

Microsoft Excel Basics for Rookies

Practice Instructions

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Complete these steps to create a spreadsheet to track retirement gifts.

1. Open Microsoft Excel.

- Click the windows key and then type Excel or browse through the list of programs to find it. Hit enter -or- double click the Excel icon to open the program.
- If you work for AgriLife Extension and don't have Excel installed on your computer, please contact First Call for help. <https://firstcallhelp.tamu.edu/>

2. Open a Blank workbook.

3. Save the file to your desktop.

- Choose File > Save As > Desktop
- Name your file: *retirement-gift-tracker*
- Choose Excel Workbook and click Save

4. Starting in cell A1, add the following column titles: Date, First Name, Last Name, Donation Type, Value

- Press the tab key to move to the next adjacent cell to the right after entering a title

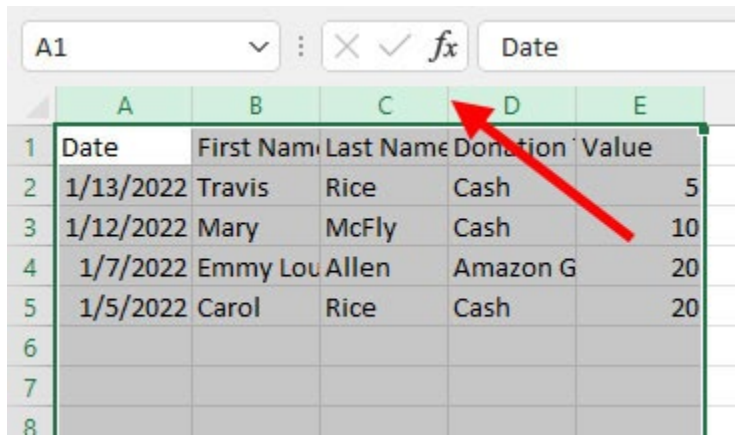
5. Starting in cell B1, add the first 4 rows of data under the correct column titles.

- 1/13/2022, Travis, Rice, Cash, 5
- 1/12/2022, Marty, McFly, Cash, 10
- 1/7/2022, Emmy Lou, Allen, Amazon Gift Card, 20
- 1/5/2022, Carol, Rice, Cash, 20

	A	B	C	D	E
1	Date	First Name	Last Name	Donation Type	Value
2	1/13/2022	Travis	Rice	Cash	5
3	1/12/2022	Marty	McFly	Cash	10
4	1/7/2022	Emmy Lou	Allen	Amazon Gift Card	20
5	1/5/2022	Carol	Rice	Cash	20
6					
7					

6. Expand the width of the columns to fit titles and data.

- Select column letters, then click a border in between 2 letters to expand everything at once
- Click and drag a column letter border for manual resizing



	A	B	C	D	E
1	Date	First Name	Last Name	Donation	Value
2	1/13/2022	Travis	Rice	Cash	5
3	1/12/2022	Mary	McFly	Cash	10
4	1/7/2022	Emmy Lou	Allen	Amazon G	20
5	1/5/2022	Carol	Rice	Cash	20
6					
7					
8					

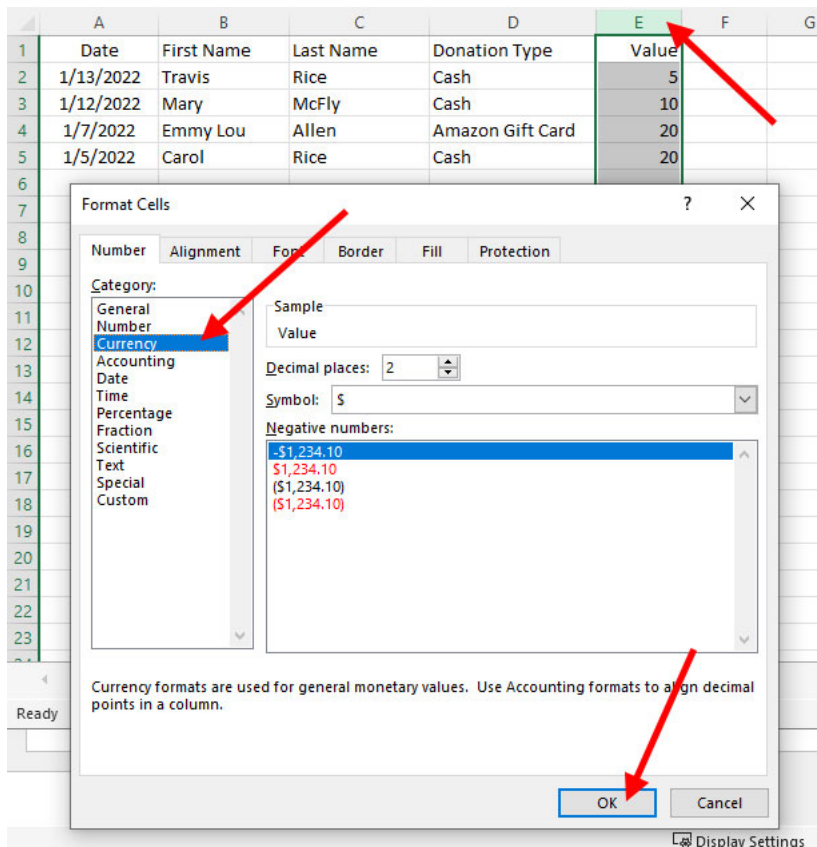
7. Center the Dates and Align Right the Values.

- Click the A above the Date column and then center: Home > Alignment > Center
- Click the E above the Value column and then align right: Home > Alignment > Right

	A	B	C	D	E
1	Date	First Name	Last Name	Donation Type	Value
2	1/13/2022	Travis	Rice	Cash	5
3	1/12/2022	Mary	McFly	Cash	10
4	1/7/2022	Emmy Lou	Allen	Amazon Gift Card	20
5	1/5/2022	Carol	Rice	Cash	20
6					
7					

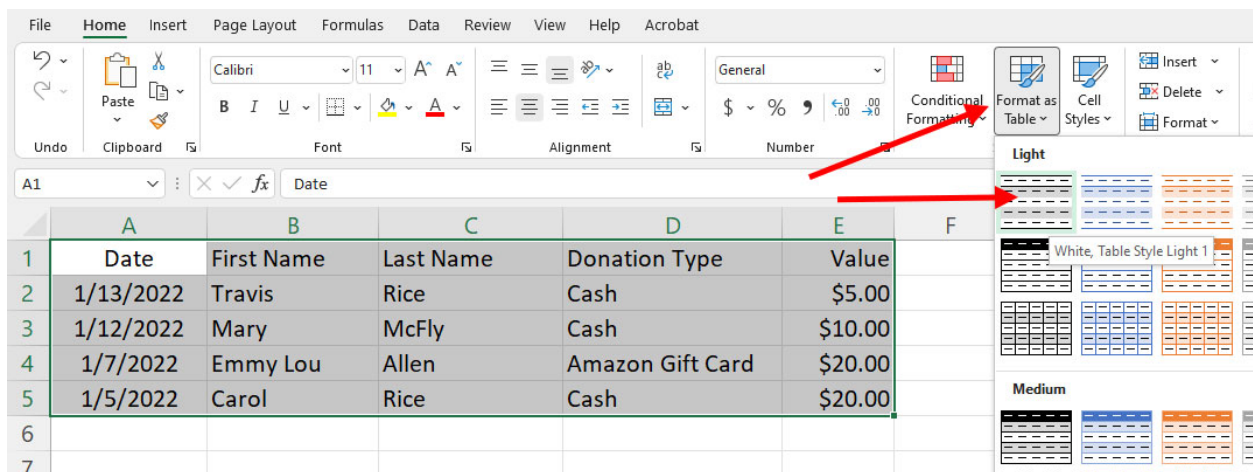
8. Format the data in the Value column as currency.

- Click on column E (Value).
- Then, right-click on column E and choose Format Cells...
- Then, Number > Currency and click the OK button.



9. Format the data in a pre-made table layout.

- Select the entire table by clicking and dragging from the first cell A1 down to the last Value cell, E5 (Shortcut for larger data sets: To select an entire table of data, click to select the first cell. Then, press Ctrl+Shift+right-arrow to select across all columns. Then, Ctrl+Shift+down-arrow to select all rows.)
- Then, choose Home > Styles > Format as Table > Light White, Table Style Light 1
- Confirm the data for your table and check My table has headers and click OK



10. Add the remaining data to the table starting on row 6. Table formatting should be applied automatically.

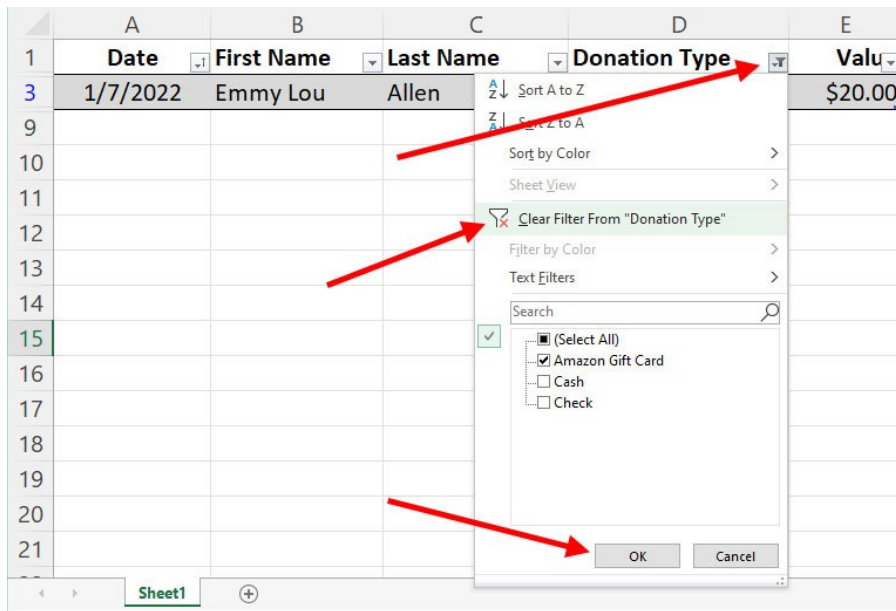
- 1/12/2022, Sally, Smith, Cash, 10
- 1/18/2022, Dan, Hale, Cash, 50
- 1/14/22, Doc, Brown, Check, 88.88

11. Try sorting and filtering the data in each column.

- Click the down arrow in the Date column. Choose Sort Oldest to Newest.
- Click the down arrow in the Donation Type column. Filter by Amazon Gift Card. Deselect Select All and then select Amazon Gift Card and click OK.

	A	B	C	D	E
	Date	First Name	Last Name	Donation Type	Value
2	1/5/2022	Carol	Rice		\$20.00
3	1/7/2022	Emmy Lou	Allen		\$20.00
4	1/12/2022	Mary	McFly		\$10.00
5	1/12/2022	Sally	Smith		\$10.00
6	1/13/2022	Travis	Rice		\$5.00
7	1/14/2022	Doc	Brown		\$88.88
8	1/18/2022	Dan	Hale		\$50.00
9					
10					
11					
12					
13					
14					
15					

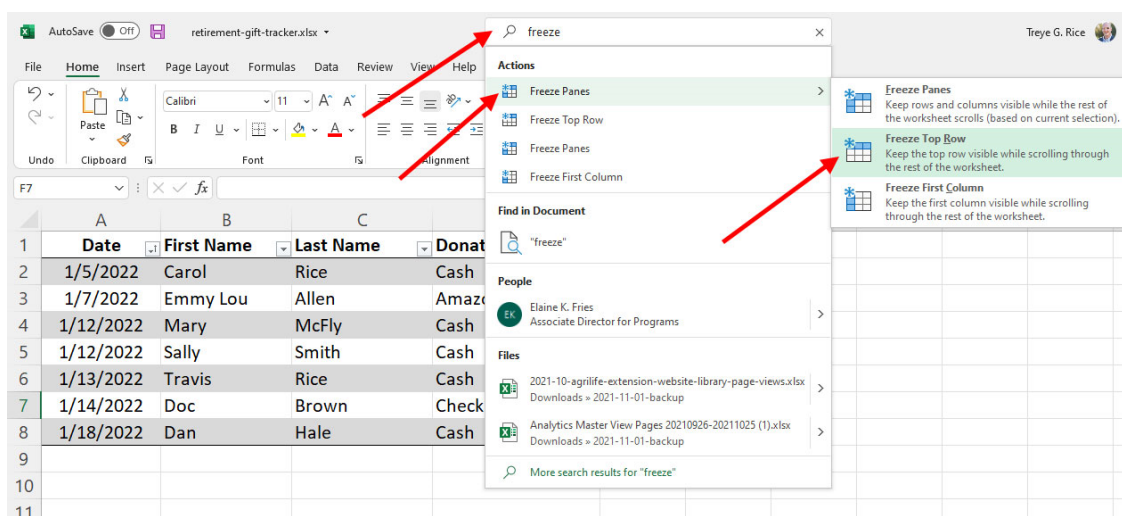
- Clear the filter by clicking the new filter button in the Donation type column. Then, choose Clear Filter from “Donation Type”. See next page for screenshot.



- Add a Number filter to the Value column. Click the down arrow in the Value column. Choose Number Filters > Greater Than... and enter 20
- Clear the filter the same way you did for Donation Type.

12. Try Freezing the top row of column titles so when you scroll through large amounts of data, the column titles will always remain at the top.

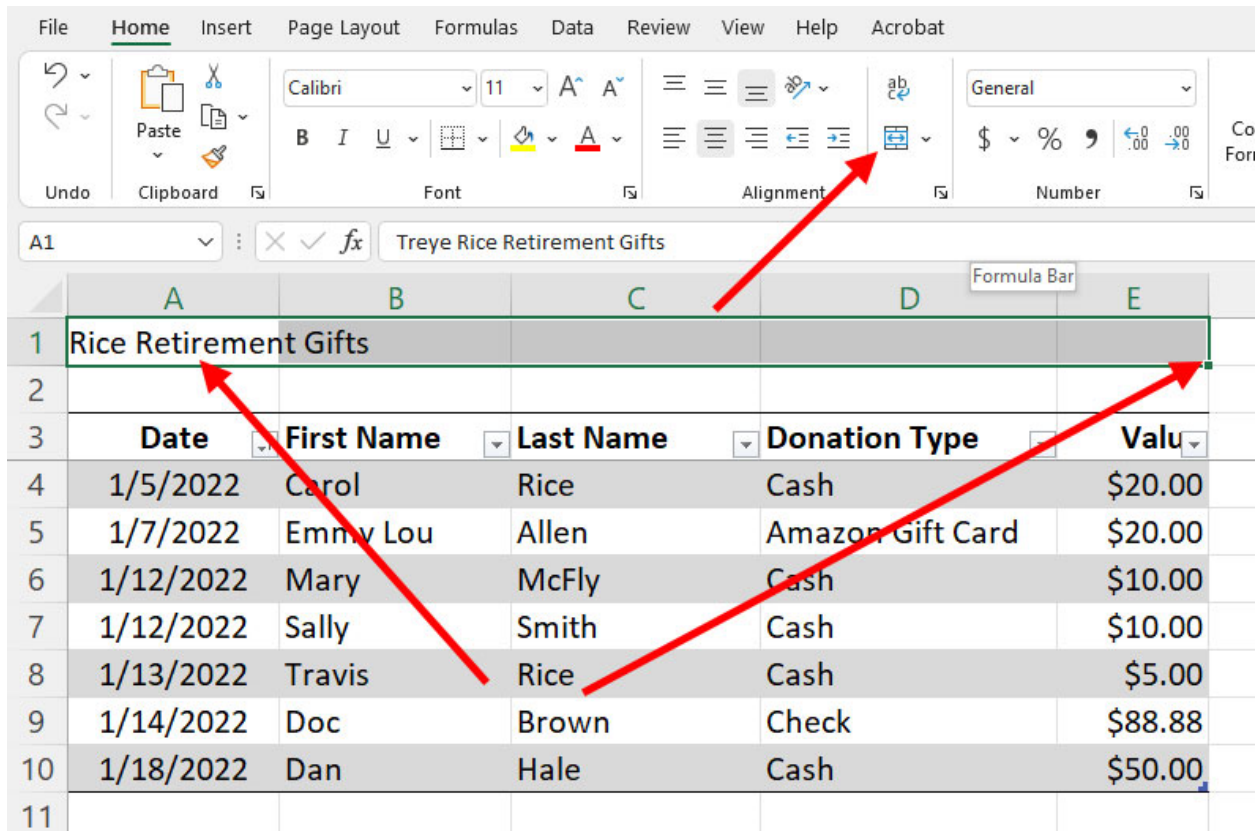
- In the Search bar at the top of the window, type freeze and then choose Freeze Panes > Freeze Top Row. Then, try scrolling through the data by spinning your mouse wheel



- Unfreeze the top row the same way by searching for freeze and then choose Freeze Panes > Unfreeze Panes

13. Add a title to this spreadsheet

- Right-click on row 1 and choose Insert to insert a new row above row 1. Repeat this again to insert another row so you have 2 new rows on top of your table.
- Add this title to cell A1: Treye Rice Retirement Gifts
- Click and drag from cell A1 to cell E1 to select these cells.
- Then, merge the cells and center the title text by clicking the Merge and Center button.

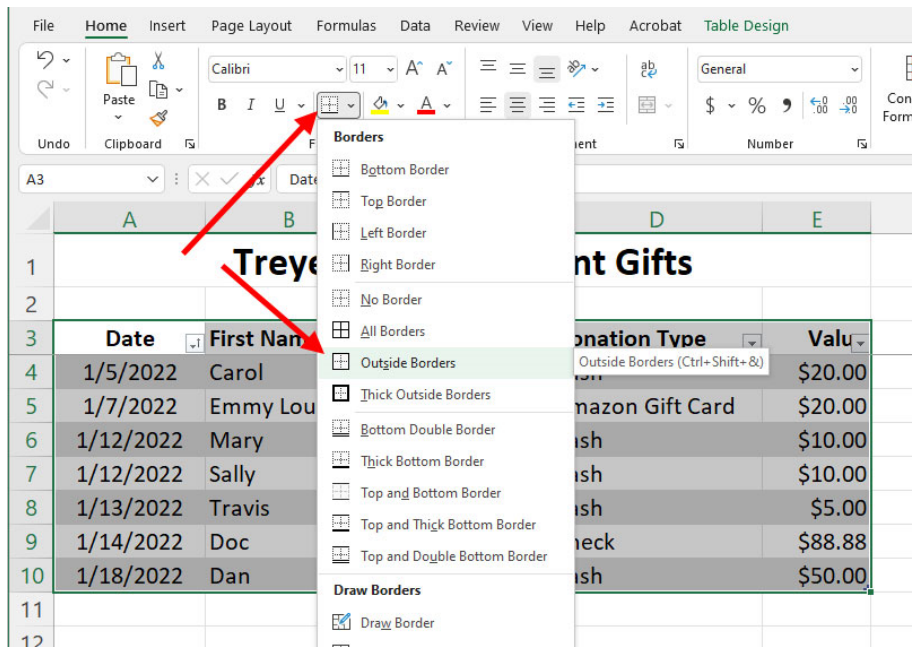


	A	B	C	D	E
1	Rice Retirement Gifts				
2					
3	Date	First Name	Last Name	Donation Type	Value
4	1/5/2022	Carol	Rice	Cash	\$20.00
5	1/7/2022	Emmy Lou	Allen	Amazon Gift Card	\$20.00
6	1/12/2022	Mary	McFly	Cash	\$10.00
7	1/12/2022	Sally	Smith	Cash	\$10.00
8	1/13/2022	Travis	Rice	Cash	\$5.00
9	1/14/2022	Doc	Brown	Check	\$88.88
10	1/18/2022	Dan	Hale	Cash	\$50.00
11					

14. Bold the title text and change its font size to 18.

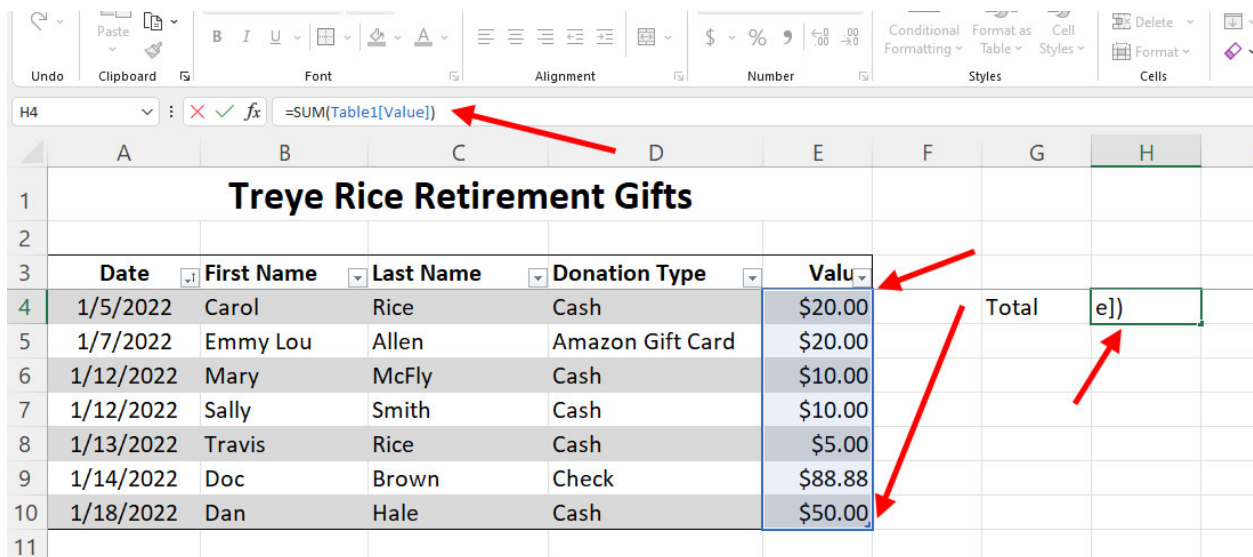
15. Add a border around the entire table.

- Select the table by clicking and dragging from the top left cell containing the Date column title down to the last value cell.
- Then, choose Borders > Outside Borders. See screenshot on next page.



16. Add a SUM function to the spreadsheet to display total donations.

- To the right of the table, add the word: Total
- Then, click the cell to the right of the word Total once to select it.
- In the Formula Bar enter: =SUM(
- Then, click the first value in cell E4
- Then, shift-click the last cell in the value column to select all the Values.
- Then, close the formula in the Formula Bar by adding a closing) and hit enter.



- You can also enter the range of cells to Sum manually like this instead of selecting the values in the column with your mouse: =SUM(E4:E10)

17. Try adding an AVERAGE function to the spreadsheet

- Add the average title and function to the cells under the Total.
- Hint: =AVERAGE(E4:E10)
- After final clean up, this is what your spreadsheet should look like:

	A	B	C	D	E	F	G	H
1	Treye Rice Retirement Gifts							
2								
3	Date	First Name	Last Name	Donation Type	Value			
4	1/5/2022	Carol	Rice	Cash	\$20.00		Total	\$203.88
5	1/7/2022	Emmy Lou	Allen	Amazon Gift Card	\$20.00			
6	1/12/2022	Mary	McFly	Cash	\$10.00		Average	\$29.13
7	1/12/2022	Sally	Smith	Cash	\$10.00			
8	1/13/2022	Travis	Rice	Cash	\$5.00			
9	1/14/2022	Doc	Brown	Check	\$88.88			
10	1/18/2022	Dan	Hale	Cash	\$50.00			
11								

18. Prepare the page layout for printing.

- Put everything on one page by clicking the Page Break Preview button at the lower right-hand corner of the screen.
- Then, click and drag the dashed line to the right of your Total and Average cells to include these on Page 1

	A	B	C	D	E	F	G	H	I	J	K	L
1	Treye Rice Retirement Gifts											
2												
3	Date	First Name	Last Name	Donation Type	Value							
4	1/5/2022	Carol	Rice	Cash	\$20.00		Total	\$203.88				
5	1/7/2022	Emmy Lou	Allen	Amazon Gift Card	\$20.00							
6	1/12/2022	Mary	McFly	Cash	\$10.00		Average	\$29.13				
7	1/12/2022	Sally	Smith	Cash	\$10.00							
8	1/13/2022	Travis	Rice	Cash	\$5.00							
9	1/14/2022	Doc	Brown	Check	\$88.88							
10	1/18/2022	Dan	Hale	Cash	\$50.00							
11												
12												
13												
14												
15												
16												
17												
18												

- Confirm that everything is on Page 1 by clicking the Page layout button at the lower right-hand corner of the screen.

Add header

Date	First Name	Last Name	Donation Type	Val
1/5/2022	Carol	Rice	Cash	\$20.00
1/7/2022	Emmy Lou	Allen	Amazon Gift Card	\$20.00
1/12/2022	Mary	McFly	Cash	\$10.00
1/12/2022	Sally	Smith	Cash	\$10.00
1/13/2022	Travis	Rice	Cash	\$5.00
1/14/2022	Doc	Brown	Check	\$88.88
1/18/2022	Dan	Hale	Cash	\$50.00

Total \$203.88

Average \$29.13

Ready Page: 1 of 1

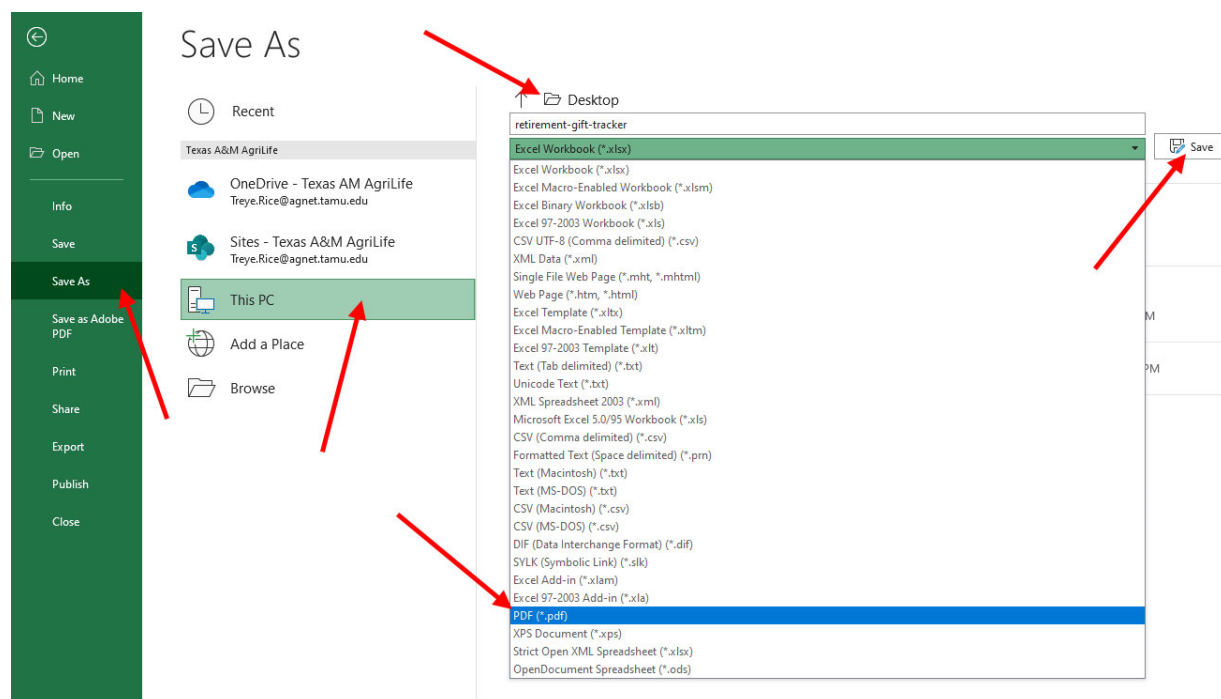
Display Settings

- To return to the spreadsheet view, click the Normal button next to the Page Layout button in the bottom-right corner of the screen.

19. Save your work by clicking the disk icon in the upper-left corner of the screen or by pressing Ctrl+s on the keyboard.

20. Save As a PDF and email your file as an attachment to: treye.rice@ag.tamu.edu

- Click File > Save As >
- Save to your desktop and call the file retirement-gift-tracker
- For the file type, choose .pdf and then click the Save button
- Feel free to email me any questions that you might have too...



- If you are unable to save as PDF, save as an Excel Workbook and email me that file instead as an attachment.

Congrats, Rookie!

You are ready for *Session 2: Excel Features & Techniques to Help Compile & Aggregate Data Efficiently* next week with Brian Faries! We'll see you then.



For more Excel tutorials and courses, be sure to visit your LinkedIn Learning account:

<https://agrilifeas.tamu.edu/training/linkedin-learning/>