

Tip Sheet: Excel

Charity Insights Canada Project (CICP)

Community Education Centre (CEC): <https://carleton.ca/cicp-pcpob/cec/>



Anatomy of a Spreadsheet

The Ribbon at the top of Excel contains tabs such as Home, Insert, and Data. Each tab groups related tools and commands. Look for the tiny arrows in the right-hand corner of the tabs for more options.

Tip: If you forget where a tool lives, use the Search box in Excel.

Columns, Rows, Cells, and Range

- Columns run vertically and are labeled with letters (A, B, C...).
- Rows run horizontally and are labeled with numbers (1, 2, 3...).
- A cell is where a column and row meet (example: A1).
- A Range is a group of selected cells (example: A1:C10).

Tip: You can check the cell reference as it is shown in the Name Box (top left of sheet)

Entering Data

“Select to Affect”: Select a cell and start typing to enter data. When done, press [Enter]. You will move to the next cell DOWN.

- You can also press these after entering data:
- [Shift + Enter] → Move to next cell UP
- [Tab] → Move to next cell RIGHT
- [Shift + Tab] → Move to next cell LEFT

Fill handle: the tiny green box in the bottom right of a cell. Use this to copy formulas or patterns in the data. Excel tries to identify the pattern for you.

Tip: [Ctrl + A] or [⌘ + A] will select the table contents; press it again to select the formatted headers, and again to select the whole sheet.

Editing Data

- **click on a cell** and type to write over the data in the cell
- **double click in a cell** to modify the existing data in the cell

Tip: To undo press [Ctrl + Z] on a PC or [⌘ + Z] on a Mac

Cut, Copy and Paste Data

You can cut, copy, and paste a cell, column, row, or range.

Keyboard shortcuts for these options:

- To copy: PC [Ctrl + C] Mac [⌘ + C]
- To cut: PC [Ctrl + X] Mac [⌘ + X]
- To paste: PC [Ctrl + V] Mac [⌘ + V]





Tip: If you select a column, row, cell or range to copy or cut, and make a mistake, just hit escape to deselect.

Move handle: The four arrows that appear when you hover over the borders of a cell, column, row, or range that is selected. You can click, hold down, and then drag the contents to another part of the spreadsheet.

Tip: When moving or pasting data, if there is already data where you move or paste, it will be overwritten. Instead of using 'Paste' when inserting columns or rows between existing columns or rows of data, use the 'Insert cut cells'.

Simple Formatting

In the Home tab there are options to change the formatting of your data:

- Font type, colour and size
- Fill colours for cells or ranges
- Borders
- Alignment of data in cells (top, bottom, right or left alignment)

Tip: Text is best aligned to the left and numbers to the right. You may notice this is how Excel aligns the data when you first enter it.

Sorting Data

Sorting Data arranges your data in a specific order based on one or more columns, such as alphabetical order, numerical size, or date.

How to Sort Data:

- Select a cell in the column you want to sort the data by
- Go to the Data tab on the ribbon, select Sort and Filter for options
- Make sure to indicate if you have headers in your data

Tip: If you go to Sort and Filter – Custom Sort, you can sort data by more than one column in a hierarchical order.

Filtering Data

Filtering temporarily hides rows that do not meet specific criteria, allowing you to view only the data you need without deleting anything.

How to Filter Data:

- Choose any cell in the table
- Go to Sort and Filter in the Home tab
- Click Filter (dropdown arrows then appear in column headers)
- Click a dropdown arrow and check/uncheck items
- Use Clear Filter if you want to filter another column
- If you are done with filtering, hit the Filter button to stop the filter option





Tip: If you convert your data to a formatted table, column headers will have dropdown options for sorting and filtering (check out the extra resources for a video on formatting Tables)

Formulas

Excel acts like a calculator, but instead of typing numbers directly, you can use cell references (like A1 or B2).

All formulas in Excel start with an equals sign (=)

- Add: =A1 + B1
- Subtract: =A1 - B1
- Multiply: =A1 * B1
- Divide: =A1 / B1

For example, if cell A1 contains 10 and B1 contains 5, typing =A1 + B1 into another cell will return 15.

Tip: Using cell references instead of typing numbers directly allows Excel to automatically update calculations whenever data changes, saving time and reducing errors.

Functions

Excel includes built-in functions that act like advanced calculator buttons. Instead of adding or averaging numbers manually, you can let Excel do the work for you. Using functions saves time and ensures results update automatically when values change.

All functions start with an equals sign (=) and use parentheses:

- The **SUM** function adds multiple numbers or cells at once.

=SUM(A1:A5)

This adds all values from cell A1 through A5.

- The **AVERAGE** function calculates the mean (average) of a set of numbers.

Example:

=AVERAGE(A1:A5)

This adds the values in A1:A5 and automatically divides by the number of entries.

Tip: When putting in cell values or a range in a function or formula, you can select the cell or range and Excel will write it in for you.

Tip: You can also have Excel do some more of the work for you, by using options under Auto Sum Σ in the home tab. Excel will try to guess what you want to add up or find the average for.

