

Excel Basics QuickStart

oit.wvu.edu/support/training/classmat/xl/

Microsoft Excel is a spreadsheet program which enables you to set up and maintain budgets, perform financial and scientific analyses, and create graphs.

A spreadsheet is a grid of cells arranged into rows and columns. Rows are identified by numbers and columns are identified by letters. A cell can be referred to by its address, which is the column letter followed by the row number, e.g. A1, B5, Q37. You can also create labels for cells and ranges of cells.

Worksheets are grouped into workbooks. You can have a number of spreadsheets stored under the one filename. To access a worksheet, simply click on one of the tabs.

Replace Existing Information with New Information

1. Click on the cell containing information that needs to be replaced.
2. Type the new information.
3. Click on the ✓ or press the **Enter** key.

Make Changes to Existing Information

1. Double click on the cell containing information that needs to be edited.
2. Notice the cursor flashing within this information. Move the cursor around and add or delete characters.
3. Click on the ✓ or press the **Enter** key.

Erase Information

1. Click once on the cell (or select multiple cells) containing information that needs to be erased.
2. Press the Delete key on the keyboard.

Select a range of cells

1. Click and hold down the left mouse button while dragging the mouse to select more than one cell.
2. Release the mouse when you have selected all of the cells that you want.

Notice that the first cell in a range is not highlighted like the rest of the cells in a range.

Select Multiple Non-Contiguous Ranges

1. Click and hold the left mouse while dragging the mouse to select more than one cell. Release the mouse button after you have selected the required cells.
2. Hold down the Ctrl key and use the mouse to select another range of cells. Repeat this procedure for each of the ranges required.
3. Release both the mouse and the Ctrl key after you have selected all of the desired cell ranges.

Activity 1: Explore and Enter Data

1. Go to the workshop web page listed above
2. Right click on the link to the Intro to Excel workbook file.
3. Save the file in the My Documents folder.
4. Start up Excel
5. Click on the **File** menu and choose **Open**.
6. Look in the My Documents folder:
7. You should see a file called **int_excel.xls**. To open the file, double-click on it.
8. Click on different tabs at the bottom of the screen to see other worksheets.
9. Have a look around the spreadsheet. Run your mouse over the buttons on the tool bar and you'll see a brief description of what action each performs.
10. Insert a blank worksheet.
11. Enter your full name in cell A1
12. Enter today's date in cell C1: press **Ctrl** ;
13. Delete the contents of one or more cells

Activity 2: Practicing navigation and data selection techniques

- ▶ Take a few minutes now to select cells, rows, columns, adjacent cells, non-adjacent cells, non-adjacent columns of the spreadsheet.
 - ▶ Use Ctrl G to go to a cell address such as G47. Use Home to go to column A of current row.
 - ▶ Use Ctrl End to go to the bottom right corner of the active sheet. Use Ctrl Home to go to A1
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Formatting the Spreadsheet

Excel allows you to perform functions in multiple ways. Many of the basic features can be accessed on the **Formatting Bar**. For more advanced features, use the **Format** menu.

Changing Column Width

1. Point to the letter of the column that you want to widen or narrow.
2. Move the mouse pointer to the right so that it rests on the black column border. At this point, the mouse changes shape to a two-headed horizontal arrow.
3. Clicking or dragging the mouse to the left will decrease the width; to the right will increase the column size.

An alternative to this method is to double-click on the black column border; Excel will automatically adjust the column to the size of the longest entry within that column.

Inserting Columns/Rows

Single Column

1. Place the pointer anywhere within the column that you want to shift to the right to allow for a new column.
2. Choose **Insert** from the menu bar.
3. Choose **Columns**.

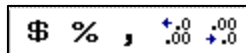
Single Row

1. Place the pointer anywhere within the row where you want to insert a row above it.
2. Choose **Insert** from the menu bar.
3. Choose **Row**.

Deleting Columns/Rows

1. Click once on the letter of the column or the row number you wish to delete.
2. Choose **Edit** from the menu.
3. Choose **Delete** (make certain that you choose “Delete”; do not choose “delete sheet” because it will get rid of your entire spreadsheet).

Formatting Numbers



There are 5 buttons on the Formatting Bar that can be used to quickly format numbers. From left to right on the bar, the formatting styles and functions are

Currency, Percentage, Comma, Decrease Decimals, and Increase Decimals.

The **Format** menu offers many more choices for formatting numbers.

1. Choose **Format Cells** from the menu.
2. Click on the **Number** tab.
3. Choose the **Category**.
4. Indicate your preferences for other options that appear, such as number of decimal places, date format, etc.



Font Options

As identified earlier, the **Formatting Bar** has a number of options for changing the formatting of the spreadsheet and its data. The formatting bar enables you to quickly make changes such as:

- ▶ Font
- ▶ Size of print
- ▶ Appearance (bold, italics, underline)
- ▶ Color

The **Format menu** offers more choices for changing the font of text and numbers. It also provides a method of previewing the selections before they are instigated.

1. Select the cell(s) for which you want to change the font
2. Choose **Format Cells** from the menu
3. Choose **Font** tab
4. Select your preferences

Activity 3: Formatting your spreadsheet.

Spend some time now using some of the formatting options:

- ▶ changing the column/row width/height
- ▶ inserting and deleting rows/columns
- ▶ aligning text and numbers
- ▶ formatting options

Functions

1. To use a function, first select the cell where you want the answer to appear.
2. Click on the **Function Wizard** button
3. In the window that appears, select the function you require. T
4. Choose the **Function name** from the choices. Notice that a brief description of each function appears as you cycle through the list.
5. Follow any prompts that may appear after you select a function. You are usually prompted to indicate the range of numbers you want to include in your calculation.



Formulas

If you do not see a function in the function list that can perform what you require, you are able to create your own formula to achieve your desired calculation. You are able to use a variety of mathematical symbols to create the formula, including parentheses if required.

On the **Standard Toolbar** you will see the **AutoSum** button. This function allows for the quick calculation of rows or columns of numbers. Beside it you will see a drop down arrow, which, when clicked, gives you access to some of the basic most used functions, as well as a link to the **Functions** window discussed previously.



1. To make use of this feature, first select the cell where you want the result of the calculation to appear. Then click on the **AutoSum** icon.
2. Excel then looks for cells close by which it thinks you may be trying to calculate. If you require a different range, use your mouse to highlight those cells, otherwise accept what Excel selects, by pressing the **Enter** key on your keyboard. The result of the calculation will then be entered into the cell you chose.

Using the following mathematical symbols will allow you to create basic formulas:

+ addition - subtraction * multiplication / division

1. Select the cell in which you want the result of the calculation to appear.
2. Type an = (this indicates to Excel that you are setting up a formula).
3. Type the formula, including parentheses if needed.
For example, =b8+c7/g9 results in a different answer than (b8+c7)/g9.
4. Press the Enter key.

Saving a File

Be sure to save regularly! Do not wait until you are completely finished creating the spreadsheet before saving it. If you don't save and experience a computer problem, it's highly likely that you'll end up losing all of your work.



1. Click on the **Save** icon.
2. The first time you save a file, the "**Save As**" window will appear.
3. Type a name for your file.
4. Indicate the folder where the file is to be saved.
5. Click on the **Save** button.

Opening a File



1. Click on the **Open** icon.
2. Locate the folder that contains the file you want to open.
3. Double click on the name of the file to be opened.

Printing a File

The golden rule is to **SAVE BEFORE YOU PRINT!!!**

- ▶ Print the entire spreadsheet: **File > Print**
- ▶ See a preview of what is going to print: click on **Print Preview** button.
- ▶ Specify various printing options: **File > Page Setup**

In the window that appears, choose the tab containing the options you want to set.

The "**Fit to**" option (under the Page tab) is useful if most of your spreadsheet fits on one page, except for a column or a couple of rows. It will automatically reduce the font sizes to allow the entire spreadsheet to print on the one page.

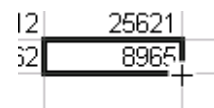
Other useful settings include:

- ▶ **Center on Page** (under the Margins tab), which allows you to print a small spreadsheet at the center of the piece of paper instead of the default top left corner.
- ▶ **Header/Footer** tab, which allows you to include the same information at the top and/or bottom of every page. For example, this document has been created using such an arrangement, with certain information and formatting created for each page.
- ▶ **Print Titles** (under the Sheet tab), which allows you to print column headings across the top and/or row labels down the side of each piece of paper so that you can always know to which column or row the data belongs.

Autofill Feature

You can use this for copying and pasting.

1. Enter a number or formula in a cell.
2. Position your cursor over the bottom right hand corner of the black box until the white plus sign becomes a black one.
3. Click and drag to the desired area.



Try this with entering a 1 and 2 in consecutive cells, then select both of them before step 2.

Try entering a name of a month or a day of the week and dragging to the right or down.