

How to Create a Spreadsheet in Excel: A Practical Workflow

- Build a clean, functional business spreadsheet from start to finish
- Follow a structured workflow: planning, data entry, formatting, formulas, review
- Use the Think-Do-Review framework throughout this training
- Avoid common beginner mistakes that break sorting, filtering, and formulas
- Designed for business staff, data beginners, and students



Get to Know Excel Before You Build



- Ribbon, formula bar, status bar, and grid make up the main view



- Workbooks are the file; worksheets are the pages inside



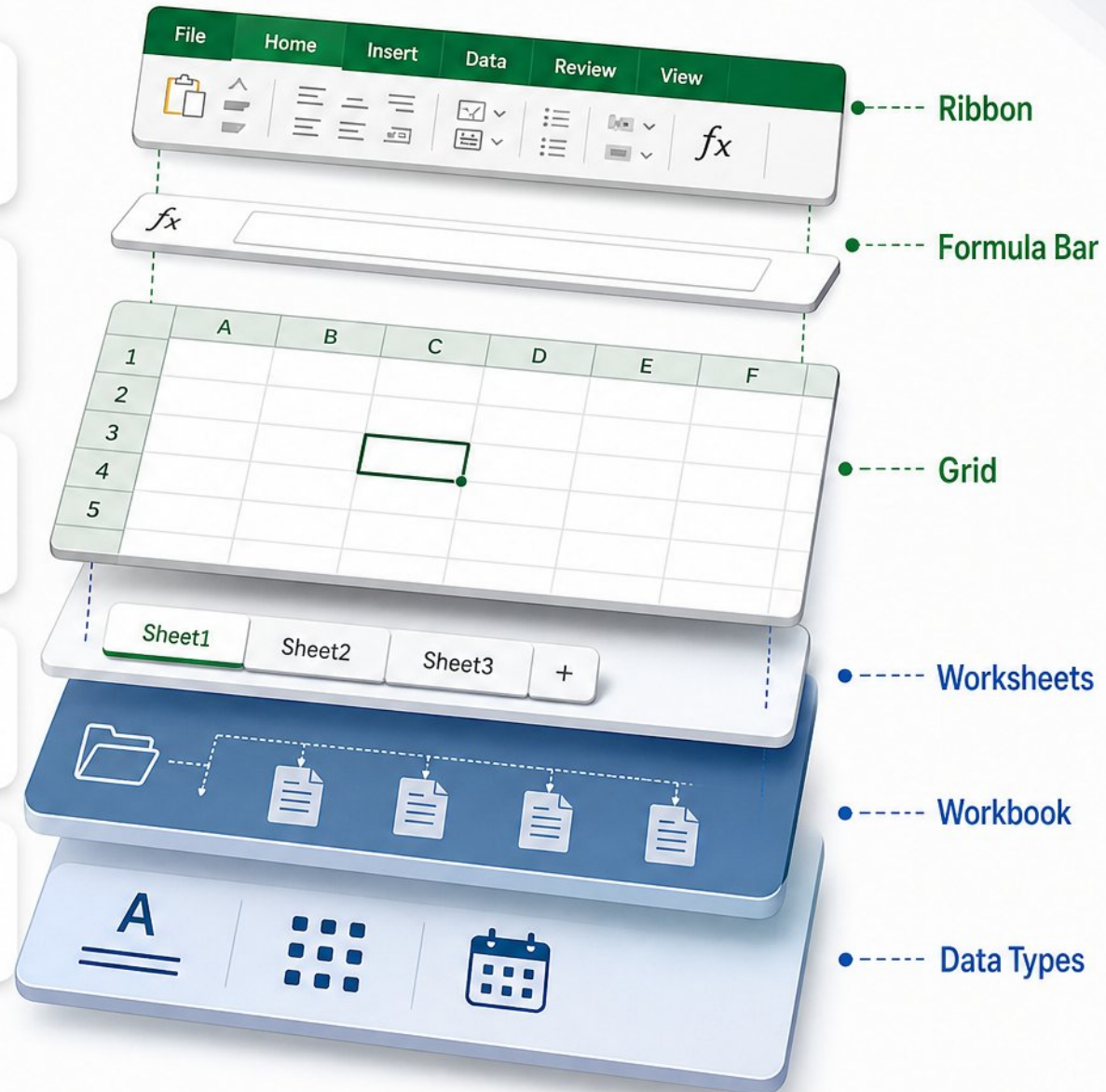
- Cells, ranges, columns, rows, and references form the core vocabulary



- Excel stores text, numbers, and dates as distinct data types



- Treat Excel as a structured tool, not a blank canvas



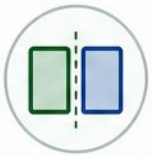
Plan Before You Type: Define the Purpose



- Start with the question: what decision or action should this spreadsheet support?



- Identify your audience and what they need to see or enter



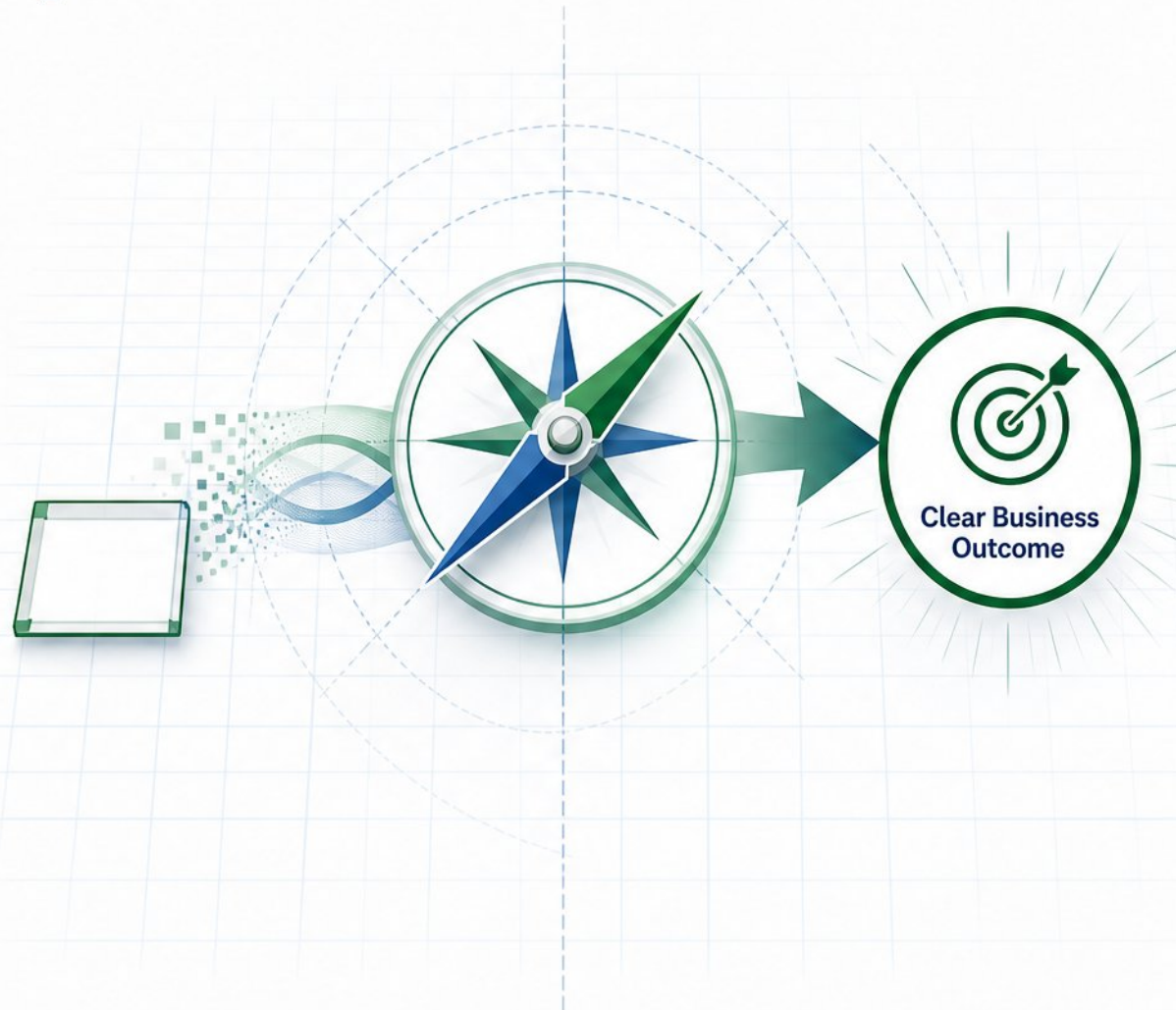
- Separate input fields from calculated fields early



- Keep the first version simple but extendable



- Use a quick 'Think' checklist before opening Excel



Sketch the Structure: Columns as Fields, Rows as Records



- Tabular structure: one row per record, one column per attribute



- Choose columns for a sample business scenario



- Avoid merged cells, blank rows, and mixed data types



- Place assumptions, totals, and notes separately



- Three-tab rule: Data, Logic, and Output



DATA SEED TO STRUCTURE



SPECIMEN CARD: WIDE TABLE

Columns as Fields, Rows as Records

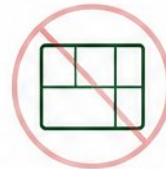
WIDE TABLE STRUCTURE

Columns = Fields

Field 1	Field 2	Field 3	Field 4	Field 5	Field 6	...

Rows = Records

WHAT TO AVOID



Merged cells



Blank rows



Mixed data types

THREE-TAB RULE





Set Up Your Workbook



Open Excel and choose Blank Workbook or a relevant template



Save with a clear file name: project, topic, date, version



Use .xlsx for most files; .xls for older Excel versions



Rename sheets meaningfully; add, reorder, or delete as needed



Keep a folder system and version backups from day one





Enter and Organize Data



- Enter data by typing, pasting, or importing text files



- Data types: text, numbers, dates — keep them consistent



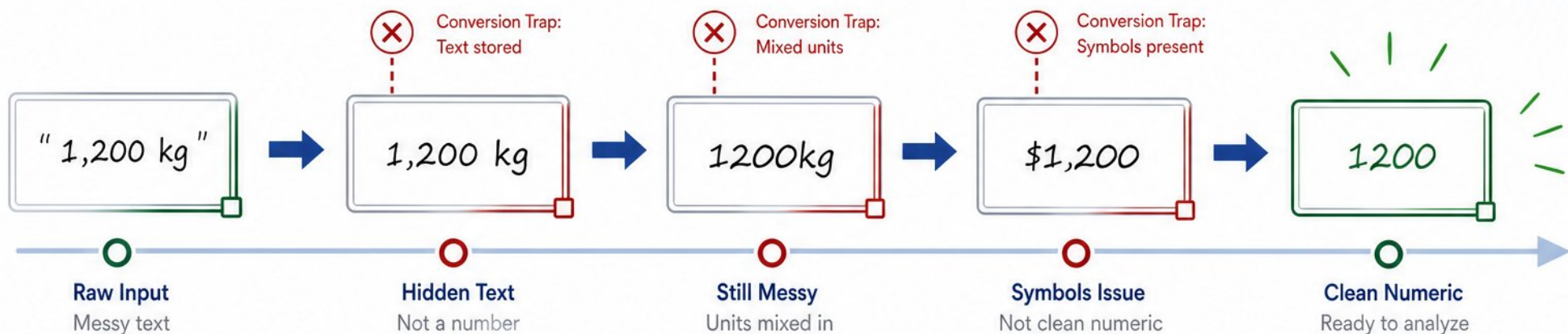
- Never mix units or symbols with numbers in cells



- Use Ctrl+Arrow keys to jump across data regions



- Ctrl+; inserts today's date; Ctrl+Enter fills selected cells



..... Data Seed to Structure ...



Format for Clarity and Control

A

Use fonts, colors, borders, and alignment for readability



Number and date formats keep values clear and calculable



Adjust column widths and row heights for clean layout



Use Excel Tables (Ctrl+T) for automatic formatting and expansion



Center Across Selection beats merging cells—keeps data sortable

Center Across Selection

Report Summary				



Text is centered across the selected cells



Cells remain independent and sortable



Data stays in columns for calculations

Merged Cells

Report Summary		



Creates one large cell



Breaks sorting and filtering



Can cause calculation and data issues

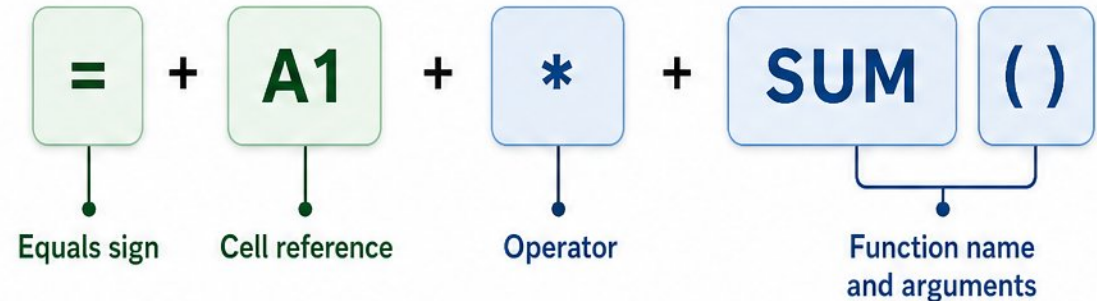


Best practice: Use Center Across Selection to keep layouts clean, data sortable, and workbooks reliable.

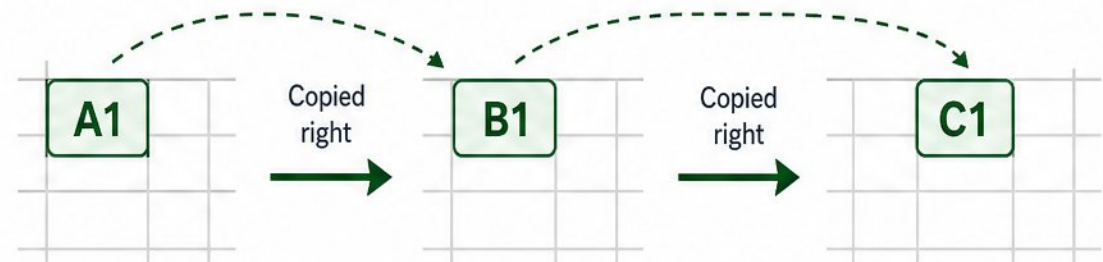
Understand Formulas, Functions, and References

- ✓ Formula: complete instruction starting with =; function: built-in tool like SUM
- ✓ Every formula begins with = ; the most common beginner mistake is forgetting it
- ✓ Order of operations: parentheses, exponents, multiply/divide, add/subtract
- ✓ Relative references adjust when copied (A1); absolute references stay locked (\$A\$1)
- ✓ Press F4 to toggle reference locking: relative → absolute → mixed

Anatomy of a Formula



How Relative References Shift When Copied



Reference Locking with F4





Apply Essential Functions That Cover Most Needs



SUM, AVERAGE, MIN, MAX, COUNT:
the foundational five



Use AutoSum (Alt+=) for instant totals



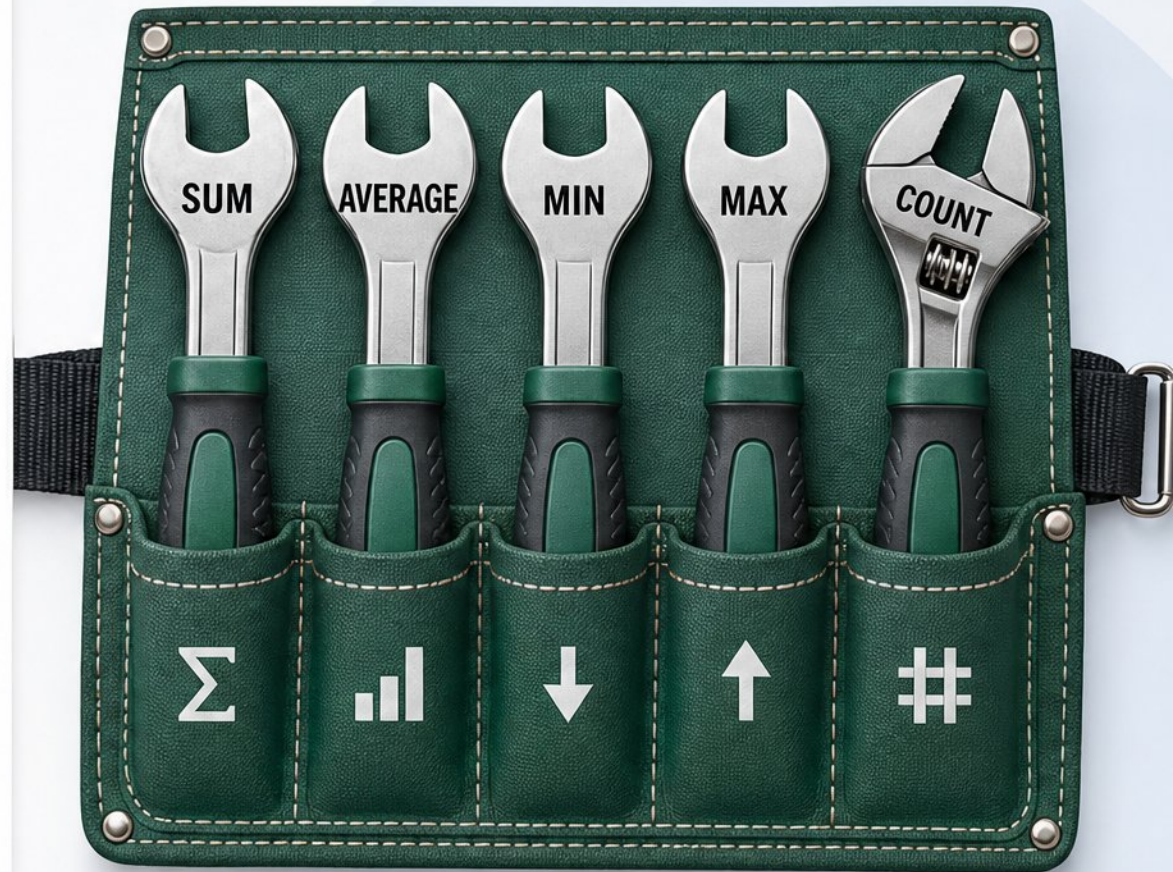
COUNTA counts non-empty cells;
COUNT counts only numbers



Common errors: #VALUE!, #NAME?,
and forgotten equals signs



Next: explore IF, COUNTIF, and
SUMIF for conditional logic



Sort, Filter, and Find What You Need



- Sort by one or multiple columns via Data tab



- Filter with Ctrl+Shift+L to focus on subsets



- Use Find (Ctrl+F) and Replace (Ctrl+H) for quick updates



- Freeze panes to keep headers visible while scrolling



- Select whole range or use Excel Tables to avoid sort disasters

Column A ↑ Column B ↓ Column C Column D Column E

↑ Sort A to Z
↓ Sort Z to A
Sort by Color ▶
✖ Clear Filter
Filter by Color ▶
Text Filters ▶

Q (Select All)
Q
Q

Frozen pane below headers

Filter dropdown open

Review for Errors Before You Share



- Check totals, broken references, and inconsistent data



- Spot numbers stored as text (green triangles) and convert them



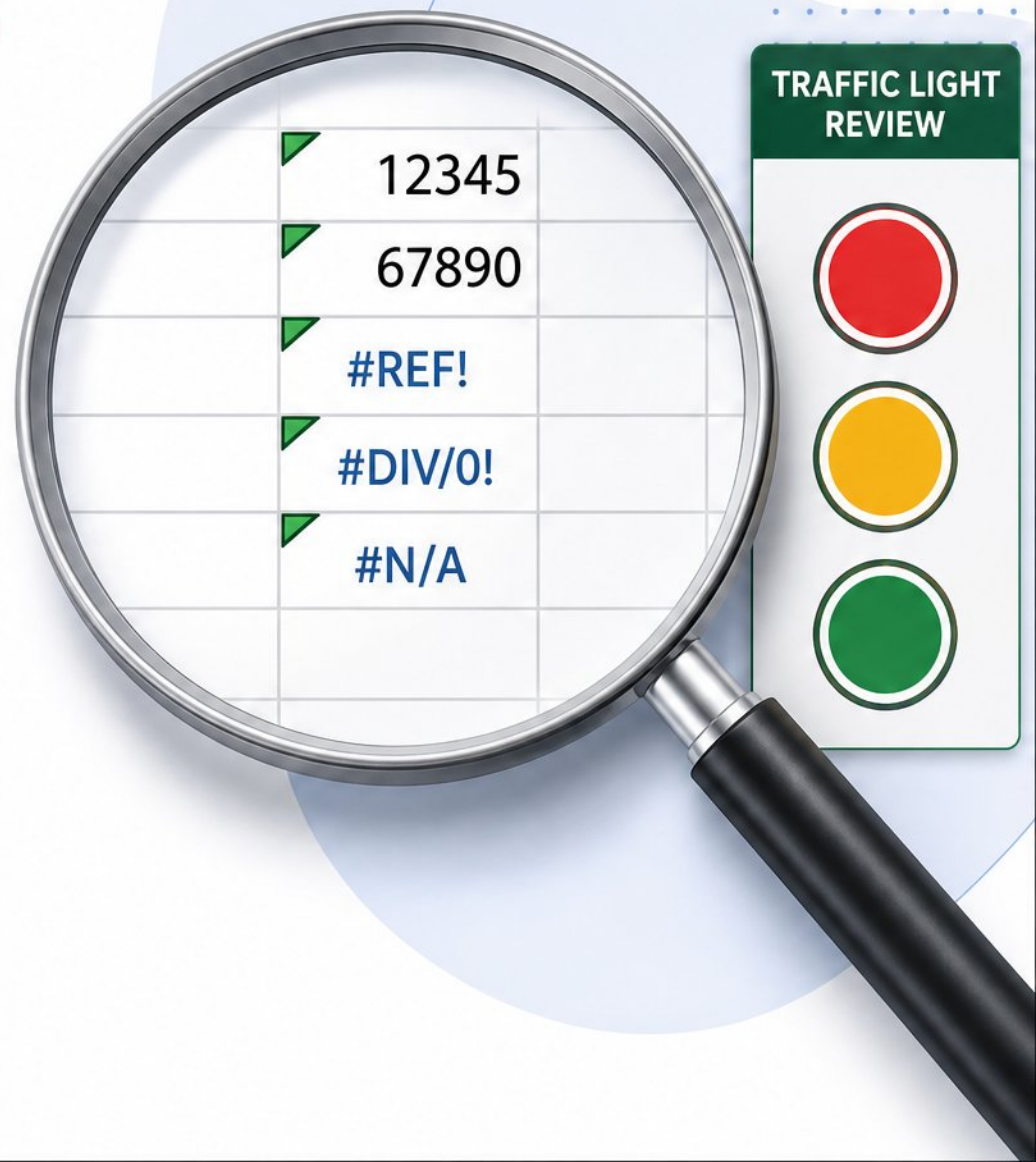
- Put fixed values like tax rates in named cells, not formulas



- Use IFERROR to keep #REF!, #DIV/0!, and #N/A errors clean



- Run a quick review checklist before sending your workbook



TRAFFIC LIGHT REVIEW



Protect, Print, and Share



- Protect cells, sheets, and workbook structure



- Set up print layout, margins, and print area



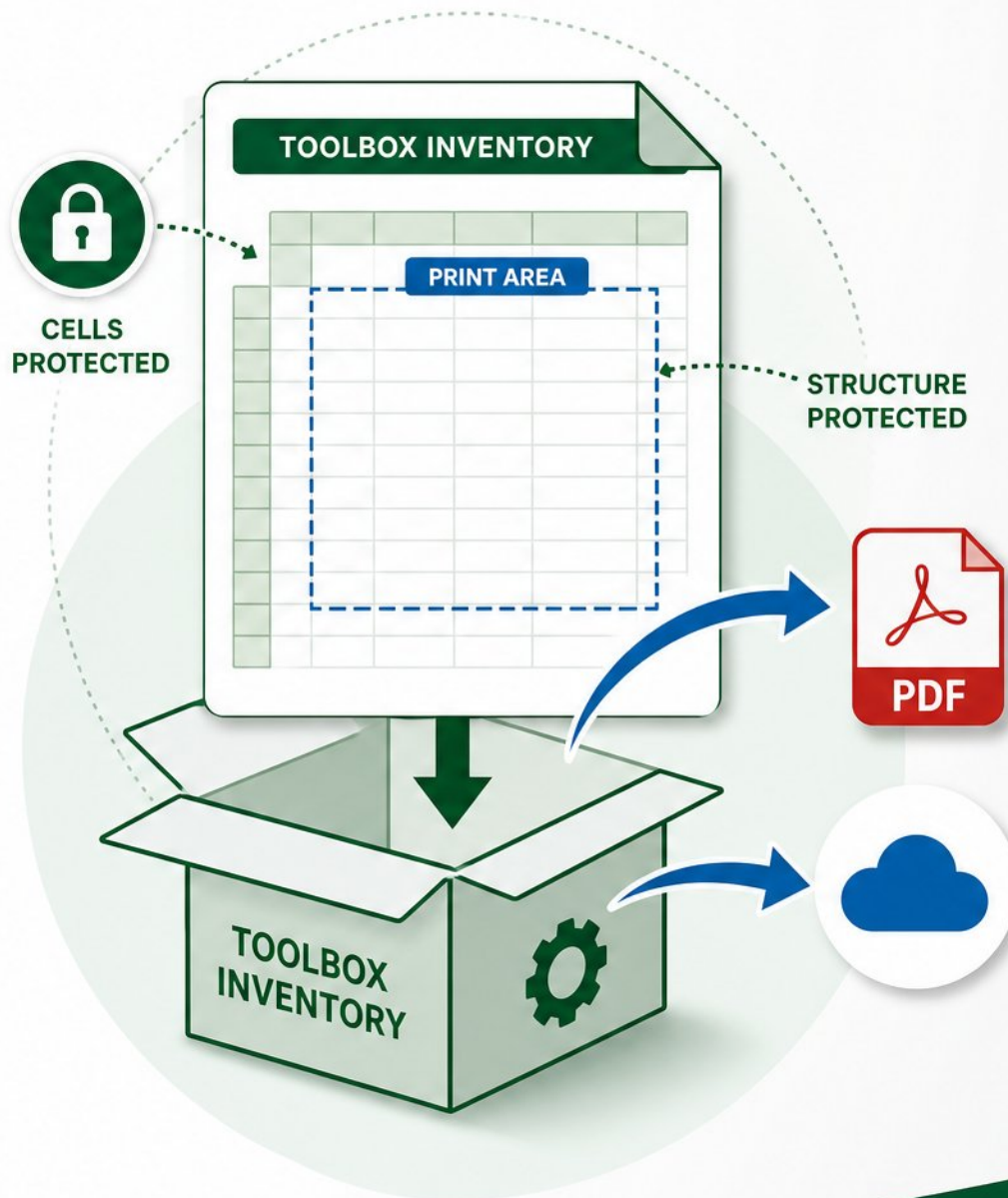
- Share via OneDrive or SharePoint for real-time co-authoring



- Use AutoSave and version history for backup

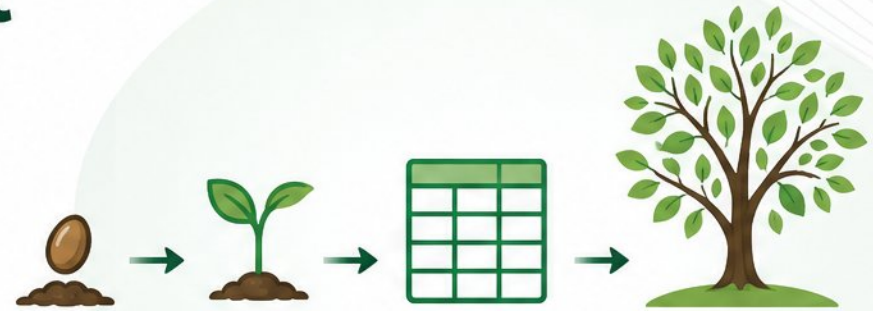


- Send as PDF or link instead of email attachments

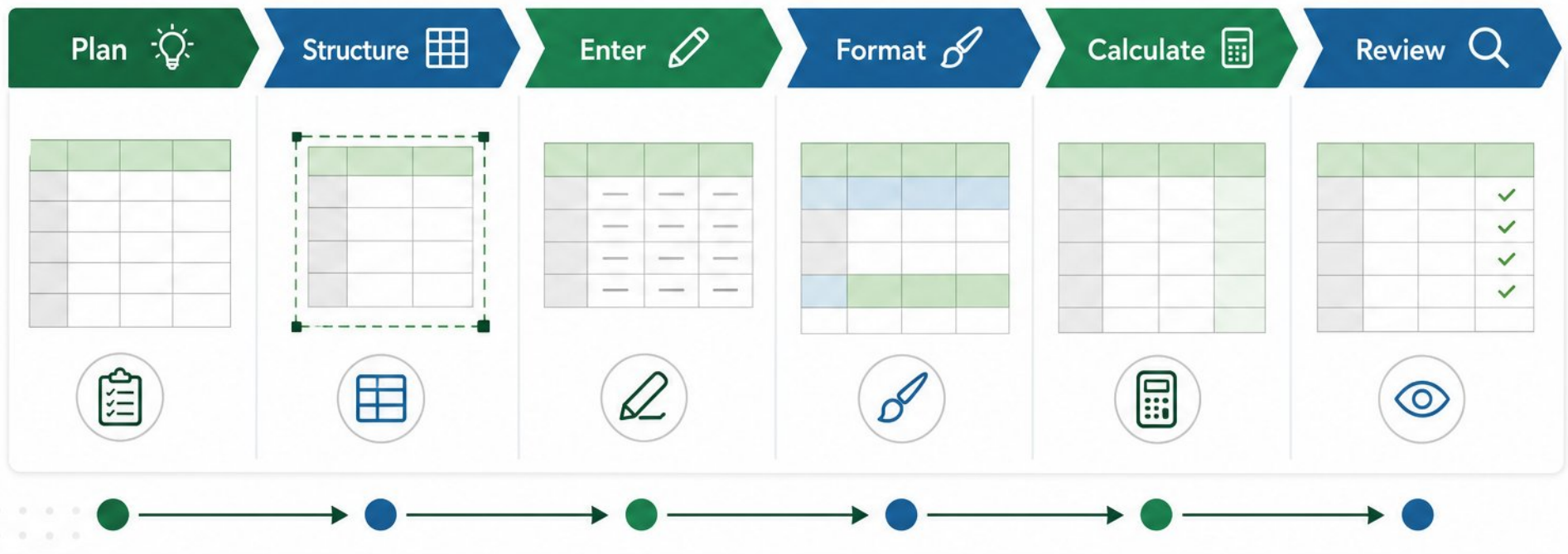


Build Your First Practice Spreadsheet

- Choose a simple budget or sales tracker as your mini-project
- Follow the full workflow: plan, structure, enter, format, calculate, review
- Avoid merging cells; use tables (Ctrl+T) for clean, dynamic data
- Compare your result with a clean reference version
- Keep a finished-spreadsheet checklist for future projects



Data Seed to Structure



Next Steps and Resources



- Recap: Think, Do, Review guides every build



- Next topics: IF functions, charts, PivotTables



- Practice with free templates and Microsoft's tutorials



- Use Microsoft Support for guides and troubleshooting



- Q&A: ask questions and share your workbook



PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/7140aa07/public