

Excel 2010

Level 2B - Class Notes

Excel 2010 Online Training

Presented by



*There is a pre-requisite for this course, please read it on the next page and be sure you meet the criteria.

Pre-requisite for this course

The time requirements for this class mean that the instructor will be unable to review material covered in previous classes. Learners may wish to take an earlier level class before participating in this one if they do not meet the following criteria:

Learners should:

- **Know how to use the fill handle/auto-fill**
- Know how to navigate an excel spreadsheet & use basic selection techniques
- Know how to copy, cut, and paste
- Understand basic excel/spreadsheet terminology

Course Topics

- Examining lists (sort, filter, advanced filtering)
- Convert text to columns
- Special & Custom number formats (creating & using)
- Advanced formatting (merging & splitting cells, wrap text, transposing data)
- Outlining & Subtotals
- Advanced charting (scale, combination, trend lines, sparklines)

Examining Lists

Open EmployeesList.xlsx for the filtering and sorting exercises

- Arrangement of data into a list
 - No blank lines (rows)
 - Include labels above the data
 - Overall rectangular shape
- General sorting
 - Click in the column you want to sort on (just ONE cell)
 - Use the sort buttons from the home or data tab or the Quick Access bar
 - Right-click on the cell and choose Sort from the menu
 - You can sort on cell and font color from here
- Advanced Sorting
 - Right click on a cell and choose Sort/Custom Sort
 - Go to the Data Tab and choose Sort (not Sort Ascending/Sort Descending)
 - When the dialog box pops up, use the drop-down menu to pick the category, then the sort criteria (values, cell or font color), then the sort order. See Figure 1: Advanced Sorting

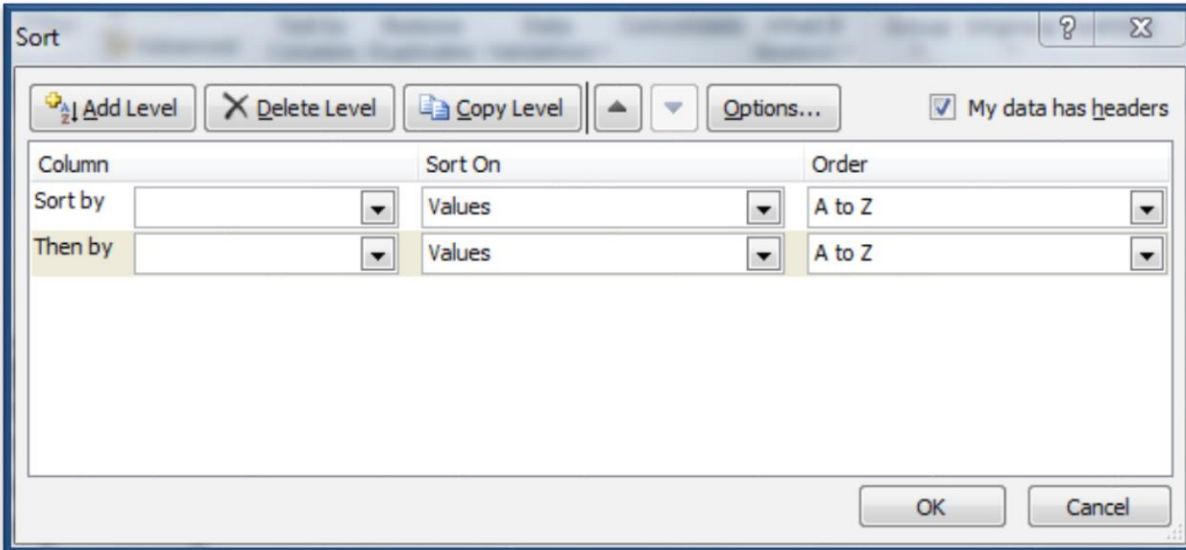


Figure 1: Advanced Sorting

- Filtering
 - Right-click the cell to filter on the cell or font color or the cell's value
 - Choose the filter button from the home tab (Home tab/Sort & Filter/Filter) or on the Data Tab.
 - The auto-filter buttons appear at the top of the list columns.
 - Click on the buttons to see the options for filtering that column.
 - Clear filters by turning off the auto-filter buttons or choosing clear filter from the drop-down lists (or from the right-click menu)

- Advanced filtering
 - Create criteria range
 - Click inside the list
 - Data tab → Advanced Filter

The screenshot shows the Excel 2010 interface with the Data tab selected. The ribbon includes options for Sort & Filter and Data Tools. The spreadsheet data is as follows:

Department	Department Code	Salary
Marketing	30	\$60,000
Marketing	23	\$250,500
Marketing	23	\$380,050
Administration	18	\$90,000
Human Resources	26	\$150,000
Human Resources	6	
Customer Support	38	
Customer Support	26	
Marketing	4	
Human Resources	19	
Customer Support	39	
Customer Support	17	
Administration	8	
Customer Support	20	
Administration	3	
Customer Support	7	
Marketing	21	
Administration	36	\$75,000
Human Resources	11	\$180,000

The Advanced Filter dialog box is open with the following settings:

- Action: Filter the list, in-place; Copy to another location
- List range: \$A\$3:\$F\$43
- Criteria range: \$I\$3:\$J\$5
- Copy to: (empty)
- Unique records only:

Convert Text to Columns

Keep EmployeesList.xlsx open for this exercise

- Use the 'Convert Text to Columns' wizard when you wish to split one column into two or more. (Ex. You have one column with both first and last names and want to split it into a column of first names and a column of last names).
 - Insert a blank column (more if you are splitting into more than two columns) to the right of the original column
 - Select the cells that you want to convert. (Don't select the entire column, just the cells that contain the information you want to split).
 - On the Data tab, choose Convert Text to Columns
 - Choose delimited width (usually)
 - Choose the delimiter (tab, space, etc. – whatever separates the two words)
 - Check the 'treat consecutive delimiters as one' if necessary
 - Assign text types as needed
 - Click finish

Advanced Number Formatting

Open TotalSales.xlsx for the next few activities.

- Special number formatting
 - Zip code
 - Phone number
 - SSN
- Custom number formatting
 - Positive; Negative; Zero; Text
 - Placeholders
 - 0 – a number must be entered, if not, a 0 will show
 - # - a number may be entered, if not, nothing will show
 - Text should be put in quotation marks (double quotes)

Advanced Formatting

- Merging & Splitting cells
 - Home Tab – Merge & Center
- Wrap Text
 - Home Tab – Wrap Text
- Transpose data
 - Copy the data
 - Paste Special/Transpose

Outlining & Subtotals

- **Grouping Data**
 - Select columns or rows
 - Data Tab/Group/Group
 - Use the + and – to expand or collapse the groups
 - Will print the way it shows on the screen
 - Expand the groups and go to Data/Ungroup/Ungroup
 - Must ungroup rows and columns separately
- **Outlining data**
 - Click inside the data range
 - Data Tab/Group/Auto-Outline
 - The outline levels are determined by Excel – main groups end at formulas
 - Use the + and – signs to expand or collapse
 - Will print the way it shows on the screen
 - Go to Data/Ungroup/Clear Outline

- Subtotals
 - Sort your data range (on the column that you want to subtotal)
 - Click on Data/Subtotals
 - Choose where to put the subtotals, the function (sum, average, etc.), and whether to replace current subtotals or not.
 - Press okay
 - Clear the subtotals by going to Data/Subtotals, Remove subtotals.

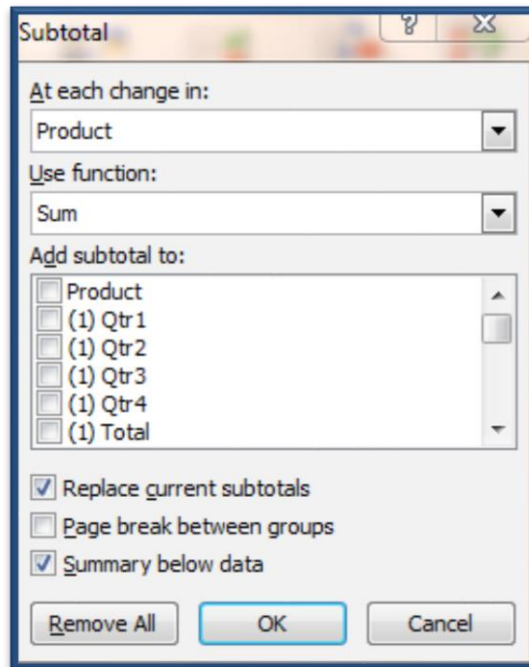


Figure 2: Subtotals Wizard

Advanced Charting

Open Charting.xlsx

- Change scale on the axes
 - Format axes (right-click on axis or use the format tab under the Chart Tools)
- Create a combination chart (put one series on a secondary axis)

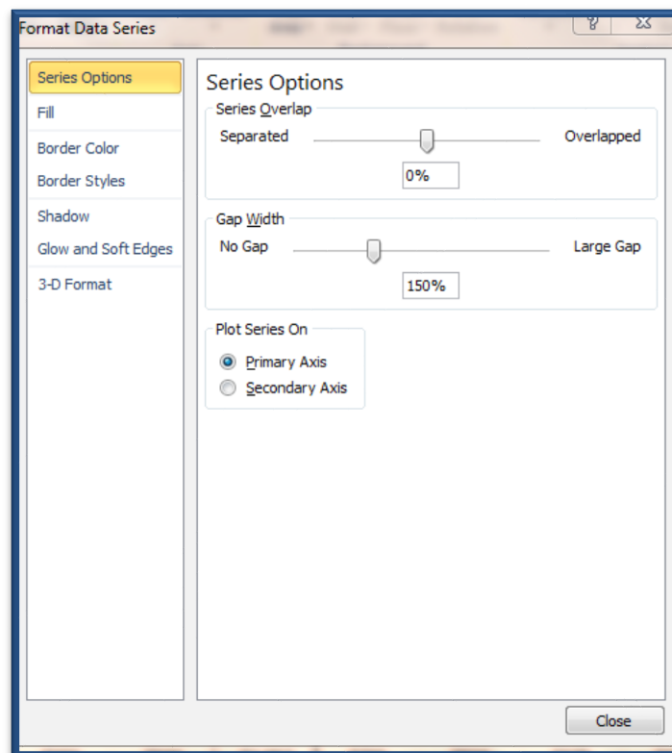


Figure 3: Format Data Series/Secondary Axis

- Analyze data
 - Create/show trendlines and R^2 values

- Sparklines
 - New in Excel 2010
 - Cell-sized mini chart

North				
Qtr1	Qtr2	Qtr3	Qtr4	
6,354	\$4,846	\$3,958	\$8,284	
8,484	\$5,858	\$5,858	\$4,555	
9,595	\$5,859	\$4,879	\$3,432	
7,578	\$6,900	\$3,444	\$5,909	
6,291	\$5,209	\$6,333	\$8,633	
\$791	\$278	\$298	\$478	
\$432	\$322	\$245	\$754	
6,354	\$6,563	\$4,333	\$8,284	
\$789	\$434	\$564	\$633	
\$534	\$423	\$521	\$625	
\$644	\$643	\$634	\$632	
\$654	\$634	\$326	\$754	
6,778	\$6,760	\$4,568	\$7,834	
6,354	\$6,346	\$3,555	\$6,442	

Figure 4: Sparklines

Follow-up Classes

- Excel 2010 – Level 2C
 - Working with styles & themes
 - Naming ranges/managing names
 - Commenting
 - Auditing (troubleshooting formulas)
 - Protecting workbooks, worksheets, cells
 - Working with templates
- Excel 2010 – Level 3A
 - Advanced functions (logical, math, statistical, financial)
 - Lookup functions
 - Displaying formulas