Microsoft®
Excel for Mac Intermediate
Quick Reference Guide

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Chart Elements

Chart Title

Bon Voyage Excursions

Data Bar

Chart Area

Gridline

Axis Titles
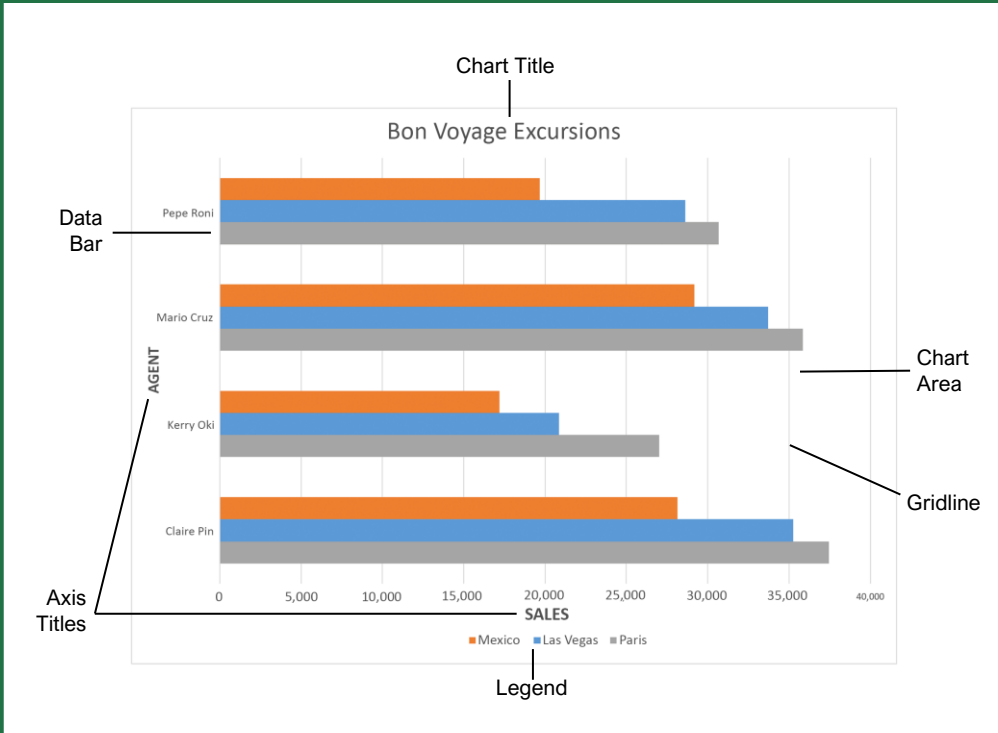
Legend

Mexico ■ Las Vegas ■ Paris

Chart Options

Chart Types

Column: Used to compare different values vertically side-by-side. Each value is represented in the chart by a vertical bar.

Line: Used to illustrate trends over time (days, months, years). Each value is plotted as a point on the chart and values are connected by a line.

Pie: Useful for showing values as a percentage of a whole when all the values add up to 100%. The values for each item are represented by different colors.

Bar: Similar to column charts, except they display information in horizontal bars rather than in vertical columns.

Area: Similar to line charts, except the areas beneath the lines are filled with color.

XY (Scatter): Used to plot clusters of values using single points. Multiple items can be plotted by using different colored points or different point symbols.

Stock: Effective for reporting the fluctuation of stock prices, such as the high, low, and closing points for a certain day.

Surface: Useful for finding optimum combinations between two sets of data. Colors and patterns indicate values that are in the same range.

Additional Chart Elements

Data Labels: Display values from the cells of the worksheet on the plot area of the chart.

Data Table: A table added next to the chart that shows the worksheet data the chart is illustrating.

Error Bars: Help you quickly identify standard deviations and error margins.

Trendline: Identifies the trend of the current data, not actual values. Can also identify forecasts for future data.

Charts

Create a Chart: Select the cell range that contains the data you want to chart. Click the **Insert** tab on the ribbon. Click a chart type button in the Charts group and select the chart you want to insert.

Move or Resize a Chart: Select the chart you want to manipulate. Place the cursor over the chart's border and, with the 4-headed arrow ✛ showing, click and drag to move it. Or, click and drag a sizing handle ☐ to resize it.

Change the Chart Type: Select the chart you want to change and click the **Chart Design** tab on the ribbon. Click the **Change Chart Type** button and select a different chart from the available options. Or, right-click the chart, select **Change Chart Type** and select a chart type from the menu.

Filter a Chart: Select a cell within the range being charted, click the **Sort & Filter** button in the Home tab and select **Filter**. Click a filter list arrow and deselect the items you want to hide.

Insert a Sparkline: Select the cell range that contains the data you want to chart and click the **Insert** tab on the ribbon. Click the **Sparklines** button and select the sparkline you want to insert. Select the cell or cell range where you want to add the sparkline and click **OK**.

Charts

Insert a Trendline: Select the chart where you want to add a trendline. Click the **Chart Design** tab on the ribbon and click the **Add Chart Element** button. Select **Trendline** from the menu.

Print and Distribute

Set the Page Size: Click the **Page Layout** tab. Click the **Size** button and select the page size desired for the worksheet.

Set the Print Area: Select the cell range you want to print. Click the **Page Layout** tab, click the **Print Area** button, and select **Set Print Area**.

Print Titles, Gridlines, and Headings: Click the **Page Layout** tab. Click the **Print Titles** button and use the dialog box to set which items you wish to print.

Add a Header or Footer: Click the **Insert** tab on the ribbon and click the **Header & Footer** button. Add the desired information to the header and footer fields that appear in the worksheet.

Adjust Margins and Orientation: Click the **Page Layout** tab. Click the **Margins** button to select from a list of common page margins. Click the **Orientation** button to choose from either Portrait or Landscape orientation.

Intermediate Formulas

Absolute References: Absolute references always refer to the same cell, even if the formula is moved. In the formula bar, add dollar signs ($) to the reference you want to remain absolute (for example, **A1** makes the column and row remain constant).

Name a Cell or Range: Select the cell(s), click the Name box in the Formula bar, type a name for the cell or range, and press **Enter**. Names can be used in formulas instead of cell addresses, for example: **=B4*Rate**.

Reference Other Worksheets: To reference another worksheet in a formula, add '!' after the sheet name in the formula, for example: =FebruarySales!B4.

Reference Other Workbooks: To reference another workbook in a formula, add brackets '[ ]' around the file name in the formula, for example: =[FebraurySales.xlsx]Sheet1!B4.

Order of Operations: When calculating a formula, Excel performs operations in the following order: Parentheses, Exponents, Multiplication and Division, and finally Addition and Subtraction (as they appear left to right). Use this mnemonic device to help you remember the order of operations:

Please	Parentheses
Excuse	Exponents
My	Multiplication
Dear	Division
Aunt	Addition
Sally	Subtraction

Concatenate Text: Use the CONCAT function **=CONCAT (text1,text2,…)** to join the text from multiple cells into a single cell. Use the arguments within the function to define the text you want to combine as well as any spaces or punctuation.

The Payment Function: Use the PMT function **=PMT(rate,nper,pv,…)** to calculate a loan amount. Use the arguments within the function to define the loan rate, number of periods, and present value and Excel calculates the payment amount.

Date Functions: Date functions are used to add a specific date to a cell. Some common date functions in Excel include:

Date	=DATE(year,month,day)
Today	=TODAY()
Now	=NOW()

Display Worksheet Formulas: Click the **Formulas** tab on the ribbon and then click the **Show Formulas** button. Click the **Show Formulas** button again to turn off the formula view.

Manage Data

Export Data: Click **File** on the menu bar and select **Save As**. Click the File Format menu arrow to select a file type, specify where you want to save the file and click **Save**.

Import Data: Click the **Data** tab on the ribbon. In the Get External Data group, select the source from which you want to import data. Locate the file with data to import and click **Open** or **Get Data**, depending on your selection.

Outline and Subtotal: Click the **Data** tab on the ribbon and click the **Subtotal** button. Use the dialog box to define which column you want to subtotal and the calculation you want to use. Click **OK**. **Note:** After the subtotals are applied, outline buttons appear to the left of the data.

Use Flash Fill: Click in the cell to the right of the cell(s) where you want to extract or combine data. Start typing the data in the column. When a pattern is recognized, Excel predicts the remaining values for the column. Press **Enter** to accept the Flash Fill values.

Create a Data Validation Rule: Select the cells you want to validate. Click the **Data** tab and click the **Data Validation** button. Click the **Allow** list arrow and select the data you want to allow. Set additional validation criteria options and click **OK**.

Tables

Format a Cell Range as a Table: Select the cells you want to apply table formatting to. Click the **Format as Table** button in the Styles group of the Home tab and select a table format from the gallery.

	A	B	C	D
1	**Excursion**	**Jan**	**Feb**	**Mar**
2	Beijing	6,010	7,010	6,520
3	Las Vegas	35,250	28,125	37,455
4	México DF	20,850	17,200	27,010
5	Paris	33,710	29,175	35,840
6	Tokyo	12,510	14,750	11,490
7	**Total**	**108,330**	**96,260**	**118,315**

Sort Data: Select a cell in the column you want to sort. Click the **Sort & Filter** button on the Home tab. Select a sort order or select **Custom Sort** to define specific sort criteria.

Filter Data: Click the filter arrow for the column you want to filter. Uncheck the boxes for any data you want to hide.

Add Table Rows or Columns: Select a cell in the row or column next to where you want to add blank cells. Click the **Insert** button list arrow on the Home tab. Select either **Insert Table Rows Above** or **Insert Table Columns to the Left**.

Table Style Options: Click any cell in the table. Click the **Table** tab on the ribbon and select an option in the Table Style Options group.

Tables

Remove Duplicate Values: Click any cell in the table and click the **Data** tab on the ribbon. Click the **Remove Duplicates** button. Select which columns you want to check for duplicates and click **OK**.

Insert a Slicer: With any cell in the table selected, click the **Table** tab on the ribbon. Click the **Insert Slicer** button. Select the columns you want to use as slicers and click **OK**.

Intermediate Formatting

Apply Conditional Formatting: Select the cells you want to format. On the **Home** tab, click the **Conditional Formatting** button. Select a conditional formatting category and then the rule you want to use. Specify the format to apply and click **OK**.

Apply Cell Styles: Select the cell(s) you want to format. On the Home tab, click the **Cell Styles** button and select a style from the menu. You can also select **New Cell Style** to define a custom style.

Create a Custom Cell Style: Apply the desired formatting to a cell in the worksheet. Click the **Cell Styles** button on the Home tab. Select **New Cell Style** in the menu. In the dialog box, the formatting from the selected cell is captured. Enter a name for the custom style and click **OK**.

Apply a Workbook Theme: Click the **Page Layout** tab on the ribbon. Click the **Themes** button and select a theme from the menu.

Collaborate with Excel

Add a Cell Comment: Click the cell where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and then click outside of it to save the text.

Share a Workbook: Click the **Share** button on the ribbon. Enter the email addresses of people you want to share the workbook with. Click the permissions button, select a permission level, and click **Apply**. Type a short message and click **Send**.

Protect a Worksheet: Before protecting a worksheet, you need to unlock any cells you want to remain editable after the protection is applied. Then, click the **Review** tab on the ribbon and click the **Protect Sheet** button. Select what you want to remain editable after the sheet is protected. If you wish, add a password to unprotect the sheet and click the **OK** button.

Add a Workbook Password: Click **File** on the menu bar and select **Save As**. Click the **Options** button in the dialog box and set a password to open and/or modify the workbook. Click **OK** and confirm the password. Click **OK**.

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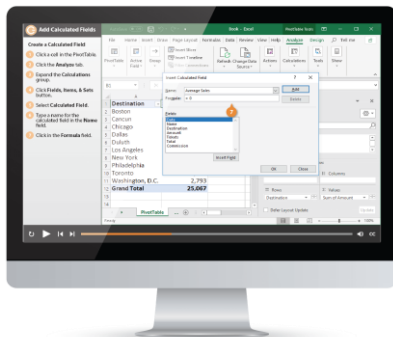
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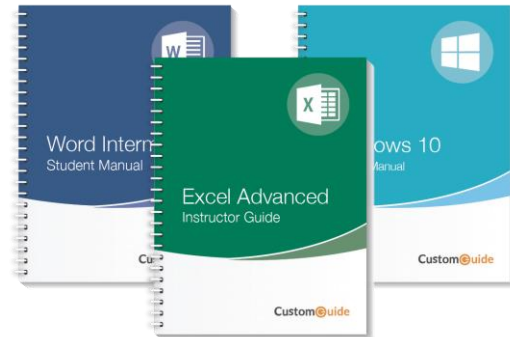
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