Excel Basics: Step-by-Step Guide

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created for LSNTAP

Transpose Data

Goal: Reorient your data — flipping rows into columns or columns into rows — so that your data layout makes more sense.

1. Select the data you want to transpose.
    a. Example: Select cells B2:D3 (your County and Zipcode row).
2. Copy the data — press Ctrl + C (or Cmd + C on Mac).
3. Click an empty cell where you want to place the transposed data (for example, A6).
4. Go to the Home tab → Paste dropdown → Transpose, or right-click → Paste Special → Transpose → OK.
5. Adjust headers and column widths as needed.

Result: Your horizontal data now appears vertically (or vice versa).

Freeze Panes

Goal: Keep headers or key columns visible while scrolling.

1. Click in the cell below the row(s) and to the right of the column(s) you want to freeze (for example, B2 to freeze Row 1 and Column A).

2. Go to View > Freeze Panes > Freeze Panes.

Result: The chosen rows and columns remain visible when you scroll.

To Unfreeze:

Go to View > Freeze Panes > Unfreeze Panes.

Hiding and Unhiding Columns

Goal: Simplify your view by hiding nonessential columns and revealing them again when needed.

Hiding Columns

1. Select the column letters you want to hide (for example, E through G).

2. Right-click the selected columns and choose Hide or go to Home > Format > Hide & Unhide > Hide Columns.

Result: The columns disappear, with double lines between letters showing where they are hidden.

Unhiding Columns

1. Find the gap in column letters (for example, D followed by H).

2. Select the columns on either side (D through H).

3. Right-click and select Unhide or go to Home > Format > Hide & Unhide > Unhide Columns.

Result: Hidden columns reappear with their data intact.

Sorting and Filtering Data

Goal: Learn to sort and filter data using two related text columns – Legal Problem Code and Case Close Reason.

Multi-Level Sorting

1. Click anywhere in the dataset.

2. Go to the Data tab and click Sort.

3. Choose 'Legal Problem Code' under Column, Values under Sort On, and A to Z under Order.

4. Click Add Level.

5. Choose 'Case Close Reason' under Column, Values under Sort On, and A to Z under Order.

6. Click OK.

Result: Data is grouped by Legal Problem Code, then alphabetically by Case Close Reason.

Multi-Level Filtering

1. Select the header row in your data and go to Data > Filter.

2. Click the drop-down arrow next to Legal Problem Code, uncheck Select All, and check only Public Housing.

3. Click OK.

4. Click the arrow next to Case Close Reason, uncheck Select All, and check only Resolved Outside Litigation.

5. Click OK.

Result: Only rows meeting both conditions remain visible.

Entering Basic Formulas: SUM, AVERAGE, and COUNT

Goal: Learn how to calculate totals, averages, and counts using a single column of numeric data, such as Client Settlement Fund Used (Amount).

1. **SUM – Add Up All the Numbers**

   a. Click the cell below your last amount, or where you want to display your total (for example, C1005).

   b. Type: =SUM(C2:1004)

   c. Press Enter.

   Result: The total of all values in that column appears.

2. **AVERAGE – Find the Mean (Typical) Value**

   a. Click the cell below your last amount, or where you want to display your total (for example, C1005).

   b. Type: =AVERAGE(C2:C1004)

   c. Press Enter.

   Result: Displays the average settlement amount per client.

3. **COUNT – Count the Number of Entries**

   a. Click another empty cell.

   b. Type: =COUNT(O2:O19)

   c. Press Enter.

   Result: Shows how many entries contain numeric values.

Tips and Tricks:

· Use Alt + = to quickly insert a SUM formula.

· COUNT counts only numbers; COUNTA counts numbers and text.

Pivot Tables

Goal: Summarize large datasets quickly using a PivotTable.

1. Click anywhere in your dataset.

2. Go to Insert > PivotTable.

3. Choose Current Worksheet and click OK.

4. In the PivotTable Fields pane:

    a. Drag **'County'** to Rows

    b. Drag **'Vet Status'** to columns

    b. Drag **'Case ID'** to Values and set to Count

Result: Displays veteran status by County.

Optional:

- Change Value Field Settings to Average or Count.

- Add 'Zipcode' to Columns for a two-dimensional summary.

Using VLOOKUP and XLOOKUP

Goal: Use lookup formulas to fill in descriptions from a reference table.

VLOOKUP

1. In cell F2, type: =VLOOKUP(E2, $K$2:$L$4, 2, FALSE)

2. Press Enter.

3. Copy down the column.

Result: Excel looks up the Funding Code in column E and returns its description from the table in K:L.

XLOOKUP

1. In F2, type: =XLOOKUP(E2, $K$2:$K$4, $L$2:$L$4, "Code Not Found")

2. Press Enter.

3. Copy down.

Result: XLOOKUP finds the description more flexibly, without needing a column number.

Text Separation with TEXTSPLIT or Text to Columns

Goal: Separate a single value, such as a Case ID (23-0130307), into two parts.

Method 1 – Text to Columns

1. Create a new column nexxt to yoru Case ID column

2. Select the Case ID column.

3. Go to Data > Text to Columns.

4. Choose Delimited and click Next.

5. Check 'Other' and enter a dash (-).

6. Click Next, then Finish.

Result: The Case ID is split into two new columns: Case Year and Case Number.

Method 2 – TEXTSPLIT Formula

1. Click an empty cell next to the Case ID.

2. Type: =TEXTSPLIT(A2, "-")

3. Press Enter.

Result: The Case ID splits into two columns dynamically.

Combining Text with CONCATENATE

Goal: Combine multiple text fields, such as County and Zipcode, into one cell.

1. Add a new column labeled Combined Location.

2. In the first cell, type: =CONCATENATE(A2, " ", B2)

3. Press Enter.

4. Copy the formula down the column.

Result: Each cell shows County and Zipcode together, such as 'New Castle 19810'.

Simple Excel Keyboard Shortcuts for Beginners

Selecting & Highlighting

- **Select whole column:** Ctrl + Space
- **Select whole row:** Shift + Space
- **Select a range:** Click first cell → hold **Shift** → click last cell
- **Select entire sheet:** Ctrl + A (press twice if needed)

Basic Editing

- **Copy:** Ctrl + C
- **Paste:** Ctrl + V
- **Cut:** Ctrl + X
- **Undo:** Ctrl + Z
- **Redo:** Ctrl + Y

Navigation

- **Move to end of data in a column:** Ctrl + ↓
- **Move to start of data:** Ctrl + ↑
- **Move to far-right of row:** Ctrl + →

Formatting

- **Bold:** Ctrl + B
- **Italic:** Ctrl + I
- **Underline:** Ctrl + U
- **Open Format Cells window:** Ctrl + 1

Quick Actions

- **Sum formula:** Alt + =
- **Find:** Ctrl + F
- **Find & Replace:** Ctrl + H
- **Save:** Ctrl + S