



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
- Analyze
- Explore
- Present summary data
- Insert > Pivot table
- Drag Fields to areas
- Change Values function if needed
- Format

Category	Title	Start Date	Start Time	End Time	Presenter	First Name	Last Name	Attendance	Registratic	Custom Q	Status
eResources	Digital Resources: Health & Wellness	10/14/2022	1:30:00 PM	3:00:00 PM	Allison Mii	Evgenia	Nikolopou	3		John C Hai	Registered
eResources	Digital Resources: Health & Wellness	10/14/2022	1:30:00 PM	3:00:00 PM	Allison Mii	Susan	Ackerman	3		Mamaroni	Registered
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Evergreen	Evergreen Essentials: Reports	10/17/2022	1:00:00 PM	3:00:00 PM	Allison Mii	Terry	Numa	8		Mamaroni	Registered
Evergreen				3:00:00 PM	Allison Mii	Diana	Wendell	8		Mount Kis	Registered
Evergreen				3:00:00 PM	Allison Mii	Elizabeth	Joyce	8		NOR	Registered
Evergreen				3:00:00 PM	Allison Mii	Alan	Ramsay	8		pound ridj	Registered
Evergreen				3:00:00 PM	Allison Mii	Nikki	Rank	8	CRO	Croton Fre	Registered
Evergreen				3:00:00 PM	Allison Mii	Marie	Nania	8	LEW	Lewisboro	Registered

PivotTable Fields

Choose fields to add to the report and drag them between the areas below:

Search

- ☒ Category
- ☒ Title
- ☐ Start Date
- ☐ Start Time
- ☐ End Time
- ☐ Presenter
- ☐ First Name
- ☐ Last Name
- ☐ Attendance
- ☒ Registration Notes
- ☐ Custom Questions Answ...
- ☐ Status

Filters

Rows

Title

Columns

Category

Values

Count of Registration Notes

Attendance By Session and Category

Count of Registration Notes	Column Labels			
Row Labels	Digital Literacy	eResources	Evergreen	Grand Total
Digital Literacy: LibreOffice	13			13
Digital Resources: Health & Wellness		3		3
Digital Resources: How-tos and Hobbies		1		1
Digital Resources: OverDrive and Libby Essentials		5		5
Evergreen Catalog Discovery			5	5
Evergreen Essentials: Circulation			2	2
Evergreen Essentials: Holds			1	1
Evergreen Essentials: Patrons			2	2
Evergreen Essentials: Reports			17	17
Evergreen Essentials: Tech. Services			8	8
Evergreen Plus: Understanding Bills			2	2
Evergreen Q&A			17	17
Evergreen Reports For Collection Development			4	4
Evergreen: Setting Up Recurring Reports			3	3
Microsoft Office 365 & Teams				4
Tech Tune-Up: Google Calendar, Time Management and More	4			4
Tech Tune-Up: Google Communication - Email and More				

Pivot Tables Purpose

- Summarize
- Analyze
- Explore
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Evergreen Q&A			17	17
Evergreen Reports For Collection Development			4	4
Evergreen: Setting Up Recurring Reports			3	3
Microsoft Office 365 & Teams	4			4
Tech Tune-Up: Google Calendar, Time Management and More	4			4
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Evergreen				3:00:00 PM	Allison Mii	Elizabeth	Joseph	8	NEW	New Roch	Registered
Evergreen				3:00:00 PM	Allison Mii	Sarah	Rodriguez	8	SCA	Scarsdale	Registered
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Choose fields to add to the report and drag them between the areas below:	
<input checked="" type="checkbox"/> Category <input checked="" type="checkbox"/> Title <input type="checkbox"/> Start Date <input type="checkbox"/> Start Time <input type="checkbox"/> End Time <input type="checkbox"/> Presenter <input type="checkbox"/> First Name <input type="checkbox"/> Last Name <input type="checkbox"/> Attendance <input checked="" type="checkbox"/> Registration Notes <input type="checkbox"/> Custom Questions Answ... <input type="checkbox"/> Status	<div>Filters</div> <div>Rows</div> <div>Columns</div> <div>Values</div>

Tables, Styles

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

The screenshot shows an Excel spreadsheet with a table of data. The table has columns for 'Times of the Day', 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Total'. The data is as follows:

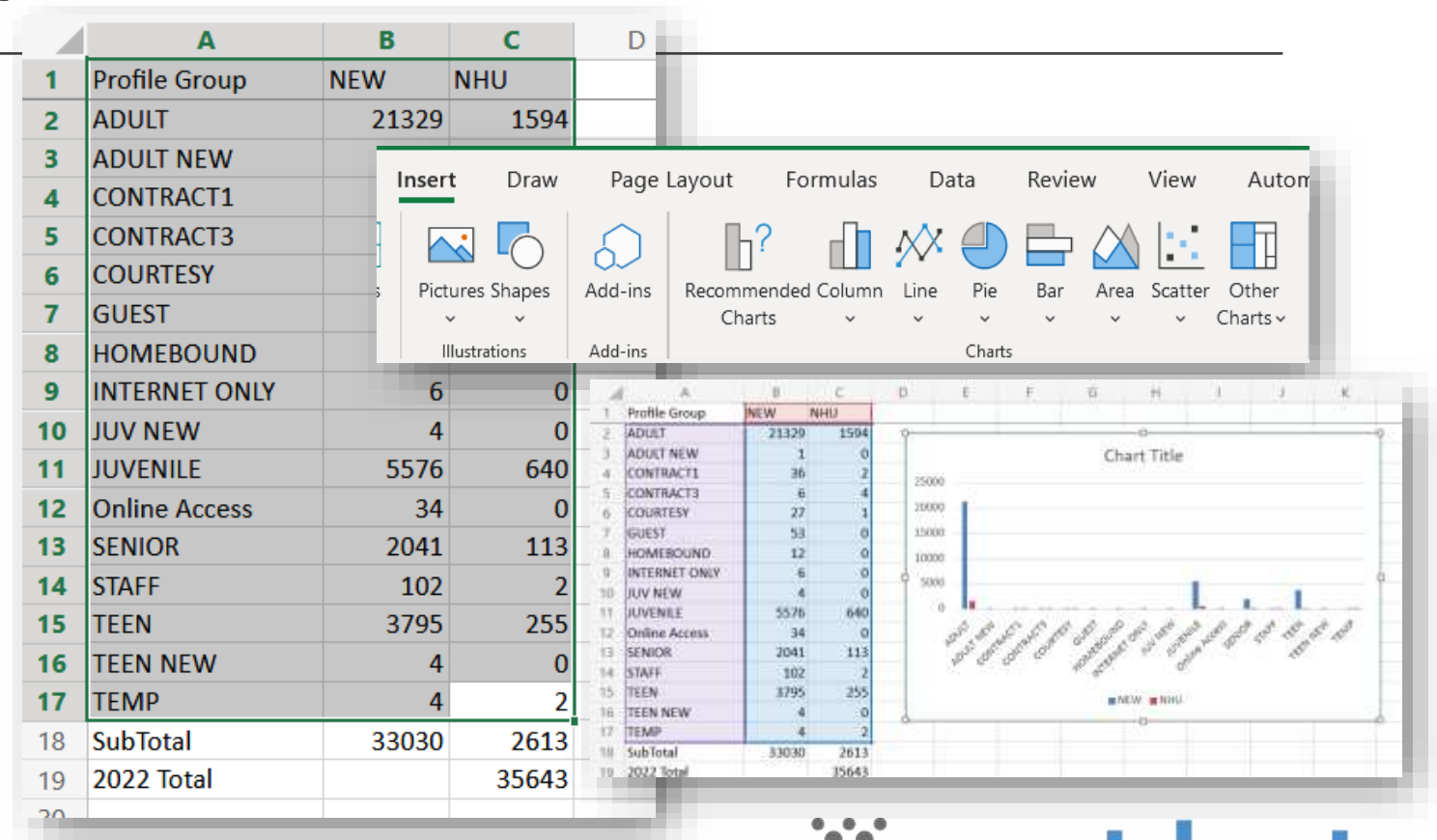
Times of the Day	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
9:00:00 AM		54	59					113
10:00:00 AM		23	23					46
11:00:00 AM		12	46					58
12:00:00 PM		6						6
1:00:00 PM	6	35						41
2:00:00 PM	8	56	23					87
3:00:00 PM	15	39	13					67
4:00:00 PM	22	123	17					162
5:00:00 PM	56	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

The 'Create Table' dialog box is open, showing the range A1:I15. The checkbox 'My table has headers' is checked. The 'OK' button is highlighted.

On the right, a preview of the resulting table is shown, which matches the data in the spreadsheet.

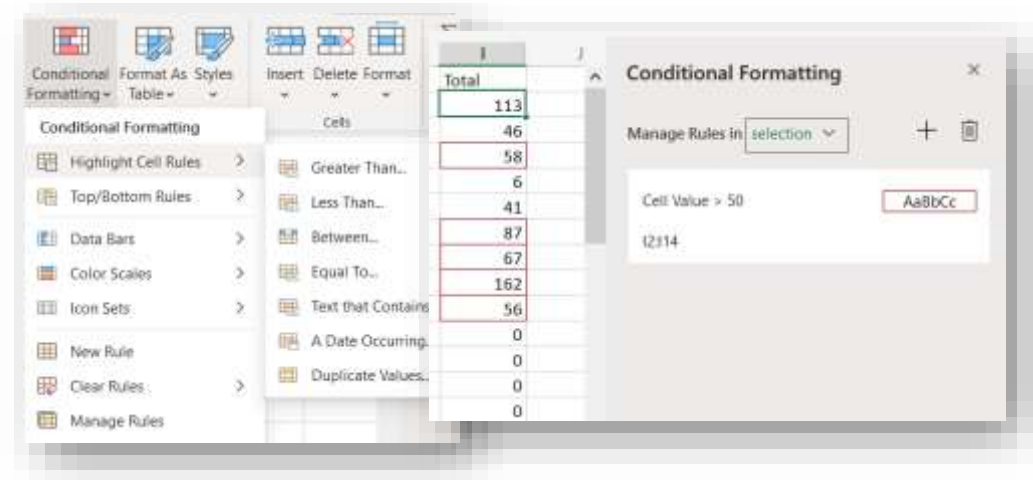
Charts and Graphs

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



Conditional Formatting

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



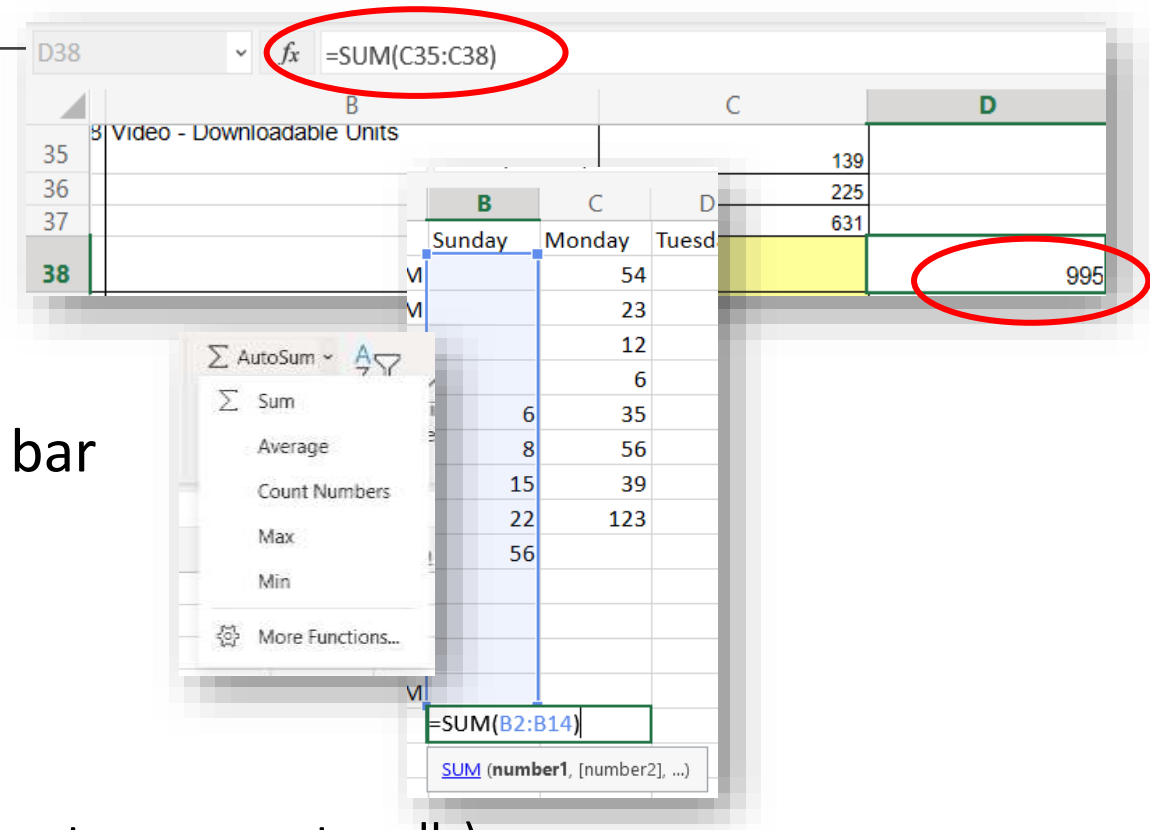
Simple Functions

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

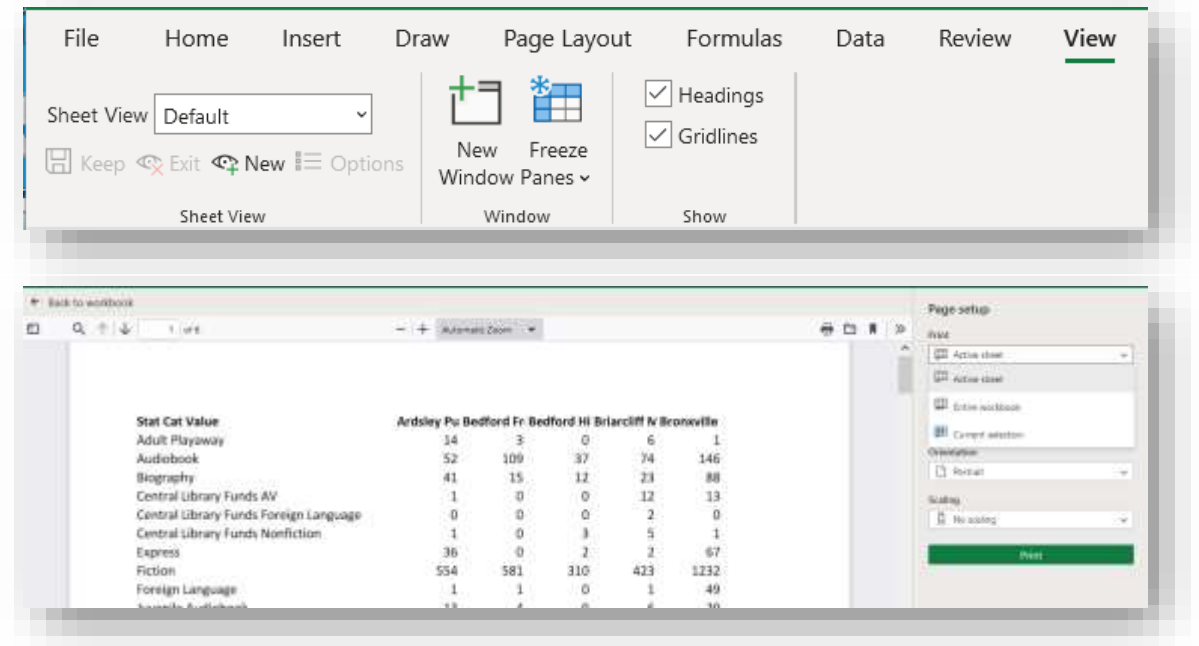
Calculations can be entered in the formula bar

- Addition $= (C2 + C16 + F45)$, $= \text{SUM}(C2:C16)$
- 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)



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

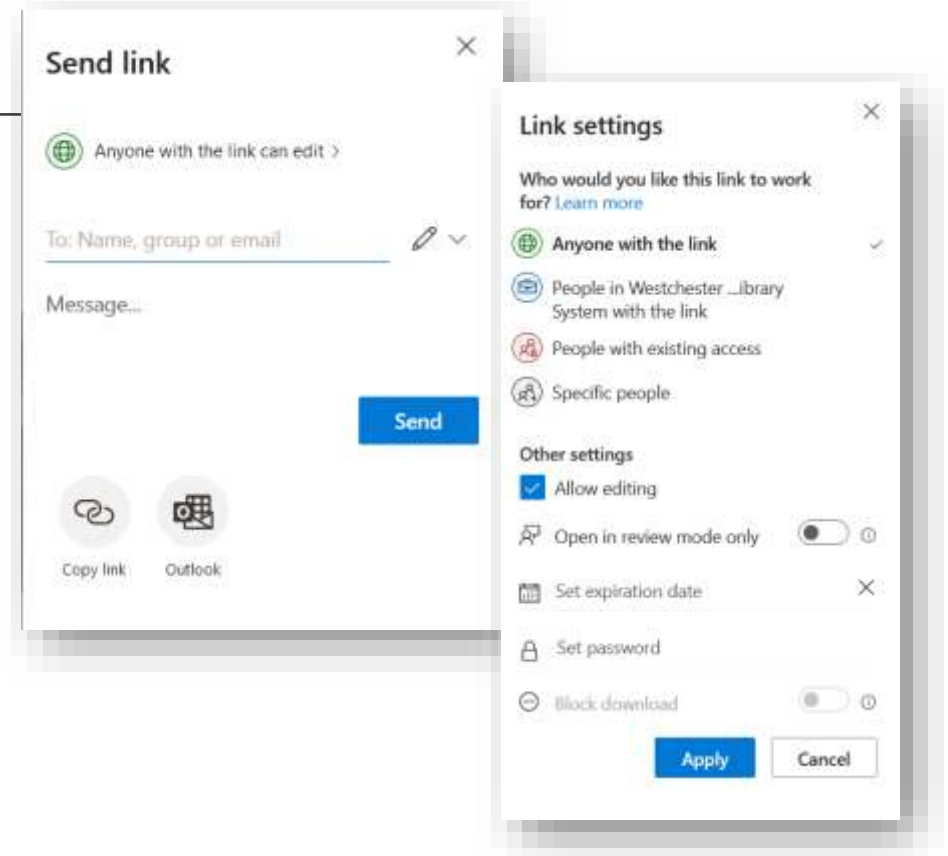


Sharing

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****



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

- [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
- Microsoft Support
 - [PivotTables and Charts](#)
 - [Create a PivotChart](#)
- [GCFGlobal Excel](https://edu.gcfglobal.org/en/topics/excel/) <https://edu.gcfglobal.org/en/topics/excel/>
- Training@wlsmail.org
- Support@wlsmail.org