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Excel From Scratch: The 20% That Does 80% of the Work

In ten days, go from a blank spreadsheet to building a working, formula-driven sheet you actually trust.

10-day guide · 6 chapters · Self-Directed Learning Framework

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ABOUT THIS GUIDE

This guide was built with the Self-Directed Learning Framework (SDLF): every chapter gives you a short starting action, the one idea you actually need, a fully worked example, a checklist, and exercises to do in your own file — no filler, no re-reading required.

Work through the chapters in order; each takes 25–40 minutes. Keep one practice workbook open for the whole guide, because each chapter builds on the sheet the last one left behind. Keyboard shortcuts are given for Windows; on a Mac, use Cmd where Ctrl is written.

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CHAPTER 1 OF 6 · DAY 1 · 25 MIN

Getting Around a Sheet Without Fear

> **Outcome:** "I can navigate a sheet, select ranges, and enter data so Excel reads it the way I mean it."

Micro-start (under 12 minutes)

Open a blank workbook, click cell A1, type your name and press Tab; type today's date and press Enter. Watch where the cursor lands each time — Tab moves right, Enter drops to the next row and returns to the column you started in. That one behaviour removes most of the mouse work beginners do.

The minimum you need to know

A sheet is a grid addressed by column letter and row number — A1, B7, C12 — and a range is two corners joined by a colon, like A1:C10. The thing beginners get wrong is data types: Excel silently decides whether what you typed is a number, a date or text. Numbers and dates align right by default; text aligns left. So if a number sits on the left of its cell, Excel thinks it's text, and every formula using it will fail or return zero. That alignment is a free diagnostic — use it.

Worked example: a small table, and one cell that breaks it

In A1 type *Month* and in B1 *Sales*. Fill A2:A4 with January, February, March and B2:B4 with 1250, 1400, 1100. The B values sit right-aligned, so they're real numbers. Now type *1,250 EUR* into B5: it lands left-aligned, because the letters made it text — and a total over B2:B5 will ignore it completely, without warning you. Delete it, type 1250, and press Ctrl+1 to format the cell as currency instead. The rule this teaches is the one that prevents most broken sheets: store the number, apply the units as formatting, and never type units into a cell you intend to calculate with.

Checklist

- ☐ Blank workbook open and saved with a real name
- ☐ Data entered with Tab (across) and Enter (down) rather than the mouse
- ☐ Headers in row 1, one record per row, no blank rows inside the block
- ☐ Numbers confirmed right-aligned; anything left-aligned investigated
- ☐ No units, spaces or symbols typed inside numeric cells
- ☐ Currency and dates applied through formatting (Ctrl+1), not typed
- ☐ A range selected by click-and-drag and its address read in the Name Box

Exercises

1. Build a six-row table of your own with one text column and two numeric columns.
2. Deliberately break one numeric cell by typing a unit into it, then find it using alignment alone and fix it with formatting.
3. Select each column in turn and read the sum shown in the status bar at the bottom right.

CHAPTER 2 OF 6 · DAY 2–3 · 30 MIN

Your First Formulas: SUM, AVERAGE and the Golden Rule

> **Outcome:** "I can write formulas that reference cells instead of typed-in numbers."

Micro-start (under 12 minutes)

In any empty cell type *=2+2* and press Enter. That's a formula — everything in Excel that calculates begins with the equals sign, and nothing that calculates works without it.

The minimum you need to know

The golden rule of spreadsheets: never type a number into a formula when that number already lives in a cell. *=1250+1400* is correct exactly once and silently wrong from the next edit onwards; *=B2+B3* keeps itself right. Three functions carry most early work: SUM(range) adds, AVERAGE(range) means, and COUNT(range) counts numeric entries. Select any range and Excel already shows sum, average and count in the status bar — useful for checking a formula's answer against something you didn't write.

Worked example: a total that maintains itself, and one that lies

With months in A2:A5 and sales in B2:B5, put *=SUM(B2:B5)* in B6 and *=AVERAGE(B2:B5)* in B7. Change January from 1250 to 1500: both update the instant you press Enter. Now, in B8, write the same total the wrong way: *=1250+1400+1100+1300*. Today it shows the correct figure. Tomorrow someone corrects February in B3, B6 updates and B8 doesn't — and because both cells still show a plausible number, nothing looks broken. That gap between the two is the entire argument for cell references, and it's why hand-typed numbers inside formulas are the most common cause of wrong spreadsheets in real offices.

Checklist

- ☐ Every formula starts with =
- ☐ No literal numbers inside formulas where a cell already holds the value
- ☐ SUM, AVERAGE and COUNT each used at least once on a real range
- ☐ Formula results checked against the status-bar figures
- ☐ A source value changed to confirm dependent formulas update
- ☐ Ranges written as corner:corner (B2:B5), not cell-plus-cell where a range will do
- ☐ Totals sit outside the data block, not inside it

Exercises

1. Add a total and an average row to your table from Chapter 1.
2. Change two source numbers and confirm both results move.
3. Write one deliberately hard-coded formula, then rewrite it with references and delete the original.

CHAPTER 3 OF 6 · DAY 4 · 30 MIN

Relative vs Absolute References: What the $ Sign Does

> **Outcome:** "I can drag a formula down a column and know in advance which references will move."

Micro-start (under 12 minutes)

Put *=B2*2* in C2, then drag the small square at the cell's bottom-right corner down to C5. Click each copied cell and read the formula: B3*2, B4*2, B5*2. Excel rewrote the reference for you — that's what 'relative' means.

The minimum you need to know

A plain reference like B2 is relative: copy the formula anywhere and it shifts by the same offset. A dollar sign freezes part of it. *B2* never moves; *B$2* keeps the row fixed while the column travels; *$B2* does the opposite. You need this the moment one fixed value — a VAT rate, an exchange rate, a commission percentage — feeds a whole column of formulas. While editing a reference, press F4 to cycle through the four forms instead of typing dollar signs.

Worked example: one VAT rate, ten rows

Prices sit in B2:B10 and the VAT rate, 21%, is typed once into E1. In C2 write *=B2*E1* and drag down to C10: every row multiplies its own price by the single rate in E1, because the dollars stopped E1 from travelling. Write it without dollars as *=B2*E1* and drag, and row 3 looks for E2, row 4 for E3 — all empty — so the column fills with zeros that look like a data problem rather than a formula problem. The real payoff comes next: change E1 to 6% and all ten rows recalculate at once. One rate, one place, one edit.

Checklist

- ☐ The difference between B2, B2, B$2 and $B2 stated in your own words
- ☐ F4 used to add dollars instead of typing them
- ☐ Fixed values (rates, factors) stored in their own labelled cell, not repeated in formulas
- ☐ A formula dragged down a full column and two copies inspected
- ☐ A column of zeros recognised as a missing-$ symptom, not bad data
- ☐ The fixed cell changed once to confirm the whole column updates
- ☐ Rate cell labelled in the neighbouring cell so the sheet reads without explanation

Exercises

1. Build a price list of eight rows with one tax rate in its own cell, using $ correctly.
2. Break it on purpose by removing the dollars, look at the result, then fix it.
3. Add a second fixed cell (a discount) and write one formula that uses both.

CHAPTER 4 OF 6 · DAY 5–6 · 30 MIN

Making a Sheet Readable: Formatting, Freezing and Tables

> **Outcome:** "I can turn a raw block of data into a sheet someone else can read without asking me questions."

Micro-start (under 12 minutes)

Click any cell inside your data and press Ctrl+T, then confirm that your block has a header row. Banded shading and filter arrows appear in one step — you've just made an Excel Table.

The minimum you need to know

Three features do most of the readability work. **Freeze panes** (View → Freeze Panes → Freeze Top Row) keeps headers visible as you scroll. **Number formatting** (Ctrl+1) makes figures legible — currency, thousands separators, dates — without altering the stored value. And **Tables** (Ctrl+T) give you ranges that grow by themselves: a formula written against a Table column stays correct when rows are added, which a plain range does not.

Worked example: a 300-row expense sheet nobody can read

Raw, it's a wall of digits. Freeze the top row so the headers stay put while you scroll to row 250. Select the amount column and press Ctrl+1 → Currency with two decimals, so 1250 reads as €1,250.00 while still calculating as 1250. Then press Ctrl+T to turn the block into a Table and rename it *Expenses* in the Table Design tab. Now =*SUM(Expenses[Amount])* totals the column by name and keeps working when tomorrow's row 301 arrives — whereas =*SUM(D2:D301)*, written today, will quietly stop including everything added after it.

Checklist

- ☐ Top row frozen so headers stay visible when scrolling
- ☐ Currency, percentage and date formats applied through Ctrl+1, never typed
- ☐ Column widths adjusted so nothing shows as ####
- ☐ Data block converted to a Table with Ctrl+T and given a meaningful name
- ☐ At least one formula written against a Table column by name
- ☐ A new row added at the bottom to confirm the Table and its formulas expanded
- ☐ No merged cells anywhere in the data block

Exercises

1. Convert your practice data into a named Table and freeze the header row.
2. Write one total using the Table-column syntax, then add a row and confirm it updates.
3. Format every numeric column appropriately, and check the underlying values are unchanged.

CHAPTER 5 OF 6 · DAY 7–8 · 40 MIN

IF and XLOOKUP: Decisions and Lookups

> **Outcome:** "I can write a formula that makes a decision, and one that fetches a value from another table."

Micro-start (under 12 minutes)

In an empty cell write *=IF(5>3,"yes","no")* and read it aloud as a sentence: if this test is true, give me this, otherwise give me that. The syntax is the sentence.

The minimum you need to know

IF(test, value_if_true, value_if_false) handles decisions. **XLOOKUP(what_to_find, where_to_look, what_to_return)** fetches a matching value from another table — it replaced VLOOKUP, and unlike VLOOKUP it doesn't care which column comes first and doesn't break when someone inserts a column. On older versions without XLOOKUP, *VLOOKUP(value, table, column_number, FALSE)* does the same job, and that final FALSE is non-negotiable: it forces an exact match instead of an approximate one.

Worked example: flagging overspend against a budget table

A second sheet named *Budgets* holds category names in column A and budget figures in column B. On your main sheet, C2 holds a category and D2 the actual amount spent. To pull in the budget: *=XLOOKUP(C2, Budgets!A:A, Budgets!B:B)* in E2. To judge it: *=IF(D2>E2,"OVER","ok")* in F2. Or combine them into one cell: *=IF(D2>XLOOKUP(C2,Budgets!A:A,Budgets!B:B),"OVER","ok")*. Drag down, and every row now says in one word whether it broke its budget — a question that previously needed a person comparing two sheets by eye.

Checklist

- ☐ IF written and read back as an if/then/otherwise sentence
- ☐ Text results inside IF wrapped in double quotes
- ☐ XLOOKUP (or VLOOKUP with a final FALSE) used against a second table
- ☐ Lookup column and return column checked to be the same length
- ☐ A deliberate non-match tested to see what the formula returns
- ☐ Nested version built only after the two separate formulas both worked
- ☐ Result column spot-checked by hand against three source rows

Exercises

1. Create a small lookup table on a second sheet and pull two values from it.
2. Add an IF column that labels each row with a word, not a number.
3. Break the lookup by misspelling one category, observe the error, then handle it with the if_not_found argument of XLOOKUP.

CHAPTER 6 OF 6 · DAY 9–10 · 35 MIN

Pivot Tables: Summarising Thousands of Rows in Two Minutes

> **Outcome:** "I can build a pivot table that answers a question about my data without writing a single formula."

Micro-start (under 12 minutes)

Click any cell inside your data, then Insert → PivotTable → OK. An empty pivot appears beside a field list. Configure nothing yet — just read the four drop zones: Rows, Columns, Values and Filters.

The minimum you need to know

A pivot table answers questions shaped like *total X by Y*. What you want broken down goes into Rows; what you want measured goes into Values; a second breakdown goes into Columns. The single most common reason a pivot refuses to behave is the source data: pivots need one clean header row and one record per row — no merged cells, no blank header, and no subtotal rows already sitting inside the data.

Worked example: a year of expenses, 2,000 rows, two questions

First question: what did we spend per category, per quarter? Drag Category into Rows, Amount into Values (it defaults to Sum), and Date into Columns — then right-click any date in the pivot and choose Group → Quarters, and Excel collapses 365 dates into four columns. Two minutes, no formulas, and you have a quarterly cross-tab. Second question: who did we spend it with? Drag Category out of Rows and Supplier in — same data, different answer, no rebuilding. Then right-click any figure → Show Values As → % of Column Total, and the euros become percentages. The skill being learned here isn't the clicking; it's asking the question in the 'total X by Y' shape before you touch anything.

Checklist

- ☐ Source data has one header row, one record per row, and no merged cells
- ☐ Pivot inserted from inside the data block
- ☐ Question phrased as 'total X by Y' before configuring anything
- ☐ Rows, Values and Columns each used deliberately
- ☐ Dates grouped rather than left as hundreds of individual days
- ☐ Values summarisation checked (Sum vs Count) rather than assumed
- ☐ Pivot refreshed after changing the source data, to confirm it updates

Exercises

1. Build a pivot answering one real question about your own data.
2. Swap the Rows field to answer a second question without rebuilding.
3. Add a row to the source data, refresh the pivot, and confirm the totals change.

You've completed this guide.

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