



City of Madison | Getting Started with Microsoft Excel





Excel Overview

AutoSave

Upload your work to OneDrive, Teams, or SharePoint. Your changes are saved automatically and uploaded to the cloud.

Groups

Easily find tools based on the category they're grouped into.

Search

Look up commands, get help, or search the Web.

Contextual tabs

See object specific tools for things like tables.

Dialog Box Launcher

Select to open advanced settings.

Status bar

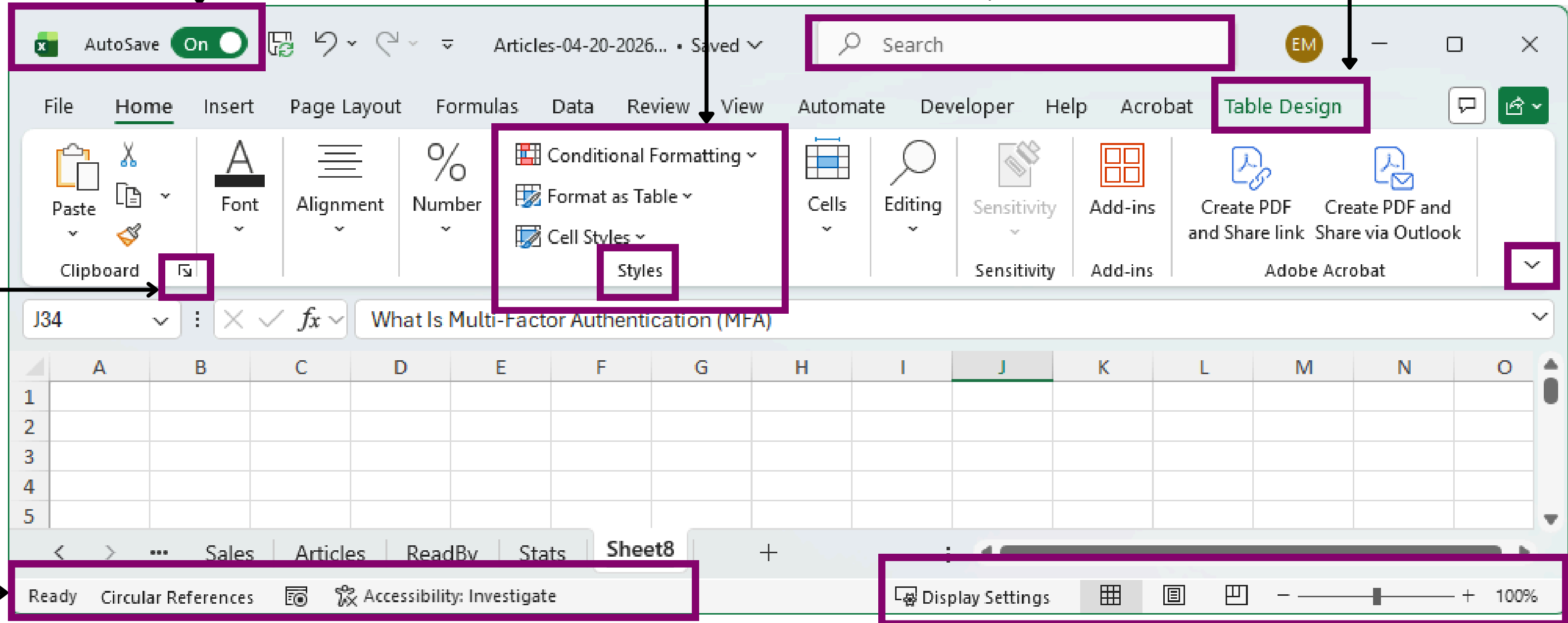
See page number, accessibility status, and more. Right-click to customize content.

Ribbon options

Hide the ribbon, only show tabs, or always keep the ribbon in view.

Display Settings

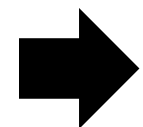
Zoom in and out. Change the page view.



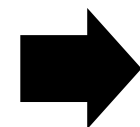


Learn About Excel Cursors

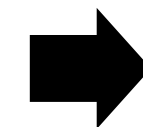
Symbol



With a Mouse



With a Keyboard



Example



- Select a cell.
- Hold the mouse button.
- Drag to highlight.

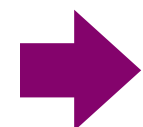
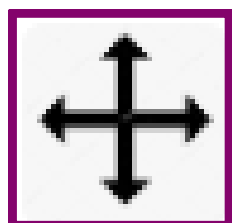


- Hold **Shift**.
- Use **arrow keys**.
- Release **Shift** at the final cell.

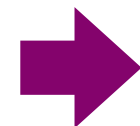


2	Multi-factor Authent	Enroll in MFA with the	1439
3	Multi-factor Authent	Multi-Factor Authent	801
4	File Storage & Shar	Where to Store Your	366
5	Computers & Equip	Price Quotes	241
6	Multi-factor Authent	What Is Multi-Factor	240
7	Policies & Govern	Approved Technology	212

Selects cells



- Select the cell.
- Hover over **top right corner**.
- Drag to destination.
- Release to drop.

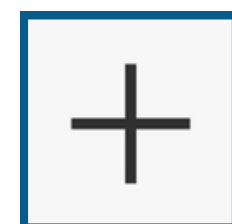


- Press **Ctrl + X**.
- Move to the destination cell.
- Press **Ctrl + V**.



	A	B	C	D
1	Category	Subject	Read By	
2	Multi-factor Authent	Enroll in MFA with the	1439	
3	Multi-factor Authent	Multi-Factor Authent	801	
4	File Storage & Shar	Where to Store Your	366	
5	Computers & Equip	Price Quotes	241	
6	Multi-factor Authent	What Is Multi-Factor	240	
7	Policies & Govern	Approved Technology	212	
8				
9			212	
10				
11				

Moves data



- Select the cell.
- Hover over **bottom-right corner**.
- Drag to fill.
- Release to apply.



- Move right → **Ctrl + R**
- Move down → **Ctrl + D**



	A	B	C	
1	Category	Subject	Read By	
2	Multi-factor Authent	Enroll in MFA with the	1439	
3	Multi-factor Authent	Multi-Factor Authent	801	
4	File Storage & Shar	Where to Store Your	366	
5	Computers & Equip	Price Quotes	241	
6	Multi-factor Authent	What Is Multi-Factor	240	
7	Policies & Govern	Approved Technology	212	
8			212	
9			212	
10				

Auto fills data



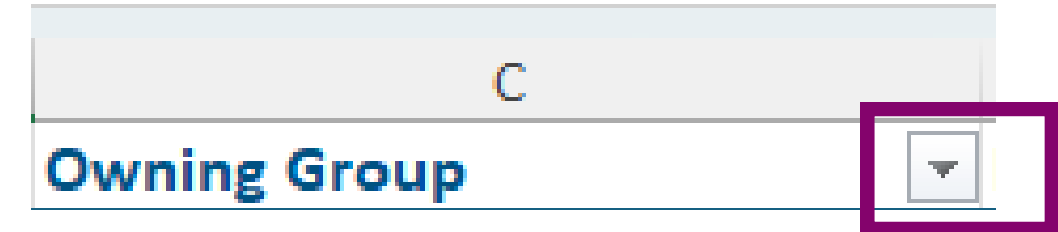
Sort & Filter Your Data

1

Format data as a table.
(Instructions are on page x.)

2

Select the column's sort
and filter arrow.



3

Choose one of the following:

Sort A to Z — Sort text A→Z and also sorts numbers smallest→largest.

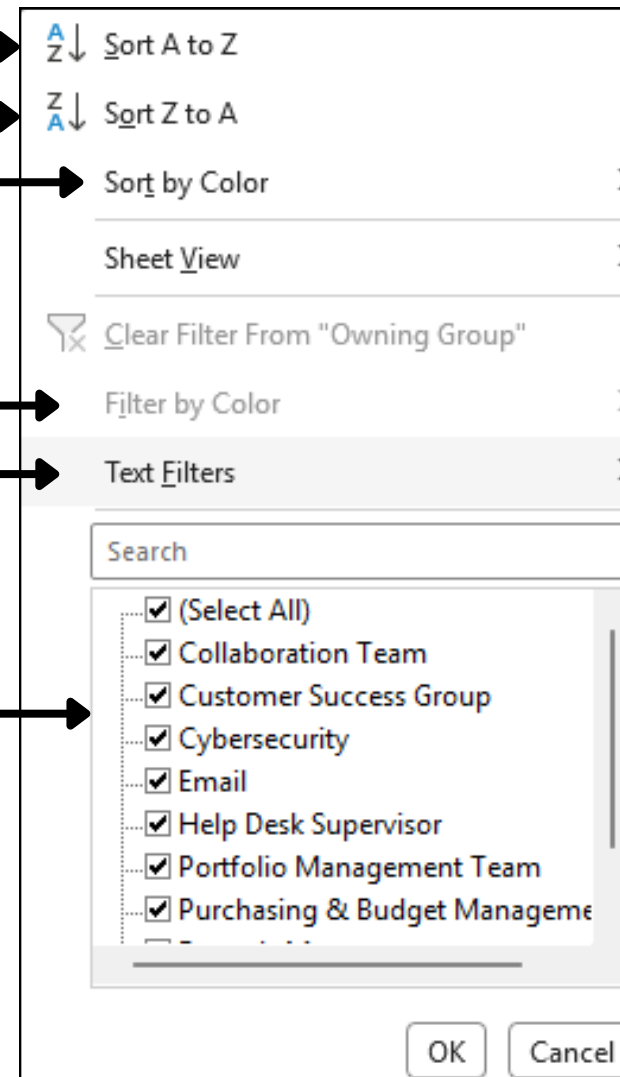
Sort Z to A — Sort text Z→A and numbers largest→smallest.

Sort by Color — Move rows with a chosen cell color to the top.

Filter by Color — Show only rows with the selected cell color.

Text Filters — Filter by conditions, like “greater than 10,”
“contains,” and “last month”

Select/Deselect Values — Show only the checked items; hides the rest.



Sort Vs. Filter Overview

Sort

- Rearranges the entire list
- Affects all rows in the column
- Useful when you want data in order (A→Z, smallest→largest, oldest→newest)
- Does not hide anything

Filter

- Hides rows that don't match your criteria
- Leaves the original order in place
- Useful when you want to focus on a subset
- Can apply multiple filters at once

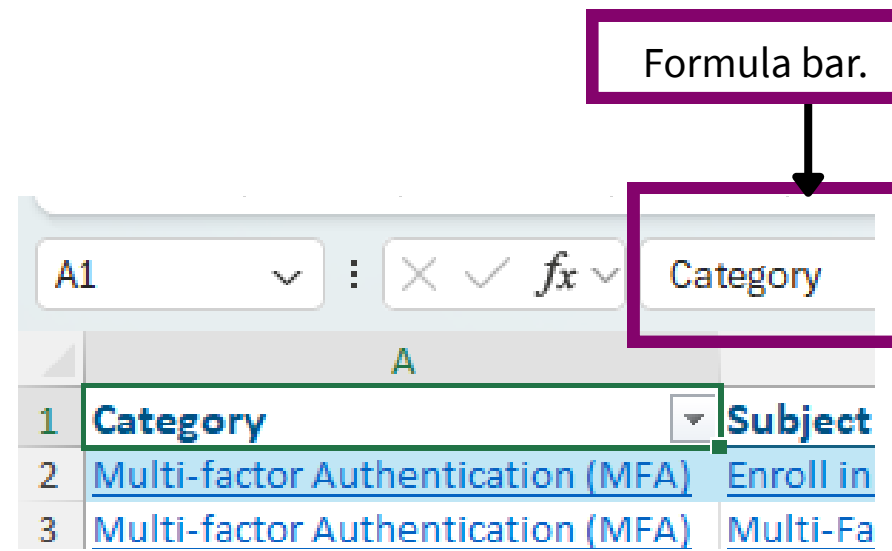
Sort changes the order of your data. Filter temporarily hides what you don't need.

Edit & Work with Your Data

Edit Cells

Update cell content:

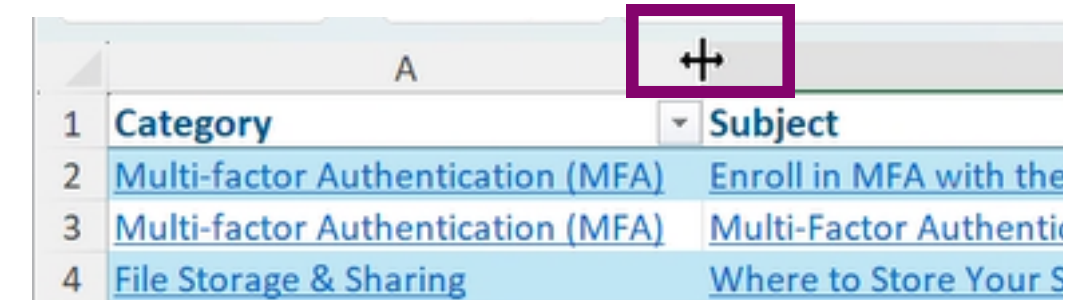
1. Place your cursor in the cell.
2. Do one of these things:
 - **Double-click** your mouse.
 - Press **F2** with your keyboard.
 - Place your cursor in the **Formula bar**.
3. Enter your changes.



Resize Columns

Increase a column's width to see all content in its cells:

1. Place your cursor on the line between two columns.
2. Double-click your mouse.



Analyze Your Data With Formulas

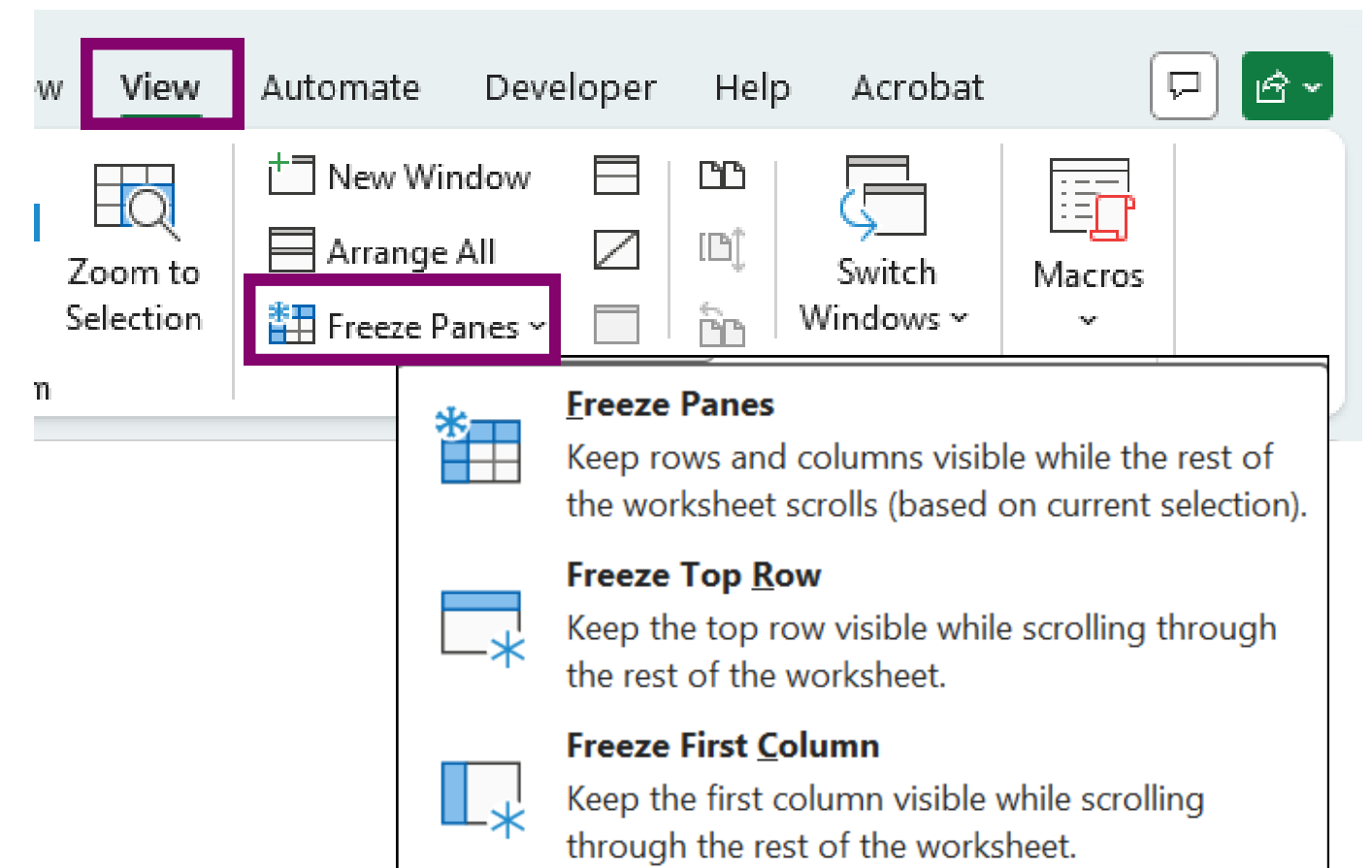
Let Excel do the math for you:

1. Place your cursor in a cell.
2. Press the **equal sign (=)** on your keyboard.
3. Enter one of the following:
 - **SUM:** Add all values in a column or row.
 - **AVERAGE:** Get the mean value of a data set.
 - **COUNT:** Add the number of cells.
4. Press **Tab**.
5. Highlight a range of data.
6. Press **Enter**.

Freeze Panes

Keep rows and columns visible while scrolling through the worksheet:

1. Go to the **View** tab.
2. Place your cursor in the row or column you want to freeze.
3. Select **Freeze Panes**.
4. Choose one of these options:
 - **Freeze Panes:** Keep the current row visible.
 - **Freeze Top Row:** Keep the top row visible.
 - **Freeze First Column:** Keep the first column visible.





Format Your Data As a Table

1

Place your cursor anywhere inside your dataset and press **Ctrl + T**.

	A	B	C
1	Category	Subject	Read By
2	Multi-factor Authentication (MFA)	Enroll in MFA with	1439
3	Multi-factor Authentication (MFA)	Multi-Factor Auth	801
4	File Storage & Sharing	Where to Store Yc	366
5	Computers & Equipment	Price Quotes	241
6	Multi-factor Authentication (MFA)	What Is Multi-Fac	240
7	Policies & Governance	Approved Techno	212

2

Check the **My table has headers** box to create and accessible table. Then select **OK**.

Create Table ? X

Where is the data for your table?

☒ My table has headers

OK Cancel

3

Mark which band of cells categorizes the data.

Search

Automate Developer Help Acrobat **Table Design**

☒ Header Row ☐ First Column ☒ Filter Button

☐ Total Row ☐ Last Column

☒ Banded Rows ☐ Banded Columns

Table Style Options

Quick Styles

Table Styles

4

Pick a **Table Style** with good color contrast.

Table Design Comments

Filter Button

Table Styles



Visualize Your Data with Charts

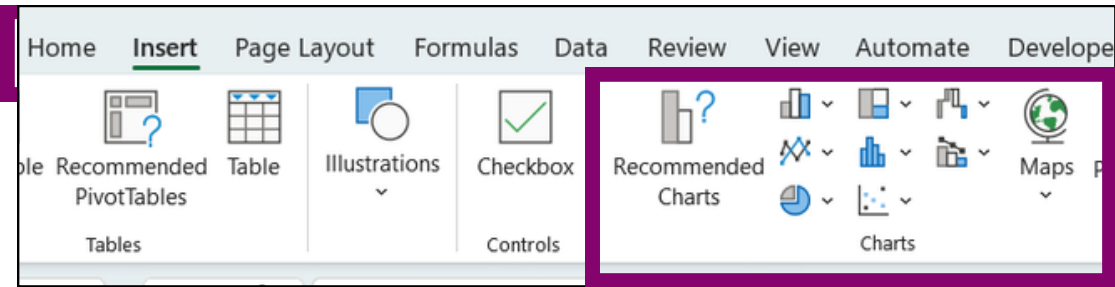
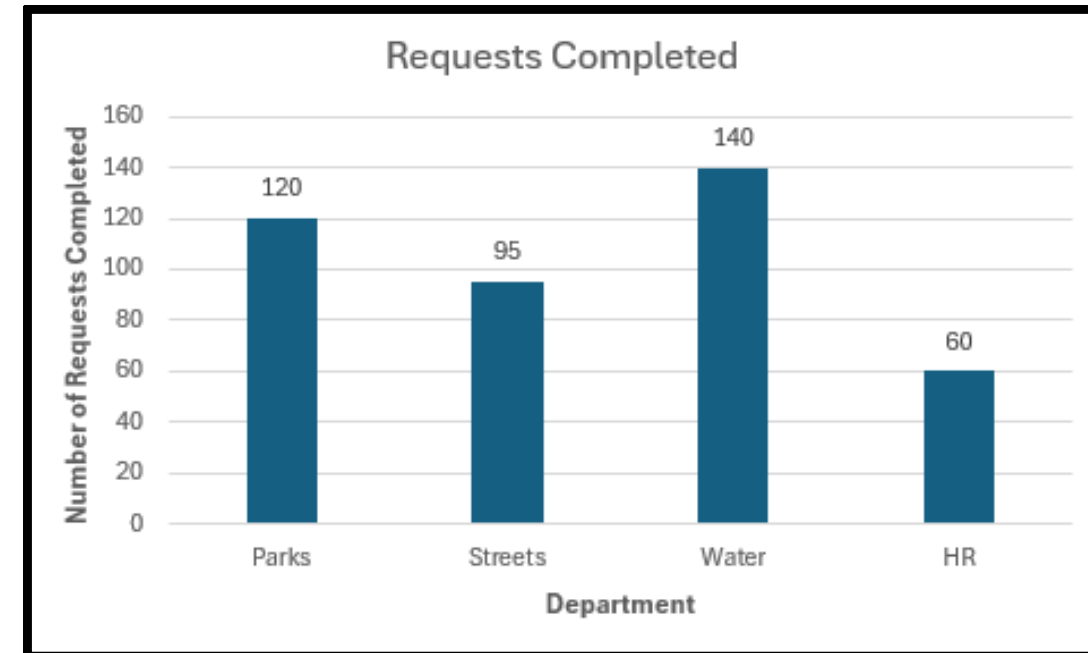


Chart Accessibility Tips

- Use clear titles.
- Label axes.
- Avoid color-only meaning.
- Add data labels or markers.
- Use high contrast colors.
- Add textures to pie charts to make them more visible to color blind users.
- Add alt text describing the purpose and main trend.
- Keep data tables clean:
 - one header row
 - no merged cells
 - no blank rows

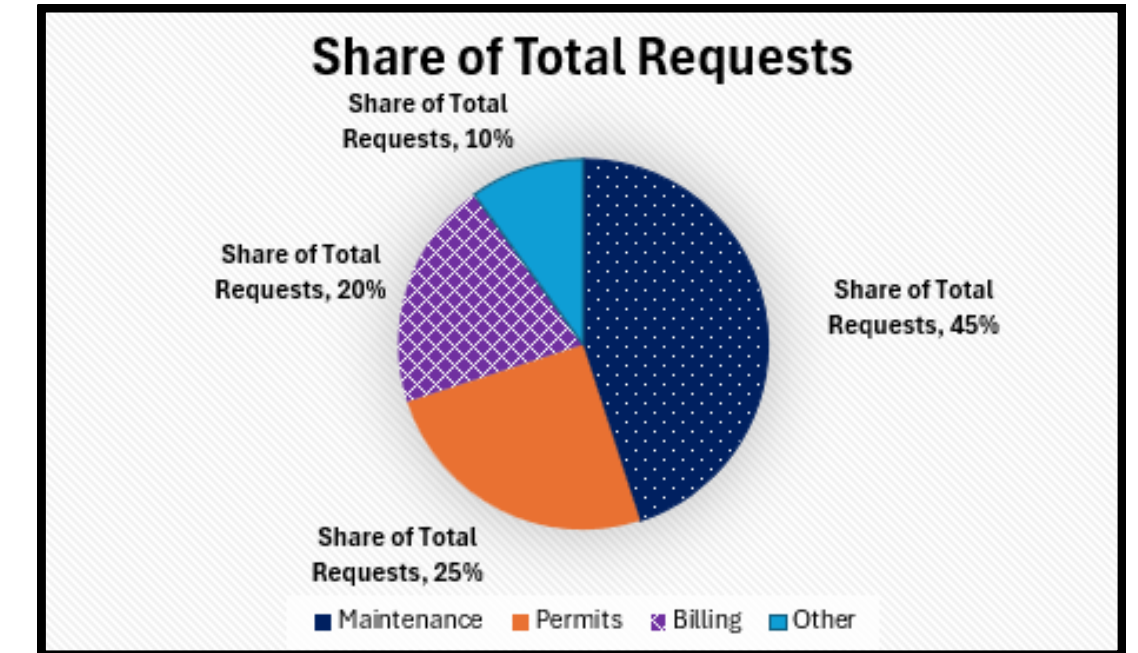
Column Chart

Compare amounts across categories



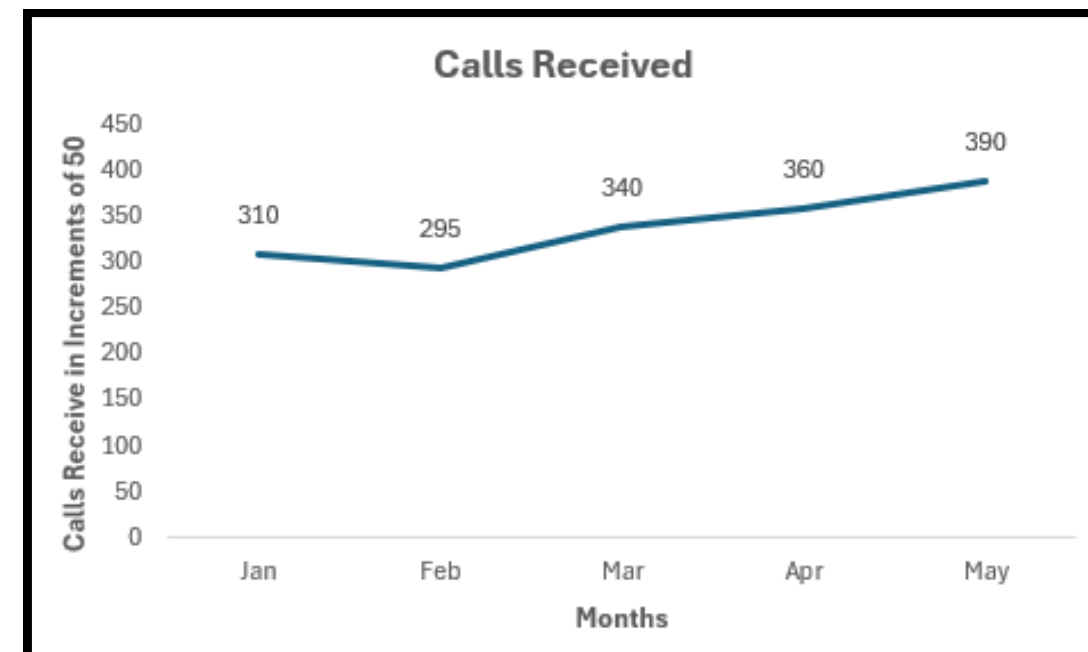
Pie Chart

Show parts of a whole



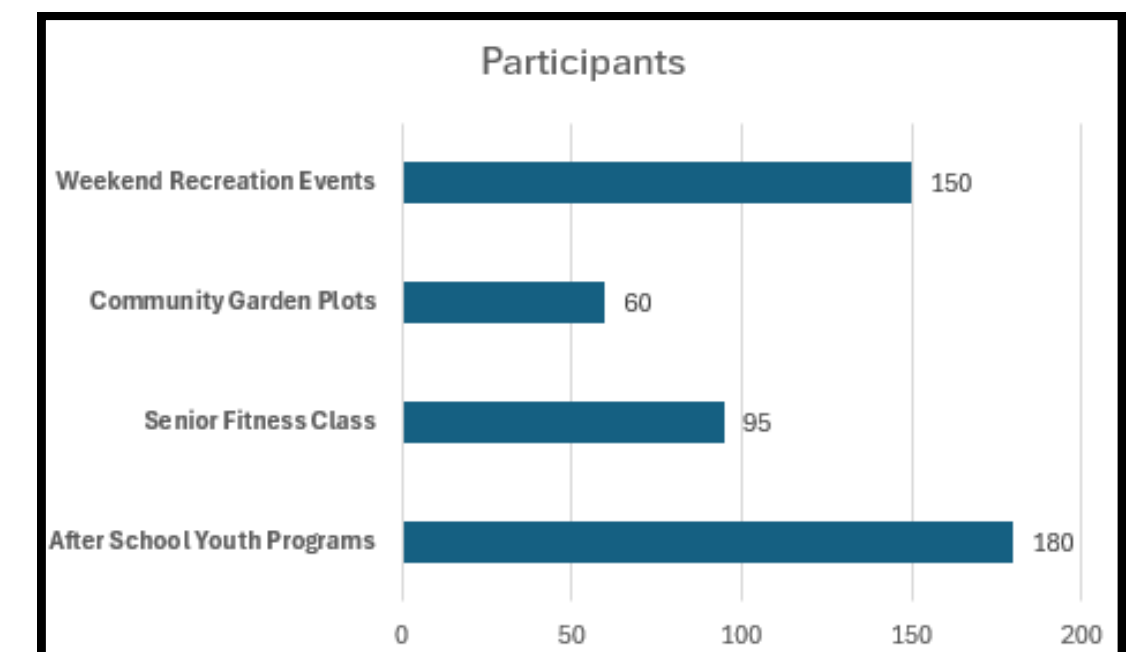
Line Chart

Show changes over time.



Bar Chart

Compare categories when labels are long.





Analyze Your Data with PivotTables

A **PivotTable** is a tool that lets you easily summarize and analyze data.

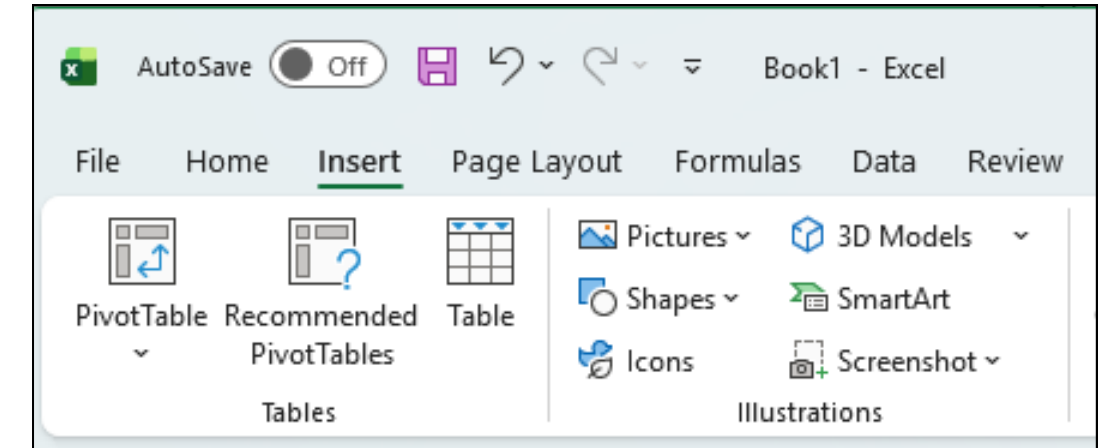
1

- Format your data as a table.
- Place your cursor anywhere inside the table.
- Press **Ctrl + A** on your keyboard.

	A	B	C
1	Category	Subject	Read By
2	Multi-factor Authe	Enroll in MFA with the	1439
3	Multi-factor Authe	Multi-Factor Authent	801
4	File Storage & Shar	Where to Store Your S	366
5	Computers & Equip	Price Quotes	241
6	Multi-Factor Authe	What is Multi-Factor	240

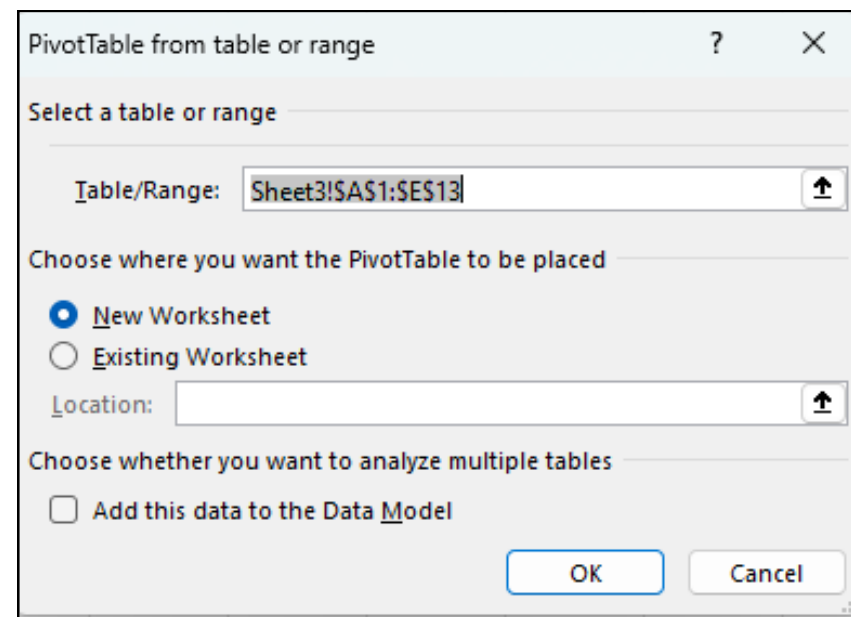
2

- Go to the **Insert** tab.
- Select **PivotTable**.



3

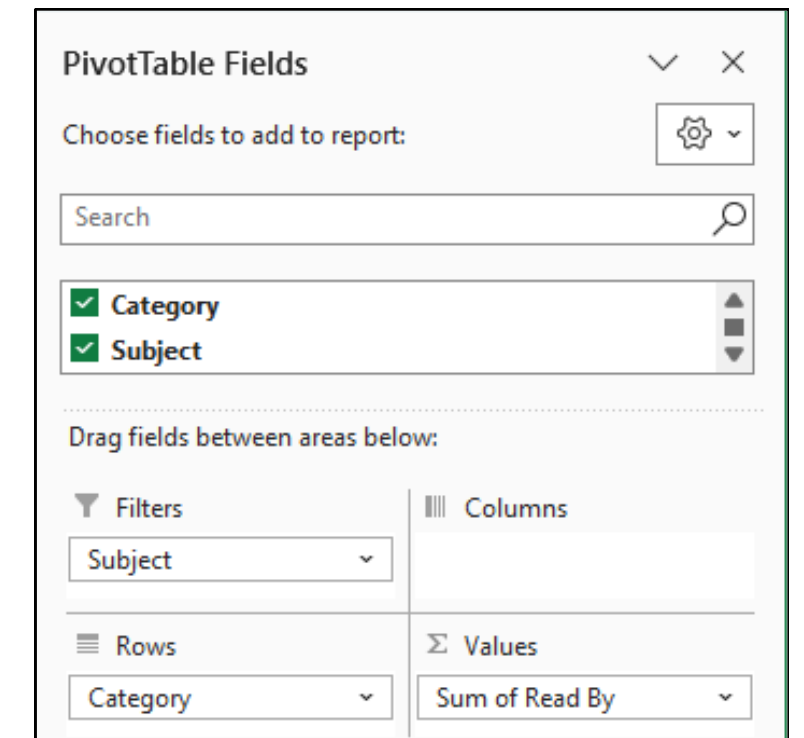
- Add the table to a new worksheet or the existing one.
- Select **OK**.



4

Drag each field to one of these places:

- **Filters:** Choose which fields to see.
- **Columns:** Create subcategories for grouped data.
- **Rows:** Group data values.
- **Values:** Add numbers or count the number of word entries.

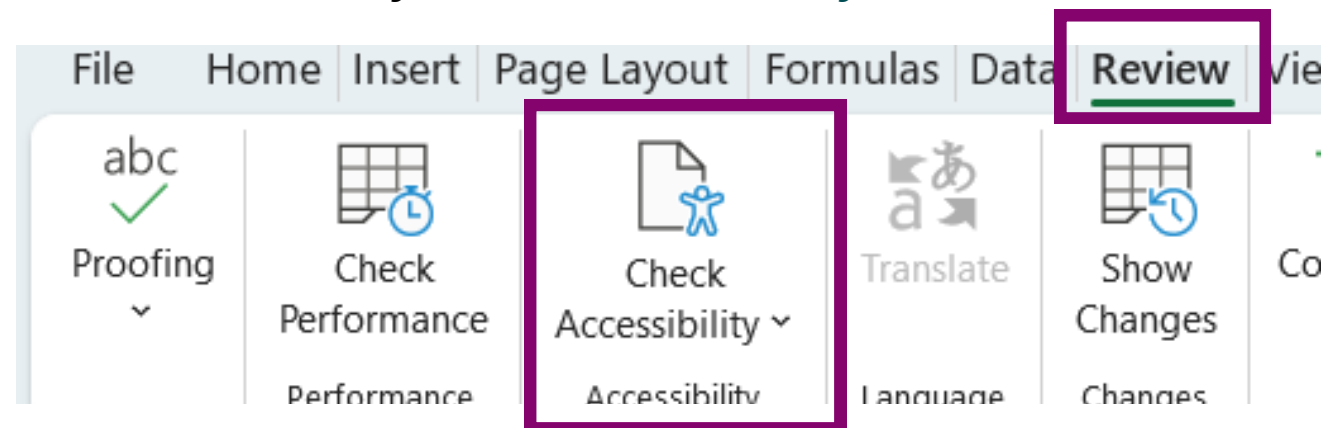




Create Accessible Content



DO: Check Accessibility. Run the **Accessibility Checker**.



DO: Describe the sheet in cell A1. Describe the sheet's purpose, structure, and columns in one short sentence.

	A	B
1	This sheet contains a table of knowledge base articles. Column 1: Category (article classification). Column 2: Subject (article topic). Column 3: Read by (how many times the article has been read).	



Don't Don't merge cells. Unmerge them if you find them. Keep one piece of information in each cell.

Knowledge Base Article Stats		
Category	Subject	Read By
Multi-factor Authentication	Enroll in MFA with the	1439
Multi-factor Authentication	Multi-Factor Authent	801
File Storage & Sharing	Where to Store Your	366
Computers & Equipment	Price Quotes	241



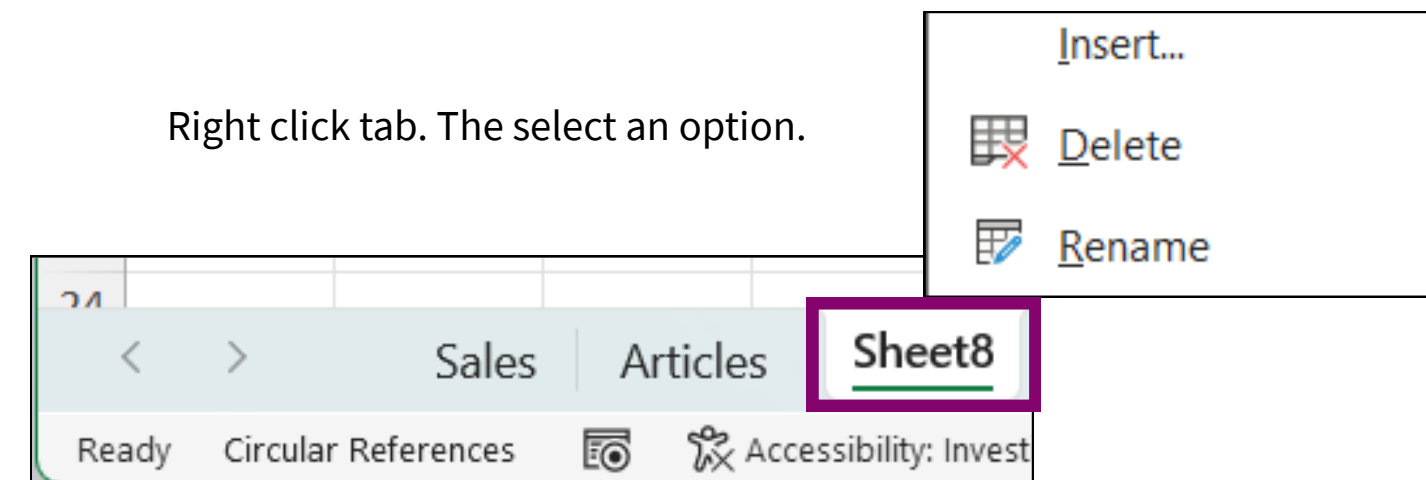
Tip: Check out the [Accessibility Category](#) in the IT Service Center to learn more.



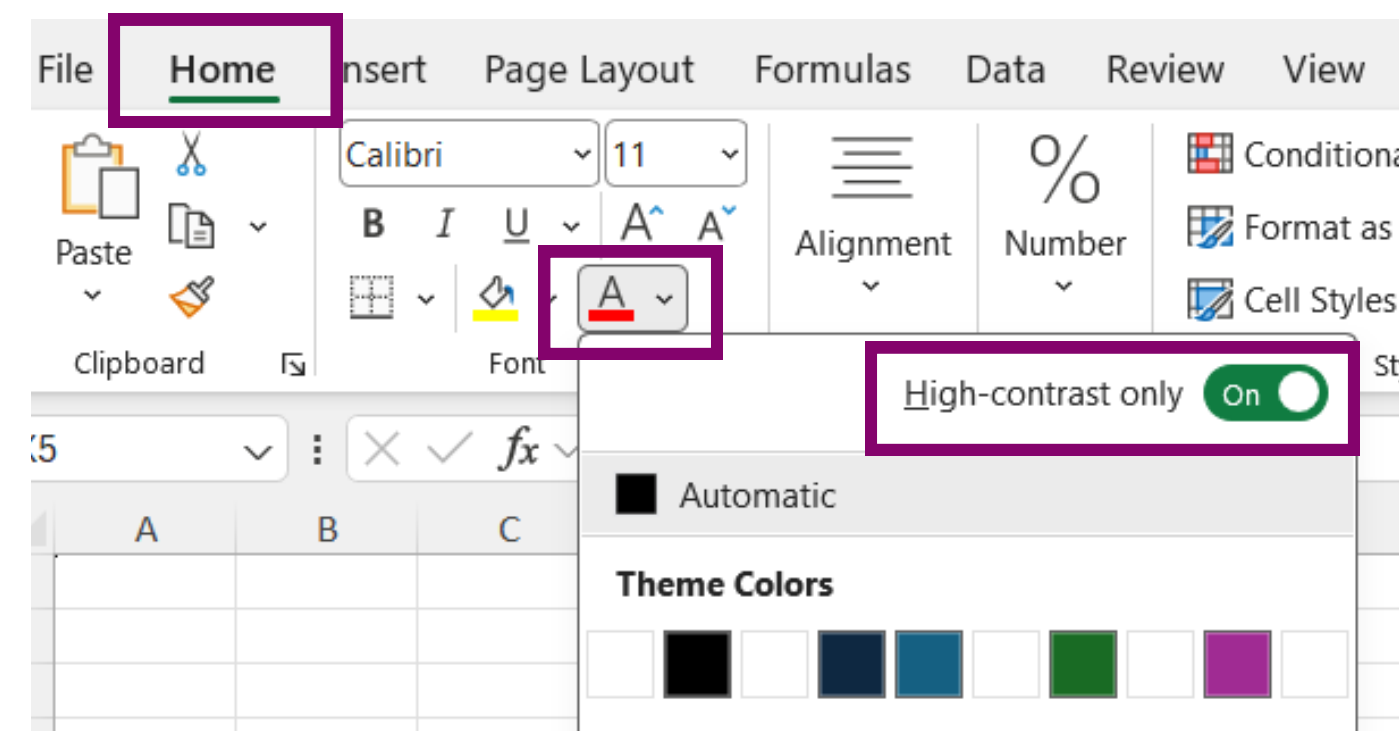
DO: Give all worksheets a unique name. Name each sheet so its tab clearly describes its content.

Remove blank worksheets. Delete unused sheet so screen readers don't announce empty tabs.

Right click tab. Then select an option.



DO: Use good color contrast. Use readable text and background colors.

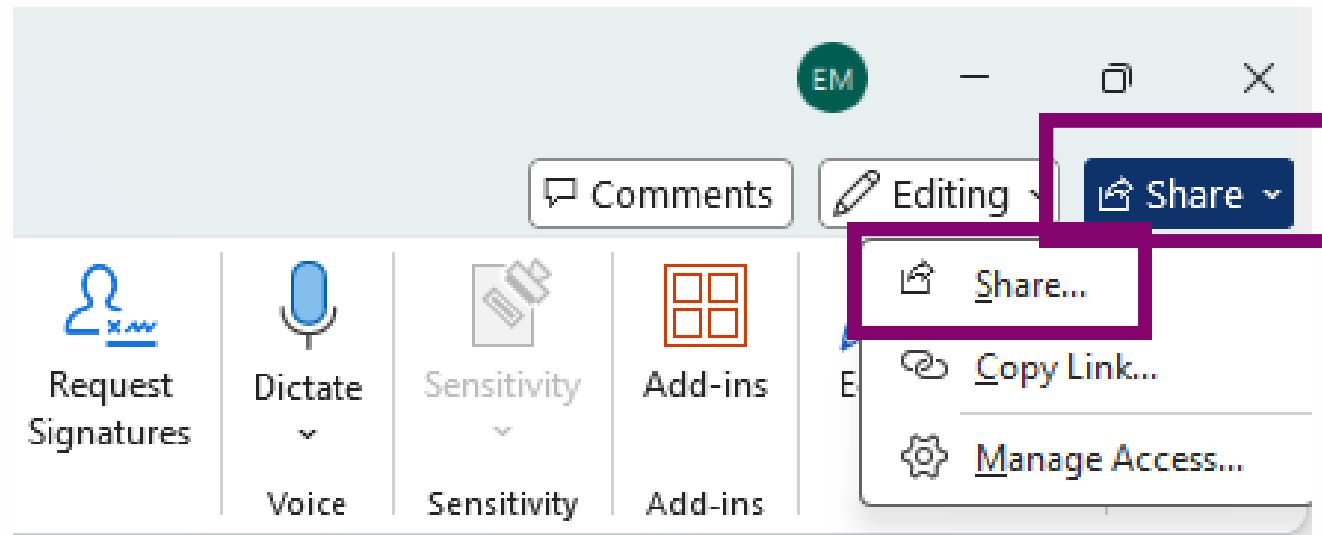




Share Your Document

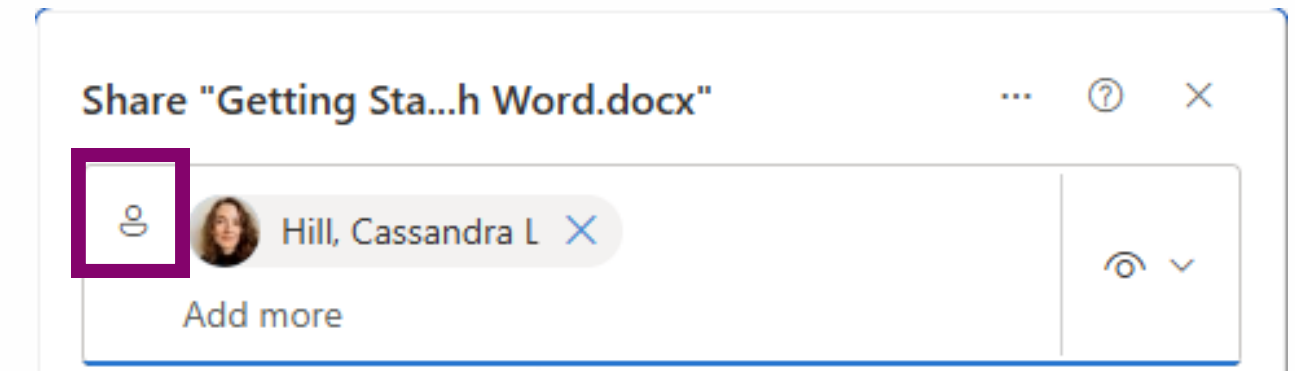
1

Select **Share** from the ribbon. Then select **Share** from the menu.



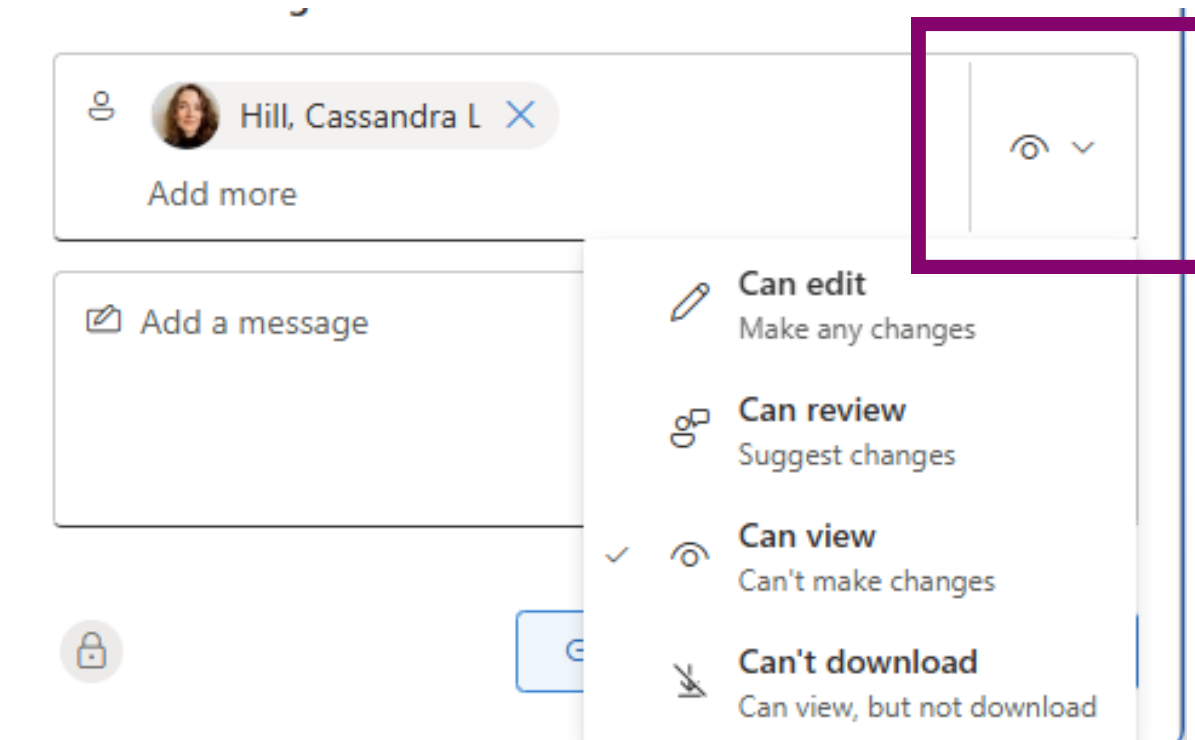
2

Chose people to share with.



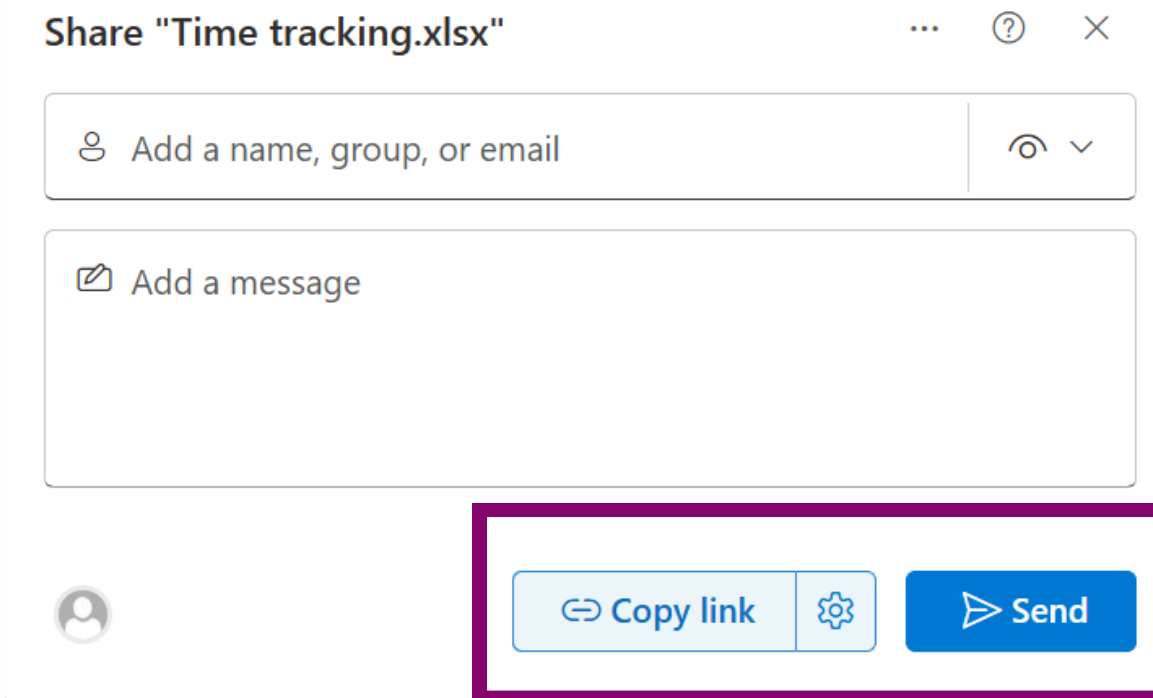
3

Choose a permission level.



4

Copy a link. Add a message and **send** a link via email. Or select the **gear** to add a share expiration date.



TIP: Only people with City IT-managed M365 accounts can open files shared via a link.