

Basic Formulas, Functions and a Few Other Things

DATA ENTRY

- Enter **dates** as 12/1/2016
- **Do not mix numbers and text** – particularly if you think you will need to do something with the dates
- If you need to record a comment, use **Comments** (click on cell, right click, **Insert Comments**, add your comment there)
- Make your headings **bold**
- Enter your data side by side (e.g. column B beside column C) and one row under the other (e.g. Row 4 under row 3)
- It makes it far more manageable to do something with the list later.
- **Consistent data entry**. Choose ONE way to enter something e.g. Galway, not Co. Galway, Co Galway, Galway County. Look into Data Validation (ask for my **Data Validation** sheet)
- If you must enter currency, enter it like 10.25 and then use the **Home | Currency** option to add a currency symbol.
- Phone numbers – highlight your column and convert to text (choose Text from the settings under **General** in the middle of Home ribbon). Allows you to enter a zero at the beginning
- Text entries appear on the LEFT
- Number entries appear on the RIGHT.

KNOW YOUR EXCEL OPERATORS:

- / = divide
- * = multiply
- + = plus
- - = minus
- Use () if you need to do a calculation first e.g. (A1+A2) / A3
- Begin every formula with a =
- This makes the formula look like this:
\$A\$1
- Now when you copy the formula, \$A\$1 will not move.

The beauty of using the approach is that all you must do is change the entry in cell \$A\$1, to change all the formulas using it.

INSERT A COLUMN

- Highlight the column to the right of where you want your new column to go
- You can either press Ctrl and + together
- OR **Home | Insert | Insert Sheet Columns**.

INSERT A ROW

- Highlight the row below where you want your new row to go
- You can either press Ctrl and + together
- OR **Home | Insert | Insert Sheet Rows.**

DELETE A COLUMN

- Highlight the column you want to delete
- You can either press Ctrl and - together
- OR **Home | Delete | Delete Sheet Columns.**

DELETE A ROW

- Highlight the row you want to delete
- You can either press Ctrl and - together
- OR **Home | Delete | Delete Row Columns.**

SORTING AND FILTERING A LIST

MAKE SURE YOUR DATA IS SET UP CORRECTLY.

- No blank rows, no blank columns
- Ensure headings are in one cell
- Make your headings bold.

BASIC FORMULA ENTRY

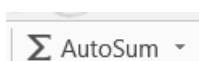
- **CLICK WHERE YOU** want the answer to go
- Type in =
- Click on the first cell you want to include in the formula. You will see a cell reference e.g. A2
- Enter an operator e.g. / or + or * or -
- Click on the second cell you want to use. You will see a cell reference e.g. A3
- Press the Enter (Return) key
- Copy down your formula to let Excel do the same calculation for the other numbers.

This is called **Relative copying**

AUTOSUM

THIS ADDS UP COLUMNS OF NUMBERS. USE WHEN YOU HAVE 2 OR MORE COLUMNS TO ADD UP

- Click at the bottom or right of the numbers you want to add up
- Click on **Autosum**

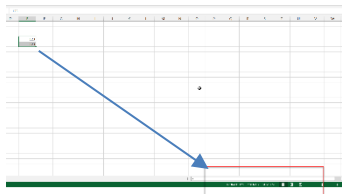


- Excel will automatically select a set of numbers
- Press **Enter**
- Excel will enter the total

QUICK CHECK

YOU CAN DO A QUICK CHECK OF YOUR TOTAL BY CHECKING THE STATUS BAR AT THE BOTTOM RIGHT HAND SIDE OF YOUR SCREEN.

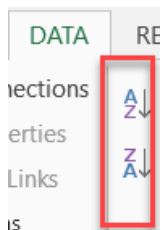
- Highlight your numbers



- Check bottom right-hand side to see total/average/max etc.

SORTING BY ONE COLUMN

- Click in ONE cell in this column you want to sort by
- Click on **Data**
- **Click on A-Z or Z-A**



This sorts the list in alphabetical order of that column

FILTERING

- Click in ONE cell in this list
- Click on **Data | Filter**
- This turns on your filters
- Click on the grey square that is now beside your headings.
- Identify what you are looking for from the list
- Note that you will get different types of filters depending on your data e.g. you may see Text filters or number filters or Date Filters – depending on the data in the column you are filtering by.

REMOVE A FILTER

- Click in ONE cell in this list
- Click on **Data | Clear**
- This removes the filter from the list and restore it to its original listing.

How do I know if a filter is on?

- Check the row numbers – if a filter is on, they will be out of sequence and they will be blue
- You will also see a message on the bottom left-hand side that says something like X of X records.

OTHER FUNCTIONS

WE CAN USE EXCEL TO FIND THE FOLLOWING:

- Highest – **Max()**
- Lowest – **Min()**
- Average – **Average()**
- Count numbers – **Count()**
- Count numbers or text or mix – **Counta()**

How this works

- Click where you want the answer to go.
- Type in =, then the first few letters of the function name e.g. Ma...
- Note that Excel produces a list of functions underneath the cell.
- Double click on the one you want to use e.g. =Max
- You will now see something like **=Max()** in your cell
- Now use your mouse to highlight all the numbers you want to include in the calculation
- Press **Enter**

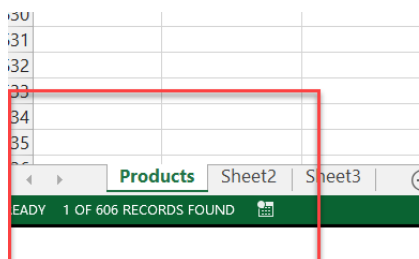
METHOD 2

- First enter the function – you should see **=max()**,
- Then click on the top of the numbers.
- Then press the following keys together ONCE:
- Ctrl plus Shift plus Arrow down.
- This highlights all the numbers
- Press **Enter**

FIXING A CELL

THIS IS ALSO KNOWN AS MAKING A CELL ABSOLUTE OR CONSTANT. YOU USE IT WHEN YOU WANT TO REFERENCE AN ENTRY IN A SINGLE CELL E.G. VAT RATE

- Identify the cell you want to use over and over again in the same formula
- When you reference this cell in the formula, just after you have clicked on it, press F4 (top row of keyboard).



CREATING A CHART

- Highlight the data you need in the chart.
- Make sure you only highlight what you need. No blanks
- Use the **Ctrl** key to select ranges that are not beside each other
- Click on **Insert**
- Identify the chart you want to use from the middle of the Ribbon
- Click on it
- You have just created the chart.
- Note that you will now see extra Ribbons on the right-hand side of the screen.
- **Useful Tip:** If you are using Excel 2013 or later, look for **Insert | Recommended Charts** and start from there.