

THE WORKBOOK

The image shows a screenshot of the Microsoft Excel application interface. The title bar at the top indicates the file is named "DEMO FILE". The ribbon is set to the "Home" tab, which includes groups for Font, Alignment, Number, Styles, Cells, and Editing. The formula bar shows the active cell is B2, containing the value 100. The worksheet grid displays columns A through S and rows 1 through 28. A small table of data is visible in the first four rows of column B: 100, 200, and 300. The status bar at the bottom provides summary statistics for the selected range: Average: 200, Count: 3, Sum: 600. The zoom level is set to 100%.

RIBBON

FORMULA BAR

COLUMNS

ROWS

CELLS

SHEETS

STATUS BAR

QUICK CALCULATIONS

ZOOM

Column	Row 1	Row 2	Row 3	Row 4
A				
B		100	200	300
C				
D				
E				
F				
G				
H				
I				
J				
K				
L				
M				
N				
O				
P				
Q				
R				
S				

THE ANATOMY OF A WORKBOOK

The entire file is called a **workbook**. When you save a workbook, the file type is .xls; .xlsx; .csv (like pdf, png, jpg). Workbooks are comprised of:

WORKSHEET, OR JUST SHEET

A single page within a workbook. You can separate sheets by the type of data you are trying to represent, and then link them together.

COLUMNS & ROWS

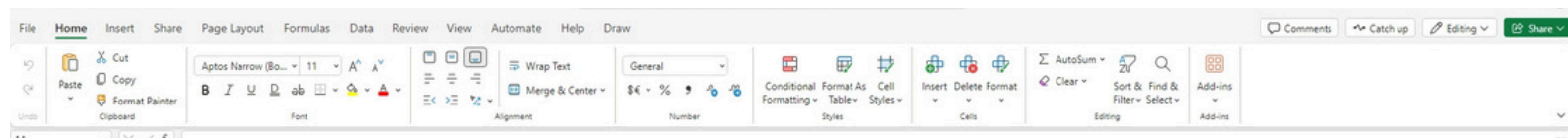
Columns run vertically across the worksheet and are labeled with letters (A,B,C, etc.) at the top

Rows run horizontally and are labeled with numbers (1,2,3) on the left side.

CELLS

Cells are the individual boxes in a worksheet where you enter data, such as numbers, text, or formulas. Each cell has a unique address based on its column and row location, kind of like reading the longitude and latitude on a map, or playing Battleship!

THE RIBBON



The **ribbon** is the toolbar located at the top of the window that organizes commands into tools and tabs.

HOME

Common tools for formatting and editing, like fonts and alignment.

INSERT

Adding elements like charts, tables, and images

DATA

Tools for importing, sorting, and filtering data.

VIEW

Controls how you view and interact with your workbook; like zoom and layout

THE STATUS BAR

Located at the bottom of the window to show information about the worksheet, display summary data, and switch views.

ZOOM CONTROLS

Control the zoom of the workbook. This does not affect the printing of the document.

QUICK CALCULATIONS

When data is selected, the status bar will display average, sum, and count automatically.



Average: 266.6666667 Count: 3 Sum: 800

VIEW CONTROLS

Allows you to toggle between views (normal, page layout, page break) to manage printing. Only available on desktop version.

WHAT DO YOU MEAN, DESKTOP VERSION?

WEB

Sharing files, collaborating with others, linking data across sharepoint.

This version is used automatically whenever you open an excel file from sharepoint or a url.

DESKTOP

Working with sensitive data, printing, or complex formulas.

This version is used automatically when you open an excel file that is downloaded to your computer.



DON'T WORRY! YOU CAN PRETTY MUCH SWITCH BETWEEN THESE VERSIONS WHENEVER YOU WANT IN THE SAME FILE. THERE WILL JUST BE A FEW FEATURES MISSING.

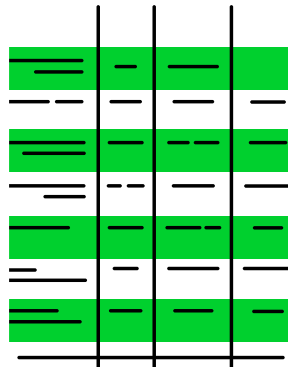
DASHBOARD SETUP

The main objective of this course is to help you create a dashboard to filter and gain insights from your data. Dashboards are usually set up in groups of three or more sheets.

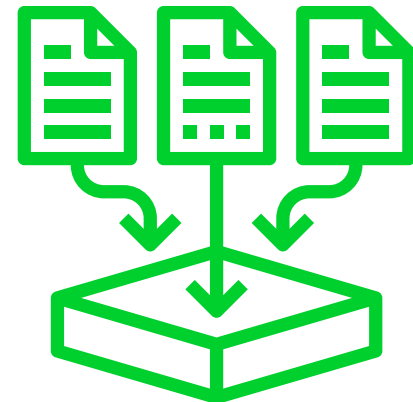
SHEET 1: DASHBOARD



SHEET 2: REPORT

A table icon representing a report. It consists of a grid with 5 rows and 4 columns, with alternating green and white rows, symbolizing structured data presentation.

SHEET 3: RAW DATA



Raw data is flowing from right to left, getting more specific as you go.

BUILDING YOUR FIRST RAW DATA SET

What kinds of questions should this data be able to answer?

Who will be using this dashboard, and how will they use it?

What are the key metrics or data points we need to track? Why?

Where is the data coming from? How do you ensure the data is correct?

CREATING A TABLE IN 5 STEPS

1

	A	B	C	D
1	First Name	Last Name	Phone Number	Date of Sale
2	Kerrie	Brinkman White	4055568989	1/10/2024
3	Cricket	Kaya	4056592558	11/1/2024
4				
5				

Put some data into your sheet, with headers in row A.

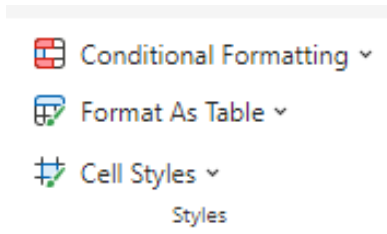
2

	A	B	C	D
1	First Name	Last Name	Phone Number	Date of Sale
2	Kerrie	Brinkman White	4055568989	1/10/2024
3	Cricket	Kaya	4056592558	11/1/2024

Select your data from top left to bottom right.

Go to Home -> Styles -> Format as Table

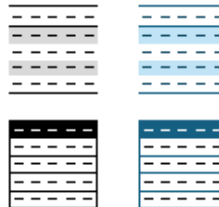
3



Select a Format

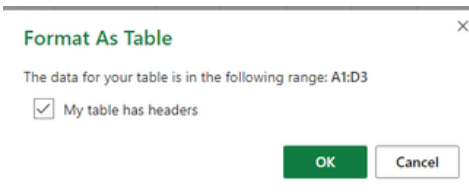
Format As Table ▼

Light



Select "My table has headers"; if you don't excel will create them for you.

5



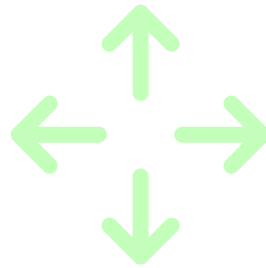
INPUTING DATA

TAB

Moves the cursor up

SHIFT+ENTER

Moves the cursor up.



SHIFT+TAB

Moves the cursor left.

ENTER

Moves the cursor down

Pssst... you can
also use the
arrow keys!

SELECTING DATA

DRAG THE MOUSE

Click and drag the mouse (cross symbol) over the data.

SELECT THE COLUMN OR ROW

You can select an entire row or column. The cursor will switch to an arrow.

CTRL + A

This shortcut will select all the data in a single sheet.

OTHER SHORTCUTS

CTRL+Z

Undo what you just did

CTRL+Y

Redo what you just undid

CTRL+S

Save your work

CTRL+C

Copy

CTRL+V

Paste

CTRL+X

Cut

AUTOFILL

Autofill will copy an entry, or recognize a pattern of numbers and finish the sequence for you.

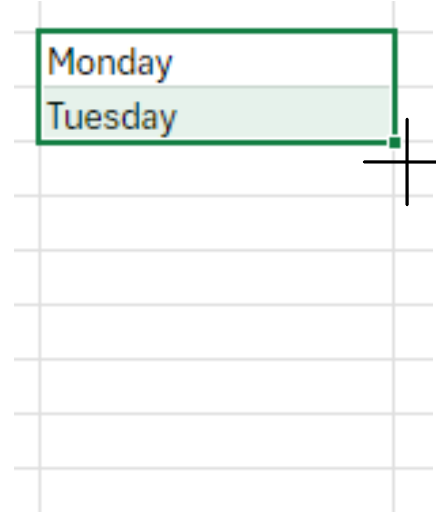
THE FILL HANDLE

EXAMPLE:

Autofill can copy the data in a cell to the whole row.

Autofill can finish a weekday sequence, ex: Monday, Tuesday....

Or, it can continue a sequence of dates, like 11/1/2024, 11/2/2024...



Monday
Tuesday



Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Hover over the bottom left of your selected data, then drag the fill handle down to fill in the data.

OTHER FORMATTING



Once you have your data selected, you can apply formatting!

FONT

Adjust text style, size, color, and effects (bold/italic) to enhance readability.

ie: you might make your headers bold, or you might want to highlight certain numbers.

ALIGNMENT

Controls the placement of text within a cell, letting, merging cells (more on that later) and orientation.

NUMBER

Formats the type of data displayed in a cell (ie currency, percentage, date...) ensuring values are represented accurately.

CREATING CONSISTENT DATA

First Name	Last Name	Phone Number	Date of Sale
Cricket Kaya		4055568989	January 10th
Cricket	Kaya	(405)-569-5598	11/1/2024



VS

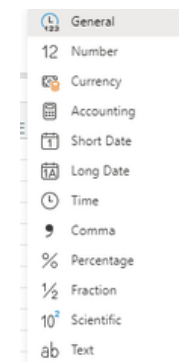
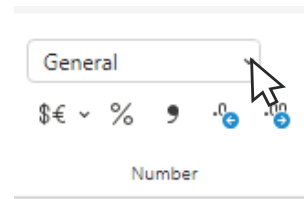
First Name	Last Name	Phone Number	Date of Sale
Kerrie	Brinkman White	4055568989	1/10/2024
Cricket	Kaya	4056592558	11/1/2024



To ensure your data is consistent, select all data of the same type (or the whole column) and then go to

Home-> Number-> Dropdown

and select the type of data.



HOMework

(sorry :P)

Create a new web workbook in the class folder titled yourname_workbook.

Create three sheets in your workbook titled Dashboard, Report, Raw Data.

In Raw Data, use the keyboard shortcuts to put input your data into the sheet. Format it as a table.

Apply basic formatting (bold/italic, highlight or borders) to your table to make the headers stand out.