

# Fast Start to Excel<sup>®</sup>

Volume 1



**Up-skill** yourself in the **job Market** by **Quickly** Adding **Proficiency** in **Excel** to **your resume**

**Easily** learn how to perform sophisticated **calculations** and create **formulas** that **automatically calculate** answers .

**Excel's data management** capability allows you to manipulate lists of information such as names, addresses, inventory items, prices, etc.

**Quickly** create **charts**. Chart types include column, bar, line, pie, area, doughnut, radar, surface, and bubble.

**Put yourself on the cutting edge** by becoming **proficient** in the most widely used **spreadsheet** program in the world.

**Frank Vickers**



# Fast Start to Excel

## Volume 1

### Discussion

Microsoft Excel is a software application that can be used as a spreadsheet, database, or graphing program.

The electronic spreadsheet portion of Excel allows you to perform sophisticated calculations and create formulas that automatically calculate answers. The advantage of using formulas is that, when data in the worksheet changes, all the formulas recalculate automatically. This feature assists you in developing budgets, forecasting models, creating sales plans, making financial projections, calculating inventories, generating banking statements, and basically working with any format involving numbers. In addition, the **AutoCalculate** feature provides you with instant answers, using functions such as **Sum**, **Count**, and **Average**.

Excel's data management capability allows you to manipulate lists of information such as names, addresses, inventory items, prices, etc. Excel can sort lists and select specific pieces of information based on specified conditions.

You can use information created in an Excel spreadsheet or database to create an Excel chart. Chart types include column, bar, line, pie, area, doughnut, radar, surface, and bubble. All charts can be formatted using styles provided by Excel.

You can get help on an Excel task or feature in many ways. You can type a question into the **Ask a Question** box on the menu bar to get help with a specific feature. Another method of obtaining help is to use the Office Assistant Help facility. The Office Assistant is context-sensitive, which means that help for the current task is only a mouse click away. The Office Assistant may also appear automatically on your screen if Excel detects that you need help completing the current task. In addition, you can search detailed Help indexes by category or keyword. Other help features include smart tags. Smart tags appear when you perform certain actions and provide a menu of choices for dealing with those tasks.

You can use the **Start** menu to start Excel. Once the program starts, a brief copyright screen appears, and then the application window opens.



The first time you open Excel after installation, the User Name dialog box may appear. You can enter your name and initials as necessary, and then select **OK**.

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## CHAPTER 1 - EXPLORING EXCEL

In this Chapter, you will learn how to:




- Start Excel
- Work with Excel windows
- Work with worksheets
- Use menu commands
- Display and hide toolbars
- Display hidden toolbar buttons
- Move and resize toolbars
- Change menu and toolbar options
- Use the task pane
- Exit Excel

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# STARTING EXCEL

## Step-by-Step

Start Microsoft Excel 2001.

<i>Steps</i>	<i>Practice Data</i>
1. Click the <b>Start</b> button on the taskbar. <i>The Start menu appears.</i>	Click  <b>Start</b>
2. Point to <b>Programs</b> . <i>The Programs submenu appears.</i>	Point to  <b>Programs</b>
3. Select <b>Microsoft Excel</b> . <i>Excel opens.</i>	Click  <b>Microsoft Excel</b>

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# WORKING WITH EXCEL WINDOWS

## Discussion

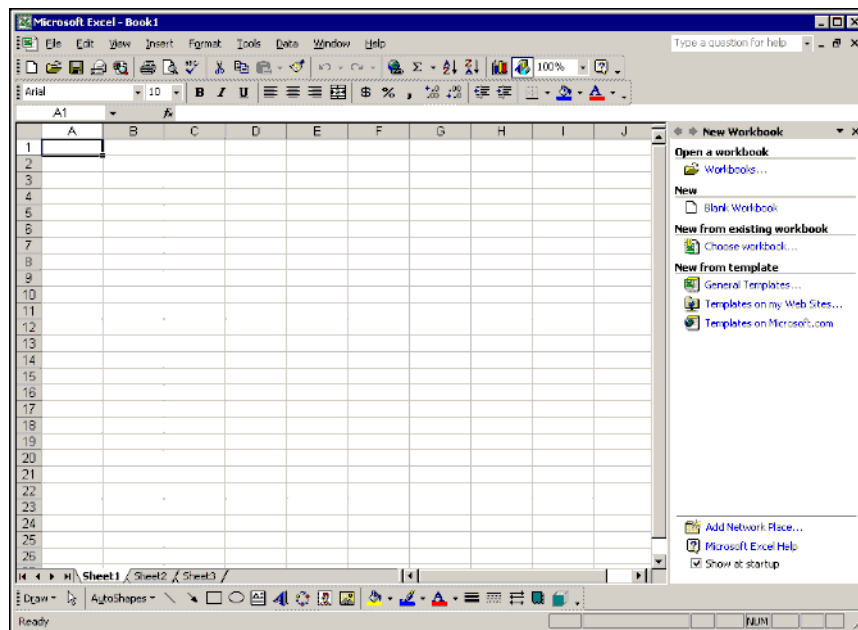
When Excel starts, the application window opens. The title bar, which appears at the top of the application window, displays the name of the current workbook and the name of the application. Under the title bar is the menu bar, which allows you to access various commands that are grouped according to function and to enter help questions in the **Ask a Question** box. Below the menu bar is a row containing two separate toolbars. The toolbar buttons provide shortcuts to many menu commands. Located below the toolbars, the formula bar displays the data in the active cell. You can edit this information as desired.

A new, blank workbook appears in the worksheet area and the task pane appears on the right side of the screen. The worksheet area consists of thousands of cells in which you can enter text, numbers, or formula expressions. The worksheet area also contains the tab scrolling buttons, worksheet tabs, tab split box, and scroll bars. The **New Workbook** task pane provides links for opening new or existing workbooks.

The status bar appears at the bottom of the application window and provides information on the current action you are performing or on a command you have selected.

Many of the objects in the Excel window (such as toolbar buttons) display brief descriptions called ScreenTips that pop up whenever you point to the object.

Several workbooks can be open at the same time. Each workbook displays its own application title bar, menus, toolbars, scroll bars, and status bar.



*The Excel window*

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## WORKING WITH WORKSHEETS

### Discussion

Information in Excel is stored in a workbook. The first new workbook opened in a session is called **Book1**. A workbook is a collection of individual worksheets. Each worksheet has a name that appears in a worksheet tab at the bottom of the screen. These names appear as **Sheet1**, **Sheet2**, **Sheet3**, etc. You can change the default names, if desired.

Worksheets in a workbook are usually related to one another. For example, a company budget could have 13 worksheets, one for each month of the year, and one representing the total year. These 13 worksheets can all be stored in one workbook as a single file and then accessed as one unit.

A worksheet is a grid composed of columns and rows. The first 26 columns are labeled column A through column Z. Columns 27 through 52 are labeled column AA through column AZ. Column 53 is labeled BA. This pattern continues until the last column, which is labeled IV. The rows are numbered sequentially down the left side of the worksheet, starting at 1 and ending at 65,536.

The intersection of a row and a column is called a cell, which is the basic unit of the worksheet. Cells are used to store data entries. Each cell is referred to by its cell address. A



cell address consists of the column letter and the row number. For example, the address of the cell in the first column and first row of a worksheet is A1.

The active, or current, cell is where you enter and edit data. The active cell has a thick black border around it and its address appears in the **Name** box on the left side of the formula bar. Only one cell can be active at a time. Excel also helps you identify the active cell by highlighting its corresponding column letter at the top of the worksheet and row number on the left side of the worksheet.

Often, you will want to select a range of cells or multiple cells. For example, you could select from cell A1 to cell A10 and format the data contained in those cells.

The scroll bars on the bottom and right side of the worksheet allow you to view parts of the worksheet that are not currently visible.

---

## USING MENU COMMANDS

### Discussion

The menu bar, located under the application title bar, provides access to all the features of Excel. Each menu contains commands grouped by function. When you select an item on the menu bar, a list of corresponding commands appears, from which you can select the desired command. Some menu commands are dimmed, which indicates that the command is not available for the current task.

Each menu appears in two stages, a short menu and a full menu. When you first select a menu, the short menu appears and displays the most frequently used commands.

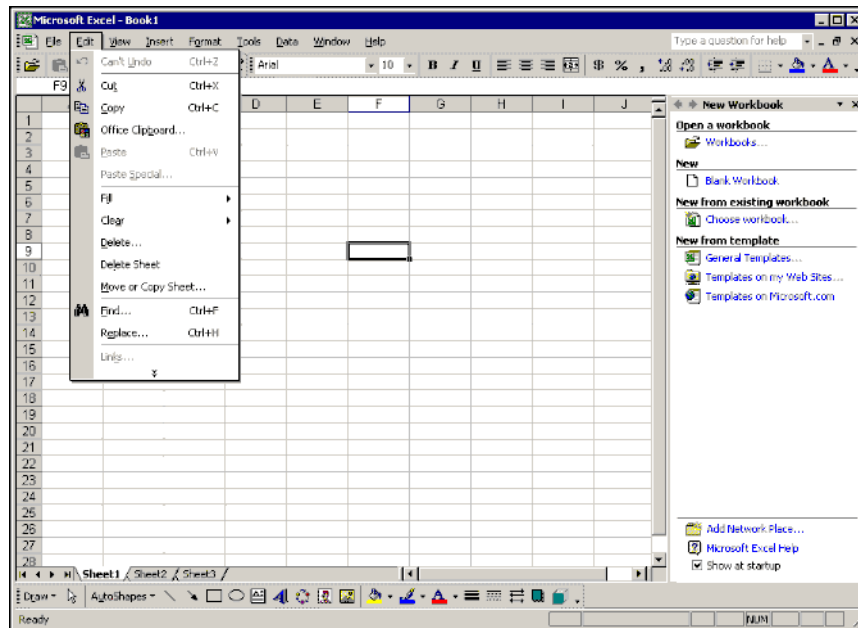
If a command does not appear on the short menu, you can click the double arrows that appear at the bottom of the menu. This action expands the short menu to display the full menu with all available commands. Once you have expanded a menu, all menus are expanded until you choose a command or perform an action. Other ways to expand a menu include double-clicking the menu name on the menu bar or hovering over the double arrows or menu name with the mouse pointer.

As soon as you select a command from the full menu, it is added to the short menu. In this way, your short menus are updated with the most frequently used commands. Commands stay on the short menu until you stop using them for a while or reset your data usage.

When a menu command is followed by an ellipsis (...), selecting it opens a dialog box in which additional information is entered. A menu command that displays a right-pointing triangle indicates a submenu. When you point to this command, the associated submenu cascades to the right.

In addition to the standard menus on the menu bar, Excel provides shortcut menus that are accessed by right-clicking a cell or an object, such as a toolbar. Shortcut menus provide

commonly used commands and are context-sensitive. Therefore, the options available on a shortcut menu vary, depending on the object clicked.




*The Edit short menu*

- ▶ You can also use key combinations to execute menu commands. To display a menu, press the [Alt] key and the underlined letter of the menu name. You can then press the underlined letter of the desired command to perform an action.
- ▶ Some Office 2002 components are available on an **Install on First Use** basis. This term means that, although the component appears on the menu, it is not actually installed until the first time you use it. Office 2002 prompts you to install the component and then installs it from the original installation source.

## Step-by-Step

Use menu commands to perform an action.

<i>Steps</i>	<i>Practice Data</i>
1. Click the desired menu. <i>The selected short menu appears.</i>	Click <b>E</b> <u>dit</u>
2. To display the full menu, click the double arrow at the bottom of the short menu. <i>The selected short menu expands to display all available commands.</i>	Click  at the bottom of the <b>E</b> <u>dit</u> menu
3. Click the desired command. <i>The appropriate action occurs.</i>	Click <b>R</b> eplace...

Select **C**lose to close the Find and Replace dialog box.

**Practice the Concept:** Using the keyboard, press [Alt+T] to select the **T**ools menu and then press the letter **C** to select the **C**ustomize command. Press [Esc] to close the Customize dialog box.

## DISPLAYING AND HIDING TOOLBARS

### Discussion

Toolbars provide shortcuts to menu commands. Each Excel toolbar is composed of buttons and pull-down lists. Each button executes a specific menu command.

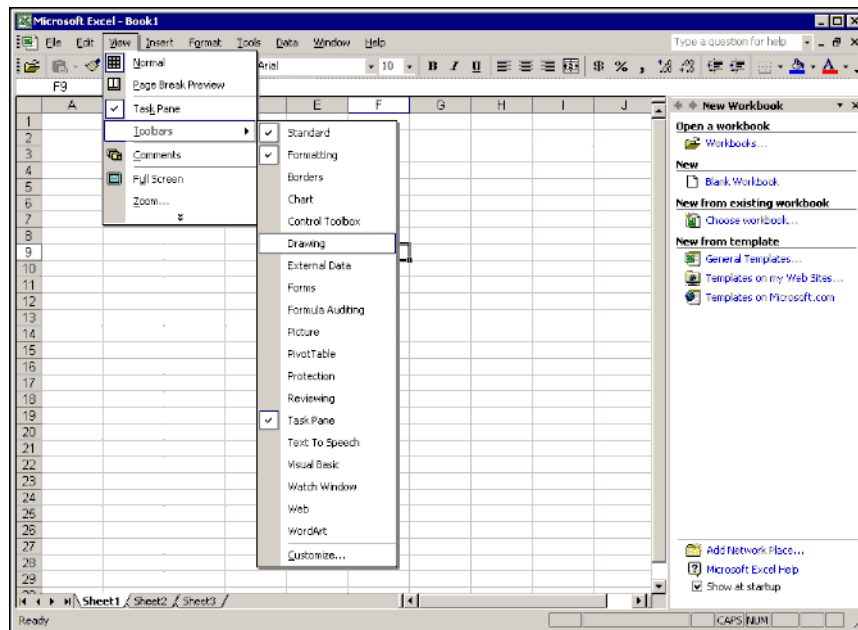
Excel provides several default toolbars, each of which groups related features. When Excel starts, the **Standard** and **Formatting** toolbars appear by default on the same row under the menu bar. The **Standard** toolbar contains buttons used for many general Excel functions, whereas the **Formatting** toolbar contains buttons and pull-down lists used to enhance the appearance of text and numbers. Additionally, task-specific toolbars may appear, depending upon the task you are performing.

You can choose to display one, several, or all the toolbars at any given time, or you can hide all the toolbars to create a larger working area.



Toolbars may be displayed as either docked or floating. A docked toolbar appears at one edge of the window, whereas a floating toolbar can be moved to any location on the screen. You can also change the size and shape of a floating toolbar. These options provide flexibility when you need to display several toolbars at once, or when you need to see all the available buttons on a docked toolbar.

When you point to a button on a toolbar, the name of the function associated with it appears. This description is referred to as a ScreenTip. Even if a toolbar button is dimmed (because it is not available for the current task), the ScreenTip still appears when you point to the button.

The **Toolbar Options** button at the right end of a toolbar can be used to display any hidden buttons that do not fit on the docked toolbar. In addition, you can customize any toolbar by adding or removing buttons.



*Displaying a toolbar*

-  You can also display and hide toolbars by right-clicking any toolbar and selecting or deselecting toolbars as desired. A checkmark next to the name of a toolbar (selected) indicates that it is displayed.
-  If you have hidden all the toolbars, you can redisplay one by selecting the **View** menu, pointing to the **Toolbars** command, and selecting the toolbar you want to display, or you can right-click the menu bar and select the desired toolbar.

## Step-by-Step

Display or hide a toolbar.

<i>Steps</i>	<i>Practice Data</i>
1. Select the <b>View</b> menu. <i>The View menu appears.</i>	Click <b>V</b> iew
2. Point to the <b>Toolbars</b> command. <i>The Toolbars submenu appears.</i>	Point to <b>T</b> oolbars
3. Select the toolbar you want to display or hide. <i>The selected toolbar is displayed or hidden accordingly.</i>	Click <b>D</b> rawing

Hide the **Drawing** toolbar by selecting it again from the **Toolbars** submenu.

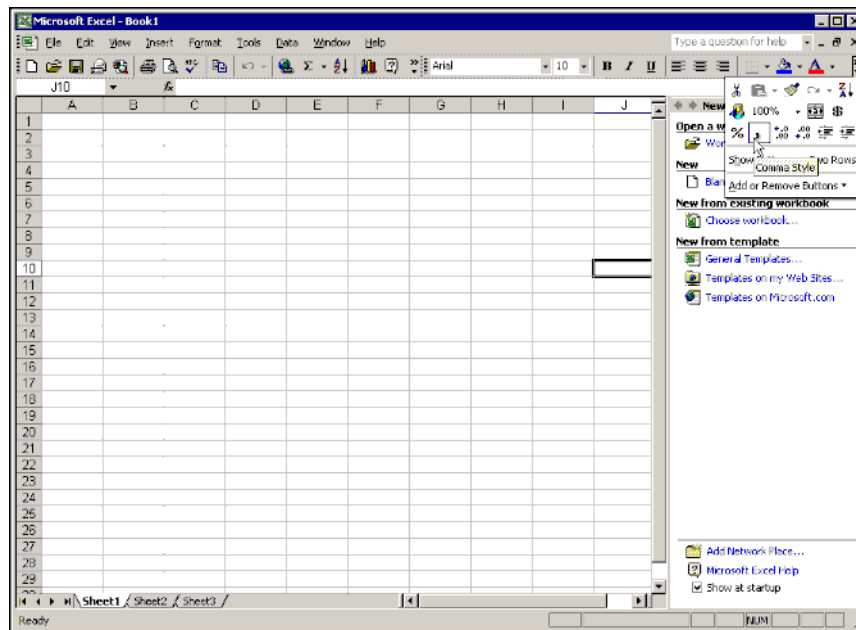
**Practice the Concept:** Display the **Forms** toolbar by right-clicking any toolbar and selecting the **Forms** command. Then hide the **Forms** toolbar by right-clicking any toolbar and deselecting the **Forms** command.

## DISPLAYING HIDDEN TOOLBAR BUTTONS


### Discussion

When Excel starts, the **Standard** and **Formatting** toolbars appear by default on the same row under the menu bar. Depending on your screen resolution, many toolbar buttons may not be visible. To view hidden toolbar buttons, a **Toolbar Options** button is provided at the far right of any toolbar. When a **Toolbar Options** button is clicked, a palette containing the hidden toolbar buttons appears.

By default, the **Standard** and **Formatting** toolbars display the most frequently used buttons. As soon as you select any hidden toolbar button, that button appears on the toolbar. If there is not enough room on the toolbar, one of the less frequently used buttons is hidden.





*Selecting a hidden toolbar button*

 You can add and permanently remove a toolbar button by clicking the **Toolbar Options** button, pointing to the **Add or Remove Buttons** command, pointing to the desired toolbar, and selecting or deselecting the button from the list of buttons. The **Reset Toolbar** command at the bottom of the list returns the toolbar to its default settings.

## Step-by-Step

Display a hidden toolbar button.

<i>Steps</i>	<i>Practice Data</i>
1. Click the <b>Toolbar Options</b> button on any toolbar. <i>A palette containing hidden toolbar buttons appears.</i>	Click the <b>Formatting</b> toolbar 
2. Click the hidden toolbar button you want to use. <i>The palette closes, and the selected toolbar button appears on the associated toolbar.</i>	Click 

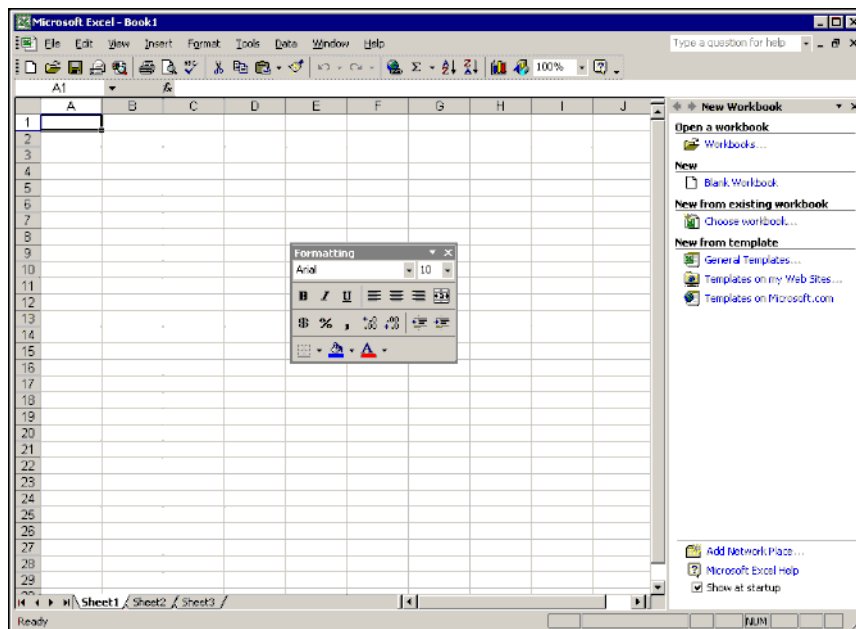
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# MOVING AND RESIZING TOOLBARS

## Discussion

You can move or resize toolbars to display more or less of the toolbar. For example, you may want to move or resize a toolbar when you need the toolbar to appear closer to your work area or when some of the buttons are hidden from view.

When a toolbar is docked, it displays a move handle (vertical bar) at the far left. You can use this handle to move or resize the toolbar. A floating toolbar can be moved using the toolbar title bar or resized by dragging any edge of the toolbar palette.



*A floating toolbar*



Any toolbar can be docked beside another toolbar, and you can dock more than two toolbars on a single line. A **Toolbar Options** button appears on any docked toolbar and can be used to display any hidden toolbar buttons.

## Step-by-Step

Move and resize a toolbar.

<i>Steps</i>	<i>Practice Data</i>
1. Point to the move handle of the toolbar you want to move or resize. <i>The mouse pointer changes into a four-headed arrow.</i>	Point to the <b>Formatting</b> toolbar move handle
2. To expand the toolbar, double-click the move handle. <i>The toolbar expands to display more buttons.</i>	Double-click the <b>Formatting</b> toolbar move handle
3. Point to the move handle of the toolbar you want to move or resize. <i>The mouse pointer changes into a four-headed arrow.</i>	Point to the <b>Formatting</b> toolbar move handle
4. To resize the toolbar, drag the move handle to the left or right as desired. <i>The toolbar expands or shortens accordingly.</i>	Drag the <b>Formatting</b> toolbar move handle to the right
5. Point to the move handle of the toolbar you want to move or resize. <i>The mouse pointer changes into a four-headed arrow.</i>	Point to the <b>Formatting</b> toolbar move handle
6. To move the toolbar, drag the move handle to the desired location. <i>The toolbar moves to the desired location.</i>	Drag the <b>Formatting</b> toolbar down into the worksheet area
7. To move a floating toolbar, point to the toolbar title bar and drag it to the desired location. <i>The toolbar appears in the desired location.</i>	Point to the <b>Formatting</b> toolbar title bar and drag it to the center of the worksheet area
8. To resize a floating toolbar, point to any edge of the toolbar palette and drag it to the desired size. <i>The size of the toolbar changes.</i>	Point to the bottom edge of the <b>Formatting</b> toolbar palette and drag it down about one inch

**Practice the Concept:** Dock the **Formatting** toolbar to the right of the **Standard** toolbar.

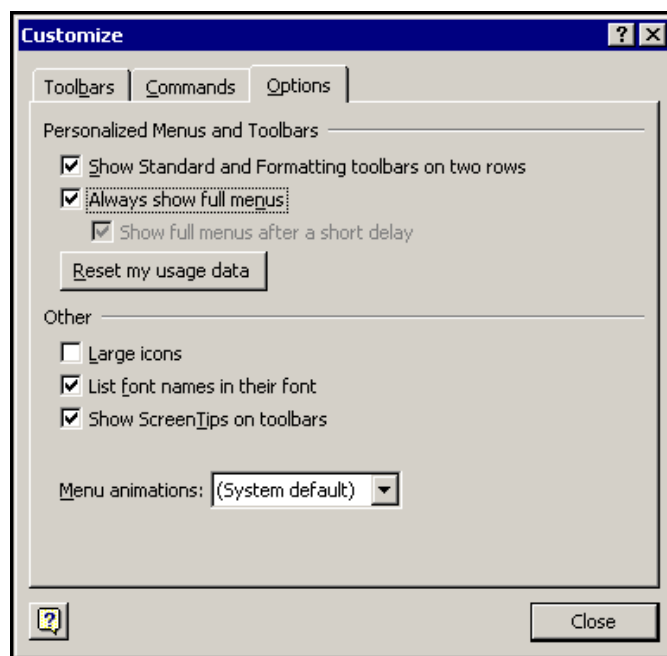


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# CHANGING MENU AND TOOLBAR OPTIONS

## Discussion

You can change menu and toolbar options in order to adjust the behavior of these objects. The **Options** page in the Customize dialog box allows you to select menu and toolbar preferences. You can choose to display the **Standard** and **Formatting** toolbars on separate rows by disabling the option that displays them both on one row. If you prefer to see full menus, you can disable the option to show recently used commands first. You can also reset any data usage changes that have occurred as a result of using the menus and toolbars.



*Changing menu and toolbar options*



The **Show Standard and Formatting toolbars on two rows** and **Reset my usage data** options only affect Excel. All other options affect all Office 2002 applications.



You can also separate the **Standard** and **Formatting** toolbars by clicking the **Toolbar Options** button and selecting the **Show Buttons on Two Rows** command.

## Step-by-Step

Change menu and toolbar options.

<i>Steps</i>	<i>Practice Data</i>
1. Select the <b>Tools</b> menu. <i>The <b>Tools</b> menu appears.</i>	Click <b><u>T</u>ools</b>
2. Select the <b>Customize</b> command. <i>The <b>Customize</b> dialog box opens.</i>	Click <b><u>C</u>ustomize...</b>
3. Select the <b>Options</b> tab. <i>The <b>Options</b> page appears.</i>	Click the <b><u>O</u>ptions</b> tab, if necessary
4. To change the display of the <b>Standard</b> and <b>Formatting</b> toolbars, select or deselect the <b>Show Standard and Formatting toolbars on two rows</b> option. <i>The <b>Show Standard and Formatting toolbars on two rows</b> option is selected or deselected accordingly.</i>	Click <input type="checkbox"/> <b><u>S</u>how Standard and Formatting toolbars on two rows</b> to select it
5. To restore toolbars and menus to the default, select <b>Reset my usage data</b> . <i>A Microsoft Excel warning box opens, prompting you to confirm the selected option.</i>	Click <b><u>R</u>eset my usage data</b>
6. Select <b>Yes</b> . <i>The Microsoft Word warning box closes.</i>	Click <b><u>Y</u>es</b>
7. To change the menu display, select or deselect the <b>Always show full menus</b> option. <i>The <b>Always show full menus</b> option is selected or deselected accordingly.</i>	Click <input type="checkbox"/> <b><u>A</u>lways show full <u>m</u>enus</b> to select it
8. Select <b>Close</b> . <i>The <b>Customize</b> dialog box closes, and the menu and toolbar settings are saved.</i>	Click <b>C</b> lose

Notice that the **Standard** and **Formatting** toolbars now appear on separate rows. Display the **Edit** menu and notice that all of the commands appear. Click in the worksheet area to hide the **Edit** menu.

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## USING THE TASK PANE

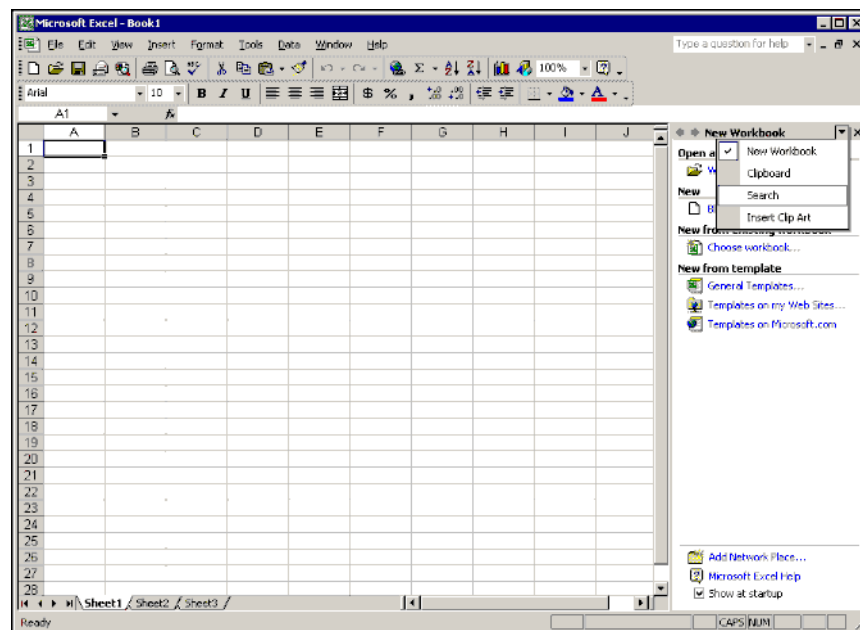
### Discussion

The task pane provides links to many common tasks in Excel. For example, you can use the task pane to create a new, blank workbook or to reopen a recently modified one.

The task pane is actually comprised of several panes, which can be viewed using the **Other Task Panes** list. The name of the current pane appears in the task pane title bar. You can use the other task panes to find and insert clip art, search for files, and create and apply styles.

The **Back** and **Forward** buttons located on the task pane title bar navigate to previously viewed task panes. Blue text in the task pane indicates a link to an action or a dialog box.


You can hide or display the task pane according to your needs. Although the features in the task pane are useful, you may want to hide it to display a larger worksheet area. By default, the task pane appears each time you start Excel. You can disable this feature by deselecting the **Show at startup** option at the bottom of the **New Workbook** task pane.



*Selecting a task pane*






Each task pane can be opened with a separate menu command. The **Task Pane** command on the **View** menu opens the most recently used task pane.

 You can change the size of the task pane by dragging the splitter bar (the border between the vertical scroll bar and the task pane) as needed.

## Step-by-Step

Use the task pane.

If necessary, display the task pane by selecting the **View** menu and selecting the **Task Pane** command.

<i>Steps</i>	<i>Practice Data</i>
1. To view a different task pane, select the <b>Other Task Panes</b> list on the task pane title bar. <i>A list of all available task panes appears.</i>	Click  on the task pane title bar
2. Select the desired task pane. <i>The selected task pane appears.</i>	Click <b>Search</b>
3. Click the <b>Back</b> or <b>Forward</b> button in the upper left corner of the task pane to return to a previous task pane. <i>The previously viewed task pane or the next task pane in the list appears.</i>	Click  in the upper left corner of the task pane
4. To close the task pane, click the <b>Close</b> button in the upper right corner of the task pane. <i>The task pane closes.</i>	Click  in the upper right corner of the task pane
5. To open the task pane, select the <b>View</b> menu. <i>The View menu appears.</i>	Click <b><u>V</u>iew</b>
6. Select the <b>Task Pane</b> command. <i>The task pane opens, displaying the most recently viewed pane.</i>	Click <b>Task <u>P</u>ane</b>

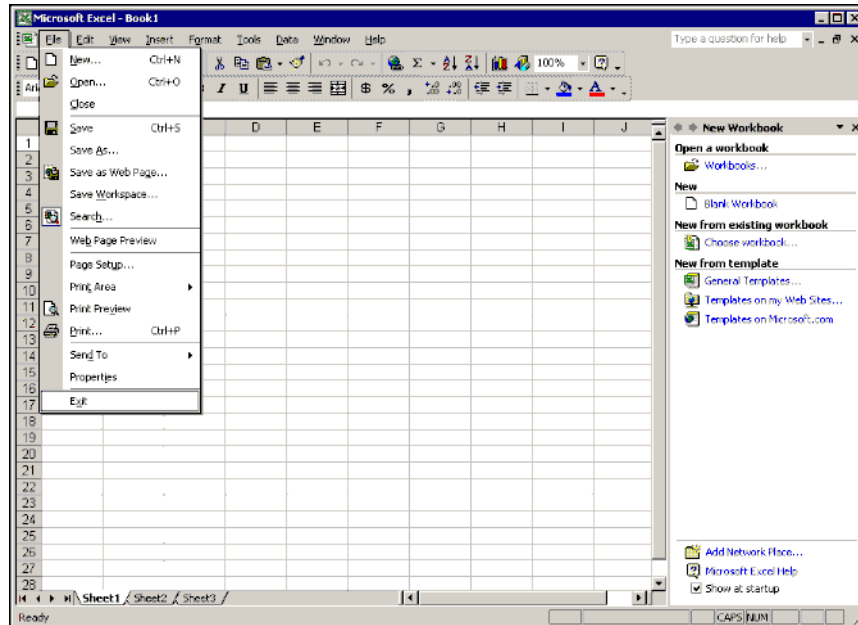
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# EXITING EXCEL

## Discussion

When you have finished using Excel, you should exit the application properly, since Excel performs necessary housekeeping before it closes.

If the current workbook has been modified but not saved, an Excel dialog box or the Office Assistant prompts you to save the changes before exiting.



*Exiting Excel*



You can also click the **Close** button on the far right of the application window title bar to exit Excel.

## Step-by-Step

Exit Excel.

<i>Steps</i>	<i>Practice Data</i>
1. Select the <b>File</b> menu. <i>The <b>File</b> menu appears.</i>	Click <b>F</b> ile
2. Select the <b>Exit</b> command. <i>Excel closes.</i>	Click <b>E</b> xit

Select **No** if you are prompted to save the changes to **Book1**.

## EXERCISE

### EXPLORING EXCEL

#### Task

Explore Excel.

1. Start Excel, if necessary.
2. Explore the toolbar ScreenTips until you find the **New** button.
3. Display the **Chart** and **Drawing** toolbars.
4. Hide the **Chart** and **Drawing** toolbars.
5. Display the **Standard** toolbar as a floating toolbar in the document.
6. Return the **Standard** toolbar to a docked position under the **Formatting** toolbar.
7. Use the Customize dialog box to display the **Standard** and **Formatting** toolbars on one row.
8. Select the **Search** button on the **Standard** toolbar. (*Hint: The button is hidden.*) Close the message box, if necessary.
9. Use the Customize dialog box to display large toolbar icons. Then, close the Customize dialog box to view the icons.
10. Reset your usage data, return the toolbar buttons to their normal size, and display the **Standard** and **Formatting** toolbars on two rows.
11. Exit Excel.