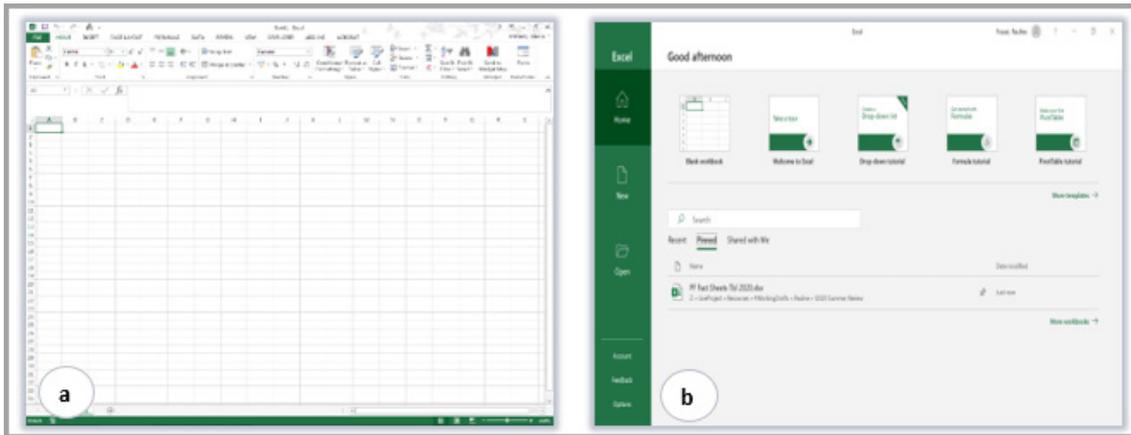Excel contains a range of useful features. Use this quick guide to familiarise yourself with some of these.
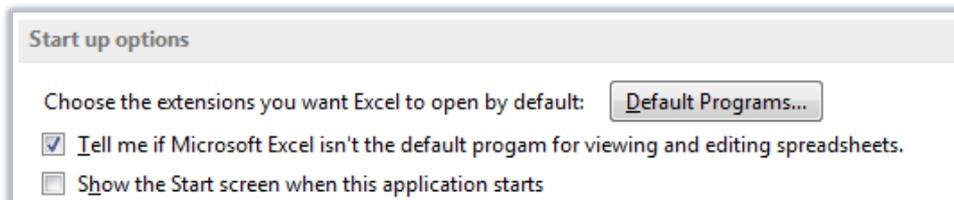
Choose Startup Options

− Depending on your preferences, Excel opens with **either** a blank spreadsheet (a), **or** a start screen from which you can choose a template (b).


Set your preferred startup option

1. Click the **File** tab, then click **Options**.

2. In the **General** section, under **Start up options**, tick/untick **Show the Start screen when this application starts**.

3. Click **OK**.

Improved workbooks view

− When you open multiple files in Excel, each workbook will open in its own window. This makes it much easier to work with different workbooks at the same time.
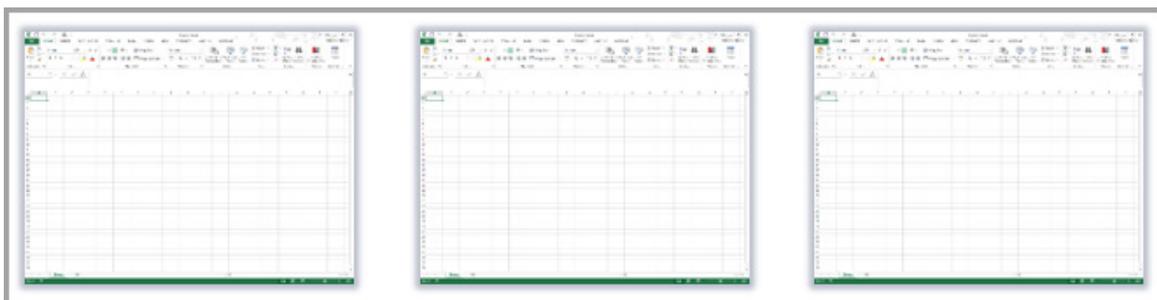
Flash Fill tool

Flash fill looks for patterns in your data and saves time by completing lists for you.

This is particularly helpful for concatenation or extraction of text, and for reformatting numbers.

	A	B	C	D	E
1	Last Name	Initials	First Name	Full Name	
2	Anderson	M	Joe	Joe M. Anderson	
3	Higgs	J	Keith	Keith J. Higgs	
4	Miller	A	Jennifer	jennifer A. Miller	
5	Cooper	M	Stephanie	Stephanie M. Coop	
6	Jones	L	Sophie	Sophie L. Jones	
7					

1. Type the first piece of data as you want it and press **Enter**.
2. Press [**Crtl**] + **E** or click **Fill** > **Flash Fill** in the **Editing** section of the **Home** tab.

Quick analysis tool

Quick analysis provides a shortcut to a number of useful features, including conditional formatting, charts, totals, tables and sparklines.

1. Select the data that you want to analyse.
2. Click the **Quick Analysis** icon at the bottom right of the data.
3. Click the type of analysis you want to perform.

	A	B	C	D	E	F	G	H	I
1	Last Name	Initials	First Name	Full Name	Salary				
2	Anderson	M	Joe	Joe M. Anderson	£22,000				
3	Higgs	J	Keith	Keith J. Higgs	£24,000				
4	Miller	A	Jennifer	Jennifer A. Miller	£16,000				
5	Cooper	M	Stephanie	Stephanie M. Cooper	£45,000				
6	Jones	L	Sophie	Sophie L. Jones	£14,000				
7									
8									
9									
10									
11									
12									
13									
14									

FORMATTING | CHARTS | TOTALS | TABLES | SPARKLINES

Data Bars   Color...   Icon Set   Greater...   Text...   Clear...

Slicers

In Excel, you can use slicers to filter data in regular tables and Pivot Tables.

1. Click on a table or pivot table.
2. Click the **Table Design** tab or **PivotTable Analyze** tab, then click **Insert Slicer**.
3. Tick the checkboxes for the slicers you want.

   If you add more than one slicer, you can drag them around the screen so they are easier to see.

4. Click on the **buttons** in each slicer to filter on that category (click again to switch off).

   Note: Select multiple items by clicking the first item you want , then pressing and holding [**Shift**] and clicking the last item (for a group of contiguous items), or [**Ctrl**] and click if subsequent items are non-contiguous.

   You can switch on as many slicer filters as you require. The funnel icon in the top right of each slicer will clear all filters in that category.
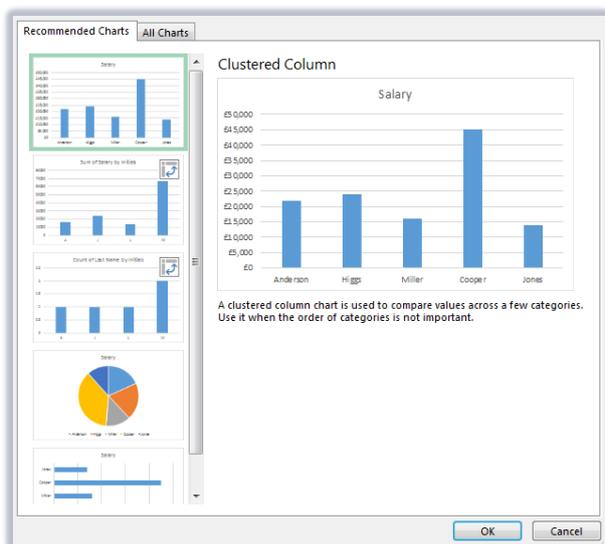
New functions

Excel contains a number of new functions[1], such as =XLOOKUP(), =FILTER(), and =MAXIFS()/MINIFS().

− The XLOOKUP function searches for a key piece of data and returns the matching item from a table.

− The FILTER function filters a range of data, according to the criteria you set.

− The MAXIFS and MINFIS functions return the highest or lowest value in a range, based on multiple criteria.

New chart recommendations

1. Select the data for your chart.

2. Click the **Insert** tab, then **Recommended Charts**.

3. Click on each chart thumbnail to preview your data in the recommended chart type(s).

4. Click **OK** to insert the chart of your choice.

Animated chart data

− Make changes to a chart's source data and watch the chart update to match. This is a useful way of visualising the change in your data.

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[1] Find out more about Excel functions on Microsoft's support site:
Microsoft Support formulas and functions

Quick chart options

When you select a chart in Excel, you will see three quick formatting icons.

1. Click the **plus** icon to add or remove chart elements.

2. Click the **paintbrush** icon to change the appearance of the chart.

3. Click the **funnel** icon to filter the chart data.

Improved chart data labels

Excel provides many options for the format of chart data labels. You can add text to data labels, include values from cells, change the shape, show leader lines and change formats.

1. Right-click on a data label within your chart.

2. Click **Format Data Labels…** from the shortcut menu.

3. Use the **Label** and **Text Options** in the **Format Data Labels** pane on the right of the window to make your desired changes.

4. To change the shape, right-click on a data label and click **Change Data Label Shapes…**


New PivotTable recommendations

1. Select the data for your PivotTable.

2. Click the **Insert** tab, then **Recommended PivotTables**.

3. Click on each PivotTable thumbnail to preview your data in the recommended arrangement(s).

4. Click **OK** to insert the PivotTable of your choice.

Timeline tool

If your PivotTable contains dates, you can use the timeline tool to focus on specific periods of time.

1. Select a PivotTable.

2. Click the **PivotTable Tools Analyze** tab, then click **Insert Timeline**.

3. Tick the date field that you want to use as your timeline filter and click **OK**.

4. Click the arrow next to **Months** to change the time period (years, quarters, months, days).
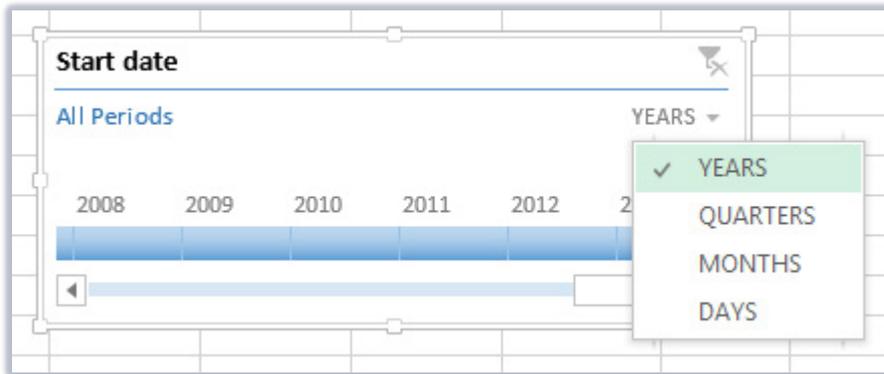
5. Use the scroll bar to move through the timeline.

6. Click and drag the timespan control to the required date range.
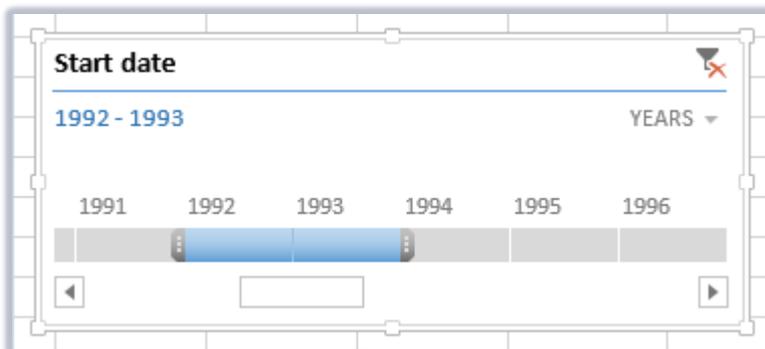

7. Clear a timeline filter with the funnel icon in the top right of the timeline.

Standalone PivotCharts

You can create PivotCharts without first creating a PivotTable. This makes it easier to copy and move if required and doesn't affect the source data.

1. Select the data for your PivotChart.

2. Click the **Insert** tab, then click **PivotChart**.

3. Choose your PivotChart fields.

4. Use the filtering controls in the PivotChart to interact with the chart data.
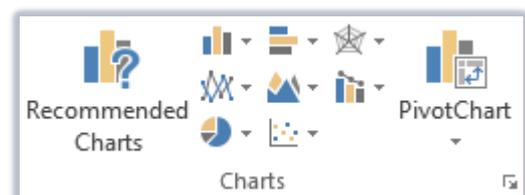
Data models and relationships

Excel contains a number of new advanced features, allowing you to connect and work with data from different sources.

− A data model works on a similar principle to related tables within a database. You can use a data model to analyse multiple tables within a single PivotTable.

− You can only use one data model within an Excel workbook.
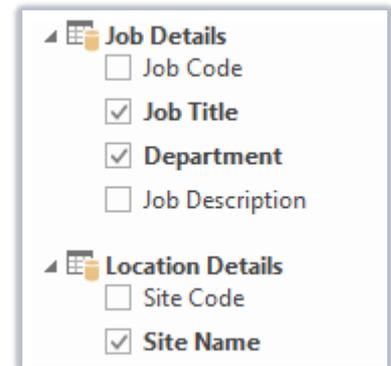
Other useful features

The Ribbon

The Ribbon is the menu area running across the top of the window. It is organised into **Tabs** which contain related **Groups** of **Tools**. You can customise tabs via **Excel Options**.
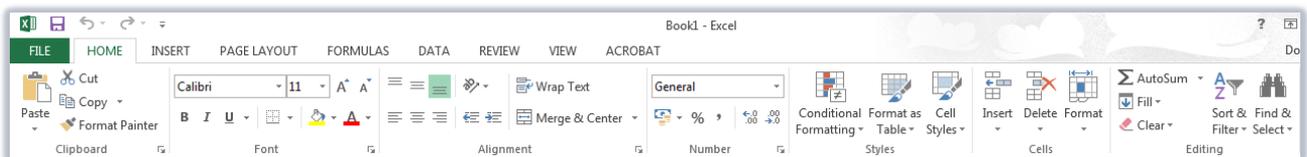
− Hover your mouse over a **Tool** icon to see a tip about what it does.

− If you see an arrow at the bottom right of a group of tools, click on it to see **More** options.

The Quick Access Toolbar

The QAT appears at the top left of the window, regardless of the tab you click on. By default, it contains **Save**, **Undo** and **Redo**. You can customise this area to include **Tools** you use frequently, from any tab.

− Use the drop-down arrow to choose **Tools** from list.

− You can also right-click on any tool from the Ribbon and select **Add to Quick Access Toolbar**.

The Formula Bar

The Formula Bar is below the Ribbon. It contains the **Name Box** (showing the cell you have clicked on) and **Insert Function** tools.

− The Formula Bar displays the contents of the currently selected cell.

The Status Bar

The Status Bar is at the bottom of the document window.

− Customise the status bar to contain information you require, such as **Cell Mode** and **Num Lock**.

− Right-click on the **Status Bar** to add and remove information using a tick list.

The Zoom Slider

Use the Zoom Slider at the right of the Status Bar to zoom in and view small detail on a single cell, or zoom out and have an overview of your worksheet.

Workbook Views

You can change the way your workbook is displayed on screen via the **View** tab. **Normal** is the default view.

− There are also shortcuts to the different view options at the bottom right of the **Excel** window, next to the Zoom Slider.
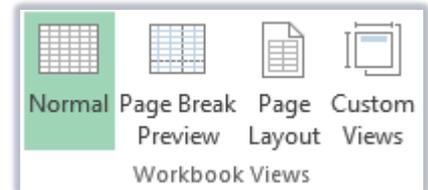
Further information and help

Use MyIT to log calls with the IT Service Desk: myit.abdn.ac.uk