Tips for using Excel

Excel is a package that has many features to facilitate data entry and analysis, including features that can save a lot of time. Listed below are a few introductory tips that you may find helpful when using the planning and budgeting tool.

If you have other questions about Excel (of the How can I ....? or Can I....? kind) when using the planning and budgeting tool, please let us know and we will add the questions and solutions (if available) to the list provided below.

1. Symbols used for calculations in Excel
Mostly, the symbols that you need to use in Excel are the same as the mathematical symbols used in books or on calculators. One that is different is the symbol used for multiplication. In Excel, you use the * sign (i.e. an asterisk) instead of x.

2. How to write a formula
You can do calculations within Excel (you don't need to do a calculation on a calculator and then enter the value in Excel). For budgeting, it is likely that some calculations are going to be necessary. Instead of using a calculator, you can enter the formula for the calculation that you want to do in Excel. To do this, click on the cell where you want to enter a formula. Then type the "equals" sign followed by your formula. For example, if you know that the budget for a member of staff is US$1000 per month while the tool is asking you to enter the cost of that member of staff for one year, you can write =12*1000.

3. How to look at which cells contribute to a formula
It is often useful to check which cells are contributing to a formula. For example, you will need to do this in the planning and budgeting tool if you have entered new rows or duplicate tables, to check that any subtotals that are being calculated include the new costs that you have entered. To check which cells are contributing to a formula, first of all click on the cell where the formula is written. Then go to the formula bar at the top of the screen and click at the end of the formula. All of the cells that are contributing to that formula should then be highlighted (although if a formula is very complicated, this will not be possible).

4. Dragging values across a row or down a column
When you want to enter the same value more than once, you don't need to keep typing in the same number (or formula). You can simply use the mouse to drag the same value (or formula) across a row or down a column. To do this, click at the bottom right hand corner of a cell, and then drag the mouse across or down the screen.

When dragging formulae, cell references to a column heading will be changed as you drag across a row (e.g. if the original formula was written as =e45, when you drag that formula across a row the next entry will be =f45), while references to rows will be changed when you drag a formula down a column (e.g. if the first cell has the entry =a55, the next entry will become =a56 when you drag that formula down a column).

5. Use of the $ sign in a formula
Often, it will be important that some cell references are kept fixed when you drag a formula across a row or down a column. For example, suppose you have written the formula =c56*5 in a cell. You want the same number to appear in the next 8 rows. If you drag the formula c56*5, the next value will be c57*5, and the next c58*5, the next c59*5, and so on. This will be wrong if you need to keep the reference to cell c56. To ensure that the formula keeps the reference to cell c56 as you drag down a row, you need to enter the $ sign before the c i.e. =$c56*5.
Similarly, anytime you insert the $ sign before a letter reference (for columns) or before a number reference (for rows), then whenever you drag the formula those references will be "fixed".