Chapter 1: Introduction

Introduction

Hello! And welcome to *Intermediate Microsoft Excel 2016*. My name is Chad Wambolt, and I'll be your instructor.

Before we get started, let me briefly tell you about myself. I've spent my entire professional career in the finance field, working for both privately and publicly held international companies. I've been teaching Excel to students of varying skill levels since 1997. In fact, I stumbled upon teaching it by accident—after being hired at one company, one of my first tasks was to convert all of their Lotus spreadsheets into Excel. After that project, it seemed a natural fit for me to begin helping my coworkers with their Excel training. From then on, wherever I've worked, I've become the official office Excel guru, finding time outside of my normal finance responsibilities to teach students about all the wonderful uses of Excel.

Hopefully, you're as excited as I am to get started. Over the next six weeks, you're going to learn about many wonderful Excel features, including charts and graphs, PivotTables, and auto filters. And you'll develop an in-depth understanding of the power of Excel's functions and formulas. If you're a seasoned Microsoft Excel veteran, this will be a great refresher for you. If you're fairly new to Microsoft Excel, you'll gain valuable experience with the great tools and techniques that the program has to offer. (If you're brand-new to Excel and you find you're having trouble following along with this first lesson, you might want to consider transferring to *Introduction to Microsoft Excel 2016* and taking this intermediate course later.)

In this first lesson, you'll discover one of the features Microsoft Excel does extremely well. You'll learn how to create Excel charts and graphs. But before we begin, I want to make sure you understand the basics of chart creation. The material we'll go over in this lesson may be new to some of you and review for the rest of you. Either way, I believe that it's essential that we all have a good foundation upon which to build.

A worksheet can have many layers of meaning. When you create a worksheet containing words and numbers, you'll have very little difficulty interpreting the meaning hidden behind your data. To you, the words and numbers in your worksheet tell a story. That story will usually lead you to what you perceive as an inescapable conclusion. To others, the numbers in your worksheet may seem, well . . . just like numbers. Patterns that seem obvious to you will often elude others, especially if they don't share the same familiarity with the data that you do.

Humans are visual creatures. Often the only way we can understand a concept is to visualize it. Imagine trying to describe the color *burgundy* to someone who's unfamiliar with that particular term. Wouldn't it be easier to just show the person something colored burgundy? He or she would understand what you're trying to say completely and immediately.

The color burgundy

If you really want others to understand the true meaning of the numbers in your worksheet, you're going to have to help them visualize the concepts embedded in your numbers. The best way to graphically show relationships between groups of numbers is with a chart. Microsoft Excel makes charting your data a breeze. Normally, all you have to do is select the information you'd like to chart. Then let Excel do the rest. Let's give it a try!

Please start Excel, open a new worksheet, and go to cell A1. Type the following values in the cells of column A:

A1: Month

A2: Jan

A3: Feb

A4: Mar

A5: Apr

A6: May

Now go to cell B1, and type the following in column B:

B1: Sales

B2: 37075

B3: 29150

B4: 28350

B5: 26500

B6: 10905

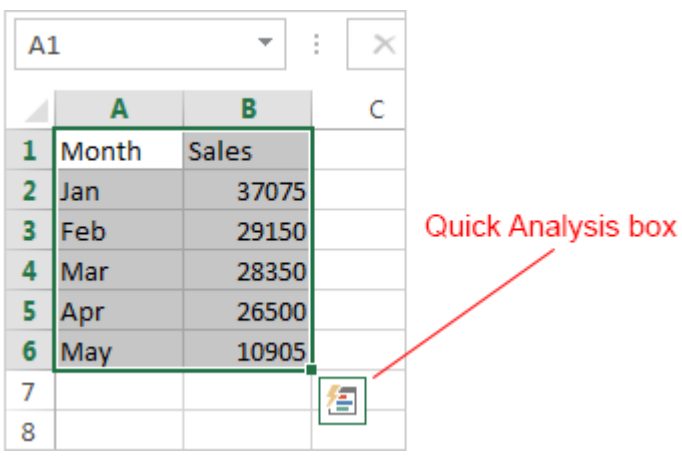
Now let's use the data you just entered to create a chart. First, a few things to remember:

1. In order to create a chart, you'll need to select at least one set of numbers and one set of labels to identify the numbers. Both the numbers and the labels need to be present in your worksheet, but they don't need to be in adjacent columns or rows.

2. You should select the same number of labels as you have numbers. For example, if you want to graph three numbers, you'd need to select those three numbers plus three corresponding labels.

Let's say you'd like to construct a graph that vividly illustrates a decline in sales volume over the last five months. The first step is to highlight the appropriate labels and numbers. In order to select the labels in column A and the numbers in column B, you'll need to select cell A1, which is the label for *Month*.

Next, hold down the left mouse button, and drag your mouse over to column B and then down to row 6. You should have all the values from A1 through B6 selected. You'll know you did this correctly when a dark border appears around this range of cells.

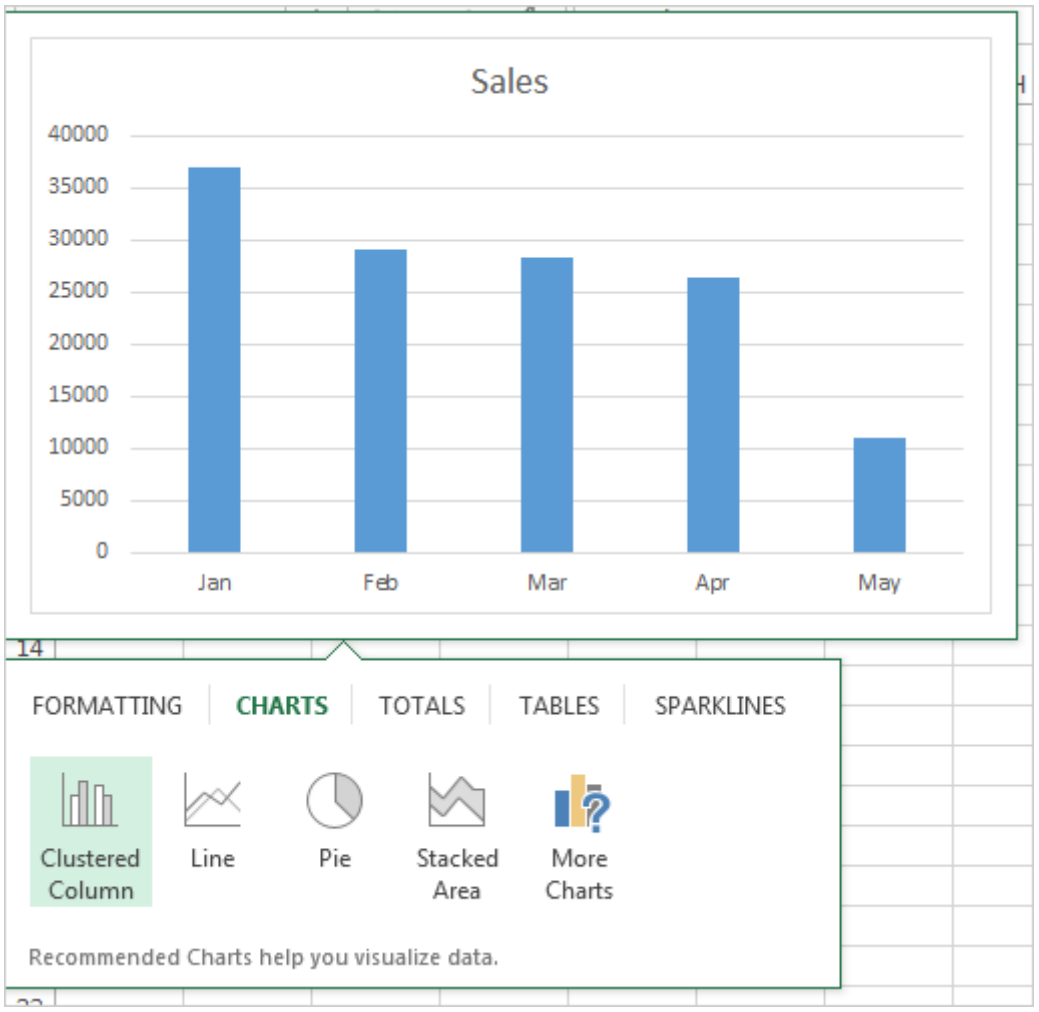


Labels and numbers selected

Once you've selected the values in columns A and B, notice the box that appears at the lower right of the highlighted area. This feature in Excel is called *Quick Analysis*, and one of its features allows you to quickly create a chart in just a couple of clicks of the mouse.

Now click the **Quick Analysis** box. You'll see a dialog box with many different types of analysis features. By default, it opens to the *Formatting* tab. To the immediate right is the *Charts* option. Select that now to display some chart options that Excel recommends, based on the data you have highlighted.

Place your cursor over the various chart options, and watch Excel provide a preview of each chart option. Below is an image of the Clustered column chart preview.



Quick Analysis Clustered Column preview

Now you're ready to start building your chart. On to Chapter 2!