

Microsoft Excel 365: Data & Lists

Welcome

Microsoft Excel 365
Data & Lists

Live Online

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Welcome

- Please unmute your mic and turn your camera on and say hello.
- Please ask questions.
- Once you have finished a practical activity either raise your hand and keep it raised until I say lower them, or just tell me.

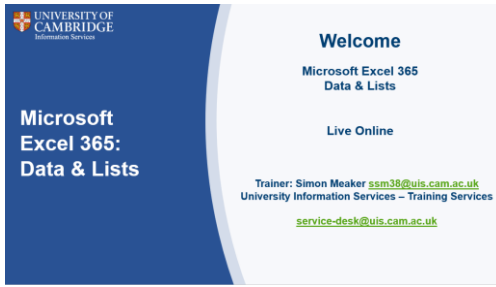
Course Information

Objectives

- How to use Microsoft Excel 365 to work with Data & Lists
- Duration
- Delivery Style – demonstrations and practical's

General Information

- Please fill in the Feedback form at the end of the course <http://feedback.training.cam.ac.uk/uis>
- Please ask questions
(This is your course and I want you to get as much as you can out of it)
- If you need assistance with the practical's let me know and we can share desktops



Slides



Files



Learning Paths



General Information

Course Material

Course Information

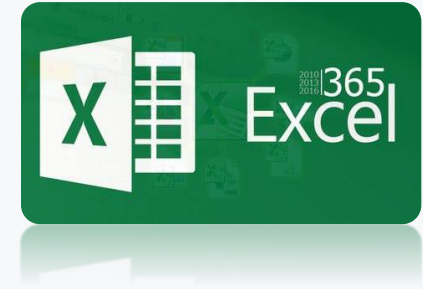
Related Courses

www.linkedin.com/learning

www.training.cam.ac.uk

Which version Are you using?

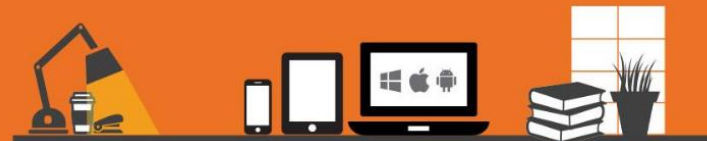
All the exercises will work using the following



Thinking of upgrading?

Staff and students can download Office 365 for free
via this [link](#)

Get Office 365 ProPlus
on your personal devices...



All students, and staff from qualifying institutions: download Office 365 ProPlus free on your personal devices to use while you are at Cambridge.
(Your login will expire 30 days after you leave the University.)

Microsoft Excel 365: Data & Lists

Course Topics

Sorting Data

Filtering Data

Grouping And Outlining

Summarising And Subtotalling

Validating Data

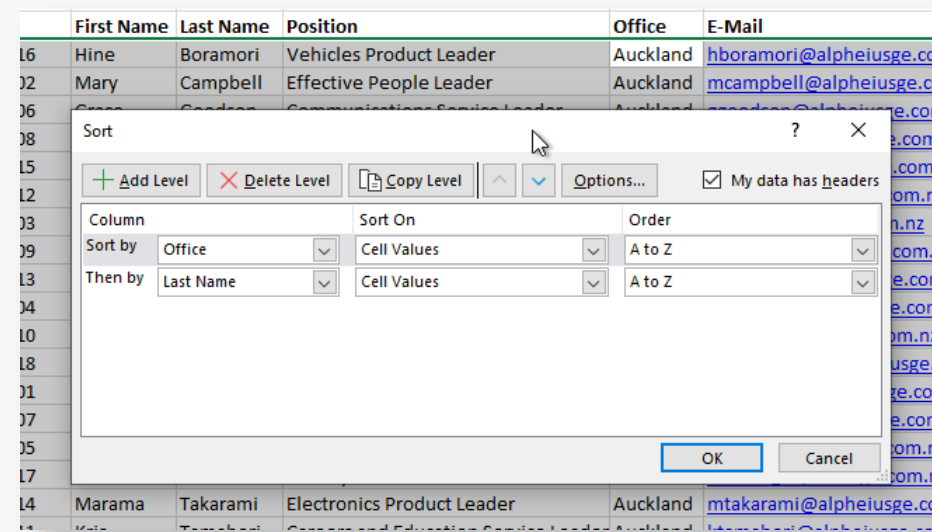
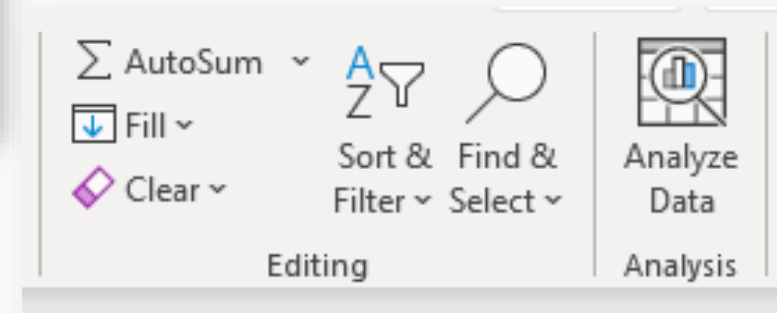
Conditional Formatting

Protecting Data

Microsoft Outlook 365: Sorting Data

Demo 1: Sorting Data

File 'Sorting_2' - 'Sorting Text' Spreadsheet



Microsoft Outlook 365: Sorting Data

Practice Sorting Text

File '*Sorting_2*' using '*Sorting Text*' worksheet

Select C4 'Last Name'

Sort & Filter button / choose Sort A-Z

Select B10 / Sort & Filter button / choose Sort A-Z

Sort DOB Oldest to Newest

Sort Age Smallest to Largest

Use Custom Sort to sort two columns

Microsoft Outlook 365: Sorting Data

Practice Sorting Numbers

File **'Sorting_2'** using **'Sorting Numbers'** worksheet

Select C5

Sort & Filter button / choose Sort Smallest to Largest

Select C5

Sort & Filter button / choose Sort Largest to Smallest

Undo

Insert row above Total row and try sorting Largest to Smallest again

Microsoft Outlook 365: Sorting Data

Practice Sorting Numbers by Rows

File **'Sorting_2'** using **'Sorting Numbers'** worksheet

Select B4:G11

Sort & Filter button / Custom Sort / Options /
Sort Left to Right / Row 5

Try some other rows

Reset back to how it was:

Selecting A4: H13

Choose Custom Sort

Sort by Row 4

Order by Custom List

Add list and type in your custom list of:

Revenue, Jan, Feb, Mar, Apr, May, Jun, Total

Microsoft Outlook 365: Sorting Data

In Your Own Time

[LinkedIn Learning - Excel Essential Training \(Office 365/Microsoft 365\)](#)

By Dennis Taylor

Worth watching whole course to learn a bit more

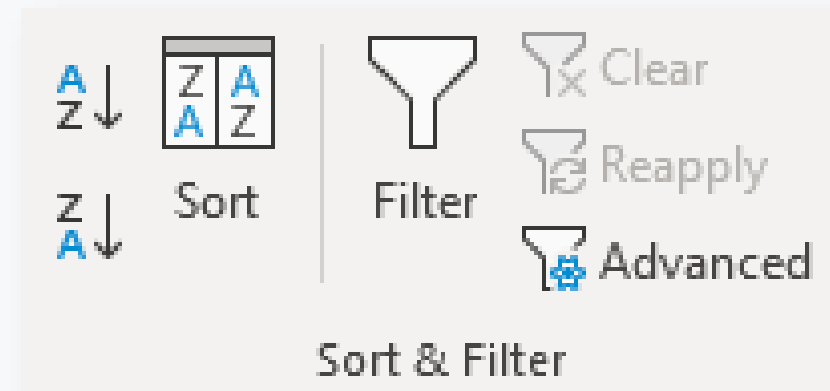
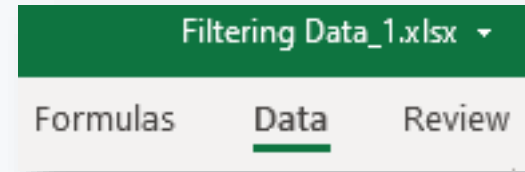
Section 10 includes:

[Sorting data](#)

Microsoft Outlook 365: Filtering Data

Demo 2: Filtering Data

File 'Filtering Data_1'



Microsoft Outlook 365: Filtering Data

Practice Filtering

File '*Filtering Data_1*' using '*Sheet 1*' worksheet

Turn on the Filter button on the Data Tab

Sort Gold under Type

Clear the Filter

Show Compound Filters

(i.e using two, Type = Theatre and Suburb = Heidelberg Heights)

Multiple Value Filters

(Click on Ascot Vale and Bentleigh so that ticks appear in both)

Microsoft Outlook 365: Filtering Data

Practice Filtering – Text Filters

File *'Filtering Data_1'* using *'Sheet 1'* worksheet

Click on Filter for Last Name

Choose Text Filters / Begins With W or S

Try others

Microsoft Outlook 365: Filtering Data

In Your Own Time

[LinkedIn Learning - Excel Essential Training \(Office 365/Microsoft 365\)](#)

By Dennis Taylor

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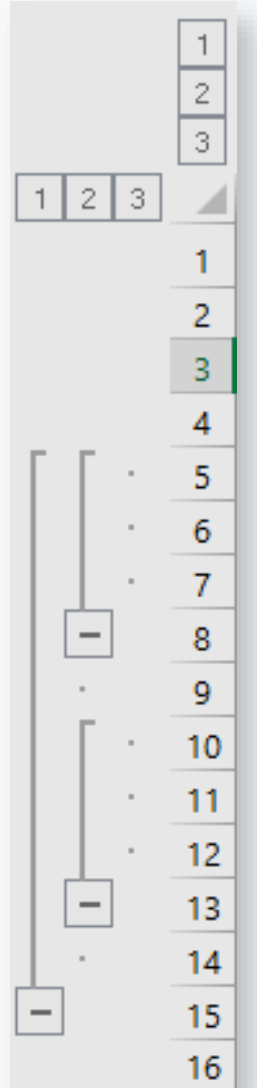
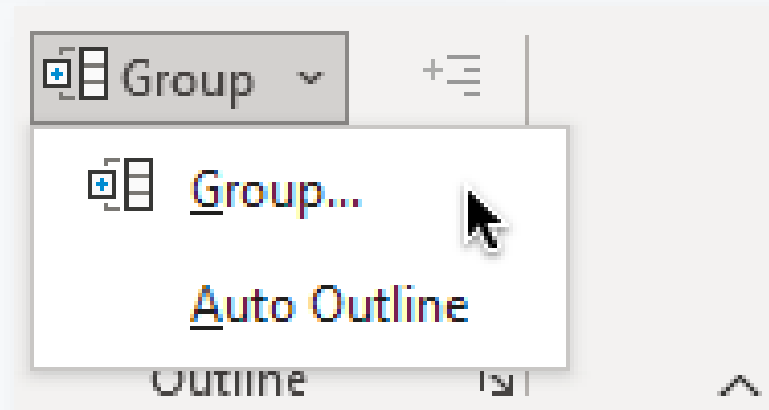
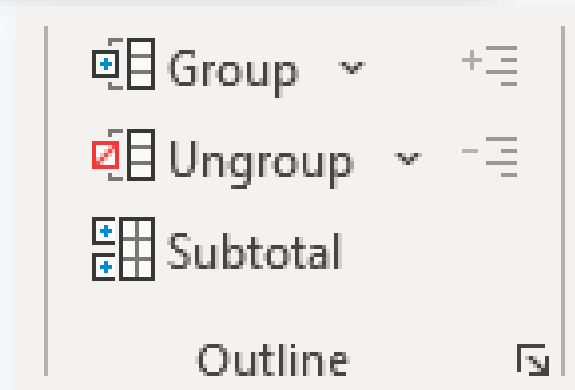
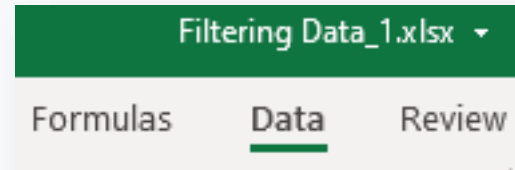
Section 10 includes:

[Using Filters](#)

Microsoft Outlook 365: Grouping & Outlining

Demo 3: Grouping and Outlining

File 'Grouping & Outlining_1'



Microsoft Outlook 365: Grouping & Outlining

Practice Automatic Outline

File *'Grouping & Outlining_1'* using *'Automatic Outline'* worksheet

Click Data tab / Group / Auto Outline

Microsoft Outlook 365: Grouping & Outlining

Practice Manual Outline

File '*Grouping & Outlining_1*' using '*Manual Outline*' worksheet

Select Columns C to G

Click on the Group button on the Data Tab to manually group Columns C to G

Select Rows 7 & 8, 12 & 13, 17 & 18 to manually group those as well

Microsoft Outlook 365: Grouping & Outlining

In Your Own Time

[LinkedIn Learning - Excel: Introduction to Formulas and Functions](#)

By Curt Frye

Worth watching whole course to learn a bit more

Includes:

Introducing Excel 2019 Formulas and Functions

Creating Basic Summary Functions

Managing Named Ranges and Excel Tables

Preparing Data for Analysis in Excel

Auditing Worksheet Formulas

Performing What-if Analysis

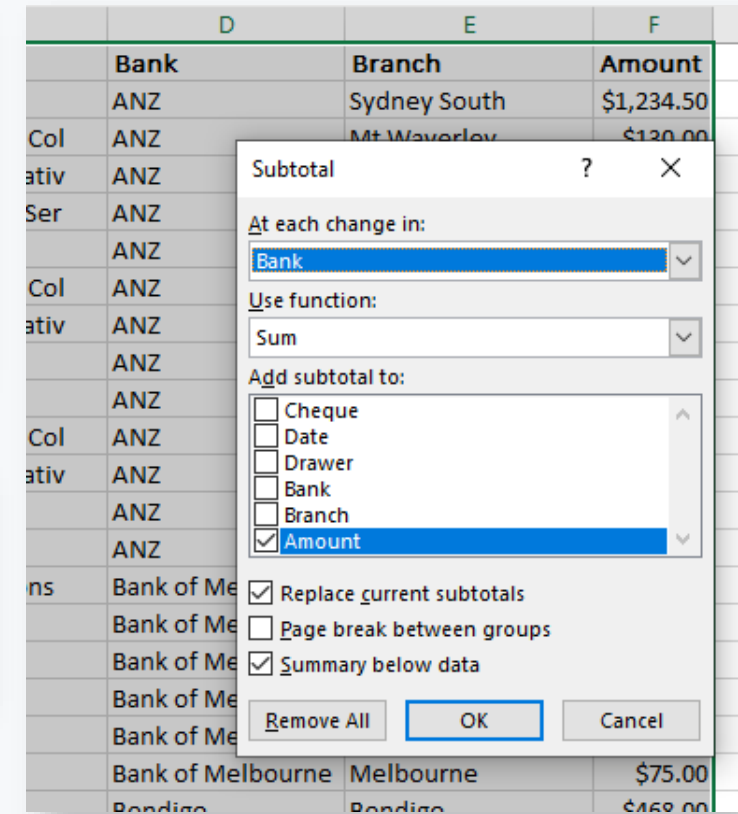
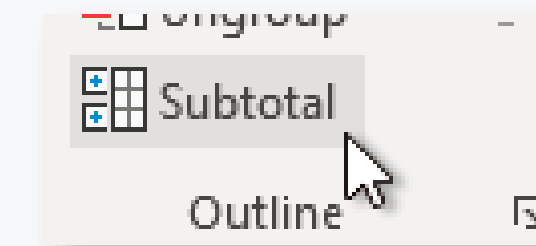
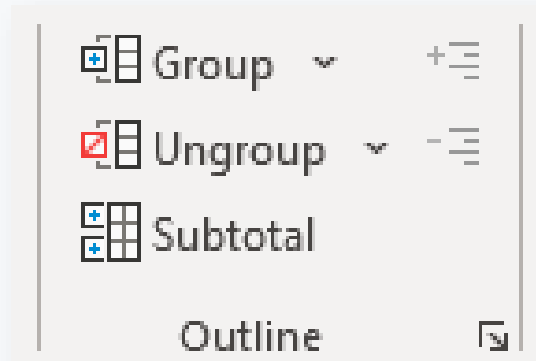
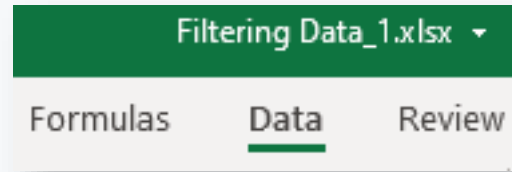
Section 3 includes:

[Group and outline list data](#)

Microsoft Outlook 365: Summarising & Subtotalling

Demo 4: Summarising & Subtotalling

File 'Summarising & Subtotalling_1'



Microsoft Outlook 365: Summarising & Subtotalling

Practice Subtotalling

File *'Summarising & Subtotalling_1'*

Sort by Bank A to Z

Data Tab / Subtotal button

Select for 'Each change in' Bank, Sum, Amount

Look at the result and try out Auto Outline

Microsoft Outlook 365: Summarising & Subtotalling

Practice Subtotalling by Date

File *'Summarising & Subtotalling_1'*

Change Subtotal drop-down for 'Each change in' to Date

Look at the result

Microsoft Outlook 365: Summarising & Subtotalling

In Your Own Time

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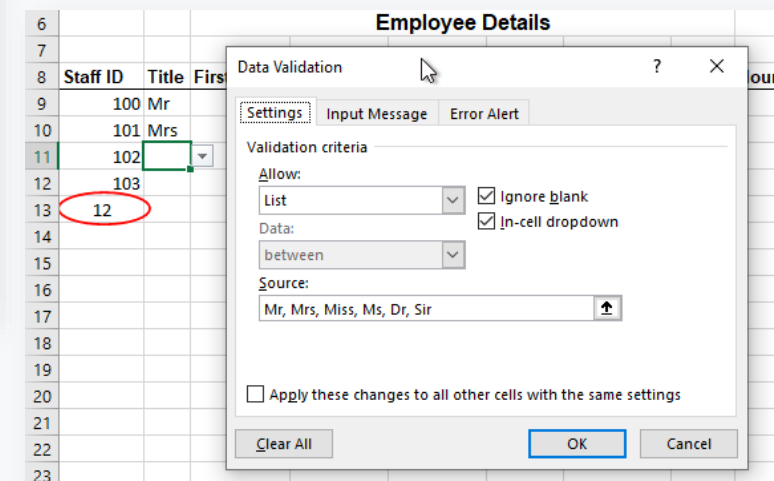
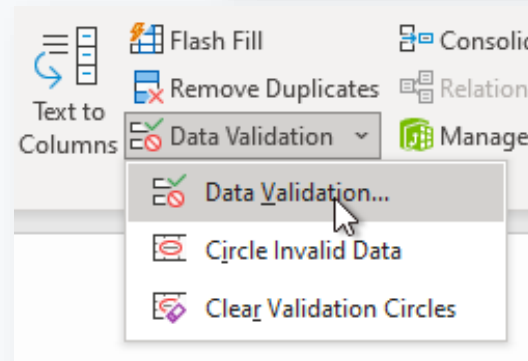
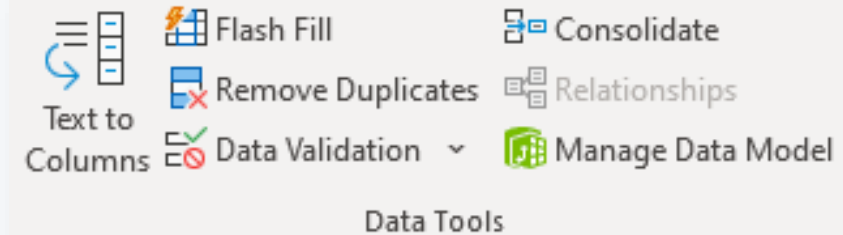
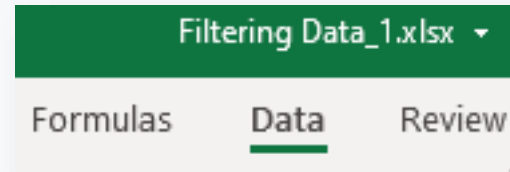
Section 3 includes:

[Summarize list data by creating subtotals](#)

Microsoft Outlook 365: Validating Data

Demo 5: Validating Data

File 'Data Validation_1'



Microsoft Outlook 365: Validating Data

Practice Data Validation

File *'Data Validation_1'* using *'Payroll'* worksheet

Select A9 'Staff ID column'

Data Tab / Data Validation button

Select Whole number between 100 & 199

Drag down formatting as far as you need

Enter some numbers

Copy and paste B20 from 'HR' worksheet

Circle invalid data

Microsoft Outlook 365: Validating Data

Practice Data Validation – Create List

File '*Data Validation_1*' using '*Payroll*' worksheet

Create List for Title column

Use Sources sheet A3:A7

Copy down formatting as far as you need

Undo and create a list manually using commas

Add in Sir and Prof

Microsoft Outlook 365: Validating Data

In Your Own Time

[LinkedIn Learning - Excel: Setting Up a Database \(Office 365/Microsoft 365\)](#)

By Dennis Taylor

Worth watching whole course to learn a bit more

Includes:

Database Design Concerns

Controlling the Creation of New Data
Tables

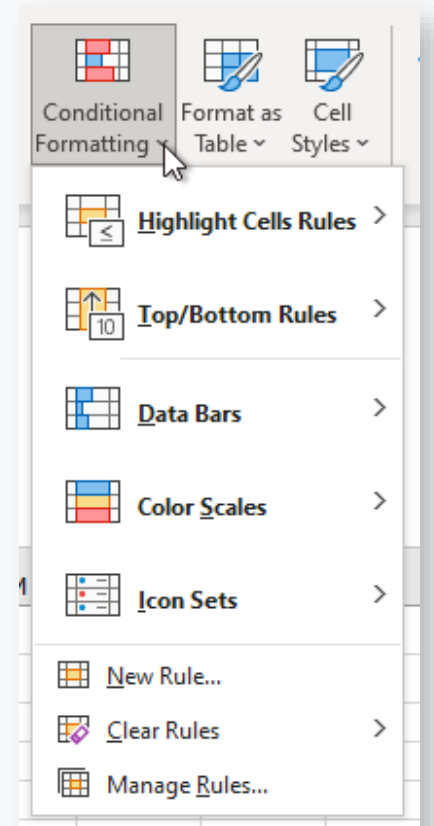
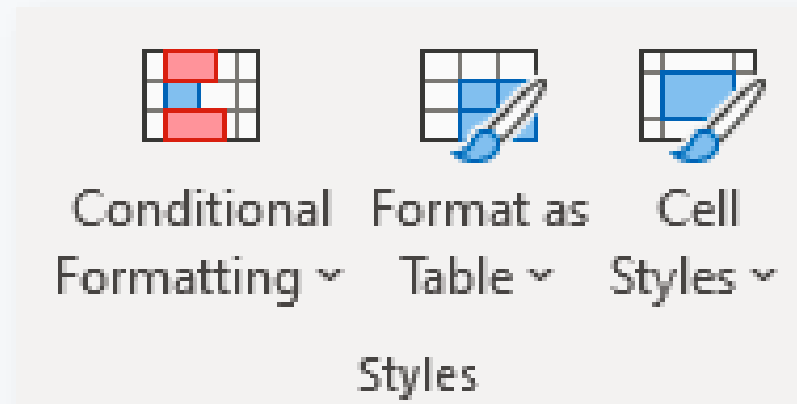
Section 2 includes:

[Use Data Validation to control data entry values](#)

Microsoft Outlook 365: Conditional Formatting

Demo 6: Conditional Formatting

File 'Conditional Formatting_1'



	Jan	Feb	Mar	Apr	May	Jun	Total
	15,900	5,740	26,850	28,455	3,200	7,223	87,368
	24,300	15,200	6,590	5,940	7,900	43,211	103,141
	4,500	3,420	32,700	2,540	4,300	2,050	49,510
	9,766	3,400	4,556	15,200	6,590	47,100	86,612

Microsoft Outlook 365: Conditional Formatting

Practice Conditional Formatting

File '*Conditional Formatting_1*' using '*Sheet 1*' worksheet

Highlight Cells Rules

Select Total Column

Home Tab / Conditional Formatting button

Highlight Cells Rules

Greater Than 90000 in Green

Less Than 40000 in Red

Clear Rules

Try the same thing with a block of data,
i.e use BMW C4:H10

Microsoft Outlook 365: Conditional Formatting

Practice Conditional Formatting

File '*Conditional Formatting_1*' using '*Sheet 1*' worksheet

Top ten Items

Select Ford block C11:H16

Top/Bottom Rules
Top Ten Items

Try the same using %

Microsoft Outlook 365: Conditional Formatting

Practice Conditional Formatting

File '*Conditional Formatting_1*' using '*Sheet 1*' worksheet

Data Bars

Data Bars

Use GMH block C17:H18

Colour Scales

Use KIA block C20:H23

Microsoft Outlook 365: Conditional Formatting

Practice Conditional Formatting

File '*Conditional Formatting_1*' using '*Sheet 1*' worksheet

Sparklines

Select J24
Insert Tab
Sparklines Group
Line Button
Data Range C24:H24

Microsoft Outlook 365: Conditional Formatting

Practice Conditional Formatting

File '*Conditional Formatting_1*' using '*Sheet 1*' worksheet

Duplicate Values

Copy and Paste some data further down the sheet
Home Tab / Conditional Formatting button
Highlight Cells Rules
Duplicate Values

Microsoft Outlook 365: Conditional Formatting

In Your Own Time

[LinkedIn Learning - Excel: Conditional Formatting for Beginners \(Office 365/Excel 2019\)](#)

By Dennis Taylor

Worth watching whole course to learn a bit more

Includes:

Applying Conditional Formatting Rules

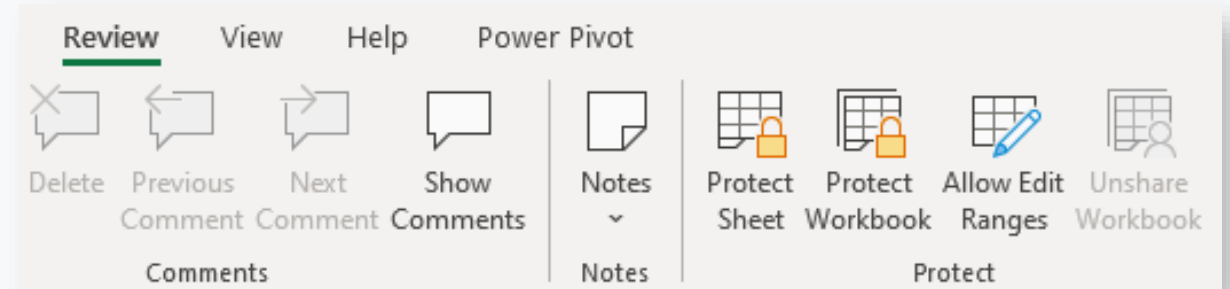
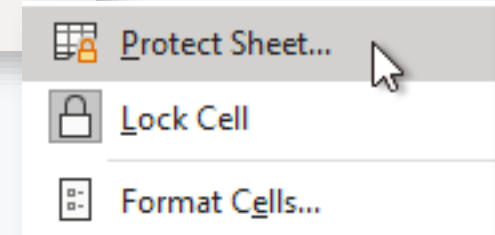
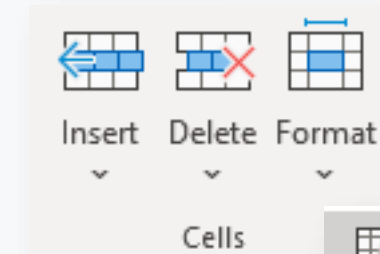
Conditional Formatting Using Data Bars, Colour Scales and Icon Sets

Specialized Conditional Formatting Uses

Microsoft Outlook 365: Protecting Data

Demo 7: Protecting Data

File 'Protecting Workbooks_1'



Microsoft Outlook 365: Protecting Data

Practice Protecting Data

File 'Protecting Workbooks_1' using 'Sales' worksheet

By default, all cells in an Excel worksheet are locked. This means that if worksheet protection is applied, these cells will be inaccessible, and nobody will be able to make changes unless the protection is removed. You need to unlock the cells you want to allow users to modify before protecting the worksheet. When the worksheet is protected, these cells will remain accessible.

Microsoft Outlook 365: Protecting Data

Practice Protecting Data

File '*Protecting Workbooks_1*' using '*Sales*' worksheet

Protect Worksheet

Select C6 to C22 / right click / Format Cells / Protection
Untick 'Locked'

Select E6 to E22 / Home Tab / Format / Format Cells /
Protection
Untick 'Locked'

Home Tab / Review / Protect Sheet.
Tick – Protect worksheet and contents of locked cells
Tick – Select unlocked cells
(Untick Select locked cells if ticked)
Press OK

Microsoft Outlook 365: Protecting Data

Practice Protecting Data

File '*Protecting Workbooks_1*' using '*Sales*' worksheet

Protect Workbook Structure

There are three ways to protect a workbook using a password. You can prevent users from opening the workbook without a password, prevent them from editing the workbook without a password, or prevent them from inserting, unhiding or deleting worksheets without a password. Your settings will depend entirely on your requirements.

Microsoft Outlook 365: Protecting Data

Practice Protecting Data

File '*Protecting Workbooks_1*' using '*Sales*' worksheet

Protect Workbook Structure

Review Tab / Protect Workbook
Use **structure** for password
Make sure structure is ticked

This prevents people from creating extra Worksheets or deleting the one you have.

Notice greyed out ribbon

View changes under File / Info

Microsoft Outlook 365: Protecting Data

Practice Protecting Data

File '*Protecting Workbooks_1*' using '*Sales*' worksheet

Password Protect the File

File / SaveAs / Browse / Desktop

Click on the Tools Dropdown and select General Options

Use the password **open** to open

Use the password **modify** to modify

Press OK

Re-enter the **open** password for open

Re-enter the **modify** password for modify

Click Save

Microsoft Outlook 365: Protecting Data

Practice Protecting Data

File '*Protecting Workbooks_1*' using '*Sales*' worksheet

Open the Password Protected File

Open the file and enter the passwords

Note! If Open in read Mode is selected then the user can't save file or overwrite as original name. A copy needs to be saved

If the Open password is given out but not Modify then the document is opened in Read only mode.

If both Open and Modify passwords are used changes can be saved in original document.

Still need Worksheet protection password to unlock the sheet.

Microsoft Outlook 365: Protecting Data

In Your Own Time

[LinkedIn Learning - Excel Essential Training \(Office 365/Microsoft 365\)](#)

By Dennis Taylor

Worth watching whole course to learn a bit more

Section 11 Includes:

[Protecting worksheets and workbooks](#)

Thank you



Trainer: Simon Meaker ssm38@uis.cam.ac.uk
University Information Services – Training Services

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