Excelling

# Login

**Username:** student

**Password:** Associate25!

# Files on the VLE

The files we need today are on the Wallingford School VLE.

1. Open a web browser and go to vle.wallingfordschool.com (or, if you’re a really accurate typist, go to vle.wallingfordschool.com/course/view.php?id=478 then skip to step 4).
2. Scroll down to find Course categories on the right side of the screen.
3. On the course list, find Associate CPD Office Training.
4. For the main morning presentation, download Interactive presentation.
5. To explore Microsoft’s own Excel Tour, download the Take a Tour (this is also available directly within Excel itself.)
6. Look at the top right corner for the **Downloads** mini window and click on **Open file**.

*The Interactive Presentation and Take a Tour are* ***template*** *files – this means you will be opening your own copy of the original file.*

**

Associate CPD Office Training

# Four Uses for Excel

* **Fix & Organise** – fix and tidy messy data from external sources; sort and filter in tables; colour for easier reference.
* **Calculate & Analyse** – perform calculations; conditional formatting; draw charts; use Pivot Tables to spot patterns and understand what the data shows.
* **Solve & Automate** – experiment; simulate; develop solutions; automate those solutions.
* **Export & Reuse** – pass into a mail merge; upload to a website (e.g. to create accounts); use as a data source for further analysis; save spreadsheet as a template.

# Task 1 – Suspect List

|  |  |  |
| --- | --- | --- |
| Suspect 1 | * Above average height
* Born 1979
* Lives in Northampton
 |  |
| Suspect 2 | * Born in the year 2000, and has a B+ blood group
 |  |
| Suspect 3 | * 1.68 metres tall, lives in Birmingham and drives a green car
 |  |
| Suspect 4 | * Lives in the town/city with the most people in A+ blood group (careful…)
* Drives a grey car
* Partial reg plate: “BW”
 |  |

# Function Extension Tasks

If you’re keen to learn the power of formulas and functions, try these challenges (roughly in order of difficulty!):

1. In Task 1, we used the Above Average number filter to filter out suspects above an average height. What is that average? Use the AVERAGE function. [Excel can also calculate MEDIAN and MODE.]
2. If you understood SUMIFS, can you work out how to use COUNTIFS on the Task 1 sheet to work out which people were born on the **exact same date**?
3. This is more difficult: can you work out how many suspects **share a birthday** (regardless of the year)? [Hint: you need to find a way to just look at the day and month and ignore the year. Three functions that might help are DATE, MONTH and DAY.]
4. How many of the suspects have **their** **initials at the start of their car registrations**? [Hint: first you need to take the initial letters of the forenames and surnames. The function LEFT can help with that. Then, after joining the letters together (CONCAT), see if you can FIND them within the registration. FIND returns “#VALUE!” when it can’t find what it’s looking for.]
5. In Task 3, postage is calculated by weight. How can **we give FREE postage when the customer spends over £50**, regardless of weight? [Hint: Try multiplying the VLOOKUP postage formula by an IF function. And remember your basic maths: what happens if you multiply by 0 or 1?]

# Some Useful Functions

|  |  |  |  |
| --- | --- | --- | --- |
| Category | Function | Description | Notes |
| **Date & Time** | TODAY | Returns the current date. |  |
| WEEKDAY | Returns a code number for a specified date representing the day of the week. |  |
| **Math & Trig** | ROUND | Rounds a decimal to a given number of decimal places. | *See also INT, TRUNC, ROUNDDOWN.* |
| SUM | Adds up a set of values. |  |
| SUMIFS | Adds up values that meet one or more conditions. | *Older function SUMIF only allows one condition.* |
| **Statistical** | AVERAGE | Calculates the mean average of a set of numbers. | *Excel also knows MEDIAN and MODE.* |
| COUNTIFS | Counts the number of cells that meet one or more conditions. | *Older function COUNTIF only allows one condition.* |
| MIN / MAX | Gives the smallest / largest value in a set. |  |
| **Lookup & Reference** | CHOOSE | Chooses a value or action based on a given number |  |
| VLOOKUP | Looks up a value in table, returning the value of a cell in the same row in a column to the right. | *See also XLOOKUP.* |
| **Text** | CONCAT | Concatenates (joins) text together. | *Older versions, like 2016, have CONCATENATE instead, which this replaces.* |
| LEN | Returns the number of characters in some text. |  |
| UPPER / LOWER / PROPER | Converts text to UPPERCASE, lowercase or Proper (Title) Case. |  |
| LEFT / MID / RIGHT | Returns a number of characters from the left, middle or right end of text. |  |
| TRIM | Removes unnecessary spaces from text. |  |
| FIND | Searches for some text in a larger piece of text and returns the position of those characters (if found). |  |
| **Logical** | IF | Does one thing if a condition is true, and something else if it’s false. |  |
| AND / OR | Allows more than one condition to be tested. |  |

# Excel Shortcut Spotter

|  |  |  |
| --- | --- | --- |
| **Category** | **Shortcut** | **What it does** |
| General | CTRL + Z |  |
| CTRL + Y |  |
| CTRL + X |  |
| CTRL + C |  |
| CTRL + V |  |
|  |  |
|  |  |
| Moving Around | ENTER / RETURN |  |
| TAB |  |
| SHIFT + TAB |  |
| SHIFT + ENTER |  |
| CTRL + ARROWS |  |
| CTRL + HOME |  |
| CTRL + Scroll wheel |  |
| CTRL + PAGE UP/DOWN |  |
|  |  |
| Selecting Cells | CTRL + A |  |
| SHIFT + Click |  |
| CTRL + Click |  |
| SHIFT + ARROWS |  |
| Click + Drag |  |
|  |  |
|  |  |
| Editing / Deleting | F2 |  |
| DELETE |  |
| CTRL + ENTER |  |
|  |  |
|  |  |
| Special | ALT + = |  |
| CTRL + E |  |
| F4 (while editing a formula) |  |
| F9 |  |
|  |  |
|  |  |