Excel II Training Guide

Creating charts

1. Create a chart by selecting your data and clicking the Insert tab on the ribbon.
2. Choose the chart type you wish to use in the Charts area.
3. Excel will use any headers and column text to create your chart labels and legend.

Editing Charts

Once you have created your chart, the Chart Tools ribbon tab will appear any time you have the chart selected. Here you can find design and format options for your chart. Chart editing is extensive and don’t worry, if you don’t like an edit, you can always undo it (ctrl+z)!

The Design tab allows you to add titles, axis labels, data labels and chart layouts. You can also find preset designs, data selection, and change chart type options.

The Format tab allows the insertion of shapes, changing of fill and outline colors, word styles, and more.

Excel 2013 has two new ways of editing your charts. The first you can find by clicking on the chart and using the three icons next to it. The options are represented by a plus sign, a paintbrush, and filter. These work like shortcuts to options found in the Chart Tools on the ribbon.

- The plus sign lets you add chart elements that can be found in the Design tab of the ribbon. These included axis labels, data labels, titles, and more.
- The paintbrush allows you to change styles and colors of all or selected chart areas.
- The filter contains options to streamline the data shown in the chart by letting you filter the displayed data to show more or less information.

The second new way of editing a chart is done by double-clicking inside the chart. This will open a Format Chart Area bar on the right side of Excel.

Here you can find many of the same options located in the Chart Tools on the ribbon. Primarily, ways to make the chart stand out with color and shading effects for both the different Chart Options and Text Options.
Formulas

There are several ways to enter formulas in Excel. You can use preset formulas, use the insert function wizard to find and enter formulas, or type them in directly. The steps below will cover each of these ways.

The AutoSum button

You can find basic formulas for addition, averages, count numbers, minimum, and maximum on the home tab of the ribbon using the AutoSum button. The AutoSum button can also be found on the Formulas tab on the ribbon.

To use the AutoSum button:

1. Select the cell you want the formula to be in.
2. Click the AutoSum button and select the formula you wish to use.
3. You can use the corners of the selection box to change which cells are included in the formula.
4. Press the Enter key when you have finished your selection and your formula is complete.

Formulas in the Formulas tab

The Formulas tab on the ribbon contains the Function Library. Here you can find the Insert Function button and formulas broken down into categories. All of these options (excluding AutoSum) allow you to open up a wizard that helps you enter the formulas.

Insert Function

The Insert Function button allows you to search a formula and use a wizard to enter it. As an example refer to the steps below to see how Insert Function can be used to find a formula that can count words.

1. Select the cell the formula will be placed in.
2. Click the Insert Function button.
3. Change the dropdown menu from Most Recently Used to All. This will allow you to search every available function.
4. Type Count into the search bar and click Go.
5. Select COUNTIF from the results and click OK.
6. Choose the range of cells the formula will be looking to count in. This can be done by filling in the range line or clicking in the line and then using the mouse to drag and select your data.
7. Set your criteria by entering in the cell with the data you want to count.
8. Click OK to finish the formula. The cell you originally selected will show the number of occurrences that the criteria appeared in the range you selected.
Manually Enter Formulas

You can also manually enter the formulas at any time directly into a cell or using the formula bar at the top of Excel. To manually enter a formula, follow the steps from the example below.

1. Select the destination cell for your formula.
2. In the cell or the formula bar enter your formula. All formulas start with an equal sign (=) followed by the formula name. For example, the sum formula starts as =SUM.
3. After the formula name use an open parentheses to start the formula parameters.
4. Enter your formula and close the parentheses when finished.
5. Press enter on the keyboard to finish the formula.

Subtotal

Subtotal is used to count rows of related data by inserting subtotals and totals.

1. Sort your data by the column that contains the information to be totaled.
2. Select your data set, including headers is helpful if the data has them.
3. Click the Data tab on the ribbon.
4. Click Subtotal in the Outline area.
5. Select the criteria for your subtotal in the At each change in: dropdown menu.
6. Choose the function to perform from the Use Function dropdown menu.
7. Select where you want the subtotals to appear with the Add subtotal to: check list.
8. You can replace current totals, add a page break between each group of totals, and obtain a summary of the totals below the data set with the final 3 check boxes.
9. Click OK to view your subtotals.
Pivot Tables & Pivot Charts

Pivot tables and pivot charts are useful tools that allow you to create tables and charts to summarize complicated data. Both options allow you to select data and rearrange how it appears in both a table and chart, filter, summarize, analyze, and ultimately get as much information as possible from your data in a concise manner.

Create a Pivot Table

1. Select your data.
2. Select the Insert tab on the ribbon.
3. Click the Pivot Table icon.  
   Note: If you did not select your data ahead of time you can select it in the dialogue box.
4. Choose to use a new or existing worksheet as the destination for the table
5. Click OK.
6. You can use the pivot table fields to set up your columns, rows, values, and filters. Simply drag and drop the fields into the areas to add and remove them. As you drag and drop your table will build next to the PivotTable Fields box.
Pivot Chart
Pivot charts allow you to not only create a pivot table, but a chart based off the information in the table creating a visual representation of your pivot chart.

1. Select your data.
2. Select the Insert tab on the ribbon.
3. Click the PivotChart button.
   **Note:** If you did not select your data ahead of time you can select it in the dialogue box.
4. Choose a new or existing worksheet as your chart’s destination.
5. Click OK.
6. Use the PivotChart fields box to set up your filters, Legend (series), Axis (categories), and values. Simply drag and drop the fields into the areas to add and remove them. As you drag and drop fields to each area a pivot table and chart will build on the worksheet.

Filtering
Use the steps below to enable and use filtering.

1. Click the Data tab on the ribbon
2. Click on the Filter button.
   If you are filtering by data other than on the first row, highlight that row before clicking the filter button.
3. Use the dropdown menus to select criteria for the filters.
   Each criteria you set keeps only rows of data that fit the criteria. The rest are hidden but appear when filters are removed or changed.
4. To turn filters off, click the Filter icon again.
Remove Duplicates

Remove duplicate data from your data set.

1. Select your **data**, include headers if possible.
2. Click the **Data** tab on the ribbon.
3. Click the **Remove Duplicates** button.
4. Check the **my data has headers** check box if you selected your headers.
5. Select the **duplicate criteria** before a row is removed.
   Be sure to set as strict of guidelines as possible. Use multiple criteria if possible. Once data is removed and the file is saved, it is gone for good.
6. Click **OK**.

Copy From/ Paste Special

Copy and paste data so that it will automatically update on a different worksheet. This relationship is directional. Once a connection is set up, updates on worksheet A will show on B but not the other way.

1. Copy your **data**.
2. Select the destination **worksheet**.
3. Click the arrow below the **Paste** button.
4. Select **Paste Special**.
5. Click the **Paste Link** button.

Your data is now linked from the original copied information. Any changes to the original data will appear in the linked cell.