



MS Excel 2007

Introduction: Excel Basics

Office of Administration
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MS Excel 2007

Introduction: Excel Basics

Training Course Manual

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STUDENT DATA FILES ACCOMPANYING THIS MANUAL

INTRO ONE.XLS
 INTRO TWO.XLS
 INTRO COMPLETE.XLS
 PMT.XLS
 PMT COMPLETE.XLS

All files can be downloaded via <http://www.robrichards.net/>

Lesson 1: Working with Excel

In this lesson you will learn about:

- Basic Concepts
- Data Types
- Entering Data
- Navigating within a Workbook

Excel Concepts

Microsoft Excel is program that helps you analyze and organize data. The most common use for Excel is creating Spreadsheets. Spreadsheets can organize data such as monthly expenses or sales data and perform various calculations such as totaling your expenses or indicating the highest producing sales person. Calculations in Excel occur automatically so if data is changed, totals will recalculate.

There are many ways to represent your data such as with using charts¹ which can display your data in a visually robust way.

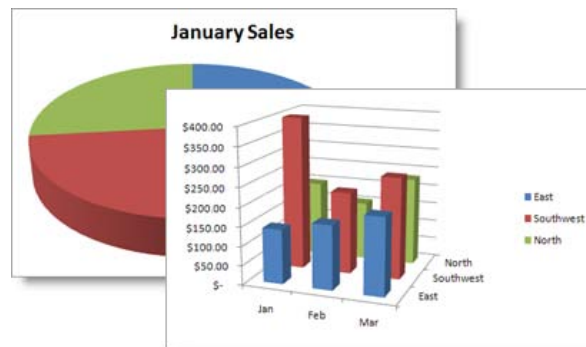


Figure 1: Excel Charts

	A	B	C	D	E	F	G	H
1								
2		2009 Sales Figures - Tom Smith						
3								
4		1st Qtr Sales	Jan	Feb	Mar	Total	Commission	10%
5		East	\$ 142.00	\$ 167.00	\$ 201.00	\$ 510.00	\$ 51.00	
6		Southwest	\$ 213.00	\$ 215.00	\$ 265.00	\$ 693.00	\$ 69.30	
7		North	\$ 198.00	\$ 154.00	\$ 231.00	\$ 583.00	\$ 58.30	
8			\$ 553.00	\$ 536.00	\$ 697.00	\$ 1,786.00	\$ 178.60	

Figure 2: An Excel Spreadsheet

You may also create lists² in Excel. Although the primary tool for creating databases is **Microsoft Access**, users who are more comfortable in **Excel** are still able to create basic databases.

	A	B	C	D	E	F	G	H	I
1									
2		Cellchainz Mfg. Co. Sales Records - 2007							(10%)
3		Date	Sales Person	Region	Item	Quantity	Unit Price	Total	Commission
4		1/1/2007	Shannon	NW	Thinline 30 - Green	5	\$ 149.70	\$ 748.50	\$ 74.85
5		1/5/2007	Malik	SW	Thinline 30 - Silver	1	\$ 149.70	\$ 149.70	\$ 14.97
6		1/11/2007	Malik	NE	Thinline 30 - Red	1	\$ 149.70	\$ 149.70	\$ 14.97
7		1/17/2007	Kelly	SW	Thinline 30 - Pink	2	\$ 149.70	\$ 299.40	\$ 29.94
8		1/23/2007	Shannon	SW	Thinline 30 - Black	1	\$ 149.70	\$ 149.70	\$ 14.97
9		1/29/2007	Shannon	NW	Thinline 30 - Silver	3	\$ 149.70	\$ 449.10	\$ 44.91
10		2/2/2007	John	NE	Thinline 30 - Black	1	\$ 149.70	\$ 149.70	\$ 14.97
11		2/8/2007	Malik	SE	Sample Pak 5 - Variety	1	\$ 37.50	\$ 37.50	\$ 3.75
12		2/14/2007	John	SW	Sample Pak 5 - Variety	1	\$ 37.50	\$ 37.50	\$ 3.75
13		2/20/2007	Shannon	SE	Thinline 30 - Red	6	\$ 149.70	\$ 898.20	\$ 89.82

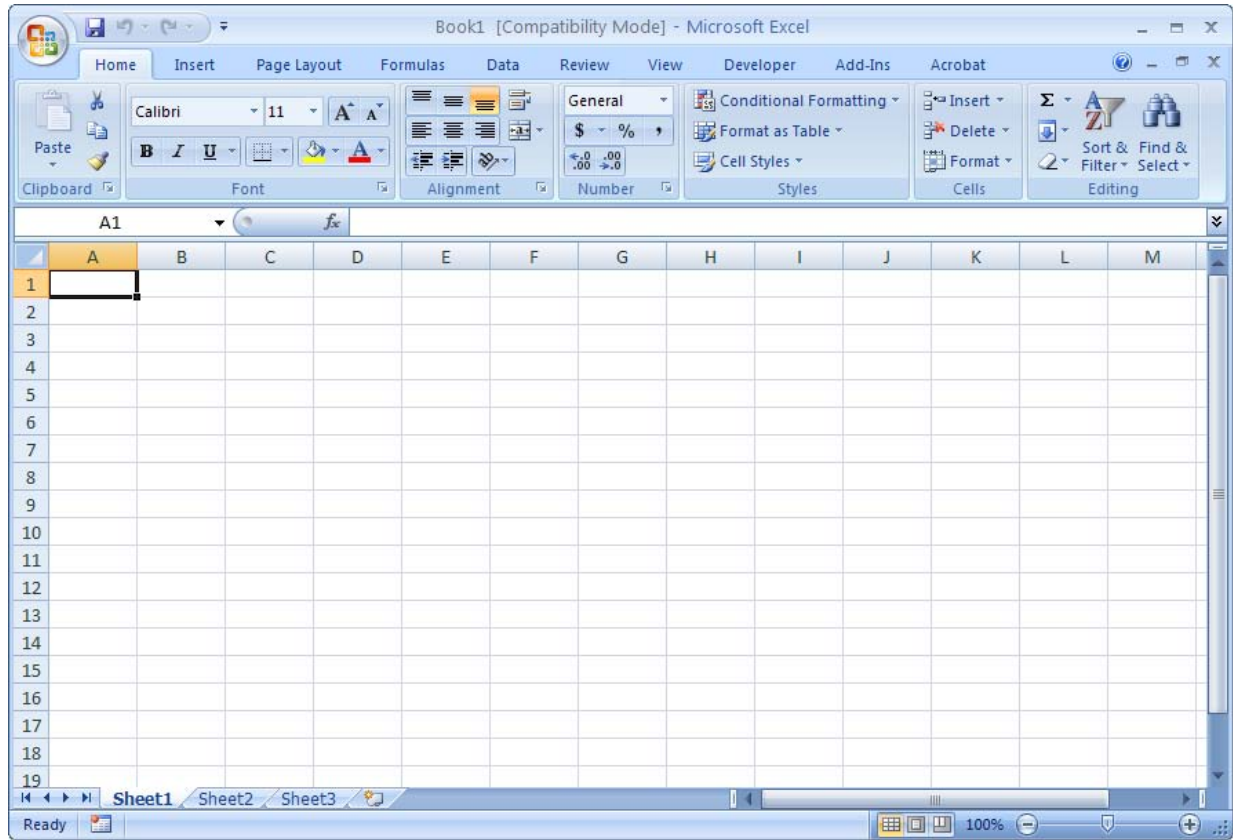
Figure 3: An Excel List

¹ Discussed in *Excel Intermediate*.

² Discussed in *Excel Advanced*.

The Excel Screen

Because Excel is very similar to other Microsoft products, it does not take long to become accustomed to the Excel screen, however, there are some items unique to Excel with specific spreadsheet and database functionality.



The Excel Ribbon	The many controls used in Excel.
Formula Bar	An area to input formulas into cells.
Rows & Columns	Rows are horizontal. Columns are vertical.
Row & Column Headings	Each row and column is designated with a letter or number.
Cells	Each cell has a cell address, also called <i>cell reference</i> .
Sheet Tabs	More spreadsheets can be saved in the same filename.
Status Bar	There are some helpful features on the Status Bar.
Workbook	The file is saved as a <i>workbook</i> which may contain multiple sheets.




Data Types

There are three types of data that can be inputted into cells which are *text*, *numbers*, and *formulas*. By default, Excel applies a general formatting on cells, which you may change if desired. Under general formatting you may notice that data types are treated differently from each other. For example, alpha characters are automatically aligned to the left and numeric values are automatically aligned to the right.

Labels	Text items are also called <i>labels</i> (e.g. West)
Values	Numeric values can be calculated (e.g. 142)
Formulas	Formulas can perform calculations (e.g. =A1+A2)

Entering Data

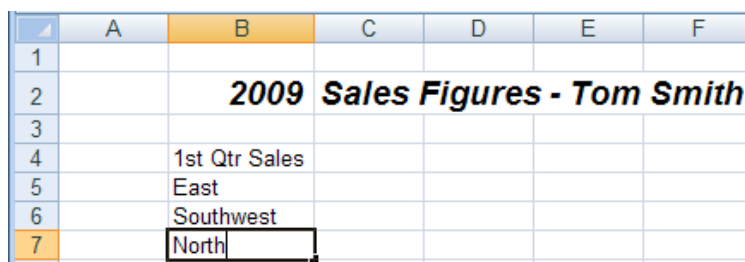
It does not matter where you choose to enter your data. If you plan on printing your spreadsheet you may want to focus on the placement of items so as to have nicely printed documents. Otherwise, simply select a cell and type your data (Figure 4).

Enter	Confirms your entry and moves to the next cell downward.
Tab	Confirms your entry and moves to the next cell to the right.
Esc	Cancels the entry.
Formula Bar	Confirms entry -  Cancels entry -  Insert Function - 

Procedure

1. Open the file **Intro One.xls** from your STUDENT FILES directory.
2. Select cell **B4** with your mouse.
3. Type the words **1st Qtr Sales** and press *Enter*.
4. Type the words **East**, **Southwest**, and **North** pressing *Enter* each time.

[Open File](#)
[Intro One.xls](#)



	A	B	C	D	E	F
1						
2		2009 Sales Figures - Tom Smith				
3						
4		1st Qtr Sales				
5		East				
6		Southwest				
7		North				

Figure 4: Entering Data

Selecting Cells

For purposes such as formatting cells or deleting the contents of cells, selecting a cell or a range of cells is necessary. Select cells by clicking and dragging across multiple cells with the mouse (Figure 5).

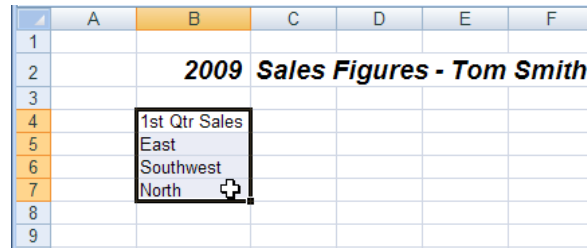


Figure 5: Selecting a Range (B4:B7)

Editing Data

Editing cell contents is as follow:

Esc	Cancels the current entry.
Click & Type	Overwrites entire cell.
Double click	Enters edit mode.
Delete	Deletes cell contents.

✓ Procedure

1. Select cells **B4:B7**.
2. Press **Delete** on the keyboard.
3. Select Undo.

✓ Procedure

1. Select cell **C4**.
2. Type the abbreviation **Jan** (*for January*).
3. Press **Esc** (before hitting Enter).
4. Retype **Jan** (hitting Enter).
5. Type the numbers **142**, **213**, and **198** pressing **Enter** each time.
6. Complete the spreadsheet *with the data shown at right*.

Navigating within a Workbook

As you become familiar with entering data, it will be helpful to know methods to navigating in your spreadsheet.

Enter	Moves selection downward.
Tab	Moves selection right.
Ctrl - Home	Moves to top of sheet.
Ctrl - End	Moves to bottom of data.
Arrow Buttons	Moves one cell at a time.
Scroll Bars	Scrolls up/down and left/right in a sheet.
Sheet Tabs	Moves to other sheets.
Sheet Tab Scroll	Views hidden sheet tabs.

Lesson 2: Formulas and Functions

In this lesson you will learn how to:

- Use Formulas
- Use Functions

This sample user guide has been truncated from this point forward.

Rob Richards