

Beginners Microsoft Excel 2002

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You will learn the following important **vocabulary words**:

worksheet, workbook, table, cell, formula bar, range of cells, fill handle, relative reference, absolute reference, Chart Wizard, AutoSum button, Sum function, built-in functions, comment

- 1) Opening Excel from the **Start button**.
 - a) Single-click on the Start button, which is a rectangle in the lower-left corner of the screen.
 - b) Move your mouse to the entry **All Programs**.
 - c) Move your mouse to the entry **Microsoft Office XP**.
 - d) Move your mouse to the entry **Microsoft Excel**.
 - e) Single-click on the entry Microsoft Excel to open that program.
 - f) As practice, open Excel.

- 2) The worksheet environment
 - a) A new blank **workbook** will automatically open on the screen and display a blank **worksheet**. Actually, three worksheets are open by default. You can tell this because there are three sheet tabs at the bottom of the screen indicating "Sheet1", "Sheet2", and "Sheet3".
 - b) A worksheet is made up of columns (named A, B, C, etc.) and rows (named 1, 2, 3, etc.). The intersection of a column and a row form a cell. Each cell has a **cell reference** formed by its column and its row. For example, the top, leftmost cell is cell A1.
 - c) You can type any number, word, or phrase into any cell. First, click in the desired cell with your mouse to make it the **active cell**. Then type a number or word and press the Enter or Tab key.
 - d) You can delete or modify anything that you have typed by double-clicking in the cell you wish to change and using the Backspace or Delete keys on the keyboard. Or, you can single-click a cell and then click in the formula bar (to the right of the equals symbol towards above the worksheet grid.)
 - e) Practice entering words or numbers in various cells and then delete those entries.
 - f) Notice that if you enter a long phrase into a single cell it appears as if it flows into the adjacent cell. Technically it does not enter in the second cell though. All of it is still contained in the original cell.

- 3) Saving an Excel workbook
 - a) To save your workbook (Excel file), click on the File menu command (top left of the screen on the menu bar) and then click on the entry Save.
 - b) As practice, save the workbook as "**John Budget**" (where your name is the first word in the name). Save the workbook to the folder that I specify during the workshop. Note that on your home computer, Excel will prompt you to save your files into a special folder called "My Documents". It is highly recommended that you store ALL personal files in the My Documents folder.
 - c) To **close** a workbook, you must click on the File menu option and then click on the Close command. This action will close the file but it will not close the program Excel.
 - d) As practice, close the workbook that you have just typed.

- e) As practice, reopen the workbook by using the File/Open... menu command.
- 4) Using Excel to create a quick and easy table with columns and rows.
- Many people consider it to be easier to use Excel than Microsoft Word to create a **table** with columns and rows. You simply type the desired column headings in cells towards the top of the worksheet and then type the applicable information in cells below.
 - Type "Budget" in cell C2. Type "Categories" in C5. Type "Jan" in E5.
 - You could type the rest of the months in cells to the right of the Jan entry but it is easier to use the **fill handle** to automatically fill in the months for you. Click any other cell and then make E5 the active cell again (that is, click in that cell.) Precisely click on the small black square in the lower-right corner of that cell and drag the mouse to cell J5. When you let go of the mouse button, you will notice that Excel was smart enough to fill in the consecutive months through June. The fill handle can be used in many situations like this to avoid unnecessary typing.
 - Type the category "Groceries" in C7. Type the categories "Mortgage" and "Entertainment" in cells C8 and C9 respectively.
 - Type the number 1000 in cell E8. Press the Enter key and then make cell E8 active again. Drag the fill handle to cell J8 in order to copy the 1000 entry to all months.
 - Enter the values 200, 230, 180, 150, 140, and 135 into cells E7 through J7 and enter the values 3000, 150, 170, 200, 80, and 300 in cells E9 through J9.

200	230	180	150	140	135
3000	150	170	200	80	300

- g) Save your workbook to prevent losing important data.
- 5) Add a **comment** to a cell in a table.
- To explain the rather high amount of money spent in Jan. on Entertainment, we will add a comment to cell E9.
 - Right-click cell E9 and then click the command Insert Comment.
 - Type "Bahamas cruise" and then click any other cell. You will notice that the comment is indicated by a red triangle in the cell. Anytime that you would like to read the comment in the future, you can pass your mouse over the cell or right-click the cell and choose the command Show Comment.
 - Save your workbook to prevent losing important data.
- 6) Compute subtotals of columns or rows.
- In cell K5, type the column heading Category Total.
 - In cell C11, type the row heading Monthly Total.
 - Make cell K7 the active cell and then double-click the **AutoSum button** on the toolbar at the top of the screen. This button is the funny-looking E (Greek letter sigma). The total 1035 should appear in cell K7 indicating the amount of money spent on Groceries from January through June.
 - Drag the fill handle from cell K7 to cell K9 in order to obtain the subtotals for the other categories as well. The values 1035, 6000, & 3900 should appear in cells K7, K8, & K9.
 - Click cell E11 and then double-click the AutoSum button to compute the subtotal for the month of January. The value 4200 should automatically appear in cell E11.

- 8) Print a worksheet.
 - a) At anytime, you can print a worksheet but you should first use the File/Print Preview menu command in order to look at it. You may have noticed the dotted line that cuts through the months of May and June. This indicates that the table will print out on two pieces of paper.
 - b) Click the File/Print Preview menu command to verify that the table fits across two pages and then click the button with the word Close on the toolbar.
 - c) To print the table "sideways", you must click the File/Page Setup menu command. Click the Landscape option and then click the OK button. The vertical dotted line now appears to the right of the table so the table will not be printed on two separate pages.
 - d) Type your name into cell A1.
 - e) Click the File/Print menu command and click the OK button in order to print your table.
 - f) Notice that the gridlines and row and column headings do not show on the printed version of the worksheet.
 - g) Save the workbook to prevent losing data.

- 9) Update a table after it has been designed.
 - a) Let's pretend that you made a mistake and meant to enter the value 180 for Entertainment in March. Simply double-click cell G9 and replace the 170 with 180. You may have to use the Backspace and/or Delete keys to erase the 170.
 - b) Notice that when you press the Enter key, a few of the totals on the worksheet automatically update. This demonstrates the true usefulness of Excel. You can change values in a worksheet and the formulas automatically update. In fact, many people use Excel to "try out" different numbers in their budget to see how much they can afford on certain purchases.
 - c) Click the column heading for column K. The whole column will be selected (and appear black.)
 - d) Right-click your mouse and click the command Insert.
 - e) A new column appears along you to enter data for the month of July. The totals are not affected. In fact, all of the affected formulas automatically change. Type Jul, 120, 1000, and 170 into cells K5, K7, K8, and K9 respectively. Notice that Excel automatically adds the necessary dollar sign and comma where appropriate.
 - f) Click cell K11 and double-click the AutoSum button. This provides an incorrect total in K11. Can you explain why?
 - g) Click the Edit/Undo menu command to erase this incorrect data and formula.
 - h) Click cell K11 to make it the active cell and click in the formula bar. Type the formula that would be necessary to compute the total expenses for June. Press the Enter key or click the green checkmark when you are finished.
 - i) Verify the formulas in L7, L8, & L9 to verify that they are still correct. If they are not fix them as well.
 - j) Delete one of the empty rows in your table by clicking the row heading 6 and choosing the Edit/Delete menu command. Notice that all of the totals remain accurate.
 - k) Save the workbook to prevent losing data.

- 10) Create a chart.
 - a) Select the range C5:L8.
 - b) Click the **Chart Wizard** button on the toolbar. It looks like a little bar chart.

- c) Click the Line entry on the left under "Chart type".
- d) Click the Finish button at the bottom of the window.
- e) Click anywhere in the white background area of the chart and drag it towards the bottom of the window in order to reposition the chart below the table.
- f) Save the workbook to prevent losing data.

Your worksheet should now look like this:

