

# Introduction to Microsoft Excel Part Two

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## I. Highlighting (Selecting) Cells with the Mouse

### A. General Info

In this class we will be using the mouse extensively to highlight cells or cell ranges that we want to underline, bold or cut and paste. By 'highlighting' a cell/cell range, we actually mean 'selecting' a cell/cell range. We will call it 'highlighting' because the selected area is offset by a different color (usually blue). The trick to doing this is:

1. Position your mouse pointer on the first cell of the cell range that you want to highlight, and click.
2. Click the mouse button down and hold.
3. Drag the mouse across the entire range of cells you want to highlight. To select only one cell, click on the cell.
4. Then, release the mouse button. If you are selecting only one cell, then the cell will be white and outlined. If you are selecting a cell range, the entire range, except for the first cell in the range, will be highlighted.
5. Now execute the command or effect you want to use.

### B. Spreadsheet pointers on highlighting

1. **SHIFT + click** will highlight from original cursor position to the point where you **SHIFT + click**.
2. **APPLE + click** will allow you to highlight more than one cell or range of cells (i.e., A1, and B4:I4, and A5:A9). **APPLE + click** the first cell in a range then **SHIFT + click** the last cell in the range, or **APPLE + click** individual cells. (This comes in handy when you want to format several areas at the same time. For instance, you may want the column titles and the row titles to be bolded. You can use this method to format both at the same time.)

**HANDS ON...**

## II. Open a Worksheet

**EXERCISE:** Do the following to open **PRACTICE WORKSHEET 2.xls**:

1. Open your web browser
2. Go to <http://www.tamucc.edu/~compserv/training/handouts/pract2.xls>
3. Make sure that you are on the **Fall97** worksheet. If you are not, click the **Fall97** worksheet tab.

### III. Changing the Screen Preferences and User Setup

**EXERCISE:** Use the following steps to change Screen Preferences.

**View Tab** This is where Screen Preferences are set.:

1. Click on **Tools** on the menu bar.
2. Click on **Preferences**.
3. Click on the **View** tab.
4. Click next to desired selections so that a check mark or a dot will appear next to the options that you want on. We want to make sure that the following have dots or check marks next to them in the corresponding areas:
  - a. **Show area:** Formula bar and Status bar.
  - b. **Comments area:** Comment indicator only.
  - c. **Objects area:** Show all.
  - d. **Window options area:** Page breaks, Gridlines, Row & column headers, Zero values, Horizontal scroll bar, Vertical scroll bar, and Sheet tabs.

**Calculation Tab** This is where you can specify how you want Excel to calculate worksheets:

1. Now click on the **Calculation** tab.
2. We want to make sure that the following have dots or check marks next to them in the corresponding areas:
  - a. **Calculation area:** Automatic.
  - b. **NOTE:** Everything else on this screen should be fine. We just want to make sure that the calculations in our worksheet will be done automatically instead of manually.

**Edit Tab** This is where you set editing options.

1. Now click on the **Edit** tab.
2. We want to make sure that the following have dots or check marks next to them:
  - a. Edit directly in cell
  - b. Allow cell drag and drop
  - c. Alert before overwriting cells
  - d. Move selection after Return
    - 1) **Direction:** Down

- e. Cut, copy, and sort objects with cells
- f. Enable AutoComplete for cell values
- 3. When you have finished making selections, click **OK**.

**NOTE:** There are other areas/tab headings where options can be set, but in most cases the default settings in the other areas are sufficient. I have shown you the settings that are most commonly manipulated.

#### IV. To Insert or Delete a Row or Column **CAUTION:** It is a very good idea to save before inserting or deleting rows.

##### A. **Inserting/Deleting Rows**

**EXERCISE:**

**Inserting:** Use the following steps to insert a row just above Row 5.

1. Click a cell in the row immediately below where you want the new row. For example, to insert a new row above Row 5, click a cell in Row 5.
  - a. Click on **Insert** on the menu bar.
  - b. Click on **Rows**.

**Deleting:** Use the following steps to delete Row 5.

1. Click on the row heading for the row that you wish to delete. This will highlight the entire row.
  - a. Click on **Edit**.
  - b. Click on **Delete**.

##### B. **Inserting/Deleting Columns**

**EXERCISE:**

**Inserting:** Use the steps below to insert 2 columns between column E and F.

1. To insert a single column, click a cell in the column immediately to the right of where you want to insert the new column. For example, to insert a new column to the of Column F, click a cell in Column F.
  - a. Click on **Insert** on the menu bar.
  - b. Click on **Columns**.
  - c. Repeat steps a and b to get your second column.

**Deleting:** Use the steps below to delete Column G.

1. Click on the column heading for the column that you wish to delete. This will highlight the entire column.
  - a. Click on **Edit**.
  - b. Click on **Delete**.

**ENTER TEXT:** Enter the following data into column F into corresponding cells.

F3 - HW2-5% (Make sure that this is bolded and centered. The cell should already be formatted for this, but if not, refer to the hint. **HINT:** Select cell F3 by clicking on it, then click the **Bold** icon on the Formatting toolbar, and then click the **Center** icon on the Formatting toolbar.)

F4 - 95

F5 - 88

F6 - 90

F7 - 92

F8 - 85

F9 - 90

F10 - 97

F11 - 83

F12 - 84

F13 - 98

**\*\*\*\*\*SHORTCUT for Inserting and Deleting Rows/Columns\*\*\*\*\***

1. Position cursor between the row/column heading where you want the new row/column. Your pointer will turn into a black cross with arrows pointing left/right for a column insert, or up/down for a row insert.
2. Control + Click to access pop-out menu, and then click on **Insert** on the pop-out menu.

**NOTE:** You may also use this method to **DELETE** a row or column. Simply choose **Delete** instead of **Insert** on Step #2.

**V. New Sheet button** (adds another spreadsheet/worksheet to the file)

**A. Add New Sheet**

**EXERCISE:** Use the steps below to add a new worksheet to your workbook.

1. Click on **Insert** on the menu bar.
2. Click on **Worksheet**. This will insert a new worksheet into your current workbook.
3. This new sheet will be positioned to the of the spreadsheet you were viewing. To move this sheet, click on sheet tab and drag to desired position.
4. To move between worksheets, click on the tabs at the bottom of the worksheets.

**B. Delete New Sheet -- CAUTION:** It is a very good idea to save before deleting a worksheet.

**EXERCISE:** Use the steps below to delete the worksheet we just added (Sheet1).

1. Click on the sheet tab of the sheet that you want to delete.
2. Click on **Edit** on the menu bar.
3. Click on **Delete Sheet**.
4. Excel will warn you that you are about to permanently delete the worksheet, and will ask if you are sure that this is what you want to do. Click on **OK** to perform the delete or **Cancel** to cancel the delete. We will click on **OK**.

## VI. Spell Checker

**EXERCISE:** Use the following steps to Spell Check the **SPELLCHECK** worksheet.

1. Click on the **SPELLCHECK** tab.
2. Go to cell A1 (**CONTROL + HOME**).
3. Click on **Tools** on the menu bar.
4. Click on **Spelling**. (Hint: The cells with mistakes are B1, D3, and C5.)
5. Excel will spell check the entire active worksheet unless you highlight a specific range of cells first. *NOTE: Excel does not check protected worksheets, formulas, or text that results from a formula.*
6. Follow the prompts in the dialog boxes to make changes. When you are finished, click OK in the box that tells you, "The spell check is complete for the entire sheet."

## VII. File Protection (file cannot be changed)

### A. **Protecting**

**EXERCISE:** Use the following steps to protect the **SPELLCHECK** worksheet.

1. Click on **Tools** on the menu bar.
2. Position cursor on **Protection**, and click **Protect Sheet**. This prevents changes to a worksheet.
3. Click next to selections that you want protected in the worksheet, enter a **Password** (optional), and click **OK**.

**CAUTION:** If you assign a password, and then forget the password, you will not be able to open the workbook/worksheet or gain access to its data. You will not be able to remove the protection or recover any data that is protected. If you plan to use password protection, it is a very good idea to keep a list of the passwords and the names of the corresponding workbook/worksheet in a secure place.

### B. **Removing Protection**

**EXERCISE:** Use the following steps to un-protect the **SPELLCHECK** worksheet.

1. Click on **Tools** on the menu bar.
2. Position cursor on **Protection**, and click on **Unprotect Sheet**. This allows

changes to a worksheet.

## VIII. Freeze/Unfreeze Titles (or column and row headings)

### A. Freezing

**EXERCISE:** Use the steps below to freeze row 3.

1. **Highlight** the row just below or the column just to the right of the titles you want to freeze. If you want to freeze both columns and rows, click the cell below and to the right of row/column that you want to freeze.
2. Since we want to freeze row 3, we will click cell A4, or click the row 4 heading all the way to the left.
3. Click on **Window** on the menu bar.
4. Click on **Freeze Panes**.
5. Now, scroll down and notice how rows 1, 2, and 3 are always visible.

### B. Unfreezing

**EXERCISE:** Use the steps below to un-freeze row 3.

1. Click on **Window** on the menu bar.
2. Click on **Unfreeze Panes**.

## IX. Split Worksheet by Columns or Rows

### A. Split Worksheet by Columns

**EXERCISE:** Use the steps below to split the worksheet vertically (by column).

1. Position mouse pointer at the bottom right of the horizontal scroll bar (split box) so that the pointer turns into a "split pointer".
2. Then click and drag split pointer until you reach the desired location.
3. To go back to normal view, click on **Window** on the menu bar.
4. Click on **Remove Split**.

### B. Split Worksheet by Rows

**EXERCISE:** Use the steps below to split the worksheet horizontally (by row).

1. Position mouse pointer at the top right of the vertical scroll bar (split box) so that the pointer turns into a "split pointer".
2. Then click and drag split pointer down until you reach the desired location.
3. To go back to normal view, click on **Window** on the menu bar.
4. Click on **Remove Split**.

### C. Split Worksheet by Rows and Columns (split in 4 separate parts)

**EXERCISE:** Use the steps below to split the worksheet into 4 separate parts.

1. Click on **Window** on the menu bar.
2. Click on **Split**.
3. To go back to normal view, click on **Window** on the menu bar.
4. Click on **Remove Split**.

**X. Charts:** Charts are used to display data graphically.

**A. Getting Started** This section will take you to the dialog boxes, which will help you to create your chart in four steps.

**EXERCISE:** Use the steps below to start creating a chart.

1. Make sure that you are still on the **EXPENSES** worksheet.
2. Highlight the cell range(s)--including headings or titles--that you want to create a Chart from. (A5:A12 and B4:B12) Refer to p. 2 "Spreadsheet Pointers on Highlighting" if necessary.
3. Click on **Insert** on the menu bar.
4. Click on **Chart**.

**B. Step 1 of 4-Chart Type** This is the first dialog box. Here is where you choose the type of chart you want to use (i.e., bar, pie, line, etc.).

**EXERCISE:** Use the steps below to select a chart-type.

1. Under **Chart type**, click Pie.
2. Under **Chart sub-type** area, click the 1<sup>st</sup> chart in the 1<sup>st</sup> row.
3. To see a sample of the chart that you are creating, click and hold the **Press and hold to view sample** button.
4. When finished making selections, click **Next**.

**C. Step 2 of 4-Chart Source Data** This is the second dialog box. Here is where you specify the cell range(s) that you want to use to create your chart.

**EXERCISE:** Use the steps below to select the range(s) that you want to use, and to specify column/row headings.

1. Under the **Data Range** tab, specify the data range that you want to use in your chart. If you highlighted the cell range(s) before getting started, your cell range(s) should already be in the **Data range** field. If the cell range(s) are not in the **Data range** field, then click inside of the **Data range** box so that your cursor is inside the box. Now repeat step 1 under "Getting Started" on this page.

2. Now click next to **Columns** under the **Series in:** area.
3. When finished, click on the **Series** tab.
4. The main thing to look at here is the **Category labels** area.
5. Click inside of the **Category labels** box so that your cursor is inside the box.
6. Now highlight cells A5:A12.
7. The cell range is now entered in the **Category labels** area. When finished making selections, click **Next**.
8. You are now in the '**Step 3 of 4**' box. Notice that your category labels have appeared in the legend.

**D. Step 3 of 4-Chart Options** This is the third dialog box. Here is where you customize your titles and legends.

- EXERCISE:** Use the steps below to format titles and legends.
1. Under the **Titles** tab, give your chart a title. Let's call ours **EXPENSES - JAN97**. Highlight the info in the **Chart title** box, and type in: **EXPENSES - JAN97**.
  2. Click the **Legend** tab. Make sure there is a check mark in the box next to **Show legend** if you want a legend to appear; otherwise, no legend will be displayed on your chart.
  3. Under the **Placement** area, click next to **Bottom** so that a dot will appear.
  4. Now click the **Data labels** tab.
  5. Click next to **Show percent** in the **Data Labels** area. Also make sure there is a check mark next to **Legend key next to label** if you want the legend key to appear with the labels.
  6. When finished making selections, click **Next**.

**E. Step 4 of 4-Chart Location** This is the fourth dialog box. Here is where you specify where you want your chart to be displayed.

- EXERCISE:** Use the steps below to place your chart into your worksheet.
1. Click next to **As object in** a sheet so that a dot appears.
  2. When finished making selection, click **Finish**.
  3. A Chart toolbar may appear at this point. It will most likely be located in the toolbar area at the top of your screen. To find out what each icon does, position your mouse pointer over the icon you are curious about, and read what the little description box says.
  4. Click and drag your chart to an area below your data.

**F. To Delete a Chart**

**EXERCISE:** Use the steps below to delete your chart from your worksheet

1. Click on chart so that little black boxes appear on the most outer border of the chart.
2. Click on **Edit** on the menu bar.
3. Position cursor on **Clear**.
4. Click on **All**.

## **XI. Borders, Colors and Lines**

**NOTE:** *Your printer must be able to print colors for you to see the colors that you use in your worksheet. If your printer is not capable of printing in color, then everything will still print in black and white.*

### **A. Applying Borders/Colors**

**EXERCISE:** Use the steps below to add borders or colors to your worksheet.

1. Highlight the cell or cell range that you wish to border or color. (**A4:M14**)
2. Control + click on highlighted selection.
3. Click on **Format Cells**.
4. Click on the **Patterns** tab to select colors.
5. Under **Color**, click the color that you would like your cells to be.
6. In the **Pattern** area, click the down arrow.
7. Click a pattern that you would like to see.
8. Click on the **Border** tab to select border styles.
9. Under **Presets**, click the **Outline** setting.
10. Under **Line** in the **Style** area, click the double-underline.
11. Click the **Color** down arrow.
12. Click the color that you would like to use.
13. When finished making selections, click **OK**.

### **B. Removing Borders/Colors**

**EXERCISE:** Use the steps below to remove borders or colors from your worksheet.

1. Highlight the cell or cell range that you wish to remove the border or color from. (**A4:M14**)
2. Control + click on highlighted selection.
3. Click on **Format Cells**.
4. Click on the **Patterns** tab. To de-select colors click on the **No Color** button. To de-select the pattern, click the down arrow in the **Pattern** area, and then click the blank white sheet (top left).
5. Click on the **Border** tab. To de-select border styles click on the **None** box under Presets.
6. When finished making selections, click **OK**.

## C. Adding Lines

**EXERCISE:** Use the steps below to add lines to your worksheet.

1. Click the **EXPENSES** tab.
2. Highlight cell or range of cells where you wish to place lines. (**A12:M12**)
3. Control + Click on highlighted selection.
4. Click on **Format Cells**.
5. Click on the **Border** tab.
6. In the **Border** area, click on the style button that has a line only on the bottom of the box.
7. In the Line area under Style:, click on the type of line that you wish to use. For our purposes, let's click on the double line.
8. Click **OK**.

## D. Deleting Lines

**EXERCISE:** Use the steps below to delete lines in a worksheet.

1. Highlight cell or range of cells that you wish to edit. (**A12**)
2. Control + click on highlighted selection.
3. Click on **Format Cells**.
4. Click on the **Border** tab. .
5. In the **Presets** area, click on the **None** box .
6. Click on **OK**.

## XII. Help Section

### A. The Office Assistant

1. Click on **Help**.
2. Click on **Microsoft Excel Help**.
3. This is the built-in Office Assistant. You may also get help from the assistant by clicking on the Office Assistant icon (question mark/light-bulb) on the right hand side of the Standard toolbar. To use the office assistant, simply type in the question that you need to ask and click the **Search** button. Excel will then provide a list of topics to choose from. Just scroll to the topics and click on the one that you want to view.

### B. Contents and Index Guide

1. Click on **Help**.
2. Click on **Contents and Index**.

3. From here, you may go to **Contents** tab to look up broad topics, the **Index** tab to look for help by typing in the first few letters of the word/topic you are looking for.

**C. Show Balloons**

1. Click on **Help**.
2. Click on **Show Balloons**.
3. If you place your cursor on something, Excel will display the info it has about the item your cursor is pointing to.

**D. Online Help (Adam, does this work on your machine?)**

1. Click on **Help**.
2. Click on **Help on the Web**.