The Courseware Shop

# Introduction to Excel 2007

One Day Course

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# **MICROSOFT EXCEL 2007: INTRODUCTION**

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### **Foreword**

This course was written for trainees wishing to learn to use Microsoft Excel. It is written for using Microsoft Excel in the Office 2007 suite of applications. A 'New Features' section is included and it is very easy to see a complete list of the new features in Office 2007 in the Help menu on-screen. This courseware cannot and should not compete with the comprehensive coverage of new features detailed by Microsoft within the application's help files. To do so would be to hinder learning the raw application.

What this course seeks to do is teach the trainee Excel in the hope that he/she may be able to go and work just as well using Excel 2002 for example and other versions. Wherever possible, 'version functionality' is purposely avoided.

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# **MODULE 1: EXCEL ESSENTIALS**

# **OBJECTIVES:**

At the completion of this session you will be able to:

- Start Excel
- Use Selection Techniques
- Enter Data
- Finish a Workbook

# **TOPICS**

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# STARTING EXCEL

This course assumes that your work or training environment uses a computer system running Microsoft Windows. There are many versions of Windows but they all look similar. It is the most common computer desktop interface. However, many work-related workstations and systems operate with a combination of windows (for general applications, such as Excel) and bespoke or specific company systems and applications. Consequently, you may need to switch from a bespoke environment to Windows. Your instructor or IT / IS Manager will advise you on this.

To work with Excel effectively, you need to know several basic skills and concepts; how to start Excel from the Windows desktop, how to make the most of the Excel interface, how worksheets are used, and how to select cells and ranges.

### STARTING EXCEL

Once you are in Windows, starting Excel is a matter of a few clicks.

METHOD -

To load Excel:

- 1. On the taskbar, click the Start button.
- 2. From the Start Menu, point to Programs.
- 3. From the Programs menu, choose Microsoft Excel.

# **EXERCISE**

In this exercise, you will load Excel.

 (If necessary) Switch to Windows or start Windows

2. On the taskbar, click the Start button

The Start menu opens.

3. Point to Programs

The Programs menu opens.

Choose Microsoft Excel.
 NOTE: Excel may be in a subfolder named Microsoft Office)

Excel starts, showing the main screen with a blank worksheet.

# WHAT IS A WORKSHEET?

A *worksheet* is the electronic equivalent of a paper ledger. It is a powerful platform used to enter, analyze, calculate, and manipulate *data*. A worksheet can be used for basic calculations such as addition and subtraction, as well as more complicated applications like statistics, audits, or mortgage tables. Moreover, worksheets allow you to quickly format your data into effective business reports.

A worksheet is a grid of 1, 048, 576 rows and 16, 384 columns. The rows are labeled with numbers (1, 2, 3, ...) and the columns are labeled with letters (A, B, C, ..., AA, AB, AC,...), as illustrated in Figure 1-1. The intersection of a row and column is a *cell*, the basic unit for storing data. The highlighted *column* and *row headings* indicate the *active cell*. You'll find the active cell's *cell reference* in the *Name box*. The cell reference consists of the highlighted column letter and row number, in this case D9. A *range* is a rectangular group of cells; the *range reference* is derived from the cell references of top left cell and the bottom right cell separated by a colon.

Please note that the illustration below is not how the section of the worksheet would be seen in Microsoft Excel version 2007. An image of the actual view of the same section is shown below. The greyscale version is shown for clarity of purpose only.

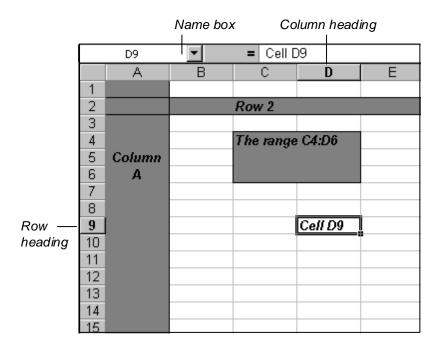
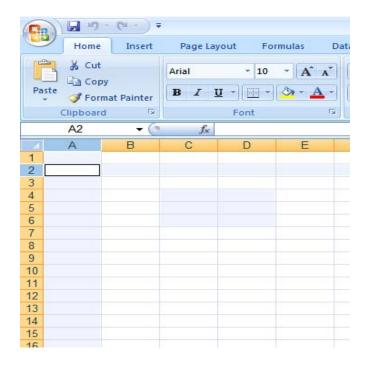
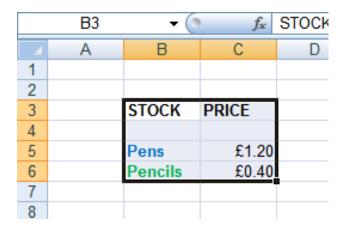


Figure 1-1: Rows, Columns, Cells, and Ranges.



**Figure 1-2:** Selected cells and ranges are shaded soft blue.

Above – the section of worksheet as actually seen in Microsoft Excel version 2007. Note that the selected areas are shaded a soft blue. This is so that the user can clearly see the contents of selected cells and ranges and even formatting. See example below for an enhanced view of selected – formatted - cells.



**Figure 1-3:** The shading of selected cells and ranges allows formatting to show through.

# WHAT IS A WORKBOOK?

A *workbook* is a collection of worksheets stored in the same file. These worksheets may contain different types of information, but they are usually related in some fashion. For example, each worksheet of a sales workbook may contain sales data for a specific division.

Workbooks can contain an unlimited number of worksheets, depending on worksheet size and the amount of memory your computer has. Besides worksheets, a workbook can include chart sheets, Visual Basic modules, dialog box sheets, macro modules, and scenario report sheets.

# **IDENTIFYING PARTS OF THE SCREEN**

The Excel window is illustrated in Figure 1-2. The bulk of the screen is occupied by the worksheet window. This grid provides a convenient workspace where you can enter and manage your data. Surrounding the worksheet window are several command interfaces, each of which allows you to receive information about, or apply functions to, the data on the worksheet. Table 1-1 describes the various parts of the Excel window.

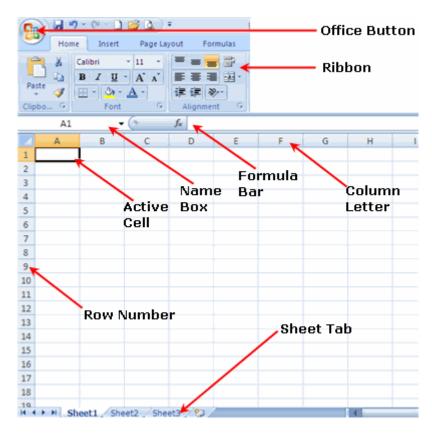


Figure 1-4: The Excel Window



Figure 1-5: The Quick Access Toolbar

Screen Part	Function
Worksheet control buttons	The worksheet control buttons allow you to minimize, maximize/restore, or close the worksheet.
Formula bar	The formula bar allows you to enter and edit data in the worksheet.
Worksheet window	The worksheet window contains the open, active worksheet. Worksheet windows can be moved and sized. You can have more than one worksheet window open at the same time.
Scroll bars	The vertical and horizontal <i>scroll bars</i> enable you to move quickly through the worksheet, vertically and horizontally.
Ribbon	The Ribbon is designed to help you quickly find the commands that you need to complete a task. Commands are organized in logical groups, which are collected together under tabs. Each tab relates to a type of activity, such as writing or laying out a page. To reduce clutter, some tabs are shown only when needed.
Title bar (extreme top right of the Excel window)	The <i>title bar</i> contains the name of the application and the active file.
Office Button	Clicking on the Office Button displays a drop down menu containing a number of options, such as open, save, and print.
	The options in the Office Button menu are very similar to options found under the File menu in previous versions of Excel.
Sheet tabs (Worksheet tabs)	The sheet tabs let you switch between worksheets in a workbook by clicking the appropriate tab.
Quick Access Toolbar	The Quick Access Toolbar (see Figure 1-3) is a customizable toolbar that contains a set of commands that are independent of the tab that is currently displayed. You can move the Quick Access Toolbar from one of the two possible locations, and you can add buttons that represent commands to the Quick Access Toolbar.

 Table 1-1: The Parts of the Excel Window

# THE RIBBON

The Ribbon is the strip of buttons and icons, organised into TABS, located above the work area in Excel 2007.

The Ribbon (with its various tabs) replaces the menus and toolbars found in earlier versions of Excel.

At the top of the actual Ribbon are a number of tabs, such as Home, Insert, and Page Layout. Clicking on a tab displays the options located in this section of the ribbon.

For example, when Excel 2007 opens, the options under the Home tab are displayed (see image to the right). These options are grouped according to their function - such as Clipboard (includes cut, copy, and paste options), and Font (includes current font, font size, bold, italic, and underline options).

Clicking on an option on the ribbon may lead to further options contained in a Contextual Menu that relate specifically to the option chosen.



Figure 1-6: The Clipboard and Font Sections of the Excel 2007 'Home Ribbon'

Although, as written in the label for Figure 1-4, tab sections can be referred to as [tab name] ribbon, like Home Ribbon, Insert Ribbon, etc, tab sections can also be referred to as only their tab names. Eg. the Home tab, the Insert tab, the Page Layout tab, etc.

# **USING SELECTION TECHNIQUES**

Before you can enter data, you have to select a cell. Before you can change the data, you have to select it. In this section, you'll learn effective, easy techniques that enable you to select cells, ranges, and *nonadjacent cells*. With one click, you can even select your entire worksheet, which is definitely a timesaver when it comes to making global changes.

# SELECTING A CELL

Selecting a cell is the first step in entering data or executing most commands in a worksheet. The single cell that receives the data or formula you enter is the active cell. When a cell is selected, its border becomes bold and the column and row indicators are highlighted.

# METHOD -

To select a cell:

1. Click the desired cell.

or

1. Use the arrow keys to move to the desired cell.

# **EXERCISE**

In the following exercise, you will select cells using the keyboard and the mouse.

- 1. If cell A1 is not selected, click it using the mouse. Cell A1 is selected and is the active cell.
- 3. Press **RIGHT ARROW** 2 times C5 becomes the active cell.

# **SELECTING A RANGE OF CELLS**

A rectangular selection of multiple cells is referred to as a range. You may wish to select a range when entering a group of data or when you wish to perform the same action on several cells. The range appears as a shaded block of cells, and the active cell in a range is defined by a bold border and white background. When a range is selected, its column and row headings are highlighted. In Figure 1-5, the selected range is referred to as B6:C9 ("B6 to C9").

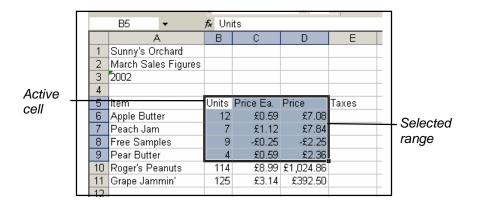


Figure 1-7: A Range of Cells



To select a range of cells:

### Mouse method

- 1. Select the first cell of the desired range.
- 2. Drag the mouse pointer through the range of cells you wish to include.

or

- 2. Press and hold **SHIFT**, and then click the final cell of the range.
- 3. Release SHIFT.

### **Keyboard** method

- 1. Use the arrow keys to move the cell pointer to the first cell of the desired range.
- 2. Press and hold **SHIFT**, and then use the arrow keys to highlight the desired range.
- 3. Release SHIFT.

# **EXERCISE**

In the following exercise, you will select ranges of cells using the mouse and the keyboard.

- 1. Select cell A1
- 2. Drag the mouse pointer to cell D5

The range A1 to D5 is selected

3. Using the arrow keys, select cell B2

Cell B2 is selected. The first range, A5 to D5, is deselected.

4. Press and hold **SHIFT**, and then use the arrow keys to select cell E7

The range B2:E7 is selected.

- 5. Release SHIFT
- 6. Select cell A1

The range B2:E7 is deselected.

- 7. Press and hold **SHIFT**, and then click cell D1
- 8. Release **SHIFT**

The range A1:D1 is selected.

9. Click cell A1

The range A1:D1 is deselected.

# **SELECTING NONADJACENT CELLS AND RANGES**

As a rule, to select multiple, nonadjacent objects in Windows, you employ the **CTRL** key. For example, you may use **CTRL** and the mouse to select multiple files or folders in Explorer or My Computer. This method also works in Excel to select nonadjacent cells and ranges.

# METHOD -

To select nonadjacent cells or ranges:

- 1. Select the first cell or range.
- 2. Press and hold CTRL
- 3. Select the next cell or range.
- 4. Release CTRL

# EXERCISE -

In the following exercise, you will select nonadjacent cells and ranges.

- Make sure cell A1 is selected
- 2. Press and hold CTRL
- 3. Select cell C4 Cells A1 and C4 are selected.
- 4. Using the mouse, select Cells A1 and C4, and the range the range B6:E10 B6:E10 are selected.
- 5. Release CTRL
- 6. Select cell A1

# **SELECTING AN ENTIRE WORKSHEET**

Selecting an entire worksheet is useful when you want to make changes on a global scale. For instance, you might want to change the size of the font in every cell in the worksheet. Once you select the entire worksheet using the Select All button, illustrated in Figure 1-6, you can do this in a single step.

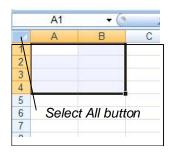


Figure 1-8: The Select All Button



To select an entire worksheet:

1. Click the Select All button.

# **EXERCISE**

In the following exercise, you will select the entire worksheet.

- 1. Click the Select All button The entire worksheet is highlighted.
- 2. Click any cell Only the clicked cell is selected.

# **ENTERING DATA**

The first step in creating a useful worksheet is entering data. By entering data, you are inputting the information that you want Excel to display, calculate, and store. Data can be entered into a cell or a range of cells. You can even set up a sequence of data and let Excel fill in the remainder of the sequence based on your first few entries.

# IDENTIFYING TYPES OF DATA

Excel worksheets contain four types of data: *text*, *values*, *dates*, and *formulas*. Examples of each are found in Table 1-2.

Text	Value	Date	Formula
Supplies	852.34	12/3/02	=C3+D3+E3
12 Dozen	42980.00254	Jan 3, 2001	=245*C3

**Table 1-2:** Examples of Data Types

Text data is alphanumeric and cannot be used in most formulas. Values are numerals only. Although a date may seem to be text, as soon as you enter what Excel recognizes as a date, it is formatted and stored using a decimal date format. As a result, dates can be used in complex functions.

Formulas are made up of values and *operators*. Because formulas contain references to worksheet cells and ranges, they depend on other elements of the worksheet. For instance, if a formula includes a reference to cell C3 and you change the value that is located in C3, the result of the formula will change accordingly.

# **ENTERING TEXT DATA INTO A CELL**

A single cell can hold up to 32,000 alphanumeric characters. If the cell is not wide enough and if the cell to the right contains data, some characters may not be visible. Excel hasn't lost this data; it just doesn't show it.

On occasion, you may need to enter a number as text. For example, you may want to exclude a number from a summed column. If you type an apostrophe (') before the number, for example '2007, Excel accepts it as text and *aligns* it on the left, as illustrated in Figure 1-7. All other numbers are right-aligned by default. The apostrophe does not show up in the worksheet cell, but you can see it in the Formula bar. You don't need to type the apostrophe when a phrase begins with a number as long as it includes text characters—for example, *1st Quarter Summary*.

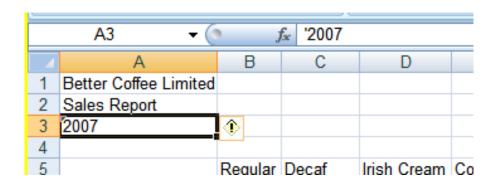


Figure 1-9: Value Entered as Text

When you enter functional data into your worksheet (that is a calculation or part thereof; e.g. the equals sign), three buttons appear in the Formula bar to the right of the Name box, shown in Figure 1-8. Use the Cancel button if you decide not to continue to enter the data into the cell and the Enter button to accept the entry. The Edit Formula button is only operable when the cell contains a formula.

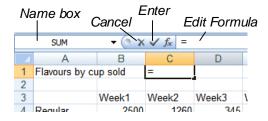


Figure 1-10: The Formula Bar

# METHOD —

To enter text data into a cell:

1. Select the cell.
2. Type the information in the cell.
3. Click the Enter button. or
3. Press <b>ENTER</b> to enter the data and move down one cell.
or
3. Select another cell.
To cancel data before it is entered:
Click the Cancel button.
or
1. Press <b>Esc</b>
EXERCISE
In the following exercise, you will enter text data into cells.
1. Select cell A1
2. Type <b>Brian's Orchard</b>

3. Click the Enter button

Brian's Orchard appears in A1, and appears to flow into the next column. A1 is still the active cell.

- 4. Select cell A2
- 5. Type 1st Quarter Summary
- 6. Click cell A3

1st Quarter Summary appears in cell A2 and cell A3 is the active cell.

- 7. Type **2007**
- 8. Click the Cancel button

The entry is canceled.

- 9. Type '2007
- 10. Press ENTER

**2007** appears in cell A3 as text and A4 is the active cell.

11. Using the worksheet shown in Figure 1-9 as a guide, enter the headings for cells A5, B5, C5, D5, and E5.

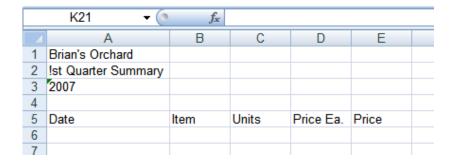


Figure 1-11: The Worksheet after Entering Text

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# **ENTERING VALUES**

You enter values into the worksheet the same way you enter text. However, it's important to note that values can contain only the following characters:

1 2 3 4 5 6 7 8 9 0 + - (), / \$ % . E e

# METHOD —

To enter values in a cell:

- 1. Select the cell.
- 2. Type the value in the cell.
- 3. Click the Enter button.

or

- 3. Press **ENTER** to enter the value and move down one cell. or
- 3. Select another cell.

# **EXERCISE**

In the following exercise, you will enter values into cells.

- 1. Select cell C6
- 2. Type **65**
- 3. Click the Enter button

65 appears in cell C6.

- 4. Select cell C7
- 5. Type **35**
- 6. Select cell C8

35 appears in cell C7.

- 7. Type **20**
- 8. Press Enter

20 appears in cell C8

- 9. In cell D6, enter **0.59**
- 10. In cell D7, enter **1.12**
- 11. In cell D8, enter **-0.25**

# **ENTERING DATA INTO A RANGE**

When you enter data into several adjacent cells, you can save time and reduce keystrokes by first selecting the range of cells you want to work with. Pressing the **ENTER** key after typing the data places the data into the cell and automatically selects the next cell in the range.

# METHOD -

To enter data into a range:

- 1. Select the desired range.
- 2. Type the information into the first cell.
- 3. Press ENTER to move to the next cell.
- 4. Type the appropriate information.
- 5. Repeat steps 3 and 4 until all information is entered.

# **EXERCISE**

In the following exercise, you will enter data into a range.

1. Select the range B6:B10 The range is selected, and B6 is the active cell.

2. Type Apple Butter

3. Press Enter B7 is the active cell

4. Type **Peach Jam** 

5. Press Enter B8 is the active cell

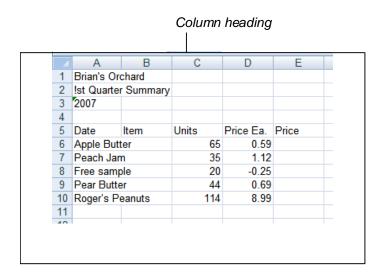
6. Type Free Sample

B9 is the active cell Press **ENTER** 8. Type **Pear Butter** B10 is the active cell 9. Press **ENTER** 10. Type Roger's Peanuts 11. Press **ENTER** B6 is the active cell 12. Select the range C9:D10 The range C9:D10 is selected. The active cell is C9. 13. In cell C9, type 44, and then Cell C10 becomes active. press **ENTER** 14. In cell C10, enter **114**, and Cell D9 becomes active. then press **ENTER** 15. In cell D9, enter **0.69**, and then Cell D10 becomes active. press **Enter** 16. In cell D10, enter **8.99**, and Cell C9 becomes active again. then press **ENTER** 

# QUICKLY ADJUSTING A COLUMN WIDTH

On occasion, you will discover that the text or values you have entered into a cell are not completely visible. This will occur when the number of characters entered exceeds the width of the column and when data appears in the cell to its right, as shown in column B of Figure 1-10.

In the example, the entries in cells A1 and A2 appear just fine, because there are no entries to the right in cells B1 and B2. If the text or value appears cut off or overflows into a totally different column which will have its own data, you can quickly adjust the column width so you can view the entire cell entry.



**Figure 1-12:** Text Too Wide for the Column

# - METHOD -

To quickly adjust a column width:

1. Double-click the right border of the column heading.

# **EXERCISE**

In the following exercise, you will adjust a column width.

 Double-click the right border of the column heading for The column adjusts to accommodate the long text.

# **FINISHING A WORKBOOK**

At the end of the day, or when you have completed your work on a particular workbook, you need to ensure that your work is safely stored. You can save your workbook in a number of ways, even as an Internet-compatible *HTML* document. In addition, you may want to make a printout of your worksheet to view the latest additions on paper or to share your worksheet with others.

# SAVING A NEW WORKBOOK

When you save a workbook file, you tell Excel to accept every change you've made since the last time the workbook was saved. It's a good idea to save frequently, especially when you enter a lot of data or make major changes. That way, if there's a power outage or surge, you will lose only a few minutes of work.

If you invoke the Save command in an unnamed workbook, Excel prompts you to name the workbook before it will save it to disk. From then on, Excel saves your workbook under that name unless you specify otherwise.

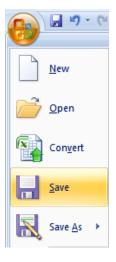


Figure 1-13: The Save button is lit up as you Mouse-over it

# METHOD -

To save a new workbook:

1. Click the OFFICE button, choose Save.

or

- 1. Click the Save button. On the Quick Access Toolbar (looks like a floppy disk).
- 2. In the Save As dialog box, in the Save in drop-down list box, select the desired drive.
- 3. In the list of folders, double-click the desired folder.
- 4. In the File name drop-down list box, type the document name.
- 5. Choose Save.

# **EXERCISE**

In the following exercise, you will save your new workbook.

1.	Click the OFFICE button and	
	choose Save	

The Save As dialog box appears.

2. In the Save in drop-down list box, select drive C:

The contents of drive C: appear.

3. In the list of folders, doubleclick the Data folder The contents of the Data folder appear.

 In the File name drop-down list box, type Brian's Orchard 2007 Report 5. Choose Save

The worksheet is saved as **Brian's Orchard 2007 Report** and the new name appears in the title bar.

# **SAVING A NAMED WORKBOOK**

Once you have named your workbook, you can save subsequent changes by simply using the Save command. Excel automatically saves it under its current file name.

To give you more flexibility, you can also save a named workbook under a different name using the Save As command. One benefit of doing this is that it gives you two copies of the same workbook; you can modify the copy all you want without affecting the "original," allowing you greater freedom for experimentation with *formatting* and other features.

# - METHOD -

To save a named workbook with its current name:

1. Click the OFFICE button and choose Save.

or

1. On the Quick Access Toolbar, click the Save button.

To save an already named workbook with a different name:

- 1. Click the OFFICE button and choose Save As.
- 2. In the Save in drop-down list box, select the drive on which to save the workbook.
- 3. In the list of folders, double-click the folder in which to save the workbook.
- 4. In the File name drop-down list box, type the new name.
- 5. Choose Save.

### EXERCISE -

In the following exercise, you'll make changes to your workbook and save the file under another name.

- 1. In cell D1, enter **Draft Only**
- 2. Click the OFFICE button and choose Save As

The Save As dialog box appears.

3. In the Save in drop-down list box, select drive C:

The contents of drive C appear.

4. In the list of folders, double-click the Data folder

The contents of the Data folder appear.

- In the File name drop-down list box, type Orchard Report Draft
- 6. Choose Save

The file is saved and the dialog box closes. The title bar displays the new file name.

# **PRINTING A WORKSHEET**

You may want to print your worksheet when you've finished working with it. This will give you a hard copy of your data to look over and to share with others. Best of all, you can get a quick printout of the active worksheet very easily.

# - METHOD -

To print a worksheet:

1. Click the OFFICE button and choose the Print button.

## **EXERCISE**

In the following exercise, you will print a worksheet.

- 1. Click the OFFICE button and choose the Print button.
- The PRINT dialog box appears.

2. Select options.

Click the PRINT button.

The worksheet is printed.

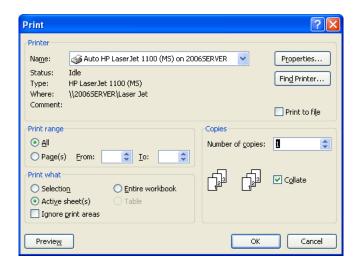


Figure 1-14: The Print dialog box

# **CLOSING A WORKBOOK AND EXITING FROM EXCEL**

Closing a workbook removes it from your screen but leaves you in Excel so that you can keep working. Before you close a workbook, you should make sure that you've saved your work. If you've forgotten, however, Excel reminds you that you need to save the document and gives you a chance to do so. You can exit from Excel after you have saved and closed any open workbooks.

# METHOD -

### To close a workbook:

- Click the workbook Window Close button. or
- 1. Click the OFFICE button and choose Close.
- 2. Save the file if prompted.

### To exit from Excel:

1. Click the application Close button.

or

- 1. Click the OFFICE button and click the Exit Excel button (bottom right).
- 2. Save the file if prompted.

# **EXERCISE**

In the following exercise, you will close the **Orchard Report Draft** workbook and exit Excel.

- Click the workbook Window Close button
- 2. If a message appears asking you if you would like to save the changes to the workbook file, choose Yes

The workbook closes.

3. Click the application Close button

Excel closes.

# **ASSIGNMENT**

- 1. Load Excel.
- 2. Select cell C3 with the keyboard.
- 3. In cell C3, enter Cathy's Computers
- 4. In cell C4, enter Sales Report
- 5. Using the keyboard, select the range B6:E6.
- 6. Using Figure 1-13 as a guide, enter the years in the range B6:E6.
- 7. Select the entire worksheet.
- 8. Use the mouse to select the range A7:A10.
- 9. Using Figure 1-13 as a guide, enter the product names into the range A7:A10.
- 10. Enter zeros in the range B7 through B10.
- 11. Using a range, enter the data for 2005, 2006, and 2007.
- 12. Adjust the width of column A so you can read the text clearly.
- 13. Select the nonadjacent cell ranges B6:E6 and A7:A10.
- 14. Save the worksheet in the Data folder on the C: drive as Cathy's Computers
- 15. Save cells A1:E10 in the Data folder as an HTML document (with no title or header) with the name **Cathy.htm**
- 16. In cell A11, enter Yearly Total
- 17. Use Save As to save the workbook again. Use the file name **Cathy's Computers Draft**
- 19. Print the worksheet.
- 20. Close the workbook, and then exit Excel.

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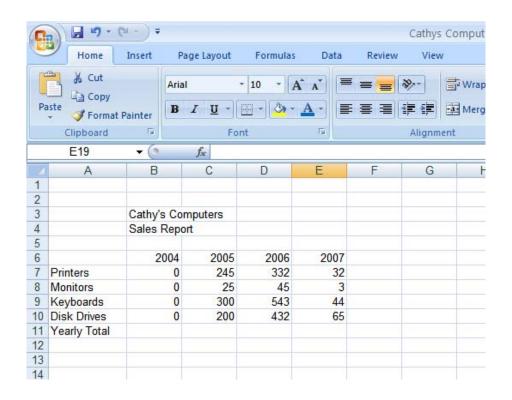


Figure 1-15: Module 1 Self-Check Worksheet

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