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Basic Excel

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Agenda

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- Lesson 1: The Benefits of Excel
- Lesson 2: The Basics of Excel
- Lesson 3: Hands-On Exercises
- Lesson 4: Import a Text File

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LESSON 1:

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THE BENEFITS OF EXCEL

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Why Use Excel?

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- Excel can be an easy way to review significant amounts of data to identify particular issues or situations.
- Excel can be used to check calculations performed within your CAMA system to verify accuracy.
- Excel spreadsheets allow analytical capability without requiring your software vendor to program a specific analysis for you.

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Why Use Excel?

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- Excel provides a generally universal method for sharing data and information with others.
- Excel can be used to prepare custom handouts, charts, and reports to highlight particular findings.

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Microsoft Excel

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- Common versions:
  - Excel 2007 (current version)
  - Excel 2003 (older version, still popular)
  - Excel 2010 (newest version, not very popular)
- While this discussion will focus on Microsoft Excel 2007, some of the capabilities discussed in this class would also be present in other spreadsheet packages. Typically, the Help option can be used to find particular functionality.

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Working with Earlier Versions

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- In Excel 2007, you can open files created in Excel 95 through Excel 2003.
- You can open and edit older workbooks and share files with people who don’t have Excel 2007.

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Saving Multiple Versions

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When you save a file in Excel 2007, you can choose from several file types.

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- **Most Common:**
  - **Excel Workbook (*.xlsx).** This is Excel 2007.
  - **Excel 97-Excel 2003 Workbook (*.xls).** Use when you need to share with someone working in a previous version of Excel.

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Microsoft Excel Quiz 1

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Quiz 1:

You can open an Excel 2003 Workbook with Excel 2007.

1. True
2. False

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Microsoft Excel Quiz 1

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Quiz 1:

You can open an Excel 2003 Workbook with Excel 2007?

Answer:

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True

In Excel 2007, you can open files created in Excel 95 through Excel 2003.

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LESSON 2:

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THE BASICS OF EXCEL

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Terminology

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- **Spreadsheet** – Table used to store and display data. The table is arranged by rows and columns.

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- **Worksheet** – Single page or tab within the Excel workbook.

- **Workbook** – The entire spreadsheet file.

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Terminology

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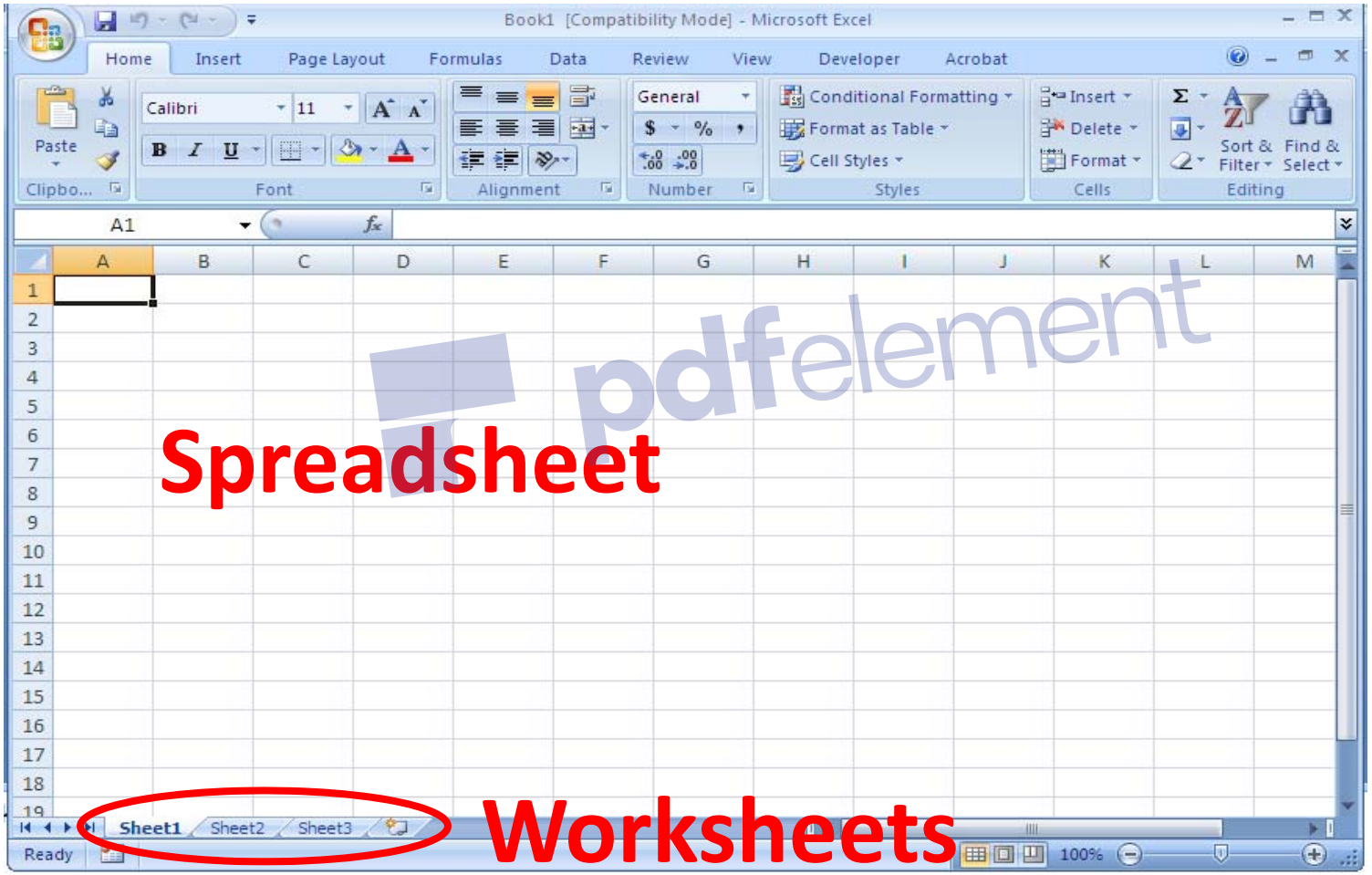

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Terminology

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- **Row** – Horizontal array of data.
  - Signified by numbers – Row 1, Row 2, etc.
  - Maximum number of rows:
    - Excel 2003 – 65,536
    - Excel 2007 – 1,048,576

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- **Column** – Vertical array of data.
  - Signified by letters – Column A, Column B, etc.
  - Maximum number of columns:
    - Excel 2003 – 256
    - Excel 2007 – 16,384

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Terminology

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- **Cell** – Individual cell. Intersection of a row and a column.
  - Signified by a combination of the column letter and the row number.
    - Examples: A1, C300, BA42

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Terminology

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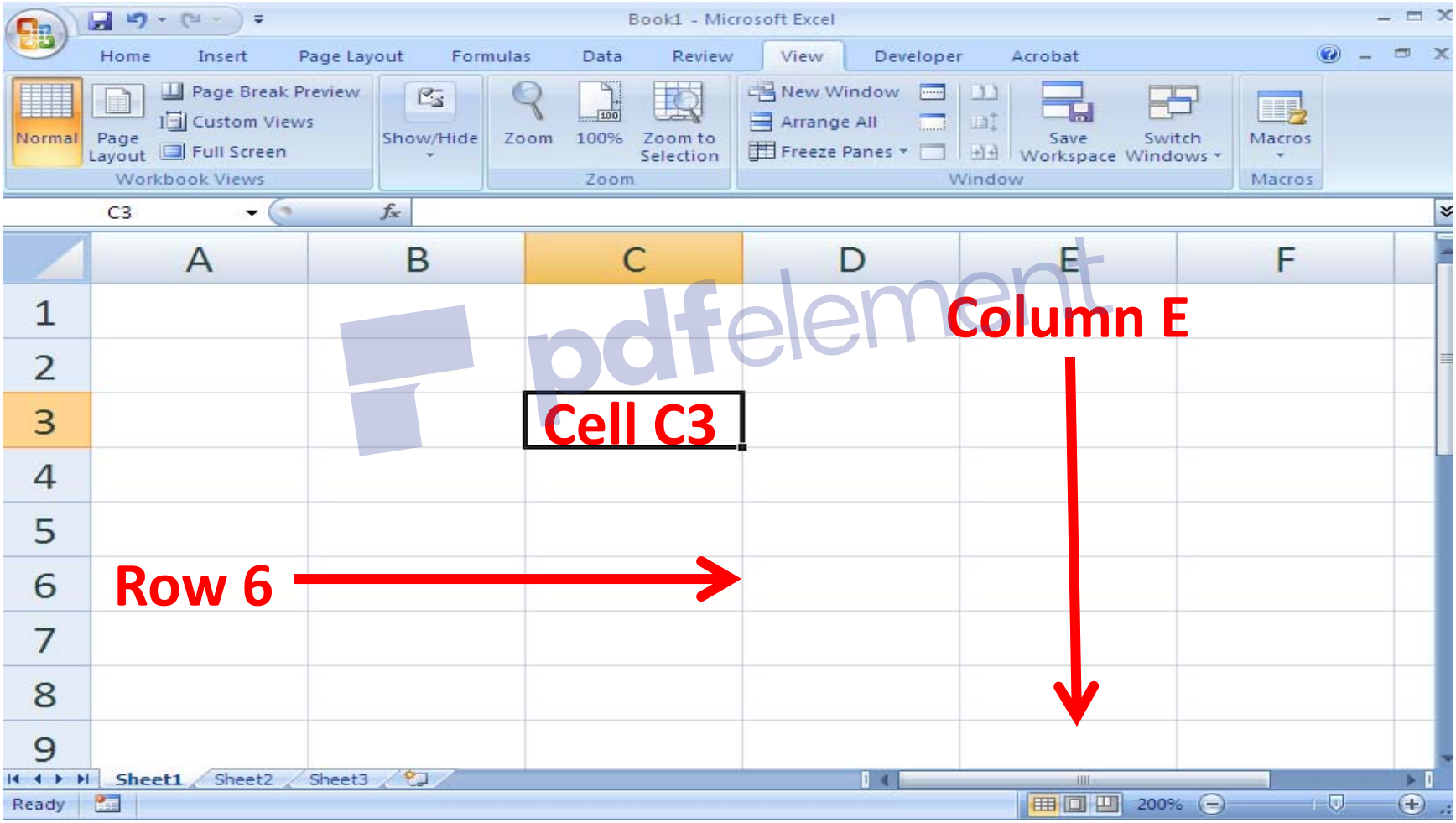

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Menus

Remove Watermark Now

- Office Button
- Quick Access Toolbar
- The Menu
  - Home Tab
  - Insert Tab
  - Page Layout Tab
  - Formula Tab
  - Data Tab
  - View Tab
  - Help Tab

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Office Button

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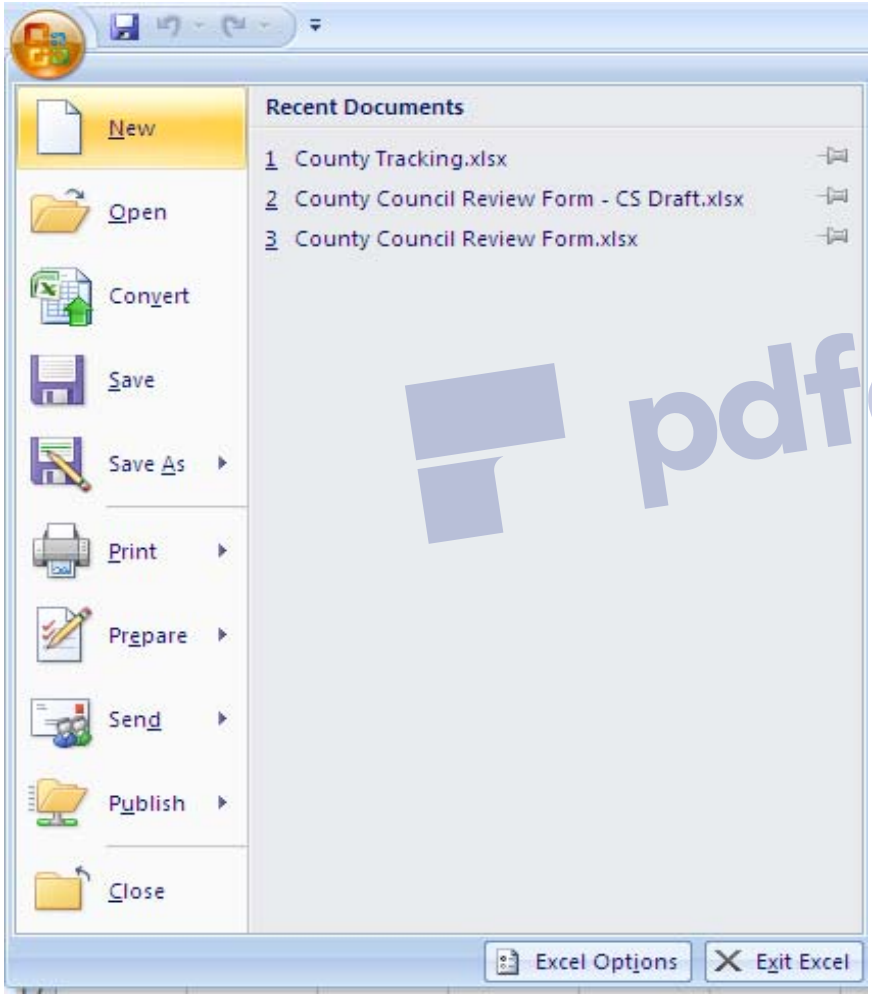

- New
- Open
- Save/Save As
  - Can select the type of file to save
- Print
  - Print Preview
- Recent Documents
  - "Pushpin" feature

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Quick Access Toolbar

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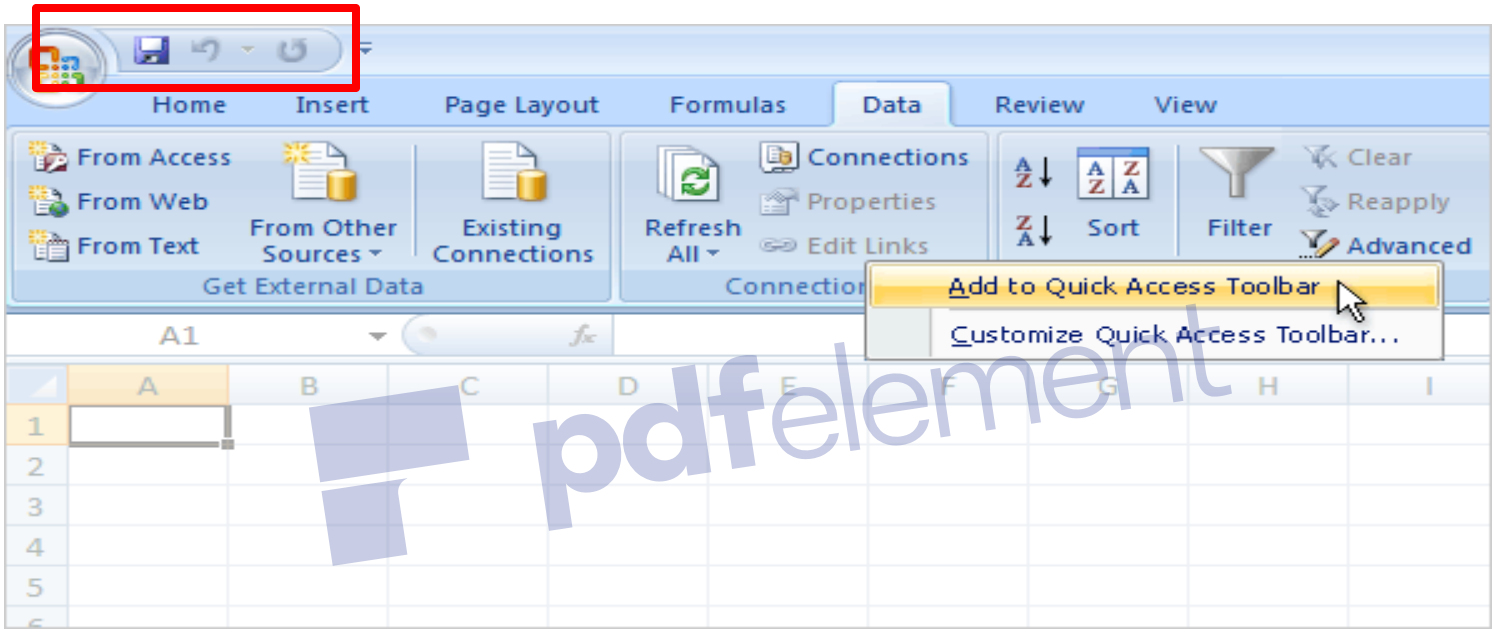

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- The Quick Access Toolbar is above the menu when you first start Excel 2007. There, commands are always visible and near at hand.

- To add a command to the Quick Access Toolbar, right click on the command and click “Add to Quick Access Toolbar”.

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The Menu (a.k.a Ribbon)

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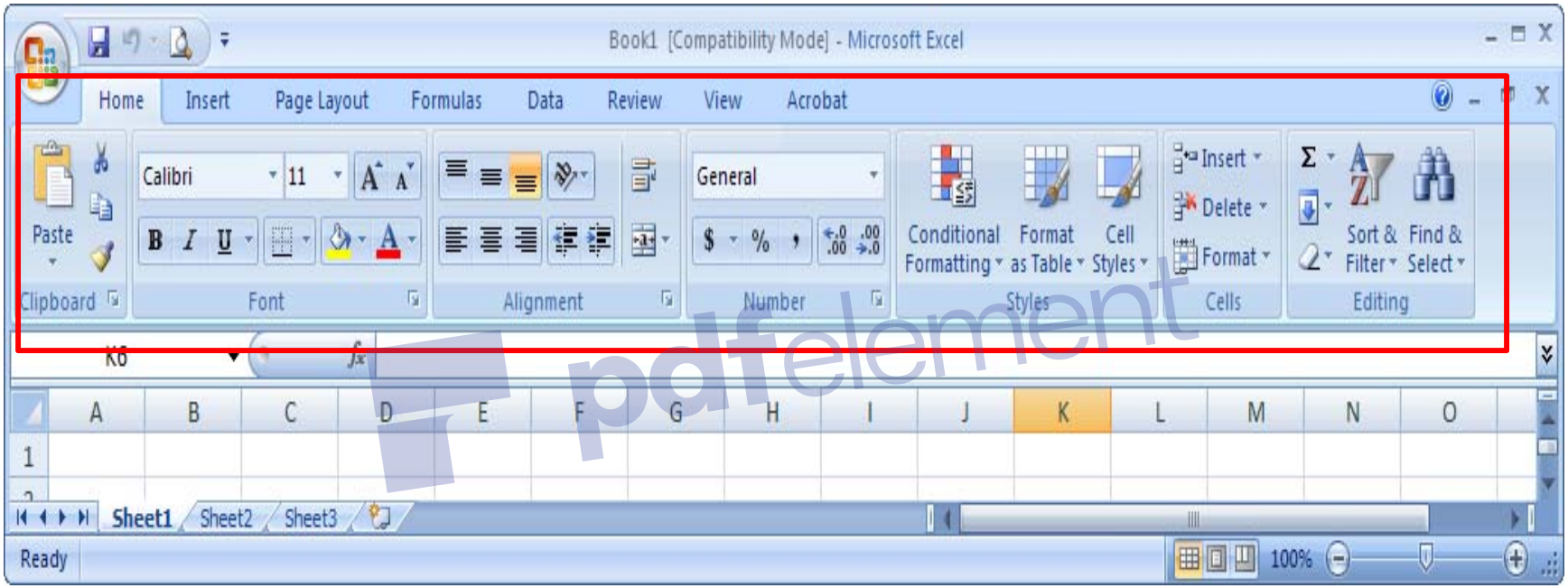

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The commands are clearly visible and readily available in one control center.

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The Menu (what's on it)

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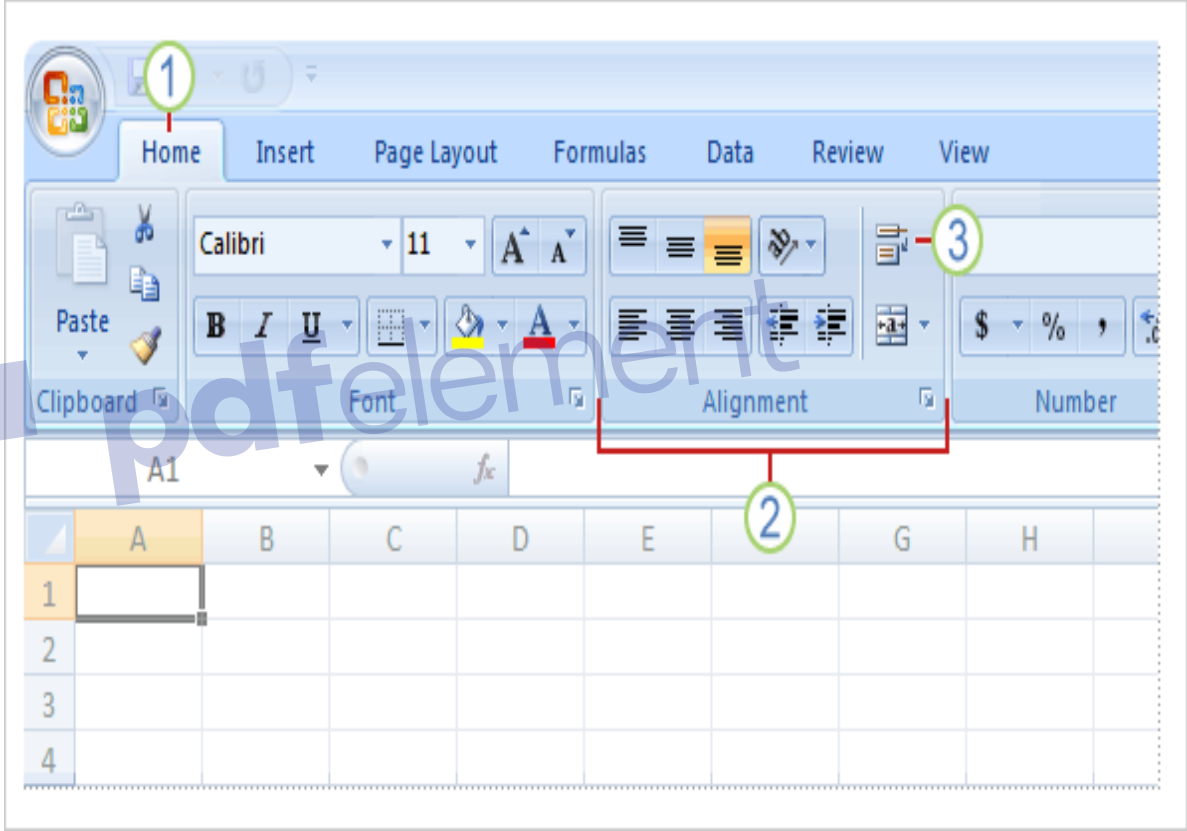
The three parts of the menu are:
(1) tabs,
(2) groups, and
(3) commands.



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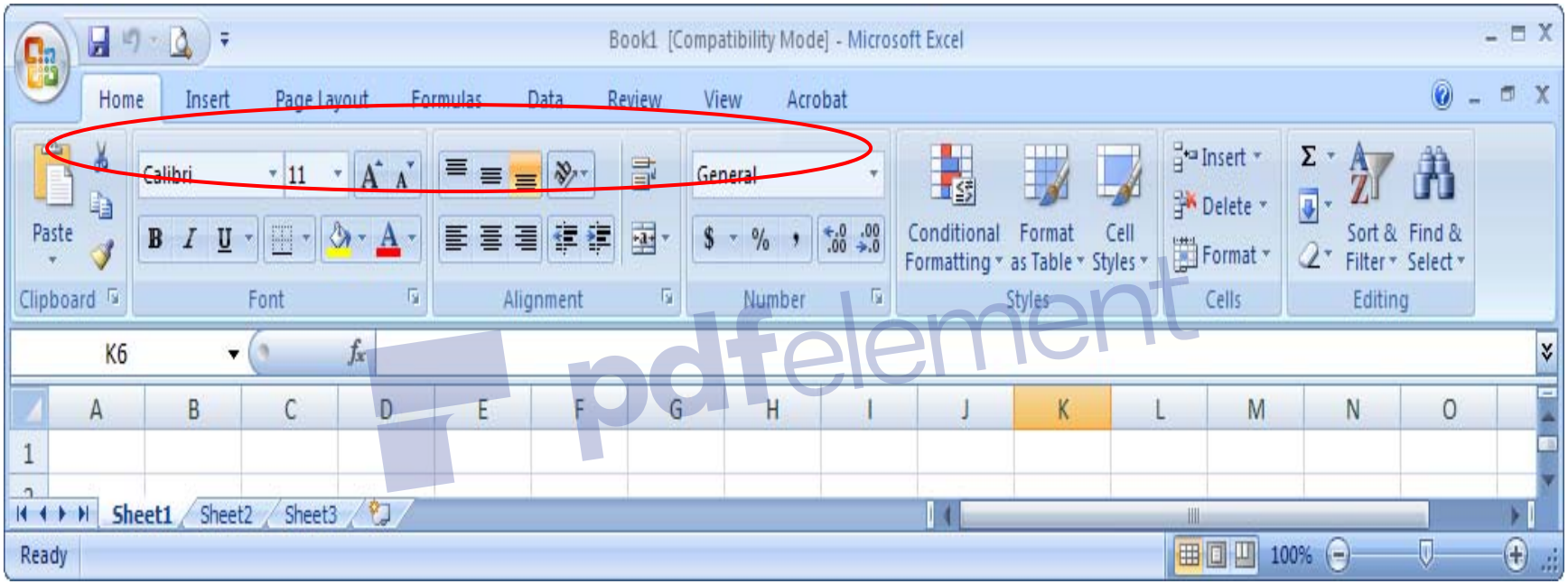
Menu Tabs

Remove Watermark Now



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The principal commands in Excel are gathered on the tabs. **Tabs** represent core tasks you do in Excel. There are seven tabs across the top of the Excel window.

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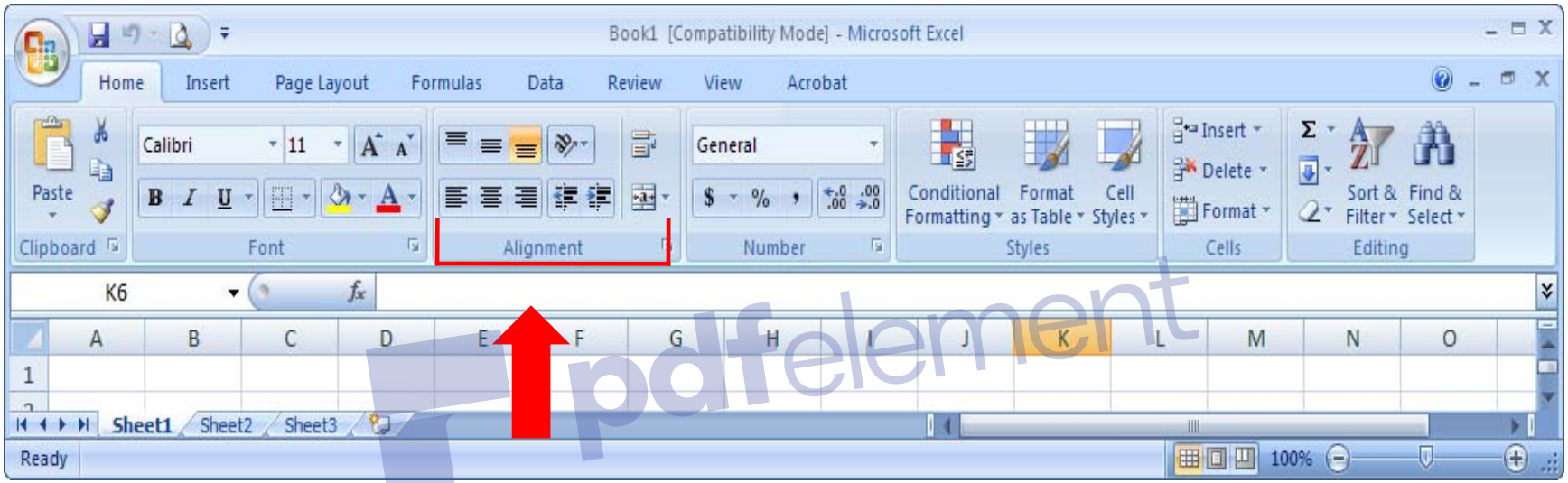
Menu Groups



Groups pull together all the commands you're likely to need for a particular type of task.

Groups are sets of related commands

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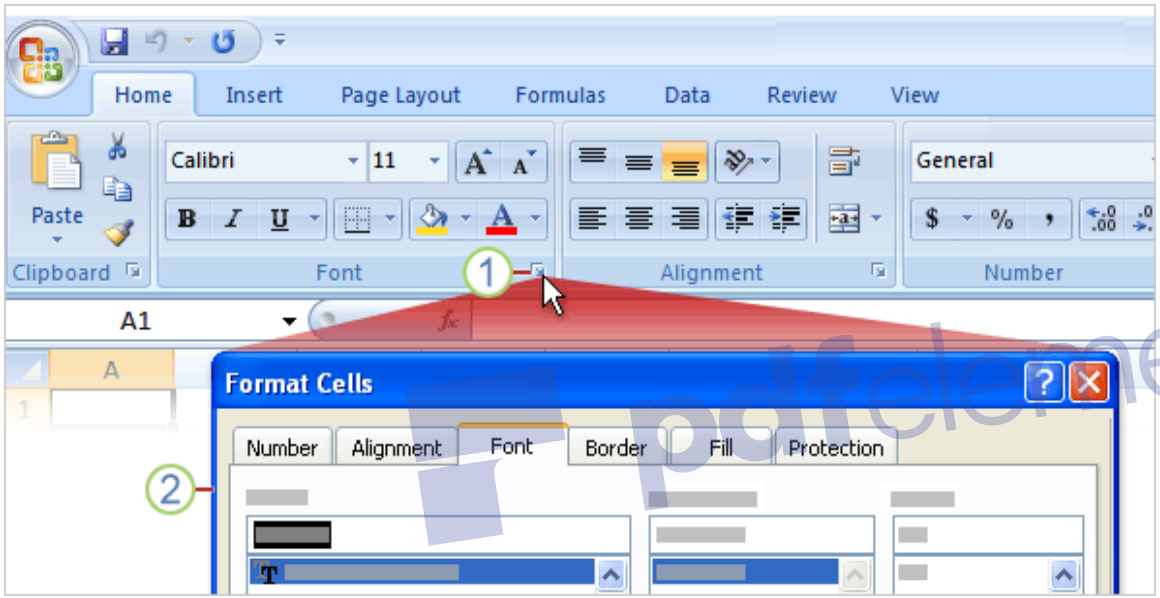
Menu Groups continued...

Remove Watermark Now



Sometimes an arrow, called the Dialog Box Launcher, appears in the lower-right corner of a group.

This means more options are available for the group.

Click the Dialog Box Launcher, and you'll see a dialog box or task pane. The picture shows an example:

1. On the Home tab, click the arrow in the Font group.

2. The Format Cells dialog box opens, with superscript and other options related to fonts.

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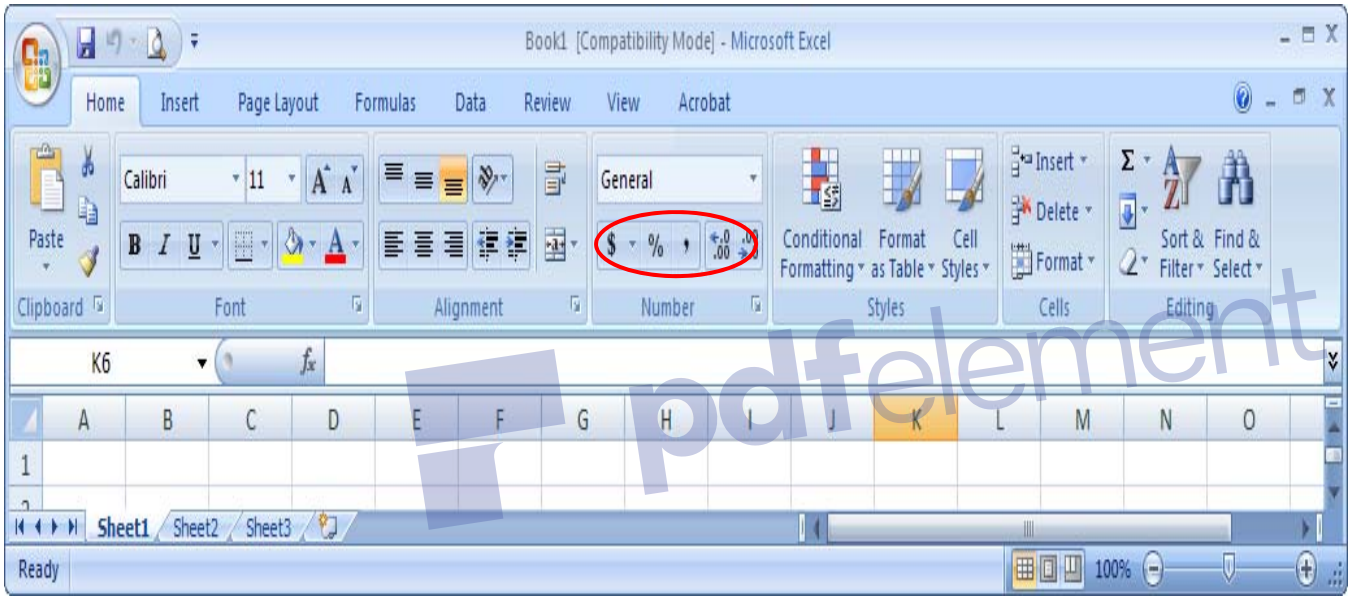
Menu Commands

Remove Watermark Now



The **Commands** on the Menu are the ones you use the most.

Instead of showing every command all the time, Excel 2007 shows some commands only when you may need them, in response to an action you take.

So don't worry if you don't see *all* the commands you need at all times. Take the first steps, and the commands you need will be at hand.

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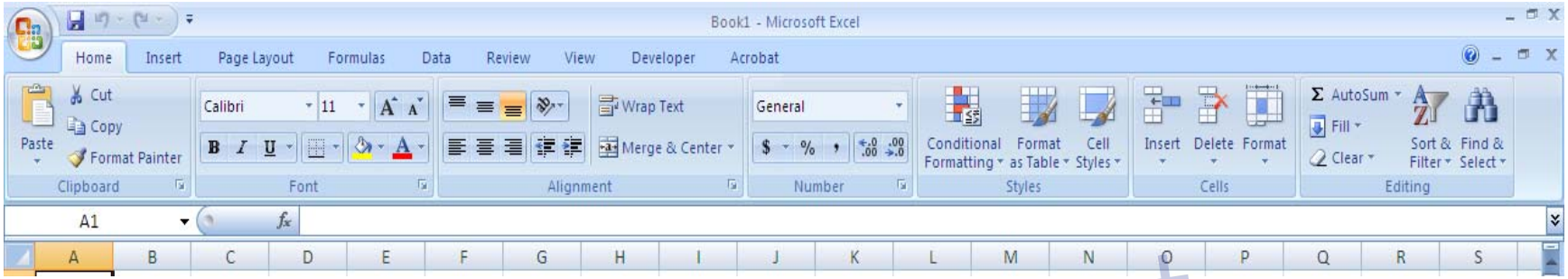
Home Tab

Remove Watermark Now



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- Formatting
- Type of Number
  - $, %, Decimal Points
- Conditional Formatting
- Sort and Filter
- Find and Select
- Cut and Paste
- Wrap Text/Merge & Center

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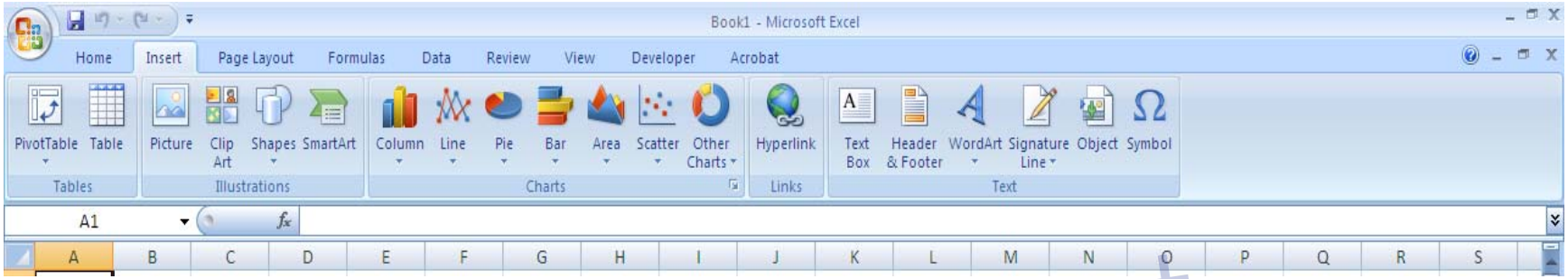
Insert Tab

Remove Watermark Now



- Tables
- Charts
- Text

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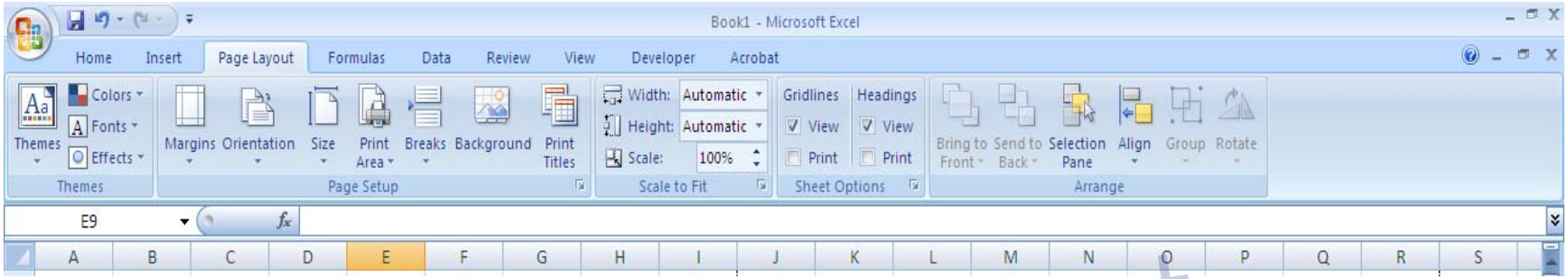
Page Layout Tab

Remove Watermark Now



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- Print Area
- Print Titles
- Margins
- Orientation

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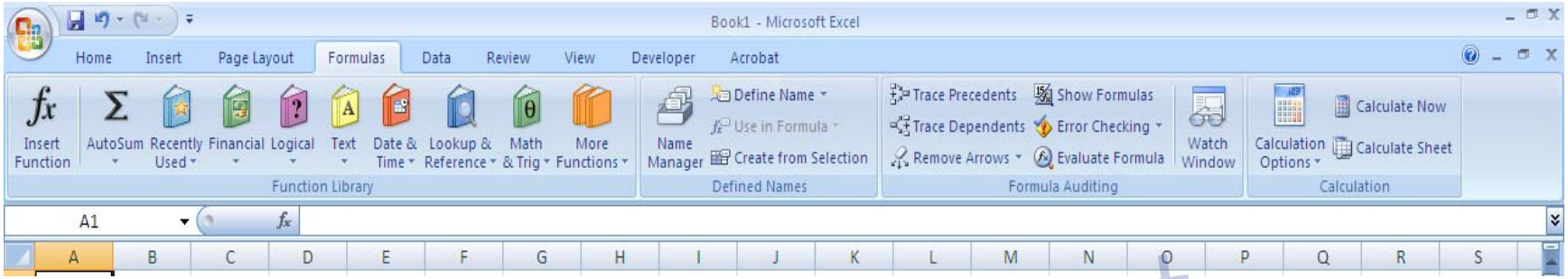
Formulas Tab

Remove Watermark Now



- Insert Function
- Auto Sum

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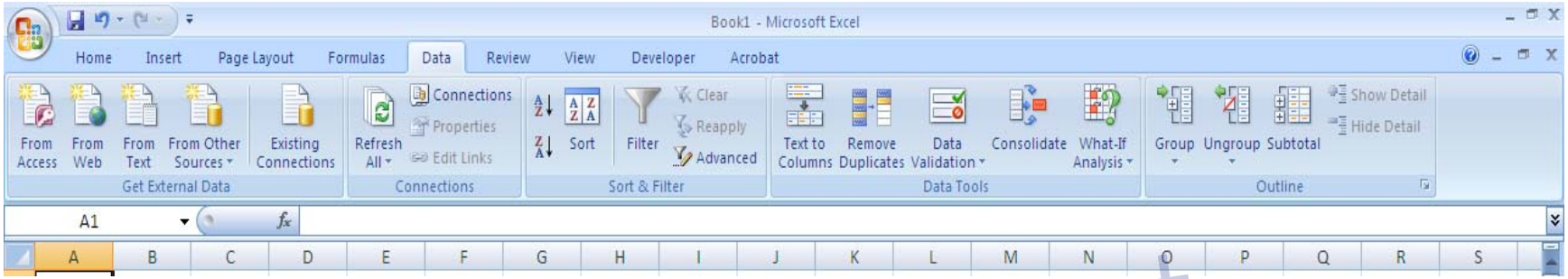
Data Tab

Remove Watermark Now



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- Sort
- Filter
- Text to Columns
- Remove Duplicates
- Subtotals

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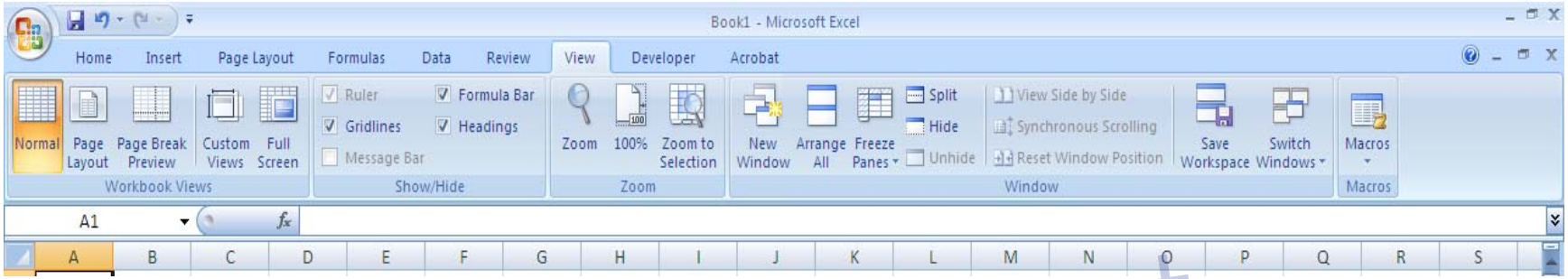
View Tab

Remove Watermark Now



- Workbook Views
- Freeze Panes
- Show/Hide
- Zoom

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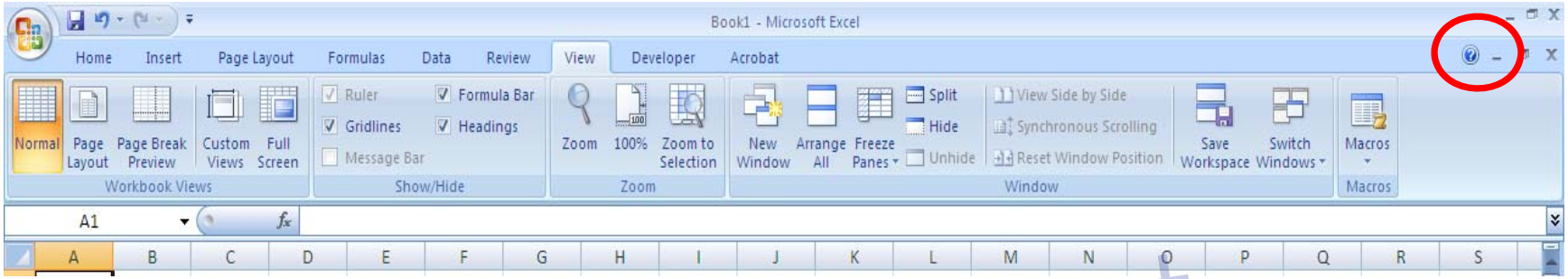
Help Menu

Remove Watermark Now



- Can Search for help or use the Table of Contents
- Another good resource is the Internet
  - Example: Go to Google and type in what you are trying to accomplish
    - "How to sort in Excel"
  - Access various user forums and questions and answers

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Microsoft Excel Quiz 2

Remove Watermark Now

Quiz 2, Question 1:

An Excel Spreadsheet is the entire Excel file.

1. True
2. False

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Microsoft Excel Quiz 2

Remove Watermark Now

Quiz 2, Question 1:

An Excel Worksheet is the entire spreadsheet file.

Answer:

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False

The Excel Worksheet is a single page or tab within the Excel Workbook. The Excel Workbook is the entire file.

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Microsoft Excel Quiz 2

Remove Watermark Now

Quiz 2, Question 2:

Only one Excel Spreadsheet can be in an Excel Workbook.

1. True
2. False

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Microsoft Excel Quiz 2

Remove Watermark Now

Quiz 2, Question 2:

Only one Excel Spreadsheet can be in an Excel Workbook.

Answer:

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False

You can have many multiple spreadsheets.

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Remove Watermark Now

Lesson 3:

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Hands-On Exercises

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Sample Data

Remove Watermark Now

- In order to complete these hands-on exercises, you will need the Excel Excellence.xlsx downloaded to your computer.

- While we are using this file in our examples, the functionality discussed could be used with other files created by you or generated by your CAMA system.

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Cut, Copy and Paste Special

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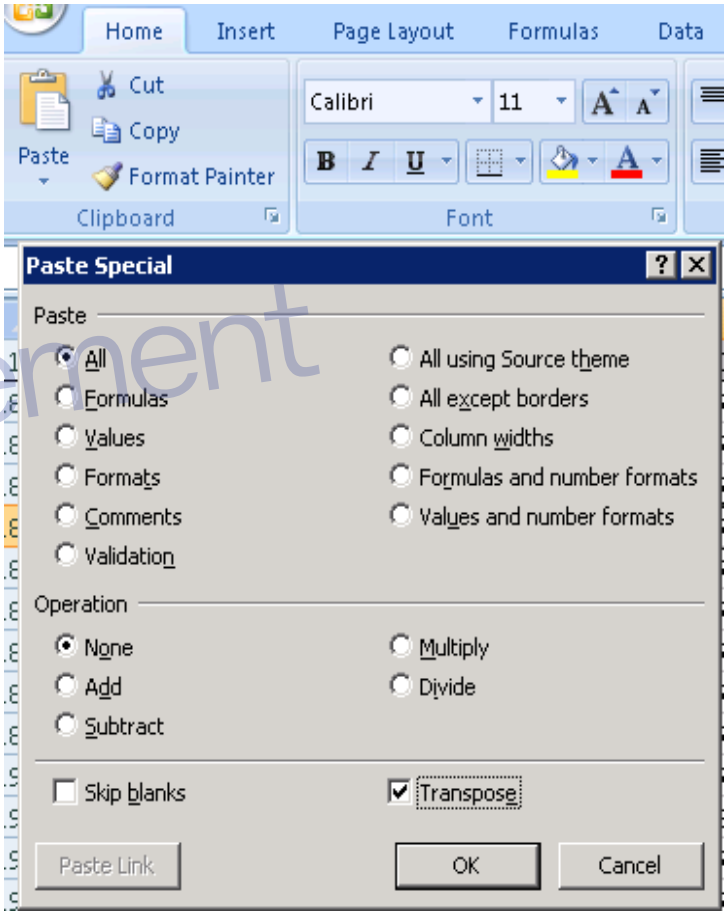
- Cut Effective Depth Column
- Insert Effective Depth Column between Land Lot Type Code and Actual Frontage
  - Right click on Actual Frontage and click “Insert Cut Cells”

- Transpose the column headings to rows
  - Copy Row 1
  - Open new Worksheet, click on A1 and go to Paste Special
  - Click Transpose and OK



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Helpful Tips - Short Cuts

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- Some commands can be done in Excel by using a keyboard shortcut.
- Most keyboard short cuts involve the Ctrl Key.
- Common short cuts:
  - Copy - Ctrl C
  - Cut - Ctrl X
  - Paste - Ctrl V
  - Undo - Ctrl Z
  - Save - Ctrl S
  - Select All - Ctrl A
  - Find - Ctrl F

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Freeze Panes

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- Freeze Top Row so column headings are always available
  - Ensure column headings are the top row of your spreadsheet
  - Go to View Tab
  - Select Freeze Panes
  - Select Freeze Top Row

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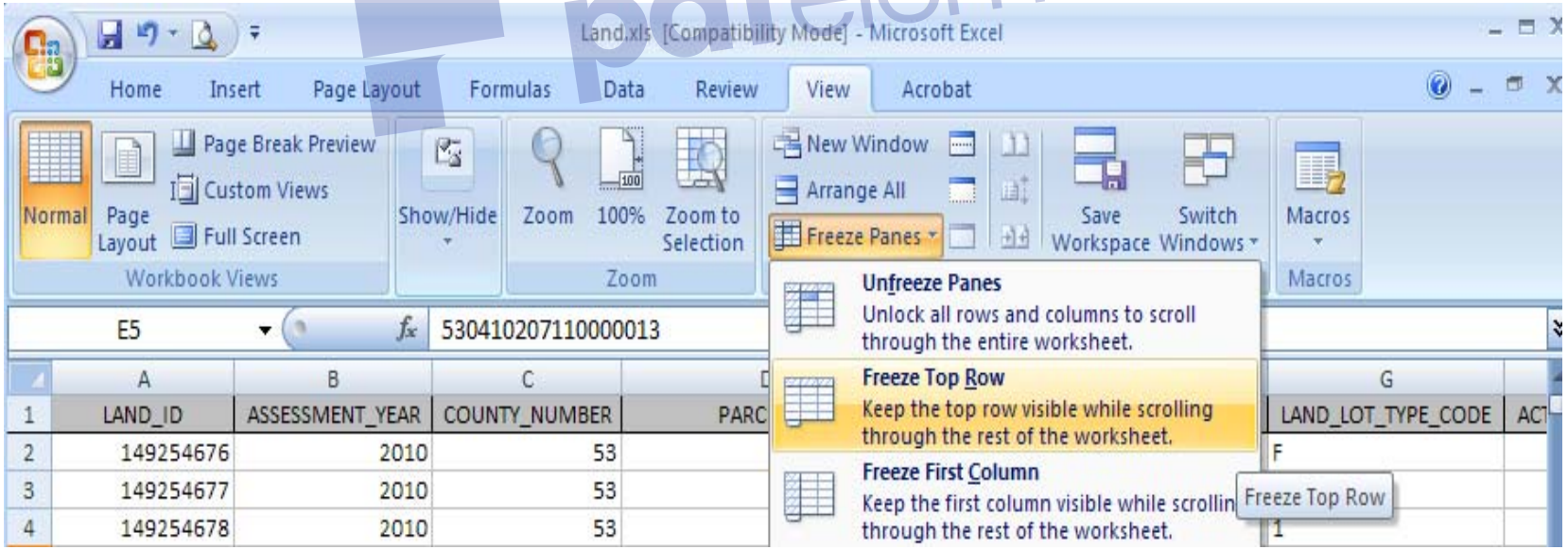

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Insert

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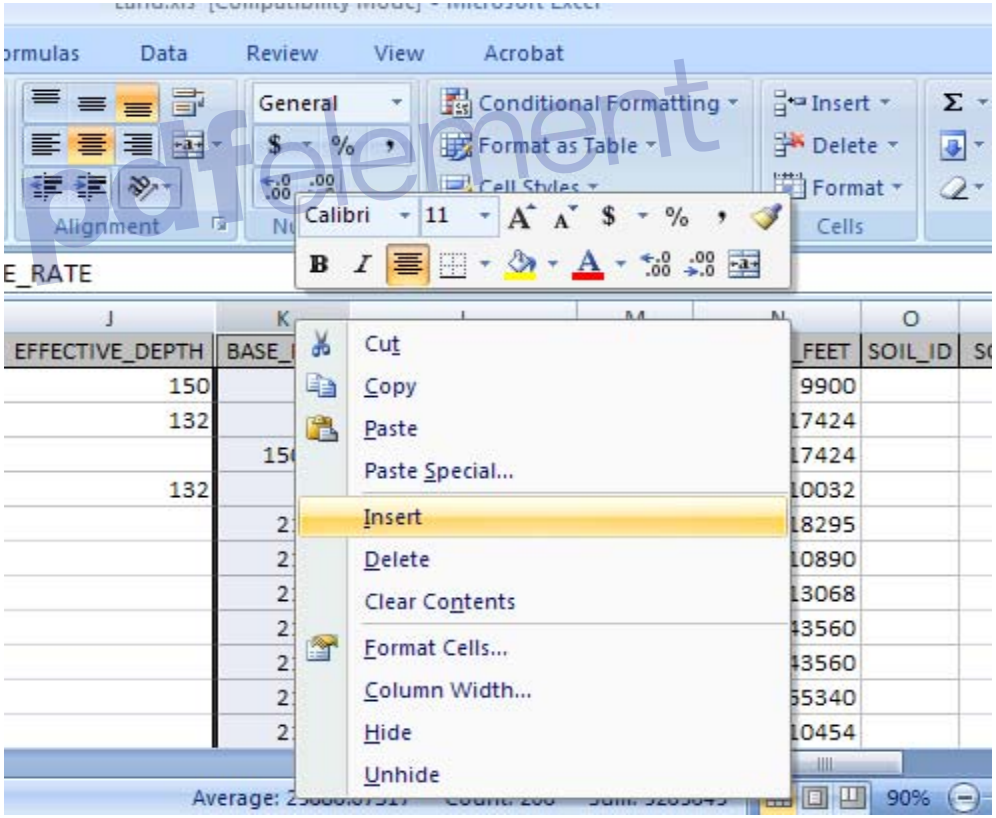
- Insert Column between Base Rate and Appraised Value
  - Select Appraised Value column
  - Right click to access menu
  - Select Insert



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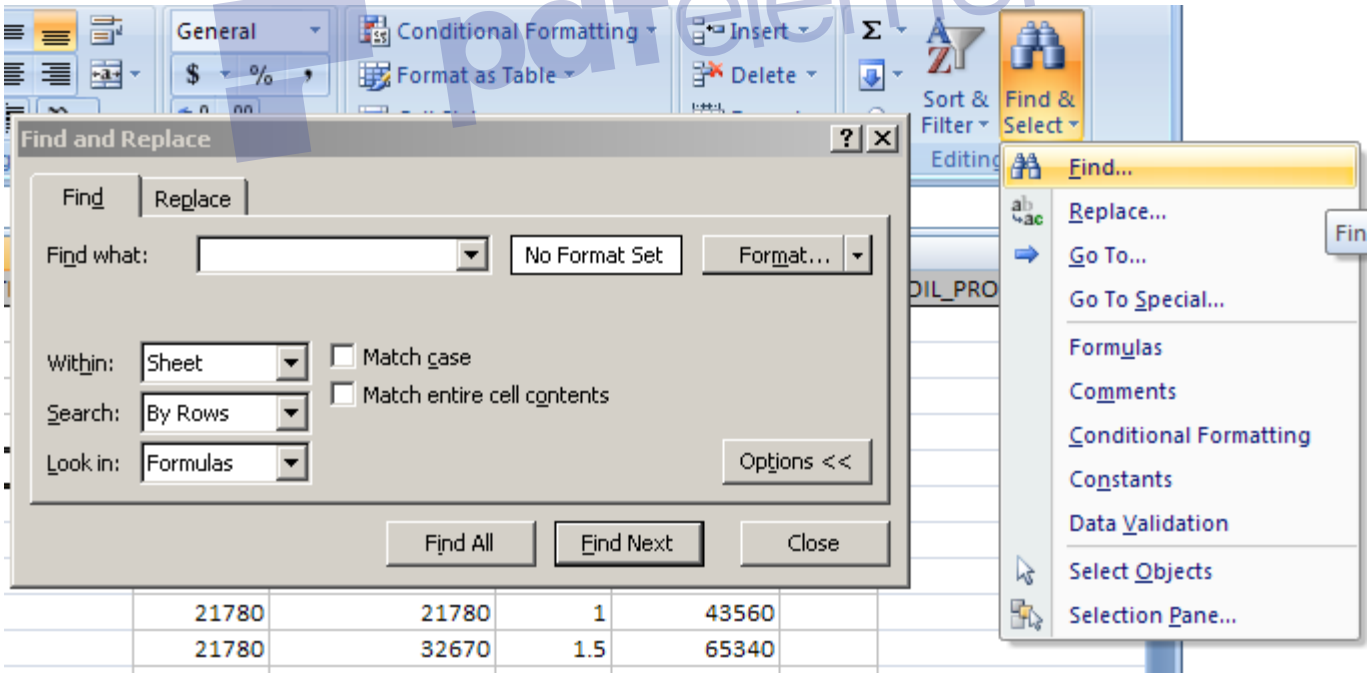
Find

Remove Watermark Now

- Ctrl – F or on Home Tab (Binoculars)
- Find Land ID Number 190117305
  - Press Ctrl-F or press the Find button on the Home Tab
  - Type 190117305 in the Find What box
  - Select Find Next or hit Enter



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Replace

Remove Watermark Now

- Located in same place as Find
- Ctrl – F or on Home Tab (Binoculars)
- Replace Year 2011 with Year 2012 Select Year column
- Press Ctrl-F or press the Find button on the Home Tab
  - Type 2011 in the Find What box
  - Type 2012 in the Replace With Box
  - Select Replace or Replace All

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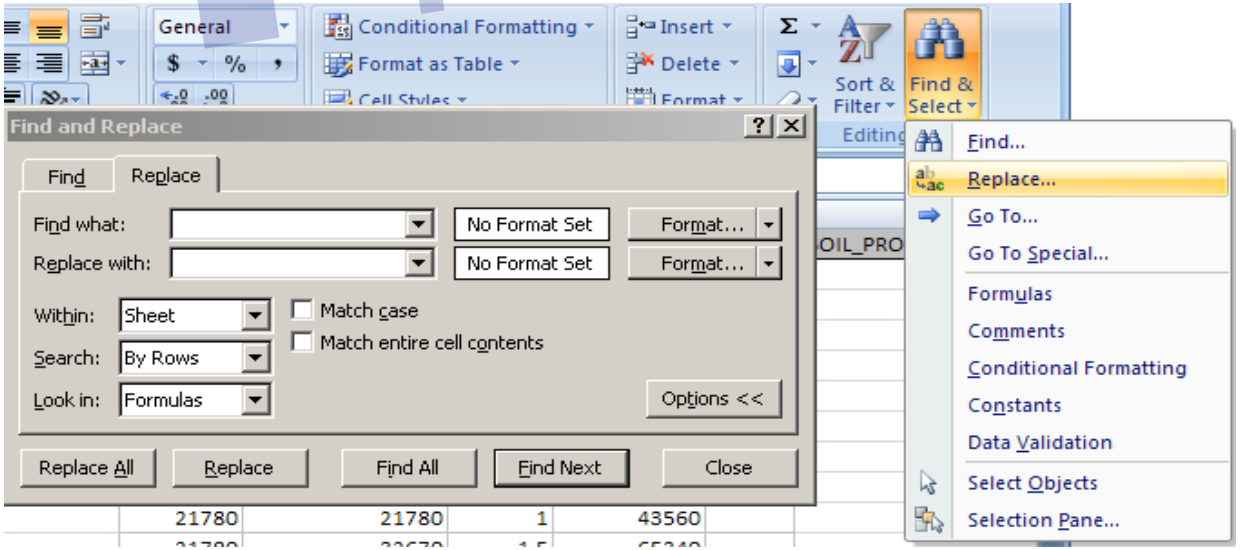

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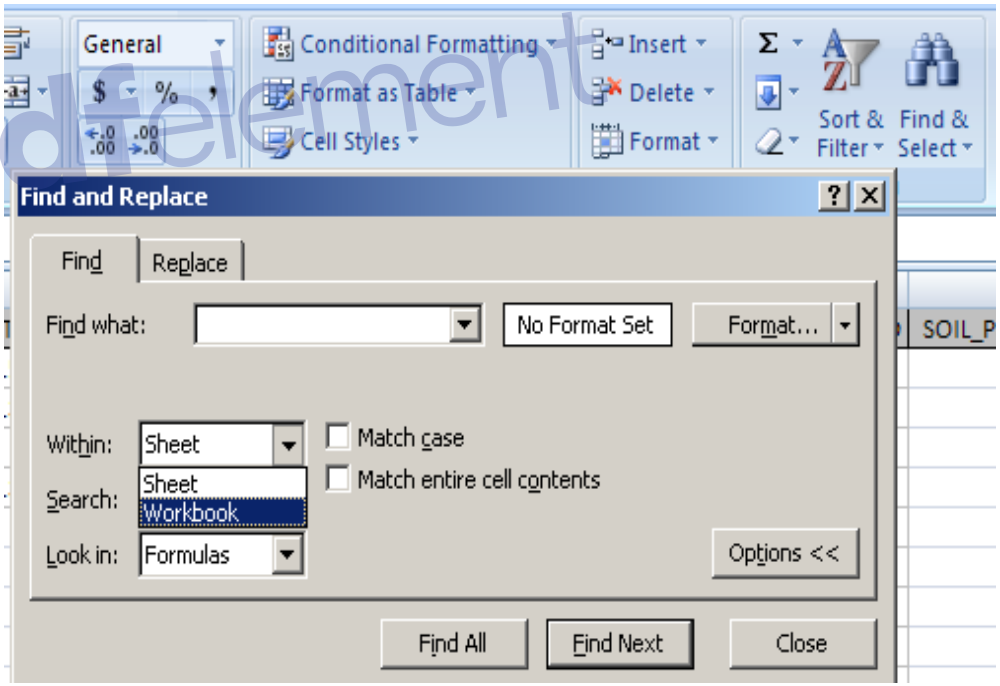
Find and Replace –Workbook

Remove Watermark Now

- Find and Replace feature can work within entire Excel Workbook
- Find Land ID Number 190117305 in Workbook
  - Press Ctrl-F or press the Find button on the Home Tab
  - Click Options
  - Select Workbook from Within box
  - Select Find All or Find Next



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Sort

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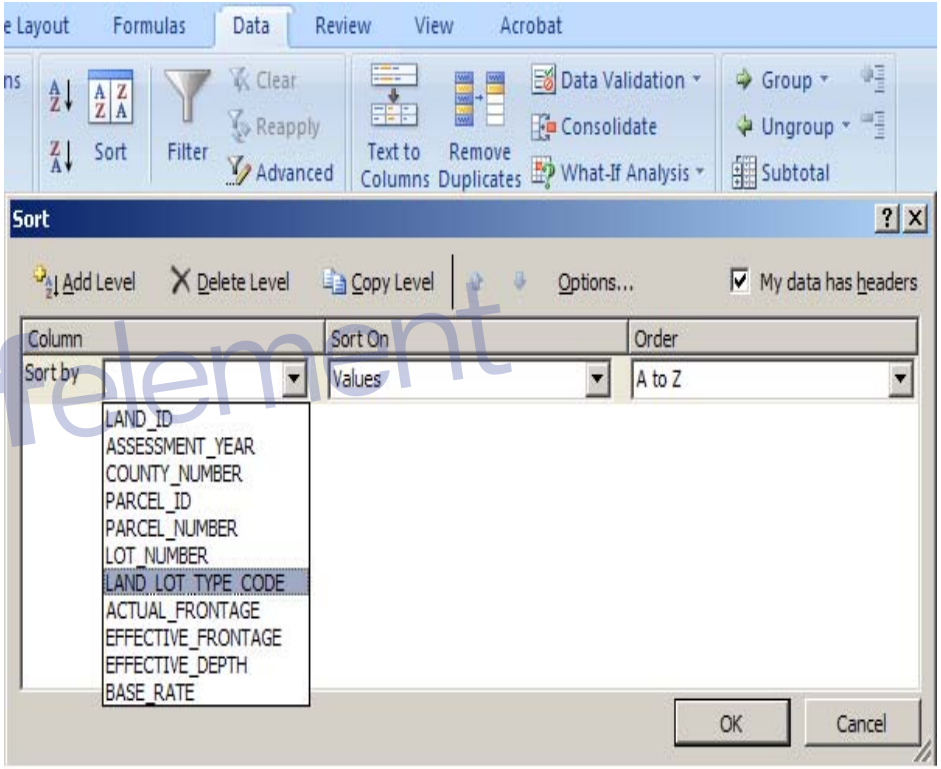
- Available on Home Tab and on Data Tab
- Sort by Land Lot Type Code
  - Select full data range
  - Select Custom Sort
  - Select LAND_LOT_TYPE_CODE in the Sort by dropdown box



- Multi level sorts can also be done in Excel
  - Click on Add Level
  - Select LOT_NUMBER from the dropdown box
  - Click OK

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Filter

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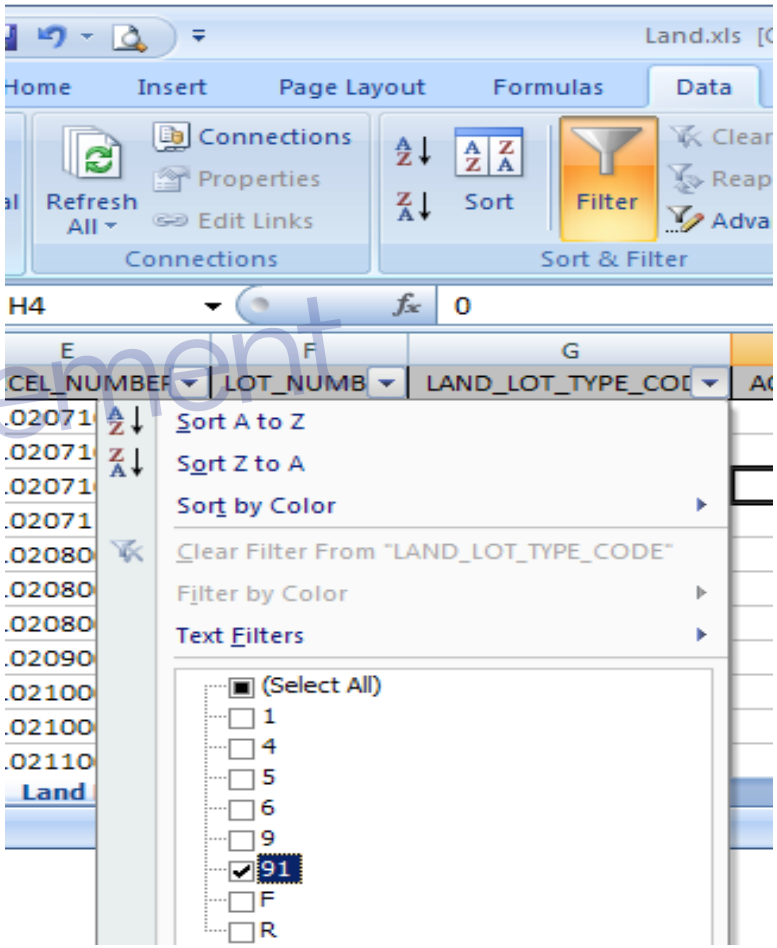
- Available on Home Tab and on Data Tab in same place as Sort
- Filter for Land Tot Type Code 91
  - Select Row 1
  - Go to Sort & Filter on Home Tab or to Filter on Data Tab
  - Select Filter
  - Go to drop down arrow on Land Lot Type Code
  - Uncheck all Land Lot Type Codes other than 91
  - Hit OK



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Clear Filter

Remove Watermark Now

- Available on Home Tab and on Data Tab in same place as Sort and Filter
- Clear filter from Land Lot Type Code column
  1. Go back to drop down box on top row of Land Lot Type Code
     a) Select All
     b) Clear Filter
  2. On Home Tab and Data Tab, option available for Clear

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Helpful Tips – Multiple Rows

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- Edit more than one cell, row or column at a time by using the Ctrl Key

- Add commas to Appraised Value and Square Feet
  - Highlight Appraised Value
  - Hold down the Ctrl Key and highlight Square Feet
  - Change columns to include commas

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Helpful Tips – Table or Array

Remove Watermark Now

- Select an array of data or an entire table of data by using the Shift Key

- Select all data in the Land File Worksheet
  - Select Cell A2
  - Scroll to end of data, Cell Y250
  - Select Cell Y250 while holding down the Shift Key

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Helpful Tips - Worksheets

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- Edit more than one Worksheet at a time by using the Ctrl Key

- Change Column B in the Land File and in the Chart Data Worksheet to a yellow fill
  - Highlight Column B in the Land File
  - Hold down Ctrl Key and highlight the Chart Data Worksheet tab
  - Keep Ctrl Key down and fill Column B

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Conditional Formatting

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- Available on Home Tab
- Next few screens walk through pre-defined options
- You can also get more specific through New Rule or Manage Rule options

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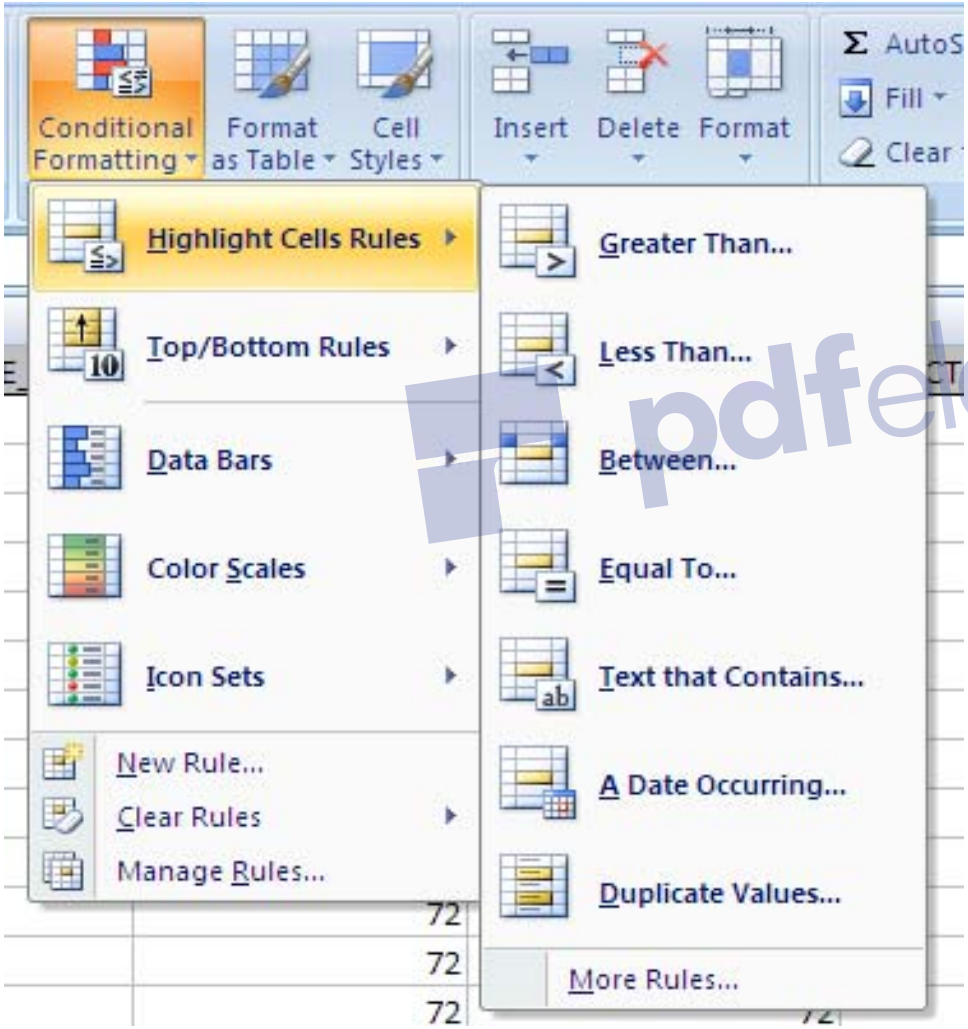
Conditional Formatting

Remove Watermark Now



- Greater Than…
- Less Than…
- Between…
- Equal To…
- Text that Contains…
- A Date Occurring…
- Duplicate Values…

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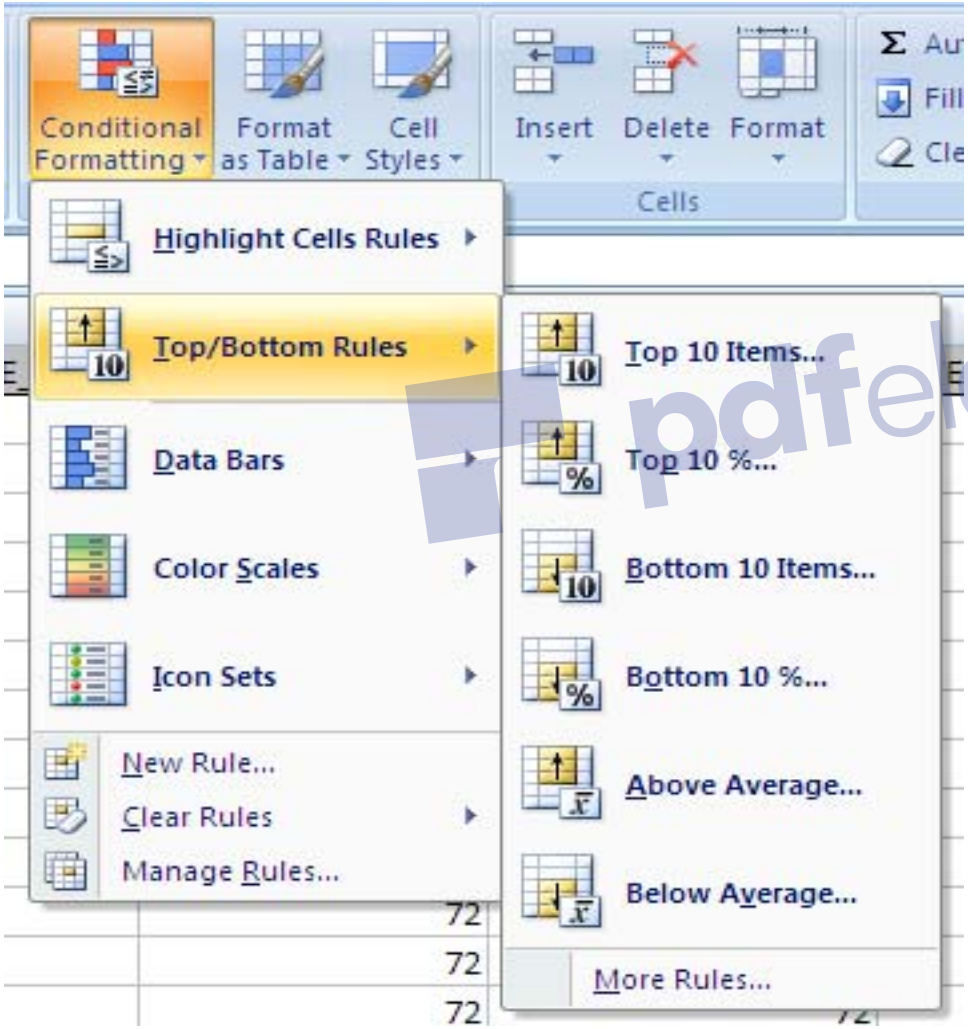
Conditional Formatting

Remove Watermark Now



- Top 10 Items…
- Top 10%...
- Bottom 10 Items…
- Bottom 10%...
- Above Average…
- Below Average…

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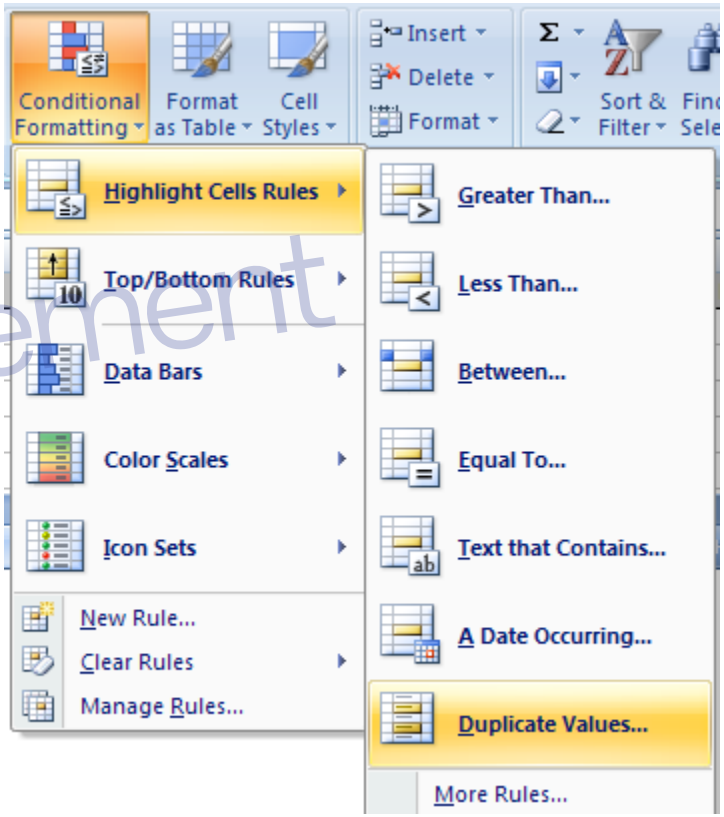
Conditional Formatting

Remove Watermark Now

- Highlight Duplicate Values in the Land ID Column
  - Select the Land ID Column
  - Go to Conditional Formatting
  - Select Highlight Cell Rules
  - Select Duplicate Values…
  - Can customize format of the rule
  - Hit OK



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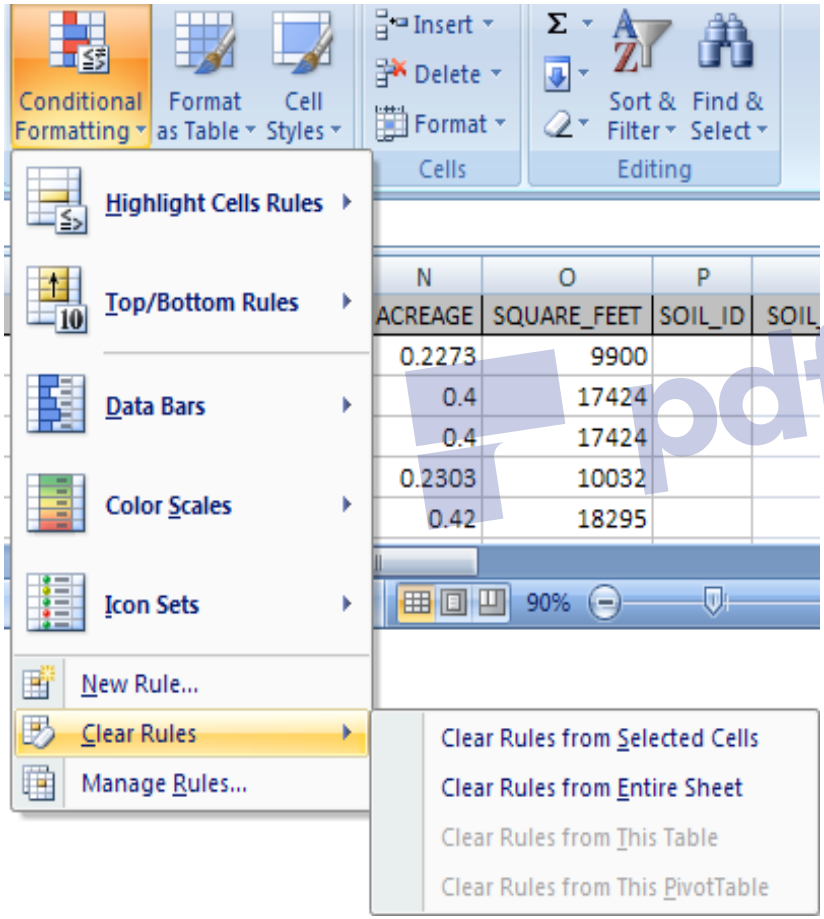
Conditional Formatting

Remove Watermark Now



- To clear Conditional Formatting
  - Go to Conditional Formatting
  - Select Clear Rules
  - Select Clear Rules from Selected Cells or Clear Rules from Entire Sheet as applicable

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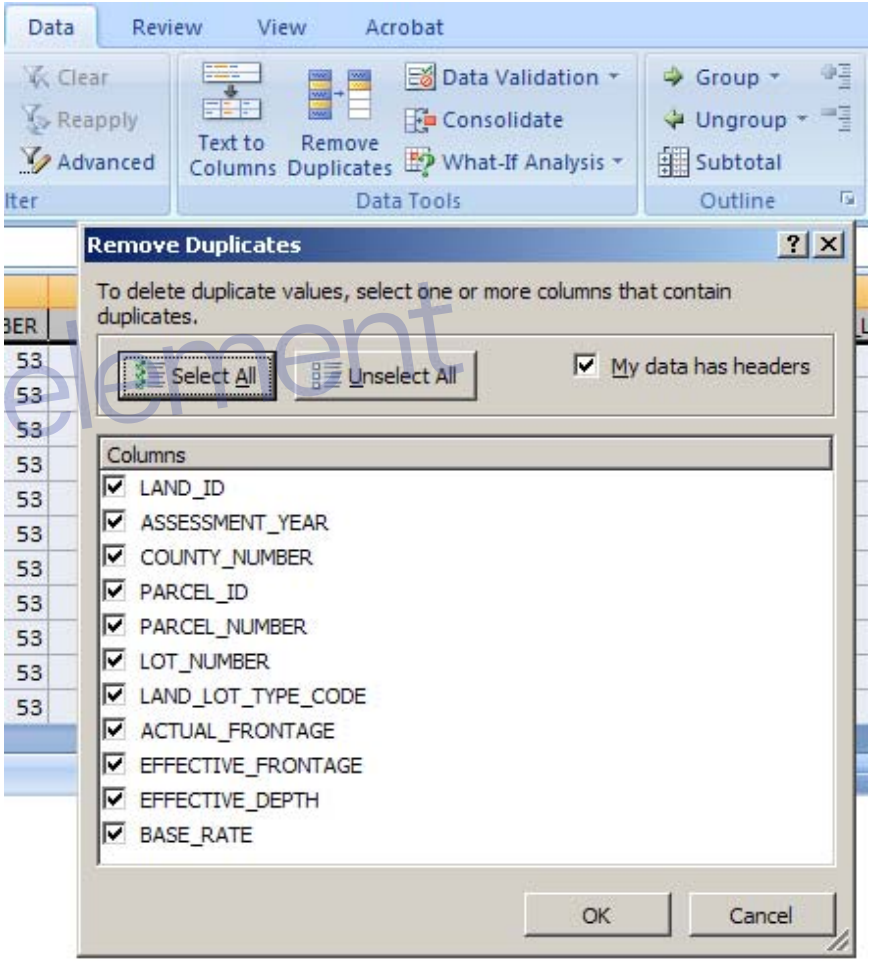
Remove Duplicates

Remove Watermark Now

- Located on Data Tab
- Remove Duplicate Records
  - Select full data range
  - Select Remove Duplicates
  - Select which columns contain duplicates
    - To ensure the full record is an exact duplicate, Select All columns
  - Hit OK



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Functions

Remove Watermark Now

- Excel has a large number of built-in functions.
- To use these pre-defined functions, you need to be cognizant of the specifics of the function:
  - What is the function designed to do
  - What cells need to be included in the calculation
  - What criteria must you specify for the calculation
  - In what order are these cells or criteria required to be entered
- Formula Dictionary on Formulas Tab
  - Insert Function

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Simple Cell Mathematics

Remove Watermark Now

- Mathematical formulas can be performed in Excel that do not require a pre existing function.
  - Variety of different mathematical functions: addition (+), subtraction (-), multiplication (*), and division (/)
- For example, add Cells E2 and E4
  - Type =
  - Click/type Cell E2
  - Type +
  - Click/type Cell E4
  - =E2 + E4
- Constant values, instead of a cell reference, can also be used
- For example, multiply E2 by 55%
  - Type =
  - Click/type Cell E2
  - Type *0.55
  - =E2*0.55

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Functions

Remove Watermark Now

- Common Functions
  - **SUM** – Adds together selected values
  - **AVERAGE** – Calculates the average of selected values
  - **MAX** – Identifies the maximum value in selected range
  - **MIN** – Identifies the minimum value in selected range
  - **ROUND** – Rounds numbers to a particular decimal point precision
  - **COUNT** – Counts number of values in selected range

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Functions – SUM & AVERAGE

Remove Watermark Now

- Sum Appraised Value for all records
  - Go to bottom of the Appraised Value column
  - In cell below data, type =SUM(
  - Specify range to be included in calculation
  - Close formula with an end parenthesis
  - Hit Enter
  - =SUM(L2:L250)
- Determine Average of Square Footage
  - Go to bottom of the Square Footage column
  - In cell below data, type =AVERAGE(
  - Specify range to be included in calculation
  - Close formula with an end parenthesis
  - Hit Enter
  - =AVERAGE(N2:N250)

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Functions – MAX & MIN

Remove Watermark Now

- Identify Maximum Value for Acreage
  - Go to bottom of the Acreage column
  - In cell below data, type =MAX(
  - Specify range to be included in calculation
  - Close formula with an end parenthesis
  - Hit Enter
  - =MAX(M2:M250)
- Identify Minimum Value for Base Rate
  - Go to bottom of the Base Rate column
  - In cell below data, type =MIN(
  - Specify range to be included in calculation
  - Close formula with an end parenthesis
  - Hit Enter
  - =MIN(K2:K250)

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Functions - ROUNDING

Remove Watermark Now

- ROUND
  - Go to cell right below average calculation
  - Type =ROUND(
  - Select cell to be rounded
  - Insert a comma
  - Identify decimal point precision
    - 0 = no decimals
    - 2 = two decimals
    - -2 = round to nearest 100
  - Close formula with an end parenthesis
  - Hit Enter
  - =ROUND(N204,0)

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Functions - COUNT

Remove Watermark Now

- Count the number of records with a Soil Productivity Factor
  - Go to bottom of the Soil Productivity column
  - In cell below data, type =COUNT(
  - Specify range to be included in calculation
  - Close formula with an end parenthesis
  - Hit Enter
  - =COUNT(P2:P250)

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Text To Columns

Remove Watermark Now

- Located on Data Tab
- Excel is able to divide values from one cell using the Text to Columns function.
  - Excel can divide a cell based on two general features
    - Fixed Width
    - Delimited with a specific character (spaces, commas, semicolons)
- Go to Text to Columns Worksheet
  - Highlight Column A
  - Click on the Text to Columns Command
  - Click Delimited option
  - Click Comma
  - Click OK

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Remove Watermark Now

Combine Values from Two Cells

We can combine values using the following formula in another cell.

- Excel is able to combine values in cells
- For example:
  - If we have two columns, one with first name and another with last name.
    - Example: We have the first name in Cell A1 and last name in B1
    - We want first then last with a space in between, then the following formula combines the two.
      - **=A1&" "&B1**
    - Or, if we want last name then first name with a comma between, the following formula works.
      - **=A1&", "&B1**

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Charts

Remove Watermark Now

- Excel provides a wide range of charting options on the Insert Tab.
  - Column Charts
  - Pie Charts
  - Bar Charts
  - Line Charts

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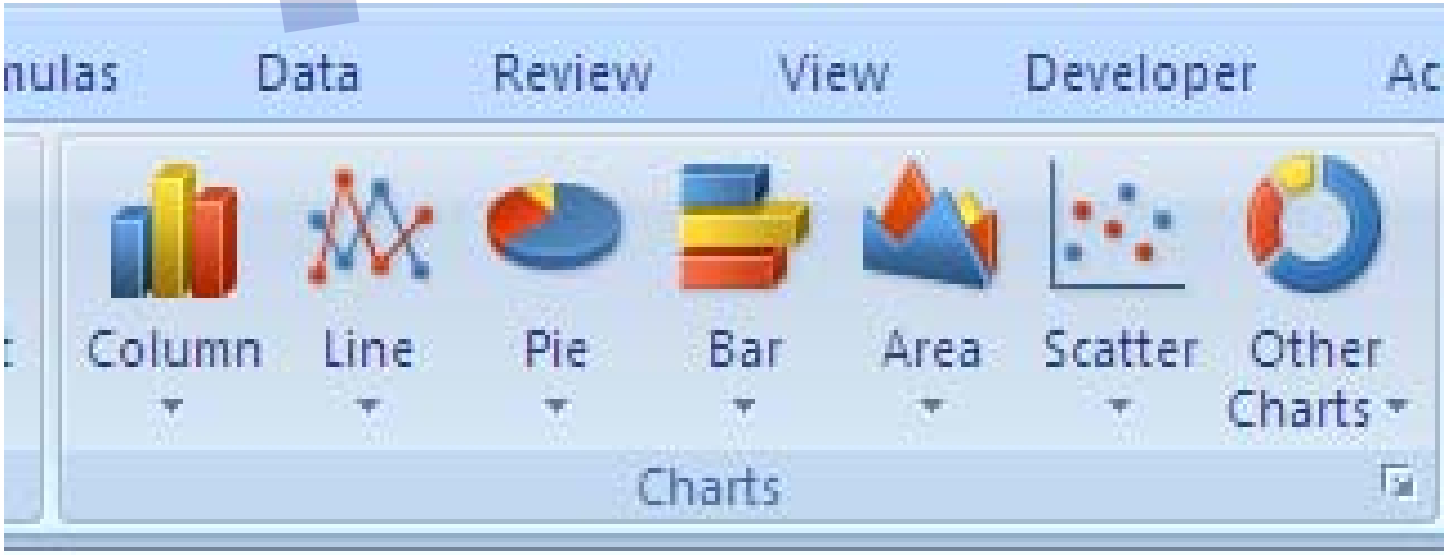

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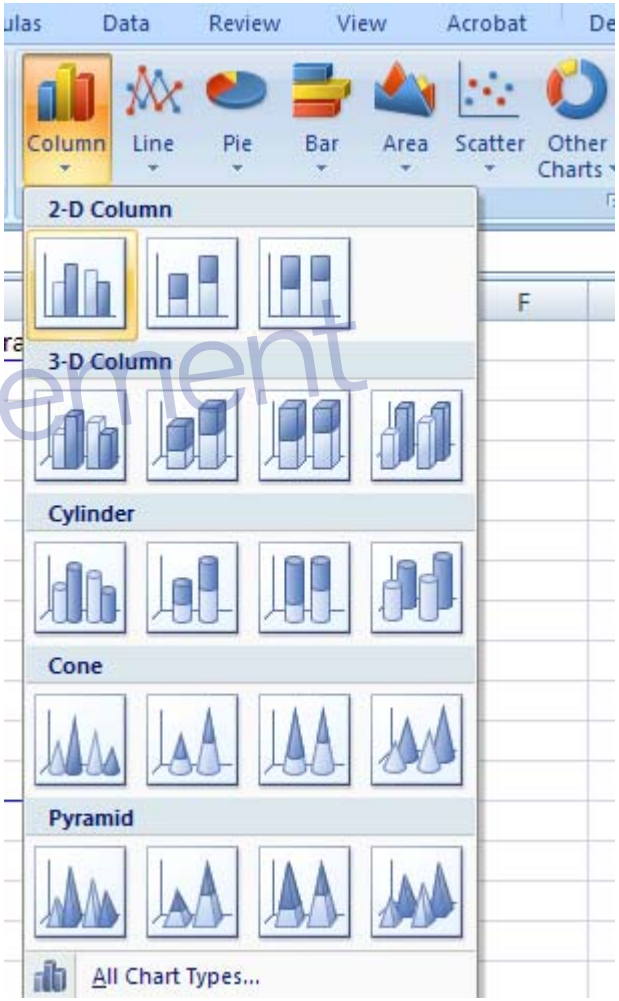
Charts – Column Chart

Remove Watermark Now

- Design a Column Chart showing Acreage by Land Lot Type
  - Go to “Chart Data” worksheet
  - Go to Insert tab
  - Highlight the chart data and Select Column 2-D Column



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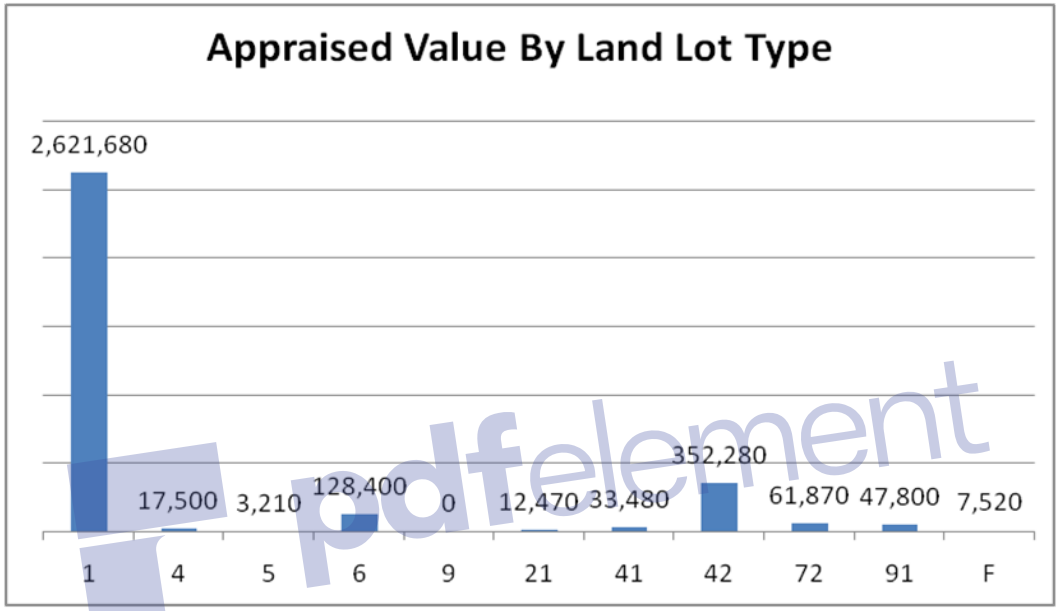
Charts – Column Chart

Remove Watermark Now



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- Can use Design, Layout and Format menus specific to the Chart to change how the Chart is presented
  - Add Appraised Value totals to top of columns
- Update chart title in chart directly
  - Appraised Value by Land Lot Type

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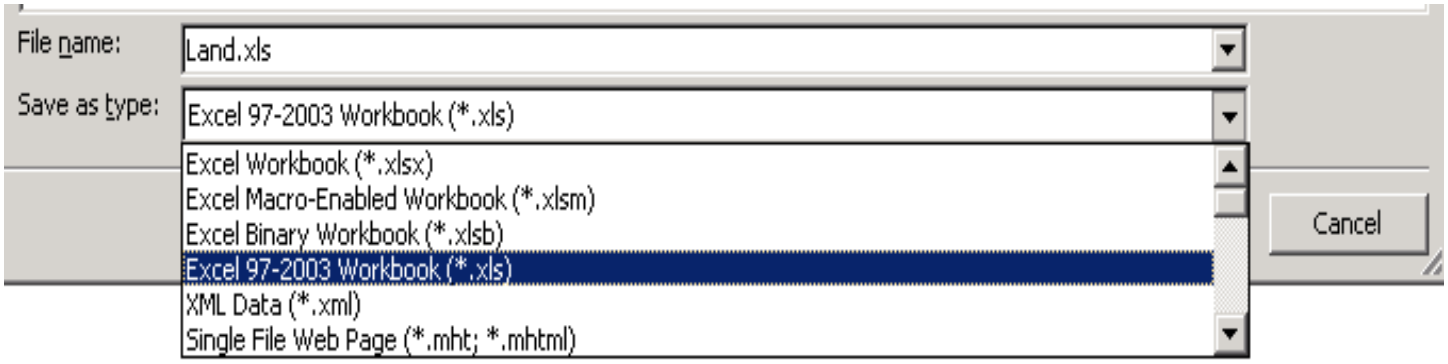
Saving Workbook

Remove Watermark Now

- Save the Excel Workbook as an Excel 97 – Excel 2003 Workbook.
  - Click on the Office Button
  - Click Save As
  - Direct where the file should be saved
  - Select Excel 97 – Excel 2003 Workbook from the Save as type dropdown box
  - Name file
  - Click Save



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Printing

Remove Watermark Now

- Before printing
  - Determine the purpose for your printing and try to arrange your data so you get the exact printout you need.
  - Print preview before printing to ensure the final printout will be useable.

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Printing – Preview and Titles

Remove Watermark Now

- Print Preview
  - Customize size and layout of paper
  - Center on page
  - Add headers and footers
    - Title of worksheet
    - Page numbers
    - Prepared by
    - Any disclaimers or notes
- Page Layout Menu – Print Titles
  - Customize column or row headings to be repeated on each page during printing.

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 1:

A column can only be inserted by using the command on the Home tab.

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1. True

2. False

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 1:

A column can only be inserted by using the command on the Home tab.

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Answer:

False

You can use the command or you can right click on the column right of where you want the new column to be.

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 2:

Multiple columns can be filtered at one time in an Excel Spreadsheet.

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1. True

2. False

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 2:

Multiple columns can be filtered at a time in an Excel Spreadsheet.

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Answer:

True

As long as there is only one table of data in the spreadsheet, then multiple columns can be filtered at the same time (only 1 row of data in a spreadsheet can have the filter).

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 3:

What do you type into an empty cell to start a formula? (Pick one answer.)

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A. *

B. (

C. =

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 3:

What do you type into an empty cell to start a formula? (Pick one answer.)

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Answer:

=

An equal sign (=) tells Excel that a calculation follows it.

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 4:

What is the correct formula to round 29,128.6547 to the nearest hundred?

A. =ROUND(29,128.6547)

B. =ROUND(29,128.6547, 2)

C. =ROUND(29,128.6547, -2)

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 4:

What is the correct formula to round 29,128.6547 to the nearest hundred?

Answer:

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C. =ROUND(29,128.6547, -2)

Formula (B.) would round to the nearest hundredth.

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 5:

Which short cut is used to Select All?

A. Ctrl Z

B. Ctrl A

C. Ctrl S

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Microsoft Excel Quiz 3

Remove Watermark Now

Quiz 3, Question 5:

Which short cut is used to Select All?

Answer:

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B. Ctrl A

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Remove Watermark Now

Lesson 4:

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Import a Text File

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Import Text File Into Excel

Remove Watermark Now

- Open a blank Excel spreadsheet. Click the Office Button.
- Click on OPEN (or use the icon button)
- Navigate to where you saved the .txt file and open it.
- Highlight the filename you want to open and click OPEN.
- A TEXT IMPORT WIZARD box will open prompting you to select how you want the data to appear when viewed using Excel.

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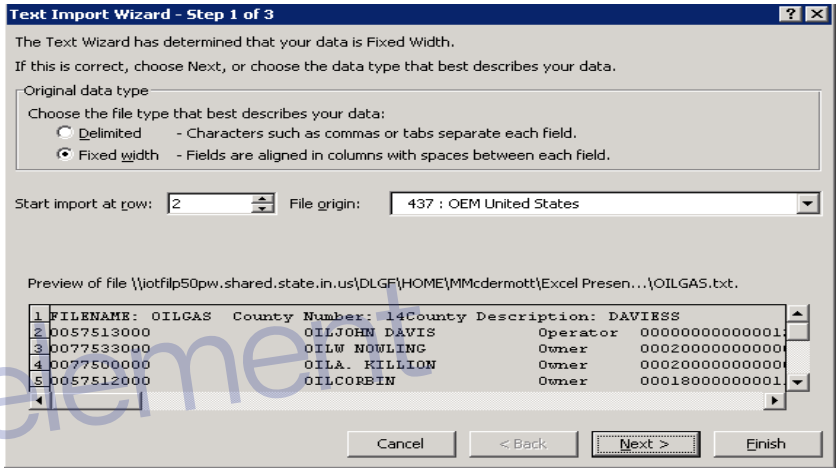
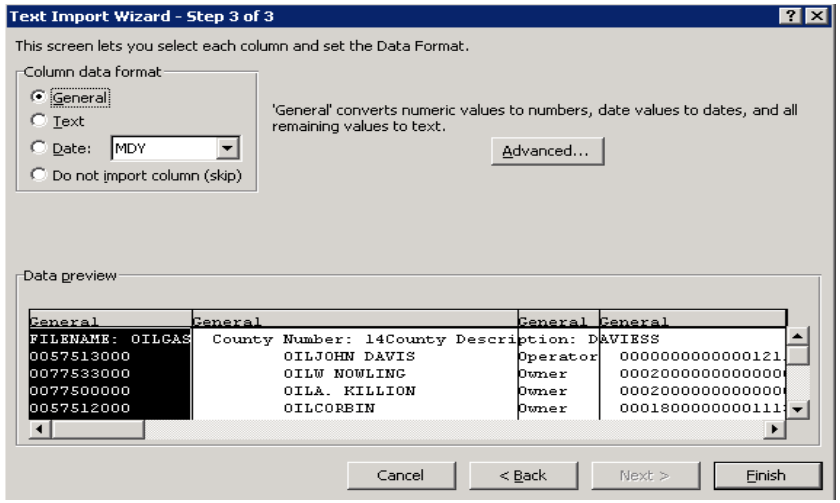
Import Text File Into Excel

Remove Watermark Now

- The Wizard allows you to choose column formats, provides data preview, and other advanced settings.
  - Click on Fixed Width
  - Start import at Row 2, click Next
  - Using the file specifications in 50 IAC 26, move break lines to desired positions, when done click Next
  - Click General for data format
- Click on Finish.





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