



Microsoft Excel 365

A WLS TECH TUNE-UP

Agenda

In this workshop, you'll learn about these essentials

- Online access
- Layout and navigation
- Data entry
- Sorting and filtering
- Saving
- Sharing

In the next session, you'll learn to work with

- simple formulas
- pivot tables
- charts and graphs
- conditional formatting

Excel and Office Access



- Office/Microsoft 365 and OneDrive
 - Word, Excel, PowerPoint, Publisher
- Similar to Google Workspace and Drive



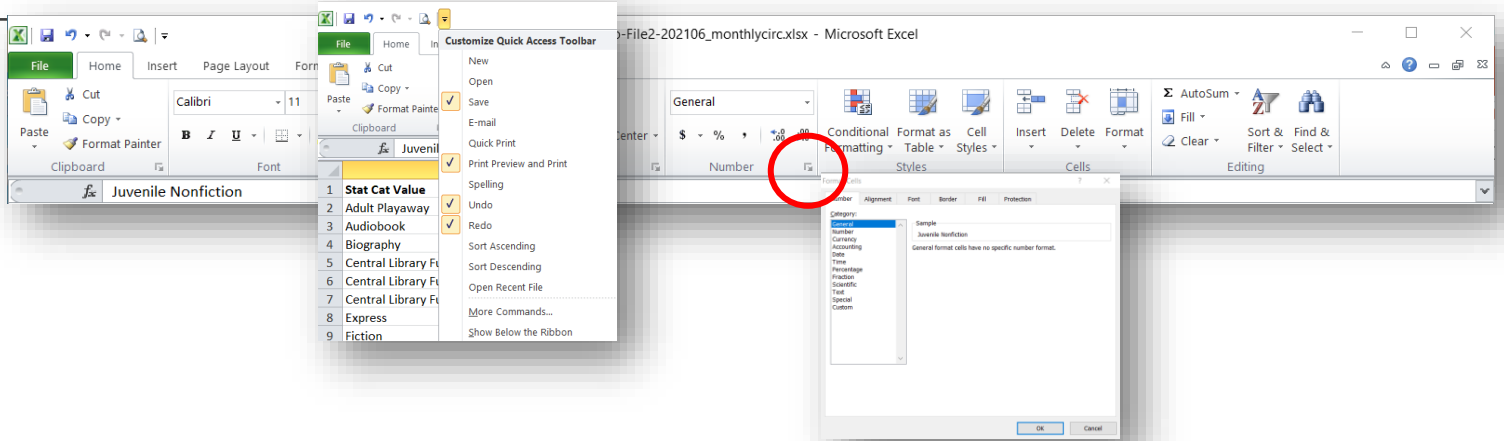
You can also open in a browser, go to office.com and sign in with your Active Directory account:

- Username: firstname.lastname@westchesterlibraries.org
- Password is the same as for VDI and Evergreen

Features: Navigation

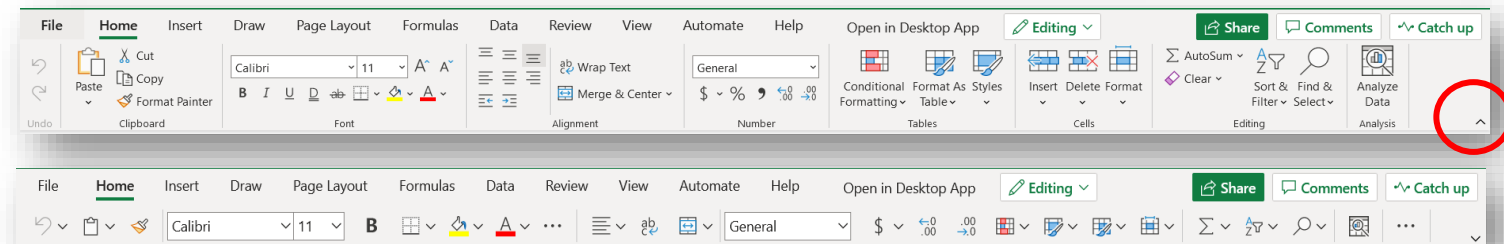
"Ribbons"

- Tool bars
- Tabbed
- Classic or Simplified



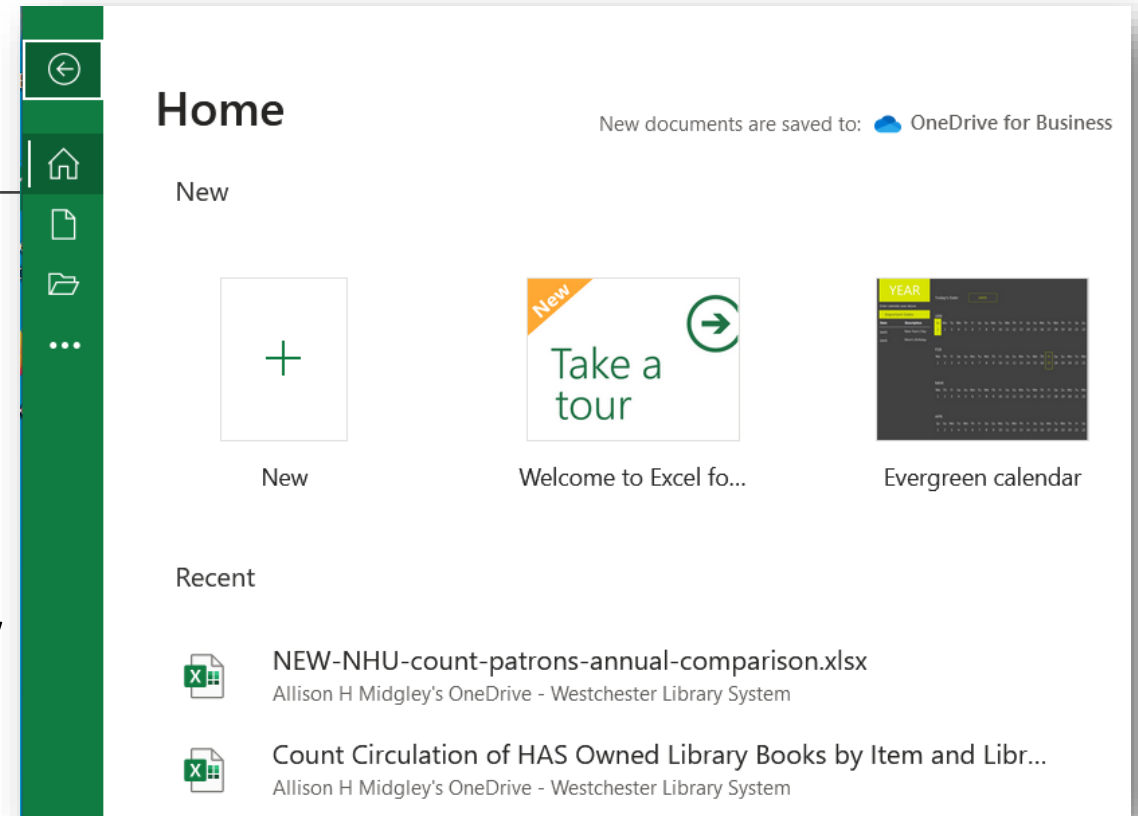
Online versions of Office 365 don't have all functions of desktop versions. In Excel, there are

- no pivot tables unless in an uploaded file
- few macros



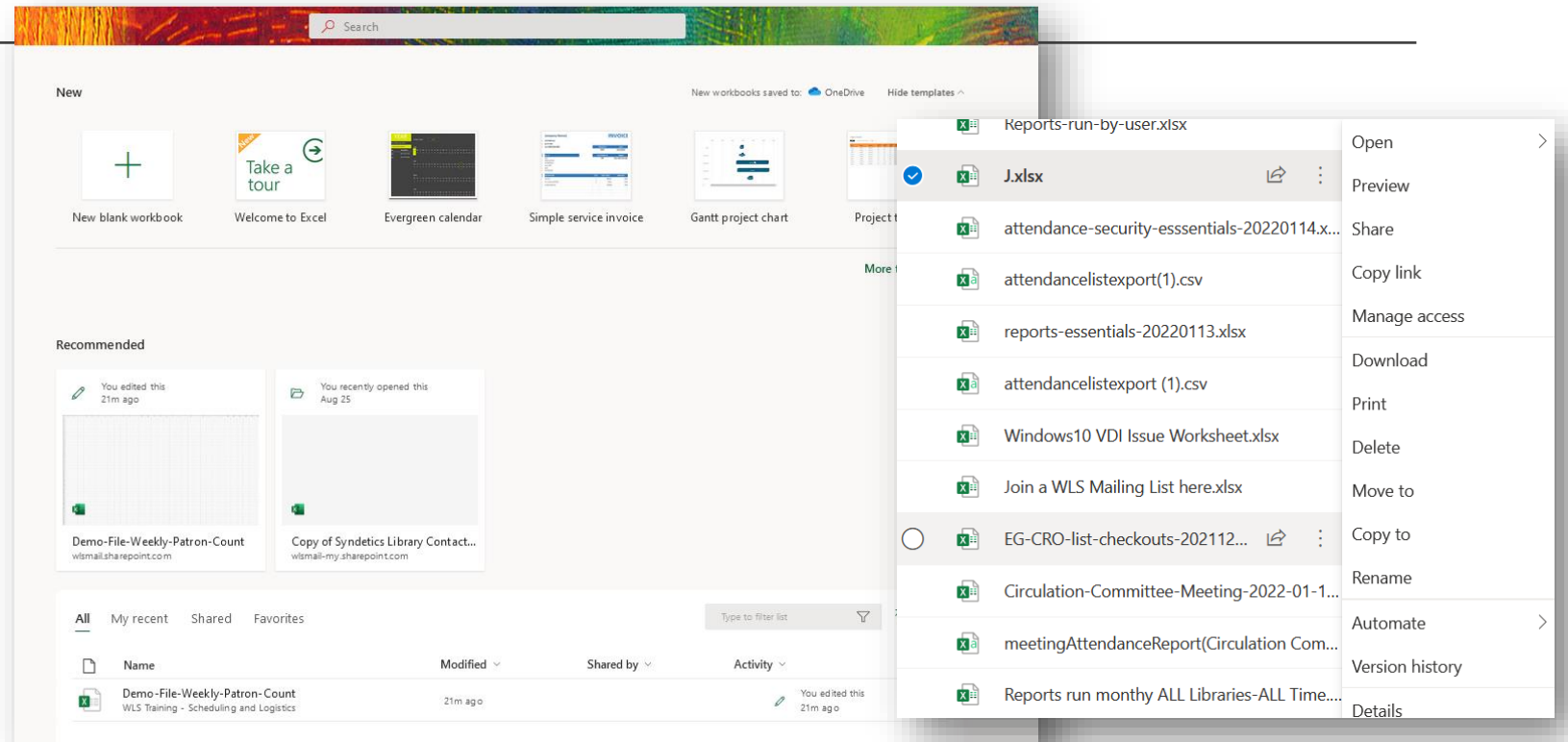
The Files Tab

- Home
 - New
 - Templates provide layout and formatting
 - Recent
- *Files - View more Files* opens a new tab with your online files
- *#-dot menu*
 - *Save as* saves a new version
 - Print
 - Share



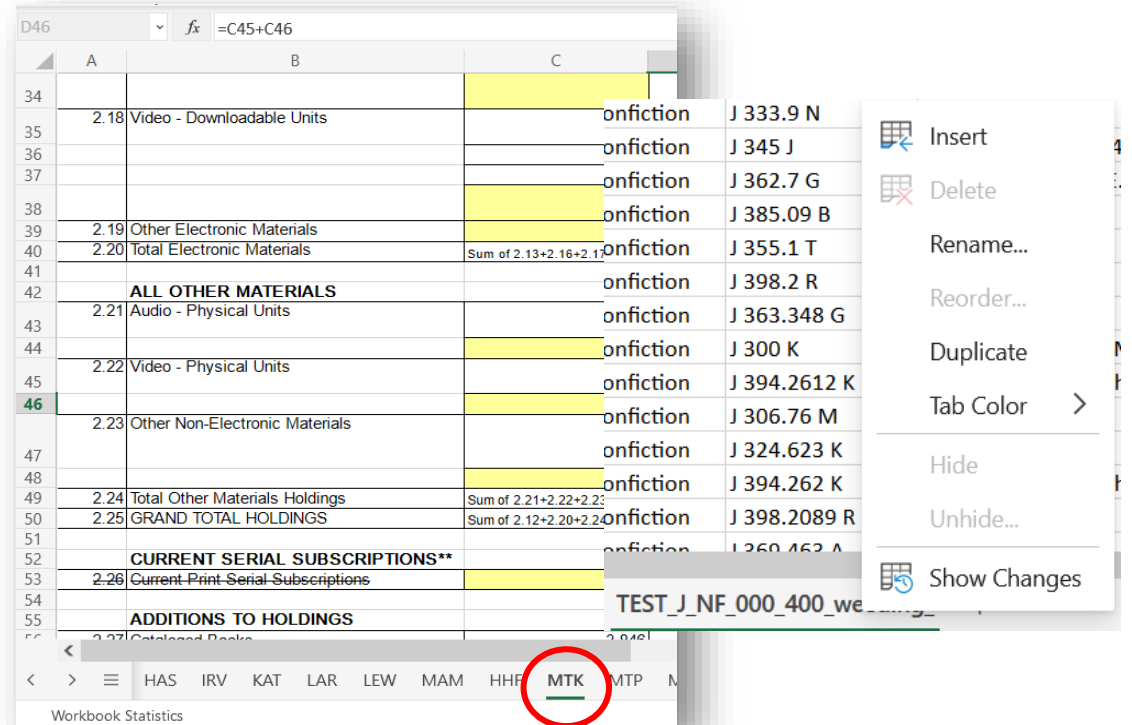
Features: OneDrive and Files

- Upload
 - xlsx
 - csv
 - Save or Save as
- Open/Replace
- Share/Copy link
- Manage access
- Rename
- Delete



Getting Started: Workbooks and Spreadsheets

- A workbook is a group of spreadsheets
- Spreadsheets
 - tabbed along the bottom
 - + to add, Rt-click to duplicate
 - Another sheet
 - Another workbook

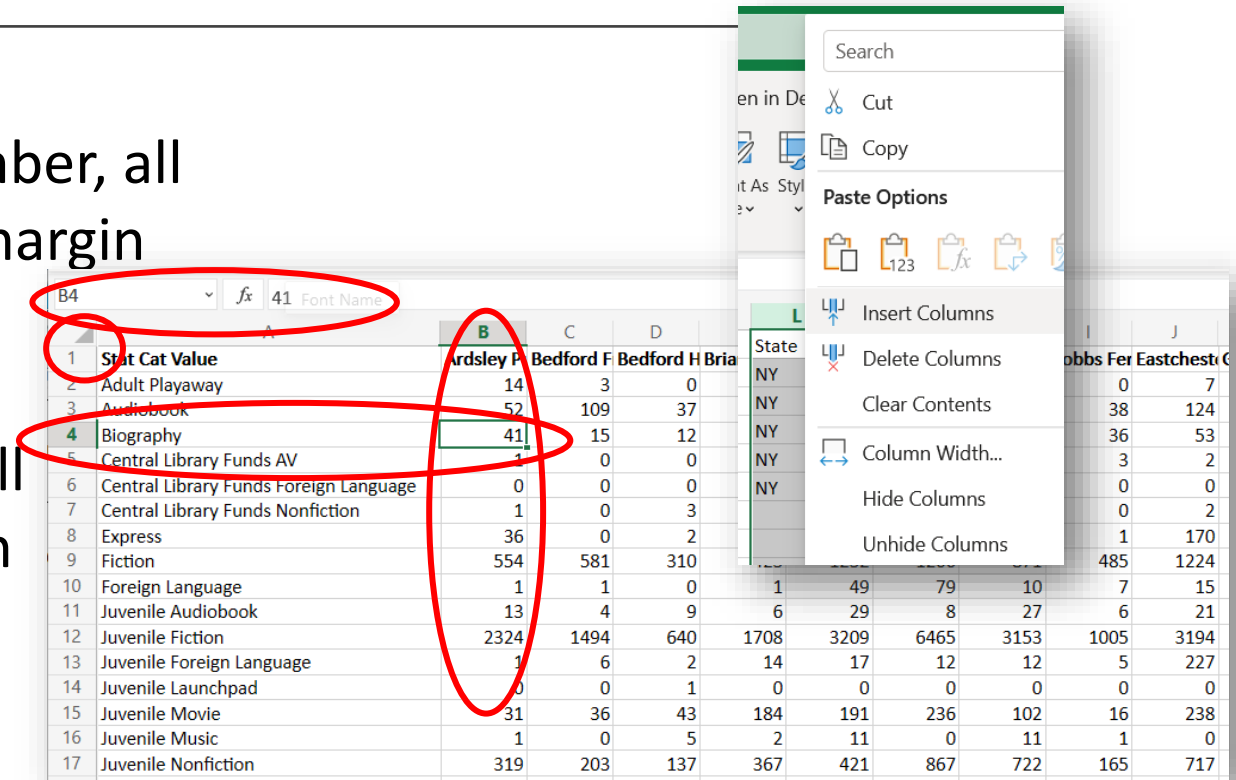


Getting Started: Navigating Rows, Columns, Cells

- Rows or columns
 - Select by column header, row number, all
 - Resize – drag or double-click the margin

- Cells and the formula bar
 - Keyboard navigation – tab, enter
 - Mouse selects cell, row, column, all
 - Delete data vs. Delete row/column

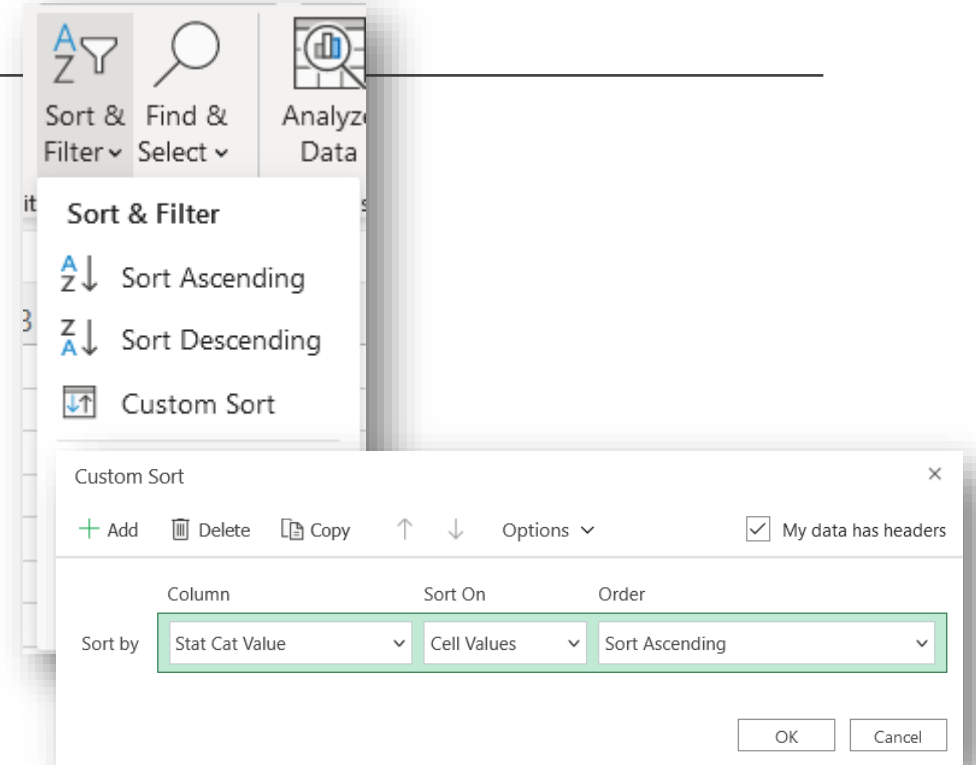
- Select and right-click to
 - Show/Hide
 - Insert, Delete
 - Cut and Insert columns or rows
 - Format



	Stat Cat Value	Wardsley P	Bedford F	Bedford H	Bria	State							
1	Adult Playaway	14	3	0		NY							
2	Audioobook	52	109	37		NY							
3	Biography	41	15	12		NY							
4	Central Library Funds AV	1	0	0		NY							
5	Central Library Funds Foreign Language	0	0	0		NY							
6	Central Library Funds Nonfiction	1	0	3									
7	Express	36	0	2									
8	Fiction	554	581	310									
9	Foreign Language	1	1	0		1	49	79	10	7	15		
10	Juvenile Audiobook	13	4	9		6	29	8	27	6	21		
11	Juvenile Fiction	2324	1494	640		1708	3209	6465	3153	1005	3194		
12	Juvenile Foreign Language	1	6	2		14	17	12	12	5	227		
13	Juvenile Launchpad	0	0	1		0	0	0	0	0	0		
14	Juvenile Movie	31	36	43		184	191	236	102	16	238		
15	Juvenile Music	1	0	5		2	11	0	11	1	0		
16	Juvenile Nonfiction	319	203	137		367	421	867	722	165	717		

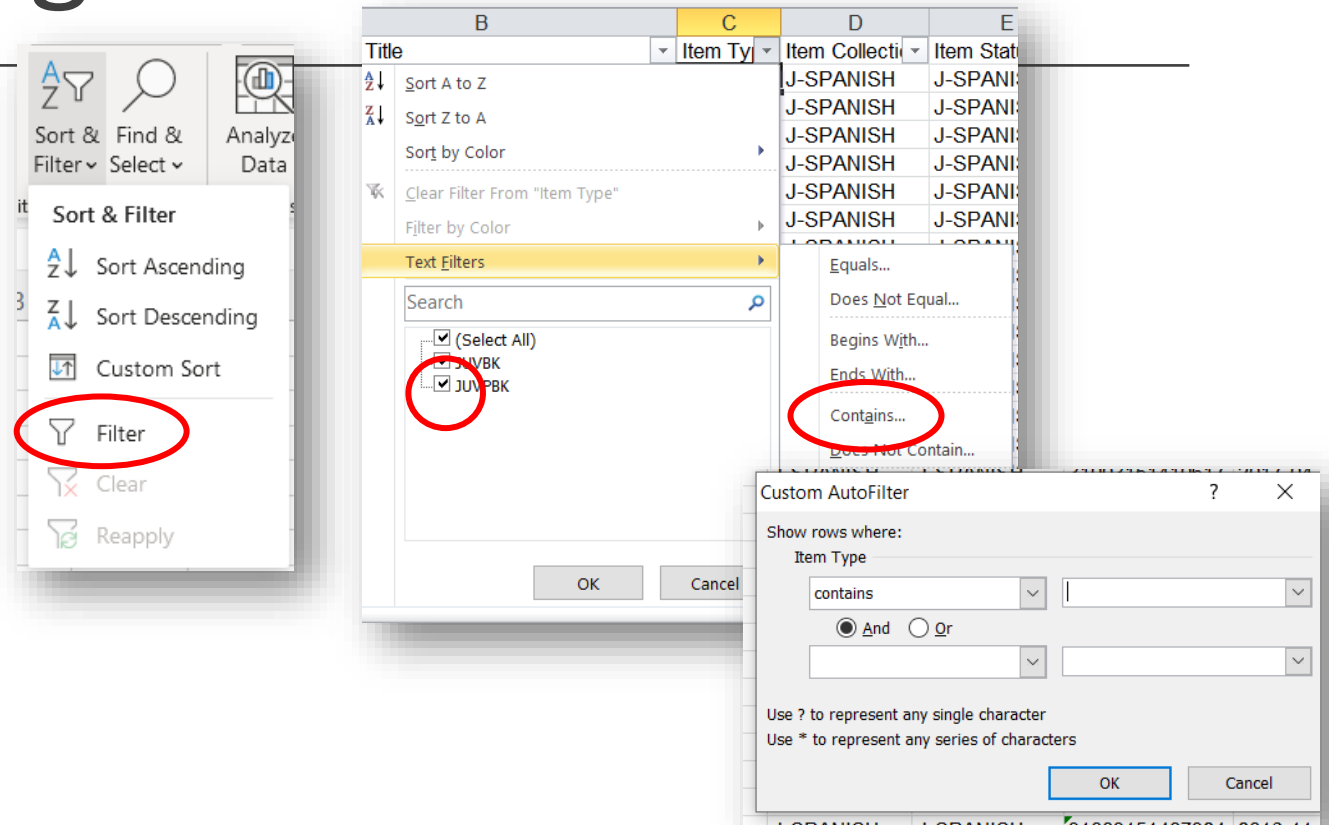
Technique: Sorting

- Click ONE cell in a column or row to sort by that column or row
 - Sort Ascending (oldest to newest)
 - Sort Descending (newest to oldest)
- Custom Sort allows you to sort on more than one column, eg. State/Zip Code, Last name, First name
 - Add columns
 - Choose what to sort on
 - Choose sort order



Technique: Filtering

- Sort & Filter > Filter
- Dropdown menus display at column headers
- Choose from options or use a text filter

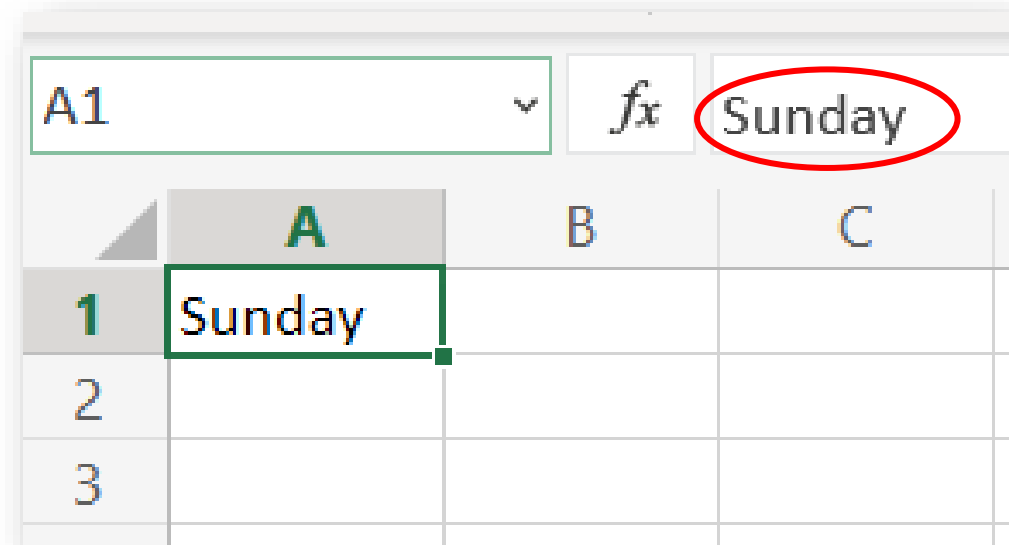


Technique: Entering data

Click in cell

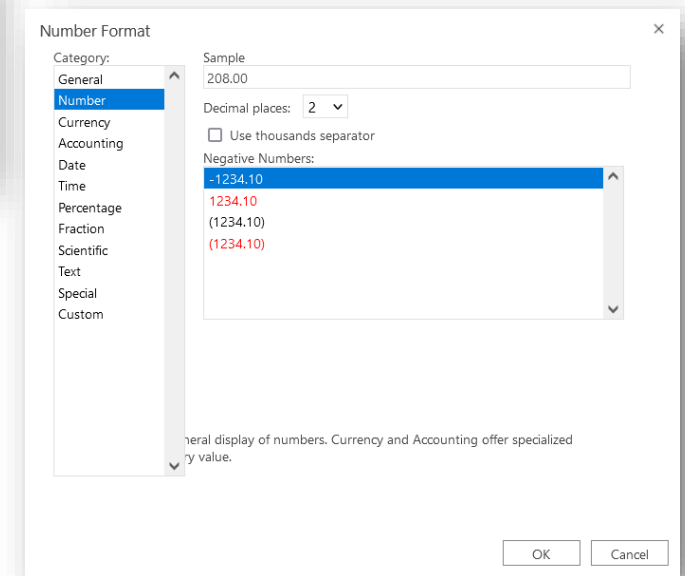
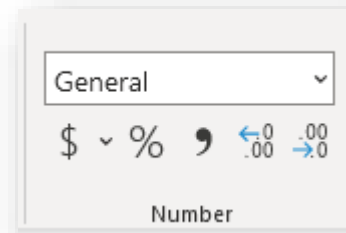
- Tab/Shift Tab to move across
- Enter to move down
- Edit
 - Type over
 - Double-click to edit part of cell

Enter in formula bar



Technique: Formatting

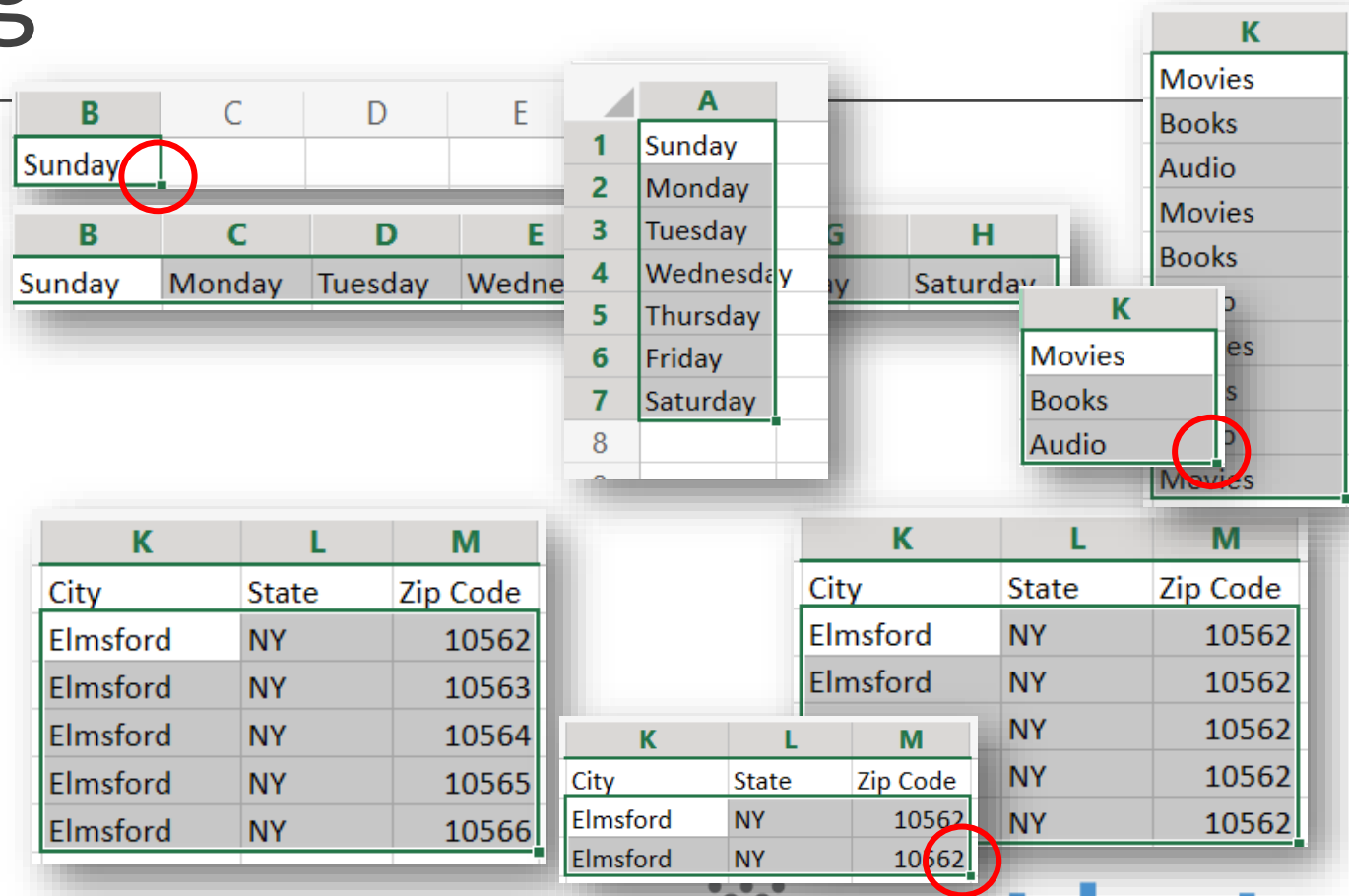
- In Excel, formatting isn't just how the information displays
- Formatting gives the data functionality
 - General – Excel guesses
 - Number – add or remove decimal places
 - Currency
 - Date
 - Time



Techniques: Filling

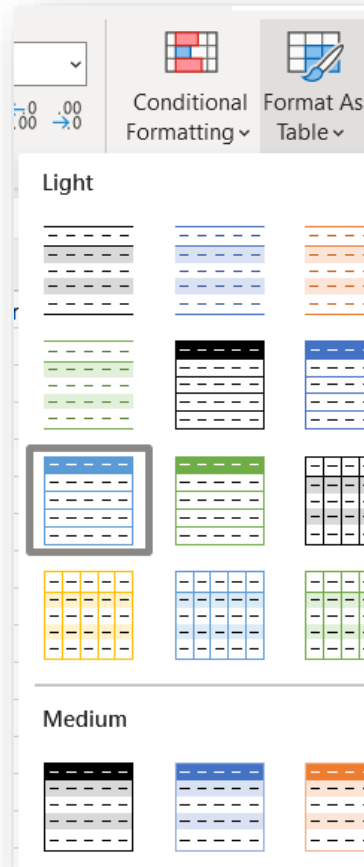
Handy for dates, days, months, numbers or text that repeats

- Click the block in the bottom corner of the cell you want to fill sequentially or in a pattern
- Drag down or across to fill
- To fill without incrementing, enter the same data in two or more cells, select them both, and then fill



Techniques: Tables

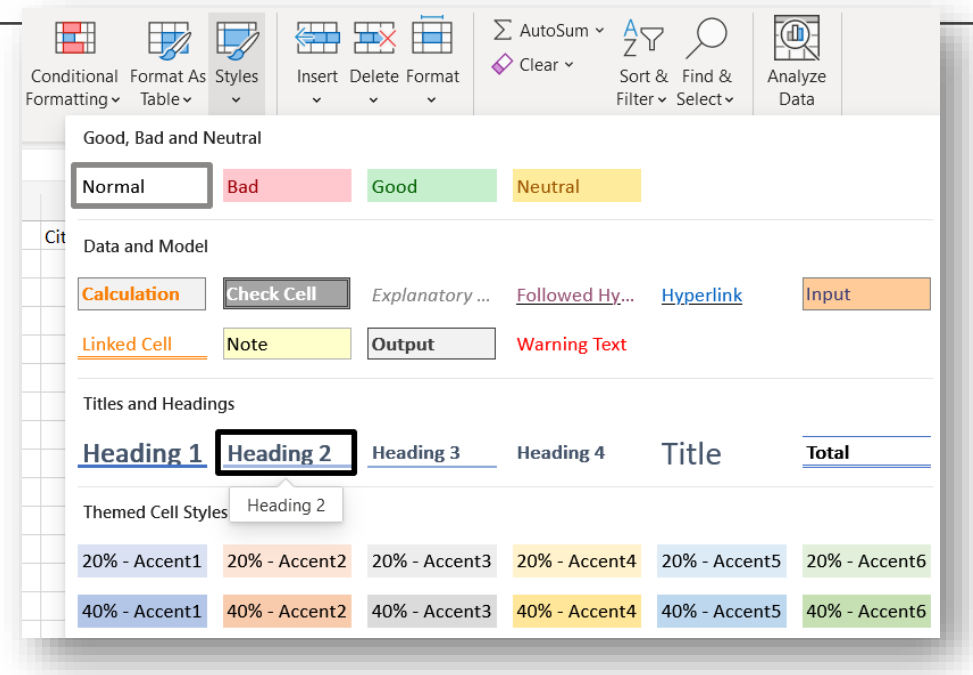
1. Highlight the cells that you want in your table
2. Go to *Format As Table*
3. Choose a style and confirm the data range



Times of the Day	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
9:00:00 AM		54	59					113
10:00:00 AM		23	23					46
11:00:00 AM		12	46					58
12:00:00 PM		6						6
1:00:00 PM	6	35						41
2:00:00 PM	8	56	23					87
3:00:00 PM	15	39	13					67
4:00:00 PM	22	123	17					162
5:00:00 PM	56							56
6:00:00 PM								0
7:00:00 PM								0
8:00:00 PM								0
9:00:00 PM								0
Total	107	348	181	0	0	0	0	636

Techniques: Styles

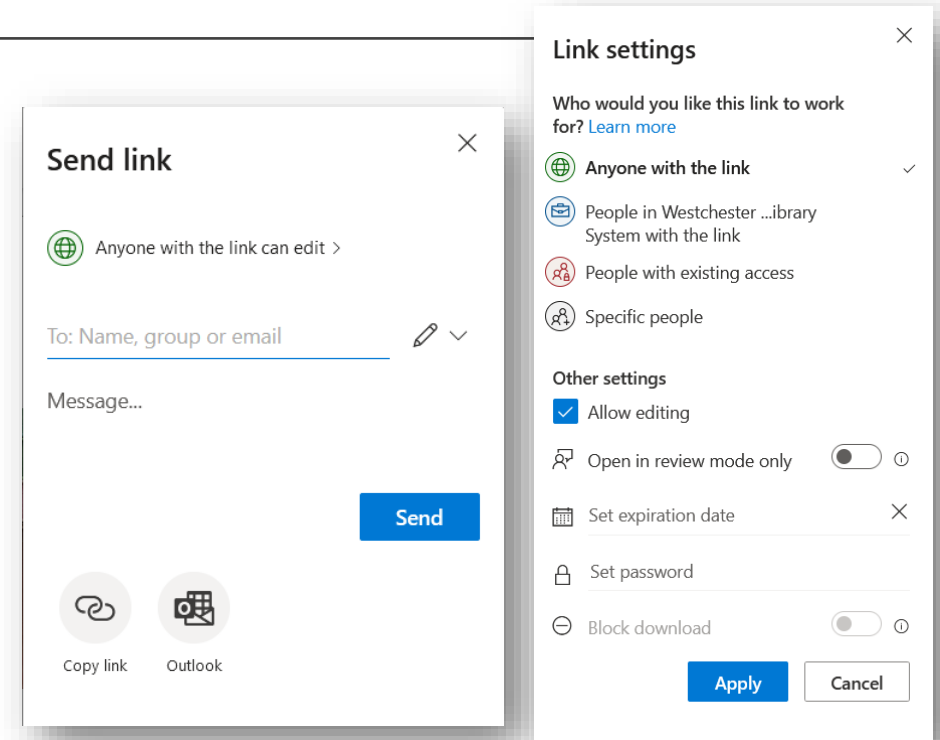
Highlight cells and apply a style to create clarity and interest



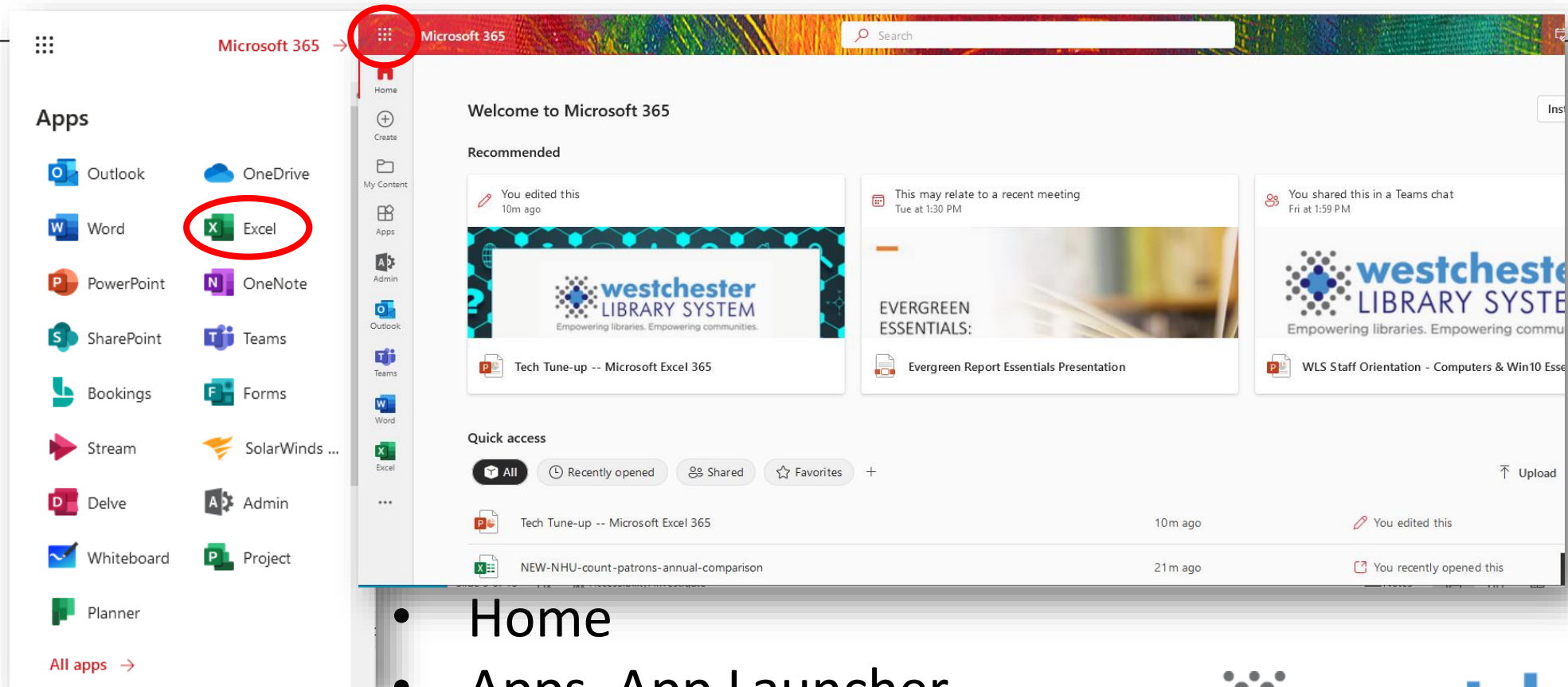
Techniques: Share

365 Share means you don't have to download, email, upload versions to collaborate

- Edit is set by default
- Set to
 - Read only
 - Review only mode (comments but no edits)
 - Choose a date when access expires
- Copy and send link
Don't use the Message feature, which uses Outlook

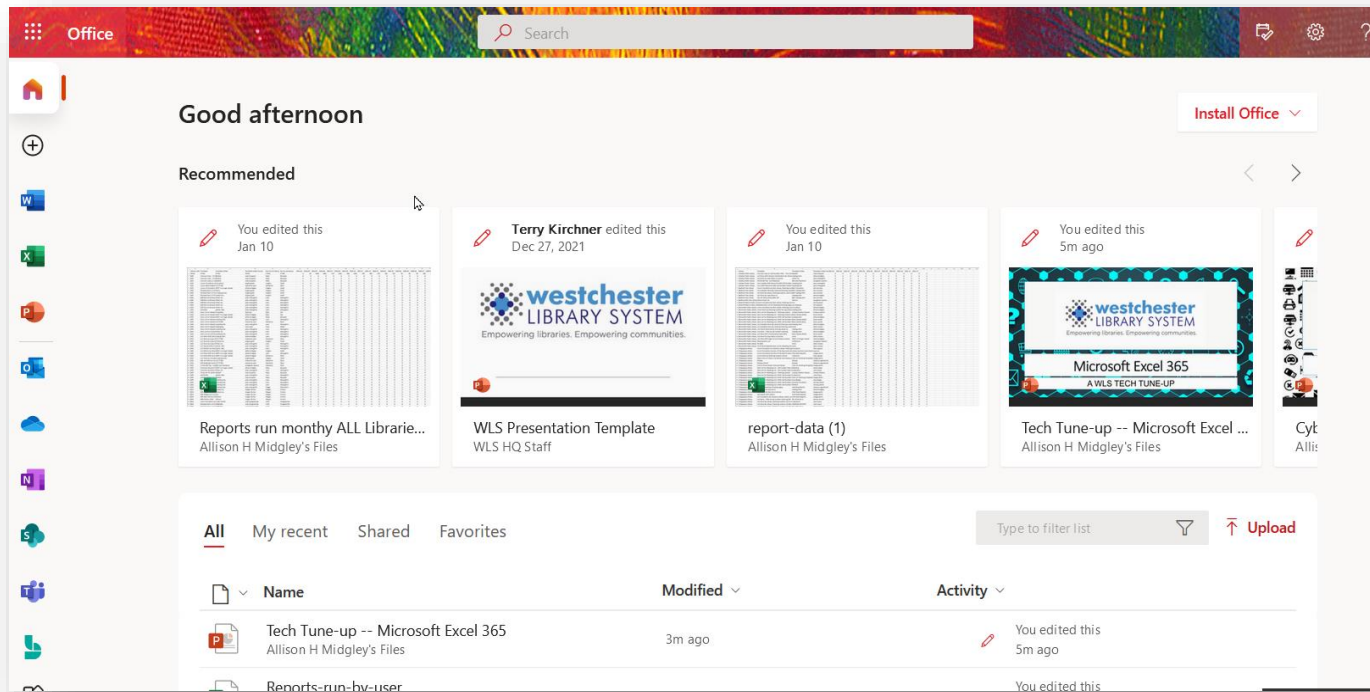


Online Office Interface



- Home
- Apps, App Launcher
- Upload

Online Office Search and Files



Search Office365 for

- Files
- People
- Teams
- Help

Links & Support

- [Excel help & learning](https://support.microsoft.com/en-us/excel) - <https://support.microsoft.com/en-us/excel>
Searchable help, video tutorials, step-by-step articles
- Use LinkedIn Learning
- [GCFGlobal Excel](https://edu.gcfglobal.org/en/topics/excel/) <https://edu.gcfglobal.org/en/topics/excel/>
- Training@wlsmail.org
- Support@wlsmail.org

Allison Midgley

Training@wlsmail.org

Amidgley@wlsmail.org