EzyLearn™

Learning computers is 'Show'ezy

Microsoft Excel 2016

301

Excel screen, toolbars, views, sheets, and uses for Excel

Pre-requisites

You should have a certain number of skills already if you are going to progress further with any word processing program. You should know:

a) How to start a program (Beginners 101),

b) How to open and save a file (Beginners 102),

c) How to move around the text in a document (Beginners 103), and

d) How to make changes (edit) to text (Beginners 103).

e) How to access and navigate around a website (Internet 105)

Career Development

Progress in your current career or find the job you're looking for

- Create, update and fleshing out a professional resume — including how to provide relevant and demonstrable examples
- Understanding what YOU are seeking in a job and what other factors are important to you (for example, work-life balance or managing competing priorities in your life with your work, looking at what opportunities there are for career development etc.)
- Realising the future opportunities for growth available in selected industries
- How to write covering letters and emails that will stand out and show off some of your personality while remaining professional

Visit Career Success Page

Sell more, Create Happy Clients and Make More Money

The concept of selling is scary for most people, but when you approach it from the perspective of wanting to help potential customers solve their problems you'll help yourself AND your clients. Topics include:
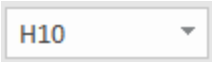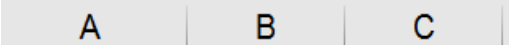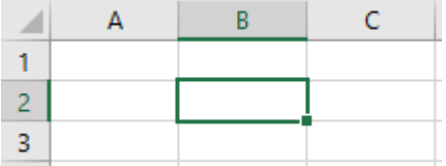
- Define the exact product/service that the customer is willing to pay for
- How they wish to pay for it
- How they wish to have it delivered
- Helping them make the order and payment

Visit Sales Training Course

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Table of Contents

Parts of the Excel Screen


H10 ▾	**Name Box**
	The name box appears at the left of the formula bar and beneath the toolbars. It:
	    a) Tells you the Cell Reference of the active cell (in the example H10 is the active cell)
	    b) Tells you the name of the Active cell (only if we have given it a name)

✕ ✓ *fx* =SUM(B10:G10)	**Formula Bar** The formula bar shows you what has been entered into a cell. You can enter a formula, text and numbers.
A B C	**Column Headers** Column Headers contain the names of columns. A worksheet can contain 256 columns (from A to IV) as soon as they pass Z they are called AA, AB…BA, BB etc. If you want to select a column simply click on its column header and the entire column is selected.
1 2 3 4 5	**Row Headers** Rows are numbers (which appear on the left) and you can see from this diagram that you can increase or decrease the size of rows. (more on that later). A single worksheet can contain up to 65,536 rows.
A B C 1 2 3	**Active Cell** This diagram shows the active cell Reference (B2) in the Name Box. The place where Columns and Rows join is called a cell and the cell that is currently selected is called the Active cell. The active cell has a thicker border than the cells around it, and its name eg. B2 refers first to the column it is in and then the row (just like reading a street directory).
Sheet1 ⊕	**Sheet Tabs** A file in Excel is called a **Workbook** and it contains can several worksheets. The workbook is called **Book1** and the worksheet is called Sheet1. The *currently selected sheet is white*, and when you want to have a look at what is on a different sheet simply click on its sheet name.

◄ ► ...	If you have more sheets than you have space to see them, you can use the arrows to the left of them to navigate through them.

The Menu System

Ribbons
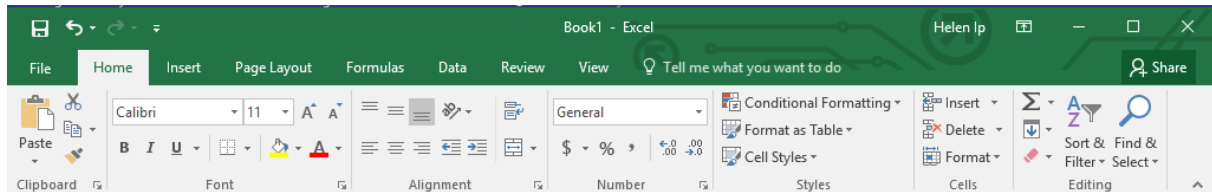
Microsoft Office programs come with a ribbon menu system. You can click on each of the words at the top of the screen to reveal a ribbon of menu options beneath. If you move your mouse over a button (and keep the mouse still) you will see that the computer tells you what that button does.

Ribbon Sections

Each ribbon is divided into sections. Eg. The Home Ribbon contains Clipboard, Font, Alignment, Number etc. Click on the small Expand button to the right of each of these options to see more detailed information about that Section.

When you click on the Font section expand button, you see a dialog just like in previous versions of Microsoft Office applications.
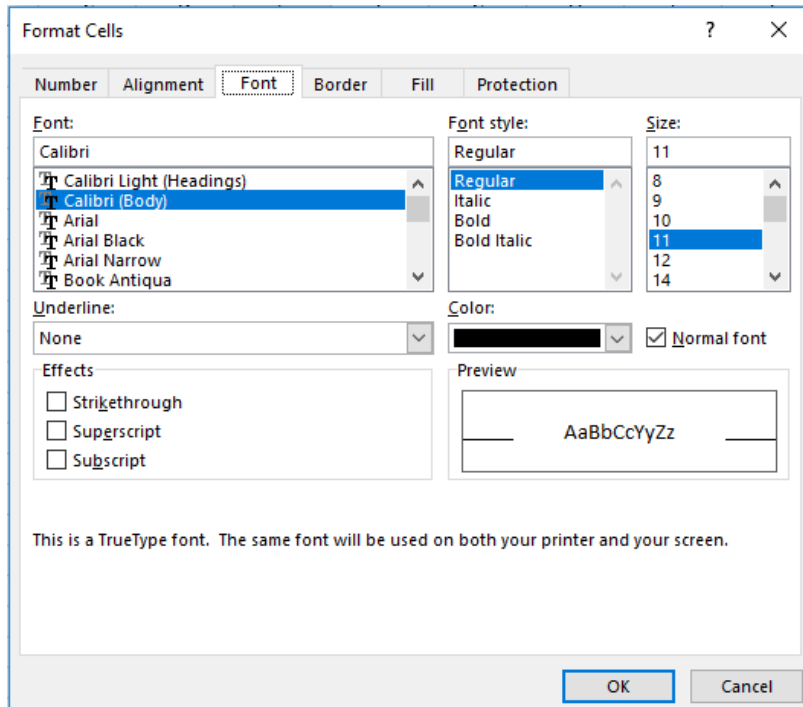
Specific Menu options

When you click on an image the "Picture" menus appear, when you click in a table, the table menu appears and in each of these menus you find the options available to you when you are using these tools.
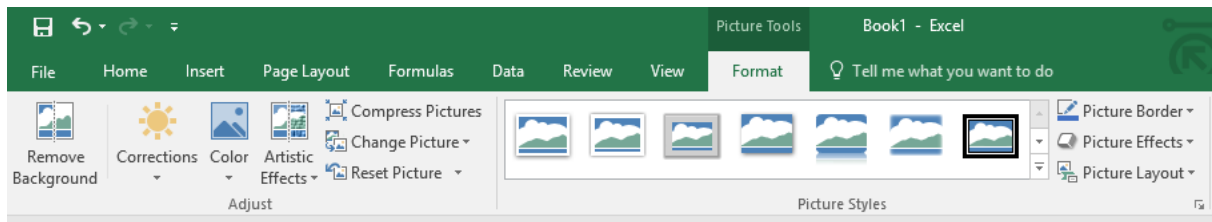
Quick Commands

For common commands like Save, Print Preview, Print etc, there is a Quick Access toolbar at the top in the title bar. You can click the drop-down arrow at the right to reveal your choices and then click which ones you want to appear permanently.
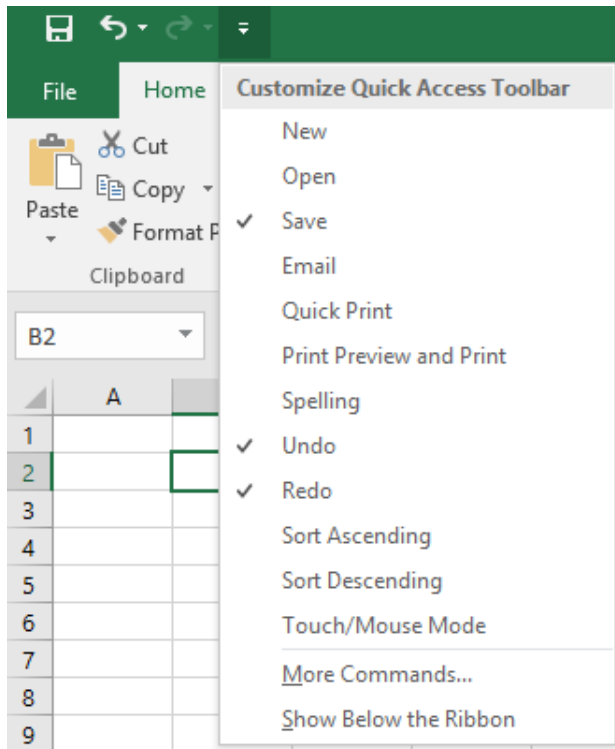
Zoom
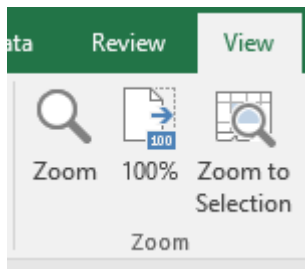
The **Zoom** menu reveals different levels of zoom, but you may find it easier to use the zoom feature at the bottom to adjust the magnification of the file you are working on.

Zoom only effects how close you look at your document. It has nothing to do with how large the document will be when you print it. Consider it like a magnifying glass.

You can change the zoom to a figure that is not listed in the drop-down list by clicking the zoom button and typing a percentage.

Views

The zoom option at the bottom right of the screen also provides three small buttons to the left of the zoom slider that allows you to change swiftly between Normal, Page Layout and Page Break Preview.

Normal

This is how you normally see a spreadsheet on your screen

Page Layout

This shows your Excel file just like it would look in print preview mode.

Page Break Preview

Before you print your spreadsheet, you want to make sure that the information fits nicely on the page. Page break preview allows you to
       a) change print borders and page breaks so that it does, and
       b) the page is zoomed out to approx. 60% so that you see a broader perspective.

The Excel Screen
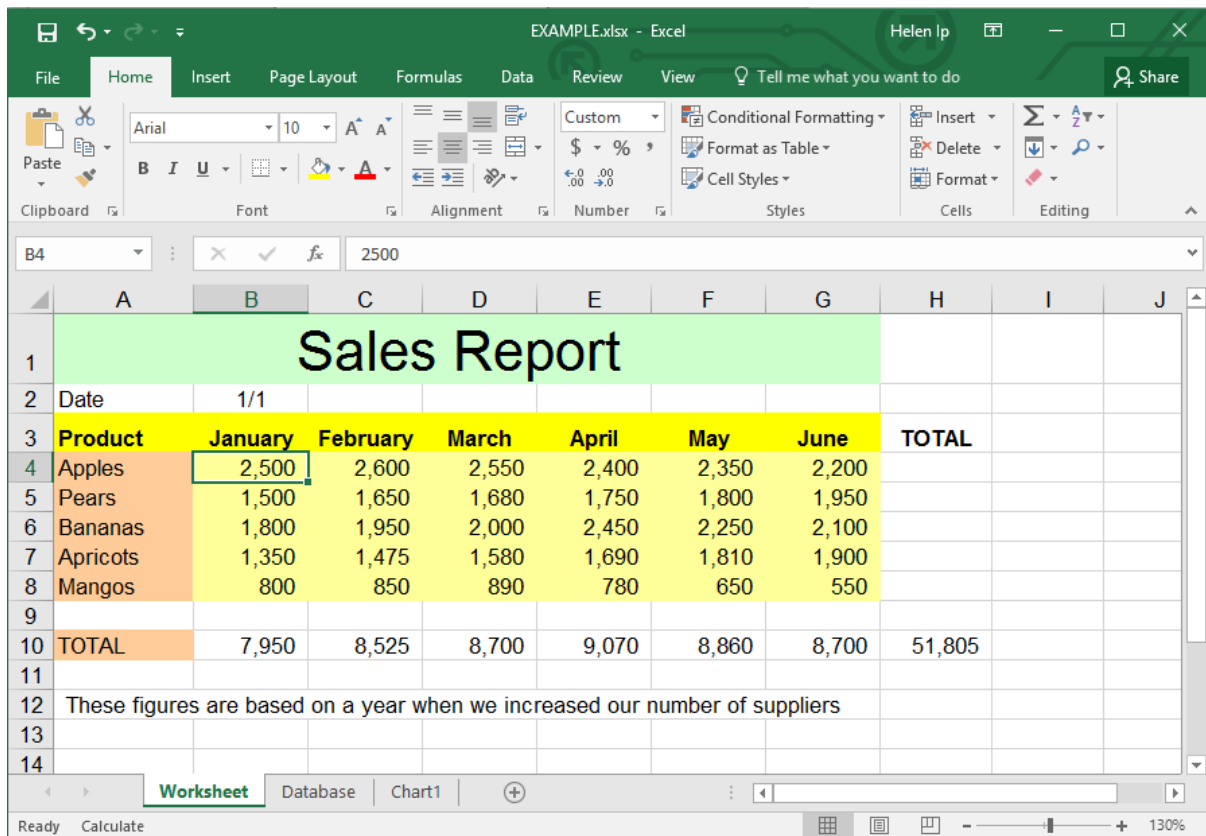
Exercise: Parts of the Excel Screen

Draw on the image above to indicate each of the areas mentioned below:

1 - Menu Options	7 - Title Bar	12 - Minimise Excel button
2 - Close Excel button	8 - File name	13 - Column header
3 - Formula bar	9 - Scroll bars	14 - Row header
4 - Sheet tabs	10 - Name Box	15 - Status Bar
5 - AutoSum button	11 - Home Ribbon	16 - Select All
6 - Sheet tab/Scroll bar divider		

Exercise: Turn toolbars off using View menu

1. Using the View menu and the Show/Hide section, turn the Formula bar, gridlines and headings off and then on.

Exercise: Showing buttons in the Quick Access toolbar

1. Click the drop-down button at the far left of the Quick Access toolbar and ensure that you reveal the New, Open, Save, Undo, Redo, and Print Preview options
2. It should look something like the diagram below:

Default Settings

When you first launch Excel, a blank sheet appears on the screen. This sheet is based on what is called the Normal Template (templates are covered more in later modules) and has a default paper size (eg. A4), a "default" text style and size and other default settings.

When we say default, it is not a bad thing. Imagine if you had 2 printers attached to your computer: one of them would be the default printer. This is the printer that is most often used. If you wanted to use the other printer you could choose it from the print dialog box. Default is like saying the "automatic choice".

Workbook Names

When you create a new file, Excel automatically calls it "Book1" (or Book2, 3, 4 etc.) (depending on how many new files you open).

 The name of the file and program is located in the title bar.
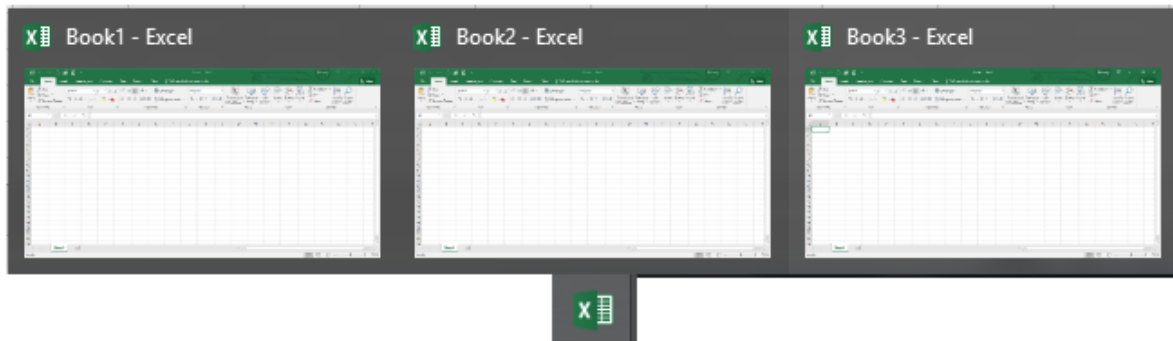
Names are also shown in the Task Bar when you hover your mouse over the icon at the bottom of the screen.

Exercise: Workbook Names

You should have Excel running and a blank sheet on the screen. You should also see the word Book 1 in the title bar.

1. **Click** the **New button** in the Quick Access bar.
   You have created a New spreadsheet. This is the quick way to do it.

2. What does it say in the Title Bar? ………………………..

3. **Click** the **New button** again.

4. What is the name of this file? ……………………………

Exercise: Closing programs

1. Hover over **Book3** in the taskbar
2. **Click** on the Close button
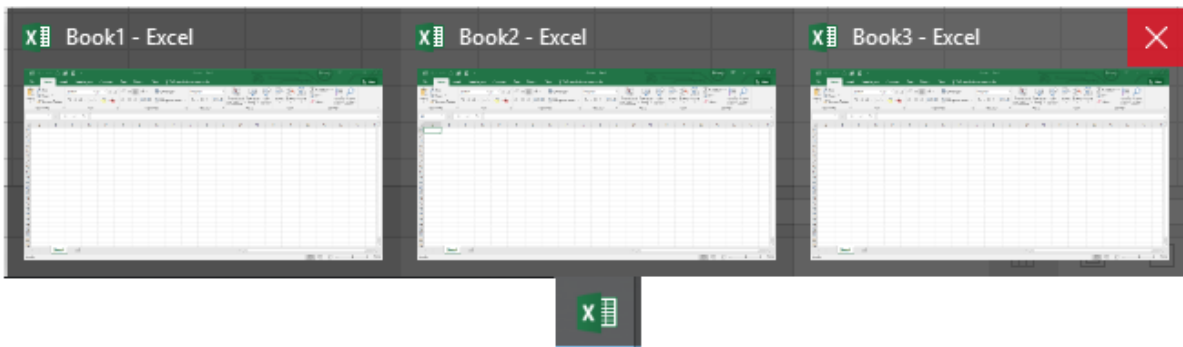
3. **Repeat steps 1 & 2** for **Book2**.

Opening Files

Clicking on the File button on the top left reveals something similar to earlier versions of Office programs. To open a file, you can click on Open and then navigate around your filing system.

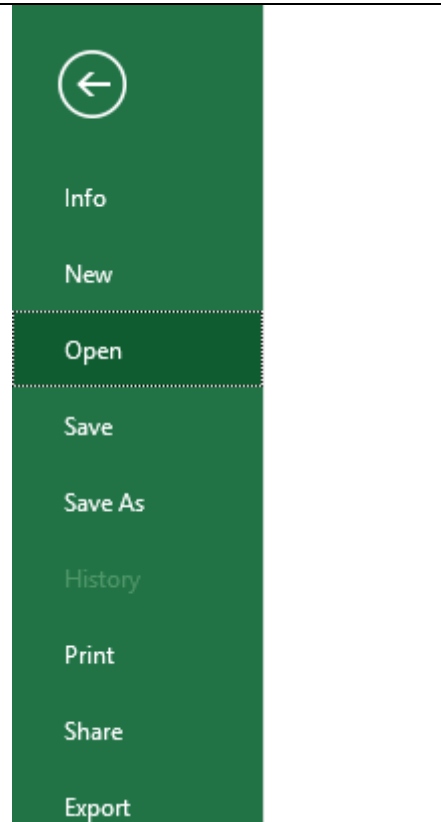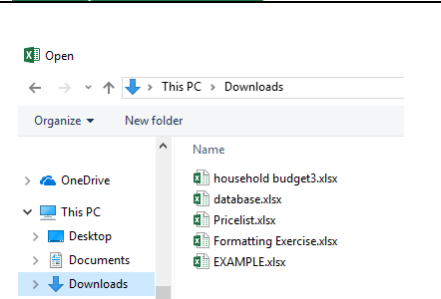|	
	## Mouse shortcuts – toolbars On the left side are the common commands such as Open. You will see this on the Quick Access bar and it's a little white folder. ## Keyboard Short cuts Some commands (like Save) have keyboard shortcuts like Ctrl+S. This means press and hold the Control button down and while it is down, press and release "s", then take your finger off the Control button, rather than click on the Office button, then on Save ## Recently used file list You'll see a list of files on the right of these options that have been used recently on your computer. You can pin the ones you want to keep there because you use them regularly and increase the number of recent files you want to see by clicking on Options.
	## Working with the exercise files The exercise files which you download are stored in the Downloads folder of your computer. This diagram shows you what your computer will look like when you click on Downloads on the left-hand side of the dialog box.

Exercise: Open a file

You should have Excel running. You should have also downloaded the exercise files.

1. **Click** on **File**, then **click Browse**.

2. **Click** on **Downloads** on the left-hand side.

3. **Double-click** the **example** file.

Print Preview
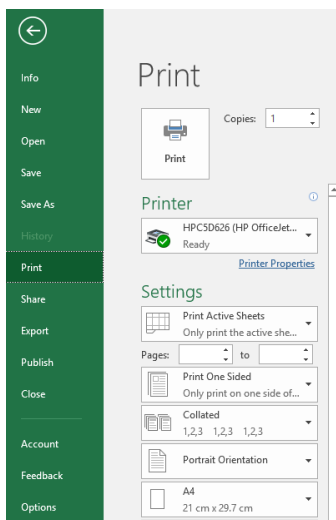
Common to most software programs, Excel gives you the opportunity to see what a spreadsheet will look like when you print it. It is called a Print Preview. There are two ways to activate it:

a) Quick Access bar
b) File Button
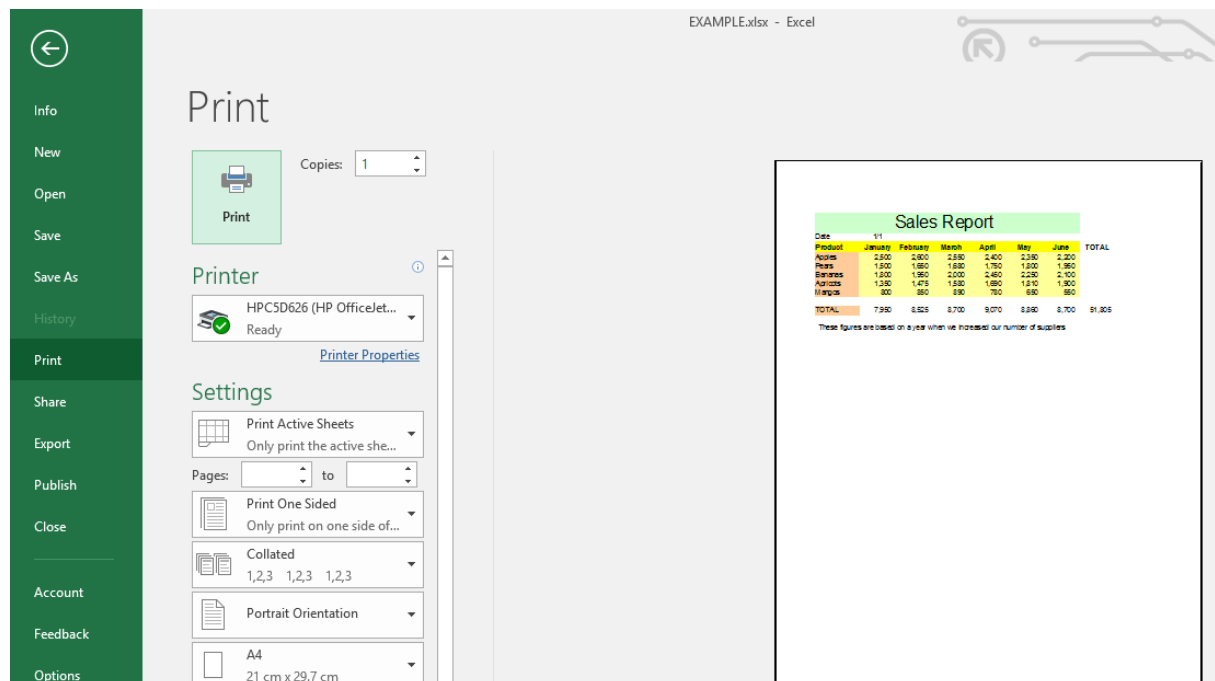
When you are in print preview you will see that:
- a) The cell borders don't print out (unless you specify that you want them to – more on that later).
- b) The menu ribbon at the top of the screen has disappeared. To close out of the Print Preview, click on the Back arrow.
- c) In the Status bar (at the bottom) you can see that you are on page 1 of 1.

Exercise: Get to know Excel

You should already have the file **example** open.

1. **Right-click** on cell **E3**
   Notice that when you right-click on a cell, you see a shortcut menu list of options that relate to that cell, as well as a cell formatting box.

2. **Press** the **Esc** key (top left corner of most keyboards).
   You could also have clicked (left) on any other cell and the shortcut menu would disappear.

3. Look at the contents of cells.
   a. **Click** on cell **B4**.
      Look in the Formula bar and you will see the number 2500. Notice that the number in the formula bar does not have a comma? The comma you see in the cell is part of the cell Formatting. Any formatting that is applied to a cell is not shown in the formula bar. We'll explain this a little later.

   b. **Click** on cell **C3**
      Notice the word February appears in the Formula bar.

   c. **Click** in cell **B10**
      Notice that although the cell contains the value $7,950, this value is a calculation based on the formula written in the formula bar. We'll explain this a little later too.

   d. **Click** on cell **C12**
      Although it appears that there is text in this cell, there is not. The text you see going over this cell is actually in cell A12.

   e. **Click** in cell **A12**
      Look in the formula bar and notice that this cell contains all the text you see at the bottom of the table.

   f. **Click** on cell **E1**
      Cell E1 is part of a "merged" block of cells. Whether you click on A1 or G1, you would see the same result. We'll explain this in the formatting section.

4. Look at a database
   a. **Click** on the **Database sheet tab** (bottom left of the worksheet)
      Excel is a great tool for managing a database because of its structure of rows and columns. Each column represents a different "field". The names of the "fields" appear in row 1, and subsequent rows represent different "records" for each person in the database. We'll show you how to use Excel as a great tool for a mail merge in another course.

5. Look at a chart
   a. **Click** on the **Chart1** sheet tab
      This chart shows the comparison between Apple and Pear sales from January to June. The information comes from the values in the Worksheet sheet.

6. **Click** on the **Worksheet sheet tab**
7. **Keep** the **file open**.

Exercise: Change between views

You should have the **example** file open on the screen.

1. **Click** on the **Database** tab
2. **Click** on **File**
3. **Click** on **Print**

    Notice the vertical dotted line (normally between column F and G depending on your page setup). This shows you where the edge of the page is.
    Where is the dotted line on your computer? ………………………………
4. **Click** on the **Close button** (toolbar at the top).
5. **Keep** the **example** file **open** for the next exercise.

Exercise: Using Zoom & Print Preview

You should have the **example** file **Open**

1. **Click** on the **Database sheet tab** (bottom of spreadsheet).
2. **Click** the **Print Preview button**.

3. **Click** the **Zoom button** 🔲 (at the bottom of the screen) **a couple times**.

    Notice that this either zooms you in or zooms you out. Again, it does not affect the way your spreadsheet prints, only the way you view it on the screen.

4. **Click** the **Close** button to **close out of Print Preview**.

    You should now be looking at your Spreadsheet in Normal view.

5. **Change the zoom** to **75**.

    Notice that your view of the spreadsheet changes. You can now see more of the spreadsheet on the screen. Changing the zoom does not mean that the spreadsheet is bigger or smaller when it comes time to print it.

6. **Click** the **Print Preview** button.

    Did changing the zoom in Normal view make any difference?......................

7. **Close** out of **Print Preview.**
8. **Change the zoom to 150**.

    Again, this does not affect what the spreadsheet looks like when you print it.

9. **Change the zoom to 83%.**

10. **Close** the **example** file but leave Excel **running.**

    You should click on File, then Close.

Working with Cells

Uses for Excel

It is important to know when to use Excel before we start. A spreadsheet is a very structured method of presenting information and so it is great for doing calculations. It is a great way to hold structured data like a customer database (or even just your own address book of friends) and it is a good basis for creating charts or graphs.

Worseet

Also known simply as a spreadsheet, this is where most of the work in Excel is done.

You can put in basic data and do calculations to add the value of columns or even do calculations between sheets.

Database

Because of its Column and Row structure, a spreadsheet is a great place to store data.

A database is made up of several records (represented by rows) and each record is made up of fields (represented by columns).

The first row is the header record because it contains the names of the fields.

Chart
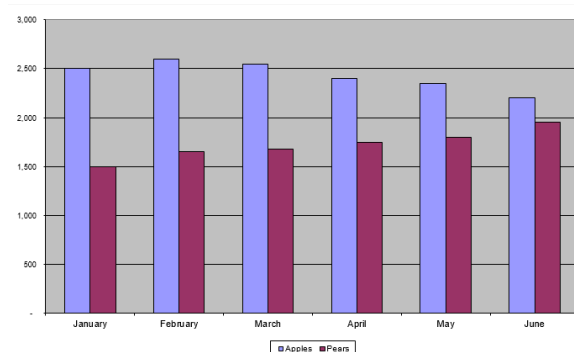
Charts are very popular because they make complicated information easy to understand.

Charts are created from the data which is entered into worksheets.

A chart can be placed on a separate sheet (like our example on the left) or it can be included in an existing worksheet. You can also copy and paste them into other programs like Word, and PowerPoint.

Moving around Worksheets and Workbooks

You can use either the mouse or keyboard to move between workbooks and around worksheets.

Getting around Worksheets

You have already looked around a spreadsheet in a previous exercise using the mouse. Let's take a look at some more.

Exercise: Scrolling, Name Box & Sheet tabs

1. **Open** the file called **Formatting Exercise**

2. **Click** on the **Custom Format** sheet
      What is the current zoom for this spreadsheet?

3. **Click** on cell **C3**
4. **Click** on the **Page Break Preview** sheet.
      What is the current zoom of this sheet?
      What is the Active cell?

5. **Click twice** on the **right arrow** on the **horizontal scroll bar**.
      What is the Active cell?
      Did the Active cell change?
      Remember that when you use the scroll bars the active cell does not change.

6. **Click** on cell **J5**
      Notice that it says J5 in the Name Box (to the left of the formula bar). The Name box tells you the name of the Active cell.

7. **Click** in the **middle** of the **name box**,
      The text J5 should now be highlighted.

8. **Type A6**, and press **enter**
      This is a quick way to jumping straight to a cell you want to get to (if you know the name of the cell).

9. **Leave** the **Formatting Exercise** file **open** for the next exercise.

Remember that moving through the worksheet **using the scroll bars does not** change the active cell. You need to click on a cell if you want to make it the active cell.

Using the keyboard

When you get more comfortable using the keyboard you'll find many ways to move around a worksheet. It also makes you look really good to your peers and managers. Try each of these keyboard methods.

If you have used the keyboard shortcuts with Word you'll realise that when you see something like Ctrl + Home, this means

          a) Press and hold the Ctrl key down, and while it is down
          b) Press and release the Home key, then
          c) Release the Ctrl key

There is no pressing any "+" key.

Which Keys to use	Result
→ or ←	Moves one cell to the right or left
↑ or ↓	Moves up or down one cell
Ctrl + Home	Beginning of current worksheet (cell A1)
Ctrl + End	Bottom right of active worksheet area
F5, or Ctrl + G	Brings up the Go To dialog box. Type in a cell reference and hit enter
Page Down	Down one screen
Page Up	Up one screen
Ctrl + →, Ctrl + ←	End of the current range
Ctrl + ↑, Ctrl + ↓	Beginning of current range
Ctrl + PgUp	Display the previous sheet
Ctrl + PgDn	Display the next sheet
Tab	Right one cell
Enter	Down one cell (can be customised)
Ctrl + W	Closes a Window (within a program)
Ctrl + F4	Windows command that closes a window within a program. In this instance, it will close a file. Does the same as above.
Alt + F4	Closes a program and all files that are open.

Exercise: Moving around Excel using the keyboard

The file called Formatting Exercise should already be Open.

Your Active cell should be A6 from the previous exercise.

1. **Press** the **up arrow 5 times** to get to the top of the spreadsheet.
2. **Press Ctrl + Down Arrow 5 times**
   > *Notice that when you use this keyboard combination it jumps from the top of a range to the bottom of that range and then to the top of the next range down.*
3. **Press Ctrl + Down Arrow one** more time.
   > *What cell are you in? ……*
   > *The maximum number of rows per worksheet is 1,048,576*
4. **Press Ctrl + Right Arrow**
   > *What is the Active Cell?......*
   > *The maximum number of columns per worksheet is 16,384*
5. **Press Ctrl + Home**
   > *You should be back at cell A1.*
6. **Press Ctrl + End**
   > *You get to the end of where information is entered in the worksheet.*
   > *What is the Active cell?......*
7. **Press Home**
   > *What is the Active cell?......*
   > *What is the last row you can see on the screen?......*
8. **Press Page Down**
   > *What row are you in?......*
   > *What is the last row on the screen?......*
9. **Press Page Down**
   > *What row are you in now?......*
10. **Press Page Down**.
    > *Notice how Page Down and Page Up move you a "screen" at a time.*
    > *Change the Zoom and notice that zoom does make a difference*
    > *when you use Page Down.*
11. **Press F5**, and then **type J17** and then **press Enter** (you could also click on the OK button)
12. What sheet are you in? …………………………………
13. **Press Ctrl + Page Up**
    > *Which sheet are you in now?*
14. **Press Ctrl + Page Up**
15. **Press Ctrl + Page Down twice** to get back to the Page Break Preview sheet
16. **Keep the file open** for a forthcoming exercise.

Between Workbooks

Just like Word and PowerPoint, you can have several Workbooks open at any one time. This is particularly handy if you want to copy and paste between them. There are several ways to move between workbooks.

Exercise: Moving between workbooks

1. **Open** the file called **Database**.
   You should have several files open. Which files are open?

   ………………………… ………………………… …………………………

2. Press **Ctrl + F6**
   > *You'll switch back to the previous file which is currently open.*

3. Keep your finger on the Ctrl key this time and while it is down press and release the F6 several times.
   > *Notice that it toggles you between the currently open files.*

4. Open the file called **Pricelist**, and then continue to press **Ctrl + F6**.

5. **Hover** over the Excel icon at the bottom of the screen (**task bar**) and c**lick** on the different **Excel files** to switch between them.

6. **Close every Open file, but leave Excel running.**

Working with Sheets

You can have as many worksheets in each Excel workbook as long as the memory on your computer will allow it.
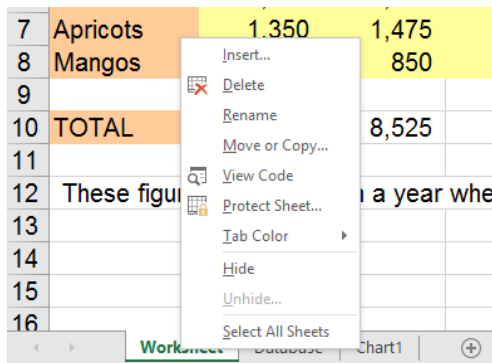
Here are some ways to work with sheets.
a) Right-click on a sheet and choose from the list of options
b) Double-click on a sheet (to rename it)
c) Click and Drag a sheet to change its order

Inserting a sheet

a) Right-click on an existing Sheet and then click on Insert from the Shortcut menu that appears,
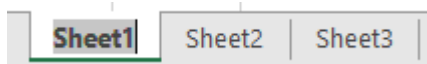b) Click on the + sign after the active Sheet

Right-click on a sheet

When you right-click on a sheet, you will get a shortcut menu which contains a list of possible options relating to that sheet. You then click on the option you want.
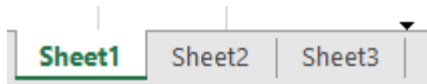
This diagram shows the list of options available.

Double-click to rename

When you double-click on a sheet name, it becomes highlighted and you can simply start typing to replace the text that is currently written there. When you have finished typing, press Enter and that sheet will be renamed.

Moving a sheet

The easiest way to move a sheet is to click and drag it to another place. When you do, a small black arrow will appear between any two sheets, when you see the arrow between the two sheets you want to move your sheet to, you can release the mouse button and the sheet will be moved there.

Navigating around sheets

Sometimes you can have too many sheets to display on the screen. When this is the case, you can use the sheet navigation buttons to the left of the sheet names to:
   a) move left and right between them or
   b) move to the first or last sheet by holding down the Ctrl button

The ellipsis (…) icon navigates to the sheet before the first visible sheet. Where this icon appears at the end of the worksheets, clicking on it will take you to the sheet after the last sheet visible.

Let's take a look at how to change the sheets in a workbook.

Exercise: Working with sheets
1. **Open** the file **household budget3**.
      How many sheets are there?
      What are they called? …………………………………………………………
2. **Right-click** on **Sheet1** and then **click** on **Rename**
      The sheet name is now highlighted so you can start typing any name you want.
      When you have finished typing, press the Enter key.
3. **Type July to Sept** and **press Enter**.
4. **Click and Drag** the **July to Sept** sheet to the **right** side **of Sheet3**,
      Keep going until the small downward arrow is at the right of Sheet3
5. **Double-click** on **Sheet2** and **type** "**Summary"**, then **press Enter**
6. **Rename Sheet3** to "**Oct to Dec"** and then put the **sheets in the following order**:
      a. July to Sept
      b. Oct to Dec
      c. Summary
7. **Save** the **File AS** "**YOUR NAME Budget**".
8. **Leave** the **file open** for the following exercises

Exercise: Inserting Sheets
You should have the file YOUR NAME Budget on the screen.
   1. **Right-click** on the **July to Sept sheet** and then **click** on **Insert** from the shortcut menu.
      The Insert dialog box appears and provides you with a list of potential options. We will only be working with worksheets.
   2. **Click** on **Worksheet** (to select it), and then **click** on **OK**.
   3. **Rename** the Sheet to **Jan to Mar** then press Enter.
      (see previous exercise on how to do this).
   4. **Click** on the + sign at the end of the sheets to add a new worksheet
      Notice that you didn't have to choose from a list of options
   5. **Rename** this sheet to **Apr to Jun** and press Enter
   6. **Arrange the sheets** so that they are in the following order:
         a. July to Sept
         b. Oct to Dec
         c. Jan to Mar
         d. Apr to Jun
         e. Summary
   7. **Right-click** on the **Summary** sheet tab and **change its colour to Red**.
   8. **Save the changes**

What's next

You should now feel quite comfortable to open most Excel files and at least take a look around them and know what is going on.

Excel 302

The next course will give you a better understanding of the different mouse cursors and what they are used for, the active cell and why it is important, how to select information, noting that you can select rows and columns OR the contents of cells. You'll learn how ranges are named, and how to copy, paste and drag and drop to move information.

Then you will enter you own data, change the widths of columns and height of rows, insert and delete rows and columns and use some automatic features that will save you a LOT of time.

Learn more about Microsoft Excel Training Course 302