in the business world is because it allows you to do advanced calculations and build business intelligence solutions out of it.

In order to do that, you need to understand formulas and functions. Formulas are the most basic way to do math in Excel.



Each formula begins with an “=” sign.



If you want to add two numbers, you’d use the “+” sign.



If you want to subtract two numbers, you’d use the “-” sign.



If you want to multiply two numbers, you’d use the “\*” sign.



And if you want to divide two numbers, you’d use the “/” sign.

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# Interpret your data

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## Sort data by column

Sorting your data by column/category makes it more presentable. Here’s how:

## Prepare your data to be sorted

Before you can sort your data, you must make sure that your data is ready to be sorted. Your data is ready to be sorted if the following is true:

- Your data is in tabular format.
- There are no blank rows or columns interrupting the data you want to sort.
- Optional: you have a distinct header row for your data.

## How to do single level sorts

- Select any cell or range inside your data table
- Go to Data > Sort.
- Configure the way you’d like it sorted, then click OK.

## How to do multiple level sorts

Multi-level sorts are good for large data sets because you’ll likely want to sort your data by one column and then by another.

- Select any cell or range inside your data table
- Go to Data > Sort.
- Configure the primary sort the way you’d like to see it.
- Click Add Level.
- Configure the secondary sort the way you’d like to sort the ties.
- You can continue to add as many sorting levels as you need.

# Use filtering

Filtering can be very useful for drilling down into data, finding only records that have specific relevance to the situation you are investigating.

To filter out duplicates, again, you must get your data ready to be filtered – make sure:

- Your data is in tabular format.
- There are no blank rows or columns interrupting the data you want to sort.
- Optional: you have a distinct header row for your data.
- Select the top row of your data. Go to the Data tab, and choose Filter (this will add a row of drop-down arrows to your headers).

## Filter for specific words

- Click the drop-down arrow of the column you wish to filter.
- In the Search box, type the term you are looking for, then click OK.

## Filter for specific dates

- Click the drop-down arrow of the column you wish to filter.
- Uncheck the Select all box to clear unwanted dates, then use the checkboxes to drill down to the records you wish to see

## Filter multiple columns

- You can add filters to multiple columns, drilling down to an ever-decreasing amount of records.

## Clear filters in one of three ways

- Click the filter icons on the column headers, then click the “Clear filter from” button in the menu.
- Go to the Data tab and click the Clear icon on the Sort & Filter group.
- Go to the Data tab and turn off filtering by clicking the Filter button, then add the filter back again.

## Summarize and highlight data with Pivot Tables

A Pivot Table is almost like a rubics cube because it allows you to mold your data and look at it in different ways.

### How to create PivotTables

- Select any cell in the data range.
- Go to the Insert tab, choose PivotTable and place it on a new worksheet.
- Drag a numeric field into the VALUES area.
- Drag fields containing text into the ROWS area as desired.

### How to remove items from a PivotTable

- Drag any field from the layout area back into the field list.

### How to modify PivotTables

- Drag a field from ROWS to COLUMNS.
- Drag a field from COLUMNS to ROWS.
- Click the arrow beside any field in the VALUES area, choose Value Field Settings, and choose Average.
- Go back to the source data and update any cell to a new value.
- Return to the PivotTable, right click it and choose Refresh

# Use filtering

If you have tasks you need to do over and over again, you should use Macros and Scripts to automate this process.

## How to record Macros

If you have tasks you need to do over and over again, you should use Macros and Scripts to automate this process.

## Add the Developer tab to your ribbon (if it is not on your ribbon)

- Right click any command on the ribbon and choose “Customize Ribbon.”
- Click the box next to Developer tab in the list on the right.
- Click OK to return to Excel and activate the Developer tab.

## Prepare to record

- Practice the steps you will go through, as the macro recorder will record your mistakes!
- Be aware that the macro will do EXACTLY the same thing EVERY time it runs (this can be modified, but it involves learning to program).

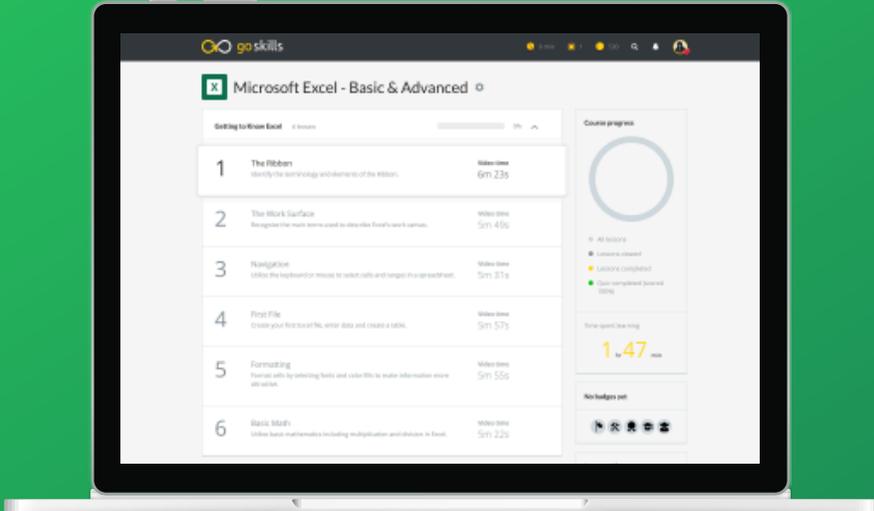
## Record a macro

- On the developer tab, click “Record Macro.”
- Give the macro a name (no spaces) and add a capital letter in the Shortcut box (like R) if desired.
- Choose to place the macro in ThisWorkbook.
- Perform the tasks that you want the macro to do.
- On the Developer tab click “Stop Recording.”

## Run the macro

You can run the macro in any one of three ways:

- Press CTRL+SHIFT+R (or whatever letter you chose) to run the keyboard shortcut.
- Press Alt+F8 to run the macro from the macro dialog.
- Go to the Developer tab and choose to Insert a Form Control Button on the worksheet (it will prompt you to connect a macro to it). You can then click the button to run the macro.



## What happens next?

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