LIBRARY SYSTEM

Empowering libraries. Empowering communities.

More Microsoft Excel 365

A WLS TECH TUNE-UP

Agenda

In this workshop, learn to

- get a start using pivot tables
- summarize with charts and graphs
- use conditional formatting
- work with simple formulas
- layout and printing

For this workshop, you should be familiar with these essentials which were covered in the recent Tech Tune-up: Excel 365 webinar

- •Layout and navigation
- •Data entry
- •Sorting and filtering
- •Simple tables



Pivot tables

- Summarize ullet
- Analyze •
- Explore •
- Present summary data ullet
- Insert > Pivot table ullet
- Drag Fields to areas •
- **Change Values function** • if needed
- Format \bullet

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Pivot Tables Purpose

- Summarize ullet
- Analyze •
- Explore •
- Present summary data •

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Pivot Tables

- Insert > Pivot table
- Drag Fields to areas
- Change Values function
 if needed
- Format

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LIBRARY SYSTEM

Tables, Styles

- Highlight the cells that you want in your table
- Go to Insert > Table to create the table

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Charts and Graphs

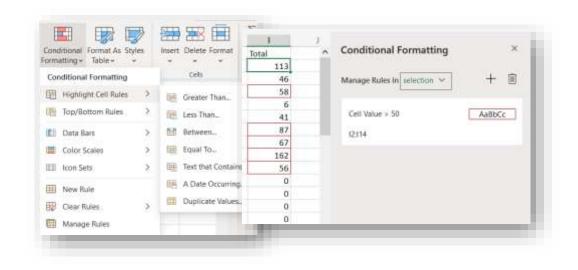
- Highlight the cells that you want in your graph
- Go to Insert > Charts
- Edit
 - Data included
 - Layout
 - Title

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Conditional Formatting

- Conditional Formatting
 - Set rules for when data meets your criteria
 - Choose color or shape codes to apply the rules





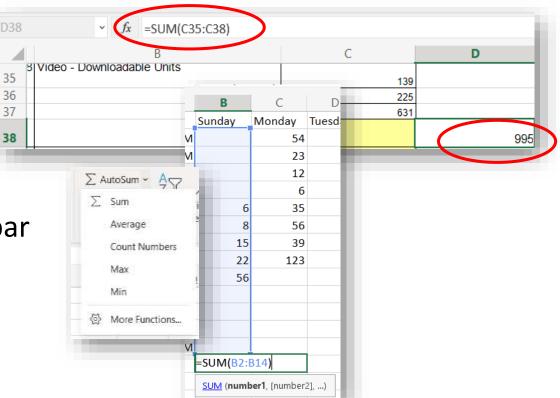
Simple Functions

AutoSum – Sum, Average, Count

- Select the cell where you want the total to display
- Press enter to use the highlighted cells or highlight the desired cells and then enter

Calculations can be entered in the formula bar

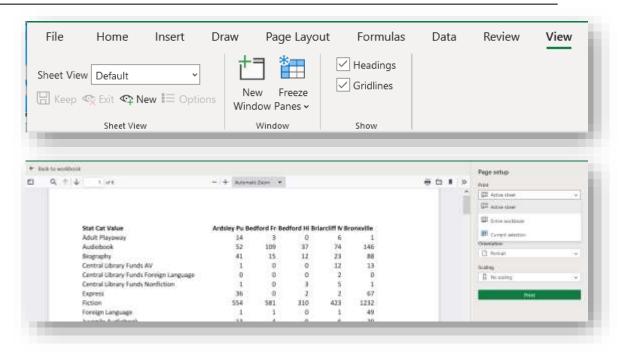
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- Subtraction =(D4-C4)
- Multiplication =(36*3), =(C2*G2)
- Division =(56/2)
- SUM, AVERAGE, ROUNDUP, ROUNDDOWN
- COUNT (Counts cells with numbers) COUNTA (Counts non-empty cells)



westchester

Page Setup and Printing

- Freeze Panes
- Choose spreadsheet, workbook, or selected cells
 - Select cells to print a range, especially if you want to print blank cells
- Hide columns as needed
- Page orientation





Sharing

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

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To: Name, group or email	Anyone with the link
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Copy link Outlook	🛅 Set expiration date 🛛 🗙
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Office versions



Office 365

- On your library computer, open Excel. If needed sign in with your Active Directory account: *firstname.lastname@westchesterlibraries.org*
- If you save files to OneDrive, you can also open your browser, go to office.com, and sign in
- Like Google Drive and Workplace
- Some features are only in the desktop app, like macros, pivot tables, and mail merge



Links & Support

- <u>Excel help & learning</u> <u>https://support.microsoft.com/en-us/excel</u> Searchable help, video tutorials, step-by-step articles
- Use LinkedIn Learning
- Microsoft Support
 - **PivotTables and Charts**
 - <u>Create a PivotChart</u>
- <u>GCFGlobal Excel</u> https://edu.gcfglobal.org/en/topics/excel/
- Training@wlsmail.org
- <u>Support@wlsmail.org</u>

