



INTRODUCTION TO MS EXCEL

Part 1

Abstract

Part 1 of the training course covers starting Excel and the anatomy of the Excel menus. You will get to understand how to interact with Excel to achieve the desired result.

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Introduction to Microsoft Excel – Part 1

Create and save Workbooks

Starting Excel

Excel starts with the home screen. It will show you a list of recently used spreadsheets.

We want a new Blank Workbook. It will show a list of different templates as well as the Blank Workbook. You can Search for Templates and there are also more templates that can be displayed.

Click on the Blank Workbook which will open a new Workbook for you.

Let's look at the anatomy of a spreadsheet.

The new Workbook starts with a single Sheet. You can have as many sheets as you like contained within a single Workbook.

Spreadsheets are made up of Rows and Columns.

The Columns are identified by an alphabetic letter, the Rows are identified by a number.

The intersection of a Row and a Column called a Cell. There are lots of Cells in a spreadsheet, almost infinite. If you click on a Cell, it becomes the active cell.

Each cell can be described by its Column and Row reference, eg - F8, B3, etc.

The next concept to understand is a Range. This is just a block of cells. You Click and Drag to select a block of cells which becomes the Range. You describe a Range using the start Column Letter and Row Numbers, starting at the upper left cell and finishing at the lower right cell, eg – D4:J14.

It's easy to work with Sheets. If you want to add a sheet, just click on the + sign at the bottom of the page by the sheet number.

The layout of an Excel page has a number of Tabs across the top of the screen. If you click on one of the Tabs, the Tool Buttons beneath it change. This called a Ribbon.

For example, if you click the Formulas tab, you get the Formulas ribbon.

Each Ribbon is divided into Groups, eg the Charts group.

There are often more options than can be shown in the Ribbon. You can click the expand icon at the bottom right of a group to show all the available options for that group.

Other features of the spreadsheet are a vertical scroll bar to move up and down the sheet and you can have a horizontal scroll bar if the spreadsheet is wider than the screen.

Underneath that, we have a Zoom slider. This expands or shrinks the size of the spreadsheet.

There are also View buttons at the bottom right. One is the Page Break preview which shows you how pages will print. The second is the Page Layout View and lastly there is the Normal View.

Most of the time you spend in the Normal View.

At the top left of the screen is the Name Box. This shows you the name of the cell which is currently active.

At the very top is the Quick Access Toolbar. This is very useful and can be customised to display frequently used tools.

In the top middle is the name of the spreadsheet.

Notice at the top right is an X. this is the tool to close the spreadsheet.

Below the Ribbon is the Formula Bar. This is used to enter Formulas into Excel.

Saving a Workbook

Once you have created a spreadsheet you want to save it.

Click File, then select Save As. If you click Save, it will move to Save As anyway.

First you need to decide where you want to save the Workbook.

Click on Browse, and move to a folder where you want to save the file.

Fill in the name of the Workbook and click Save.

Entering Cell Values

As an example, we are going to create a simple payroll spreadsheet.

To start to create it we type Employee Id in Column A, then we type Employee Name in Column B.

We can fill in further information about wages, etc.

To populate the spreadsheet we select cell A1 and type in 1, then Enter or Return. Notice that the cursor goes down a cell.

Enter 2 in B1, 3 in C1, 4 in D1, etc

This is hard and there is an easier way. We can use the build Autofill feature. This will recognise patterns and carry on a sequence.

As an example, click on cell D1. Notice that there is an autofill handle at the bottom right of the cell.

Click on the handle and drag down and the following cells will be autofilled.

Click on Cell B1, then type Fred and Enter

Click on Cell B2, then type James and Enter

Click on Cell B3 and type Cindy and Enter

Carry on down the page entering employee names.

Editing cell values

The value of a cell stays the same until you type something else into the cell. This erases what was in there before.

If you Double Click in the cell, this allows you to edit the contents of the cell.

You can use the arrow keys to move the cursor within the cell being edited.

Once you have completed your edit, hit Enter and the cell will be changed.

To move around the spreadsheet there are some keyboard shortcuts.

For example, select cell B1. Hit Shift and Enter and you move up on cell.

You can move left and right using the Tab key. Tab moves Right, Shift + Tab moves Left.

Navigate to cell C1,

Type in the hourly wage for Fred which is 15

Tab to cell D1,

Type in the number of hours Fred has worked this month which is 120

How to clear and copy cell contents

To copy the contents of one cell to another,

Click on the cell, Type Ctrl+C to copy, then

Click on the destination cell, then

Type Ctrl+V to Paste the contents. You can also do this via the menu, or by Right clicking.

It's hard work pasting the same values into a line of cells.

Let's use the Autofill handle to speed up the process.

Click on the cell that you want to copy, then grab the Autofill Handle and drag it down or across to fill the cells easily.

What if you want to clear a cell.

Right Click on the cell and choose Clear Contents.

Another way is to go to the Home Tab, in the Editing Ribbon, there is an icon for Clear which deletes everything in the cell, or just the formatting depending on the option you choose.

Another useful tool is Undo. To do this type Ctrl+Z. You can also access this through the Quick Action toolbar at the top left of the page.

How to create column headings

To insert a new blank row above Row 1, Right Click on the number 1, then select Insert and a new row will be inserted. The same process works for inserting Columns.

Right Click on the A, select Insert and a new column is inserted.

You can insert a column between columns which is probably where you will use it most.

For example, Right Click on D, select Insert and a new column is inserted.

Type Ctrl+Z to reverse the changes.

In cell A1, type Employee ID,
Tab to cel B1, then type Name,
Tab to C1, Type Hourly Wage,
Tab to D1, Type Hours Worked,
Tab to E1, Type Taxable Income
Then hit Enter.

Notice that some of the titles overflow the cell boundary.
You can resize a column by dragging the column divider at the top to the right until it fits.
An easier way to do this is to select the columns, eg A to E,
Then double click in the selection and the columns resize automatically.

In order to rapidly change the same information on a number of cells you can use the Find and Replace function.

On the Home Tab, in the Editing group, click on the magnifying glass which is the Find and Select function.
Notice that there is an option for Find and an option for Replace. Select Replace.

For example, Find What is 15
Replace with 15.5

Select Replace All. All the replacements happen, then you get a confirmation banner telling you how many replacements were done. Then click Close.

Check that you are happy with the changes.

Notice that the Employee Id number 15 has been changed to 15.5. We don't want that, so edit it back to 15.
The shortcut keys for Find and Replace are Ctrl+H.

Fill in the hourly wages and hours worked for all the records.

A look at Autocorrect options

If you click File, Options, then Proofing, it gives you access to Autocorrect options.

You can adjust the settings as you wish.

Notice at the bottom there are two columns, Replace: and With:

These are for commonly misspelt words.

You can use this for something slightly different as well and that is expanding commonly used phrases.

For Example, you can type U3A, and it will expand it to University of the Third Age.

Moving data

Another way to move the contents of a cell is to Click the cell, then grab the edge of the cell. Note that the cursor becomes a cross when you grab it. You can then drag the cell to anywhere you want in the spreadsheet. You can do the same thing with a Range, just click and drag.

Formulas

We need formulas to calculate the Taxable Income by multiplying the Hourly Wage by the Hours Worked.
Excel can do this for you.

In cell E2, type =

This might seem strange at first, but think about algebra that you did at school.

Remember $C=A \times B$

Type 13.9×158 , then Enter

E2 shows the result 2196.2

This is a bit manual. A better way is type the formula as cell references,

For example, $=C2 \times D2$, Enter.

The difference now is that the formula is dynamic. If the input values change, then the result changes.

For example, if the hourly wage changes, then the result changes.