

Introduction to Excel

Scott Kravatz

This presentation available at

<http://ExcelBeginner.com>

Overview

- What is Excel?
- What can Excel do?
- Who uses Excel?
- Why Learn Excel?
- What skills are needed?
- How to Get Excel?
- How to Learn Excel?
- What to do when you get home?

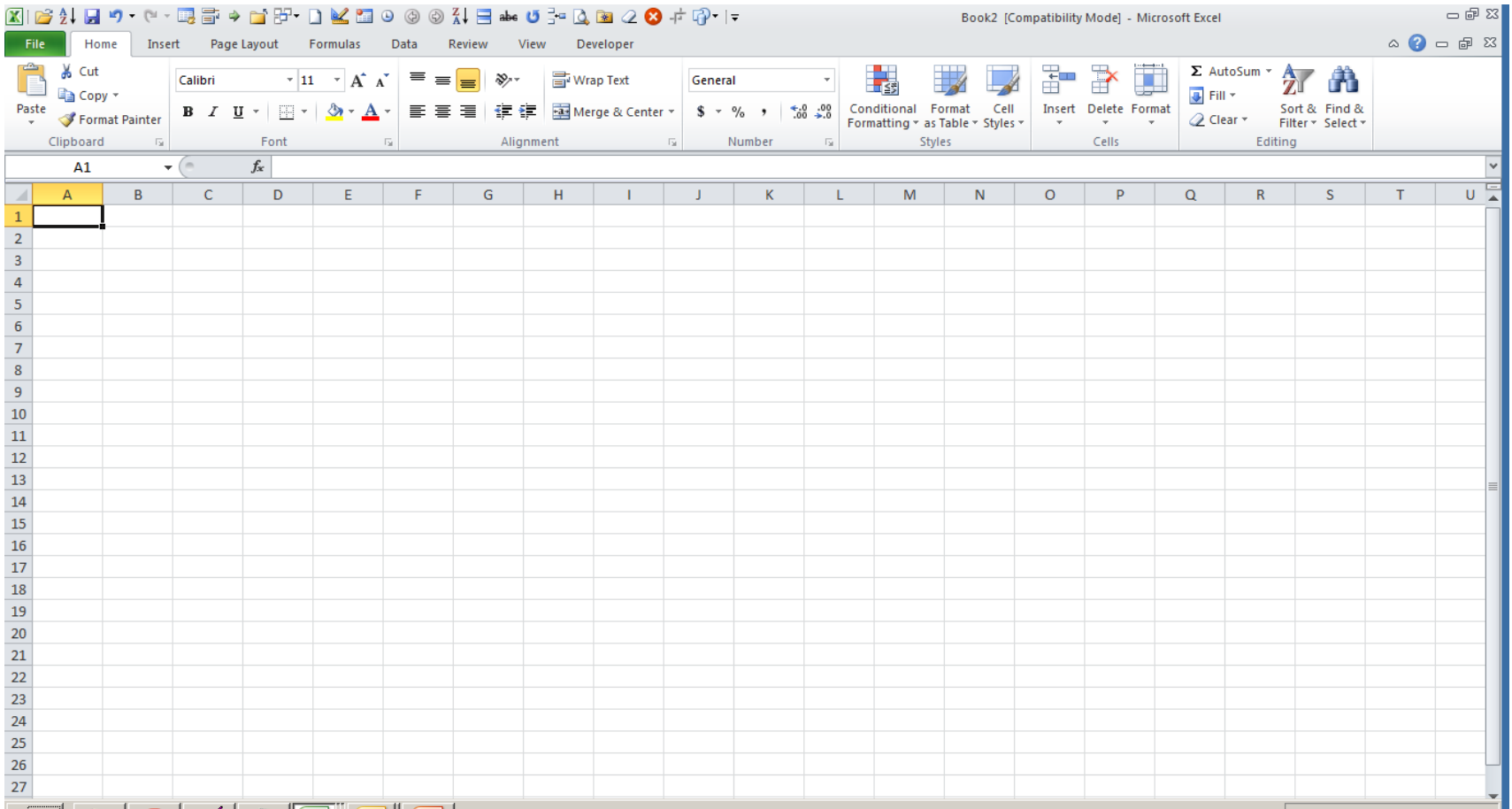


What is Excel?

- Productivity Tool From Microsoft
- Spreadsheet category of software
- Change one piece of data and the whole spreadsheet can recalculate itself
- Graph-paper like tool that allows you to easily manipulate data



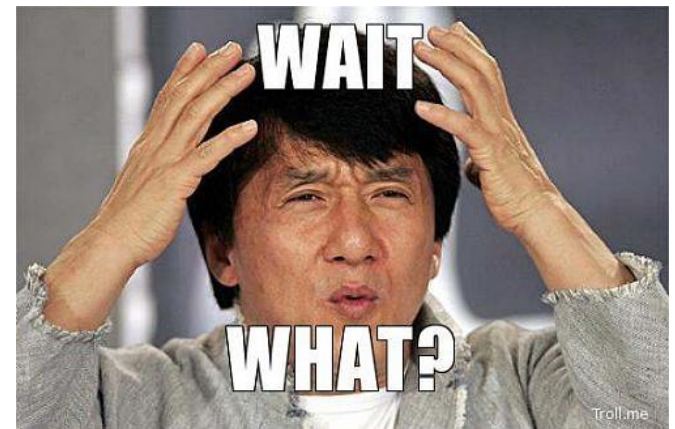
Blank Excel Spreadsheet



Excel Spreadsheet with Data

What can Excel do?

- Help you lose weight – <http://ExcelDiet.com>
- Help you Exercise – <http://Excelcise.com>
- Track your time <http://time-creator.com>
- Automate twitter – <http://twixel.com>
- Balance your time – <http://TimeBalancer.com>
- Help you create a website –
 - <http://e4hf.com>
- Create a dynamic website –
 - <http://Listi.net>
- Beat the Stock Market –
 - <http://Stockg.com/Backtester>



Other Tools I've built

- Black Jack Simulator
- Chess simulator
- Hockey Simulator
- Test Stock Market Strategies
- Idea Creator
- Plan your line-up in hockey



Who uses Excel?

- Software Developers
- Traders
- Accountants
- Financial Analysts
- Students
- Marketing
- Managers
- Data Analyst
- Credit Officers
- Banks
- Insurance
- Sales

Business Usage

- Analyze Traders for a Hedge Fund
- Develop Trading strategies
- Reporting to Fed Gov on Credit Risk
- 1 Page Fund Overview
- Trading tool (VWAP Slicing)
- Trade Optimization
- Bloomberg interface
- Reuters interface
- Project Planning
- Todo lists
- Automation
- Data collection from web
- Budgeting
- Floor plans

Companies that I've Used Excel at

- Bank of America
- Merrill Lynch
- Hite Capital – Hedge Fund
- DKR Capital – Hedge Fund
- Instinet

Fortune 500 Companies that Use Excel

- All
- 500

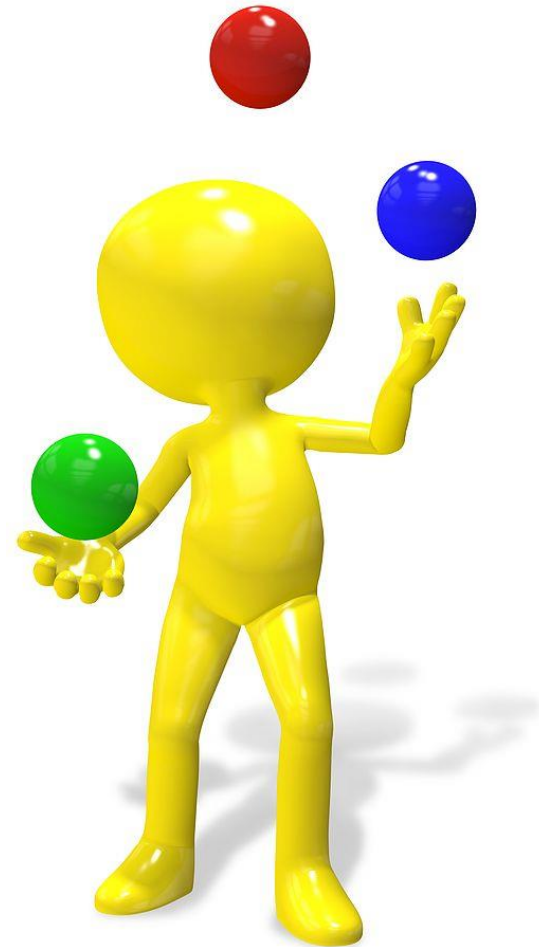
Why Learn Excel?

- Fun
- Increase your salary
- Earn 6 Figures
- Save time



What skills are needed?

- Basic Computer skills
 - Windows knowledge
 - Mouse, Keyboard
- Patience
- Persistence/Determination
- Finding Time (A Little Each Day)
- Problem Solving
- Basic Math skills
- Taking Action



How to Get Excel?

- Opensource
 - <https://www.openoffice.org/>
- Google Docs
 - <http://www.google.com/sheets>
- Microsoft Excel
 - Search for “Microsoft Excel”
 - Search for “Microsoft Office”
 - Amazon
 - Staples



How to Learn Excel?

- Start with a project you want to create
- Track something
 - Ideas
 - Weight
 - Issues at work
 - Goals
 - To do list
 - Projects
 - Employees
 - Diary
 - Problems/Solutions
 - <look at what I track from sheets I have>



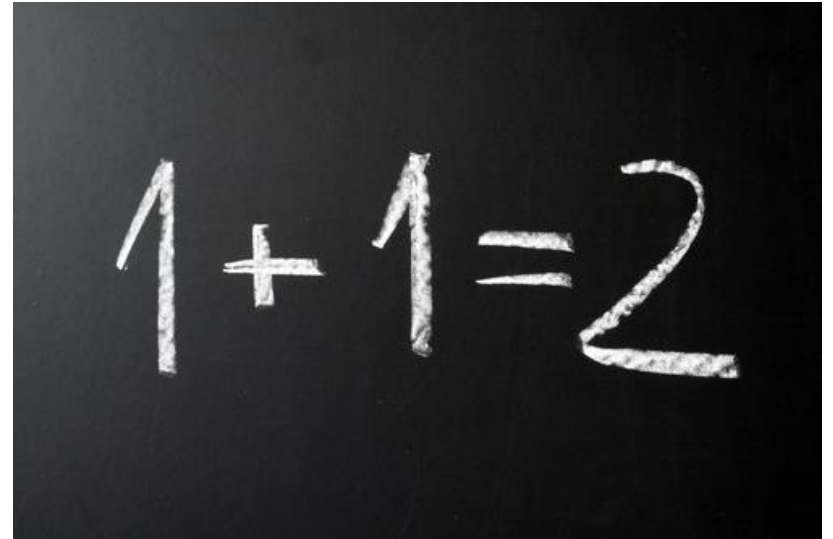
Methods to Learn Excel

- Trial and Error/Experimentation
- YouTube videos
- Find a mentor
- Books
- Class
- Google
 - Excel Tutorial
 - Learn Excel
- <http://ExcelBeginner.com>



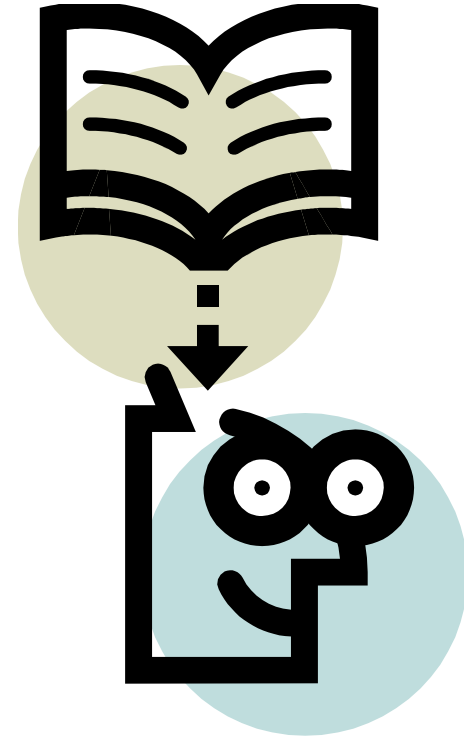
Excel Basics

- Install Excel
- Create a spreadsheet
- Save a spreadsheet
- Losing your work



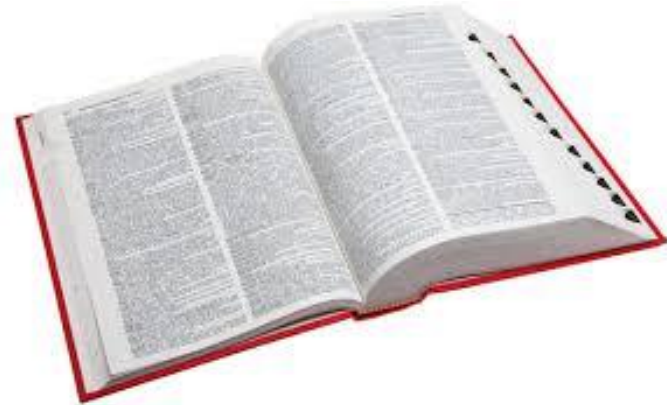
Windows to Know

- Mouse Actions
 - clicks – Left, Right, Double
 - Drag, drop
 - Move, resize, hover
- Keyboard
 - Fkeys
 - Ctrl
 - Esc
 - Alt
 - Windows
- Explorer
 - File Suffixes



Excel Terms to Know

- Spreadsheet
- Sheet aka WorkSheet
- Workbook
- Cell
- Ribbon
- Insert
- Delete
- Rename
- Save vs. SaveAs
- Formulas
- Functions
- Cell notation – A1
- Hyperlink



Excel Terms to Know (cont.)

- Formatting
- Clipboard

Important Features of Excel

- Formulas
- Functions
- Filtering
- Sorting
- Charts
- Vlookup
- Pivot Table
- Finding Data
- Formatting
- Hyperlink
- Cut,Copy,Paste
- Importing data
- Grouping data
- Comments

Important Developer Features

- Visual Basic Window
- Macros
- Record Macros
- Forms

What to do when you get home?

- Purchase a copy of Excel or get open-source or Google versions
- Experiment
- Create your first spreadsheet
- Work on Excel everyday
- Start small and work big



Why People Fail to Learn Excel

- Can't learn to swim without getting in the water
- Don't have a good application to use it for
- Give up too easily
- Think they can't (I Can't)
- Make excuses
 - Too old
 - Bad with computers
 - Don't have copy of Excel

