

Making Excel Work for Your Tribal Community

Excel Basics:
Intermediate Skills



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MAKING EXCEL WORK FOR YOUR TRIBAL COMMUNITY

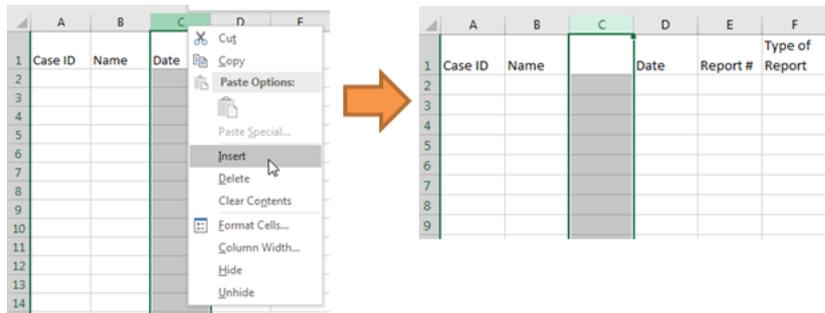
Excel Basics: Intermediate Skills

Excel offers us many ways to enter, format, and read data, though most of us will use only a fraction of its capabilities. In this refresher, we'll go beyond the basics to review a few skills that you might not use every day, but that can be helpful when you need them.

Adding Columns

To add a column in between two existing columns:

1. Right click in the gray space at the top of the column *to the right* of where you want to insert a new column.
2. Click on "Insert".
3. A new blank column will appear *to the left* of the column you clicked in.



Tip: Be careful when adding columns, as they can affect existing formulas. Also, formatting or drop-down menus may carry over from the existing column.

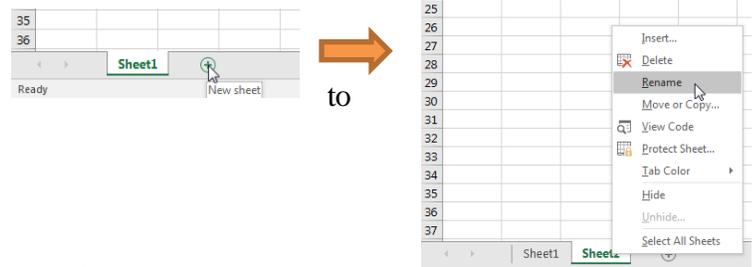
Adding and Naming Worksheets

When we talk about "Excel spreadsheets," sometimes we mean the entire Excel file. Sometimes we mean a single worksheet within the Excel file. One Excel file (also called a workbook) can hold many worksheets, and you will probably want several of them for your data collection files. For example, in the intake file we'll build together in this learning series, we'll add a worksheet to record cases for each month of the year, plus a separate worksheet that calculates our reporting numbers. This helps keep all our data organized and easy to manage.

To add a new worksheet, look at the bottom of the screen and click on the plus sign next to the worksheet tab. Give your worksheets short but descriptive names (e.g., “Reporting” or “Sept”):

1. Right click on the bottom tab of the worksheet.
2. Select “Rename”.
3. Type the new name.
4. Hit the “Tab” key or click anywhere

exit.

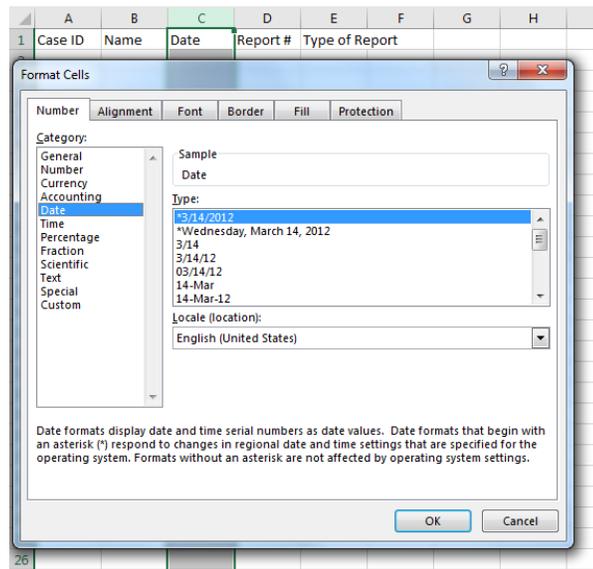


Cell Formatting

When entering dates, times, money, percentages, or other special numbers, Excel can automatically format them in a standard way. For example, if you had a column for report dates, you could set it to display every date in the “mm/dd/yyyy” format, no matter how it was typed. This can help make data entry faster and more consistent -- typing “2 jan” changes to display “1/02/2018” automatically.

To format cells:

1. Click at the top of the column to select all cells in that column.
2. Right click in any cell and select “Format Cells.”
3. On the “Number” tab, select the type of information (e.g., date, percentage).
4. Select the format you want (e.g., how the date is written, decimal points).
5. Click “OK” to close.

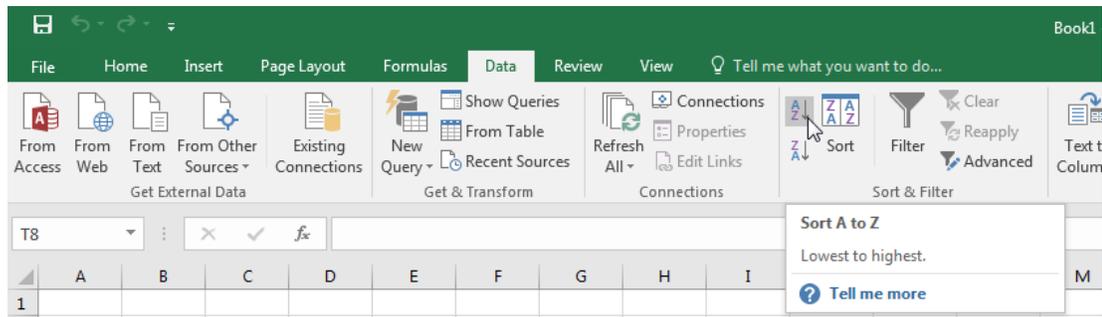


Sorting and Filtering

Sometimes you might need to look at your data in certain ways. For example, you might want to see families in alphabetical order by last name, or see all the reports from a certain town or village.

Sorting displays your rows of data in a particular order (such as alphabetical order or by date):

1. Decide how you want to look at your data (alphabetical order by last name, in order of court dates, by disposition, etc.).
2. Find the column you want to sort.
3. Click on one cell in that column. (Do *not* highlight the entire column for this one!)
4. Click on the “Data” tab in the ribbon.
5. Find the “Sort & Filter” section.
6. Click on the “A to Z” or “Z to A” buttons to sort your data in ascending or descending order. (This works the same for both words and numbers.)

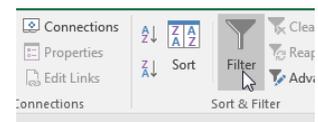


Filtering lets you see only the cases that match particular criteria. For example, you could see only reports of physical abuse by filtering out all other report types.

Filtering takes two steps: (1) activating filtering on your spreadsheet and (2) using filters as needed.

To activate filtering in your spreadsheet:

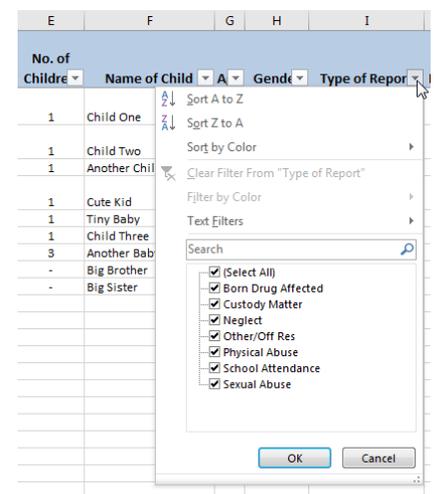
1. Go to the “Data” tab of the ribbon.
2. Find the “Sort & Filter” section.
3. Click on the “Filter” icon.
4. Little drop down arrows will appear in your header row.



Child	Gender	Type of Report
2	Male	Physical Abuse
3	Male	Custody Matter
0	Female	Born Drug Affected
4	Female	School Attendance
0	Female	Other/Off Res
5	Male	Neglect
0	Male	Sexual Abuse
6	Male	Physical Abuse
7	Female	Neglect

To use filters:

1. Find the column you want to filter by.
2. Click on the drop-down arrow at the top of the column.
3. Uncheck everything except the data element you want to see.
4. Click “OK” to filter.
5. When you want to remove the filter, click on the drop-down arrow again.
6. Check “Select All” and click “OK”.



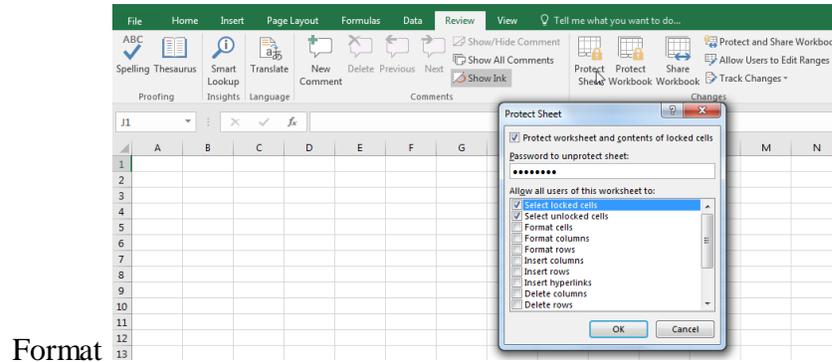
Protecting Cells

Often several different people may be entering or getting data from a spreadsheet. Enhanced spreadsheets have formulas and drop-down lists that can get messed up easily by accident. Protecting certain worksheets can help keep everything working without disruptions. For example, our intake spreadsheet will have a separate sheet for calculating reporting totals with formulas.

Once we are finished entering the formulas, we can lock the sheet so that staff can read and copy the data, but can't accidentally break a formula.

To lock a sheet:

1. Go to the "Review" tab on the ribbon.
2. Click on the "Protect Sheet" button.
3. Enter a password for unlocking the sheet later. Make it easy to remember! If you forget the password, you won't be able to unlock the sheet again if you want to edit it.
4. Click "OK".



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