

Easy Way



Teach yourself...

Microsoft Excel 2007

(Level 2)

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Written in plain English

A Cheryl Price Publication

Easy Way Microsoft Excel 2007 – Level 2

This book is designed to teach topics for learning Microsoft Excel 2007. It contains simple step-by-step exercises to guide you through the learning process.

There are dozens of exercises including consolidation exercises, both theory and practical at the end of each section.

The process of consolidation and accumulation of learning is unique to the Cheryl Price books.

Retrievable exercise files are used with this book. These are available for free download from our web site at www.cherylprice.co.nz. Instructions for downloading are included on the next page.

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Cheryl Price
T.Dip.WP, T.Dip.T

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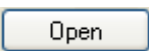




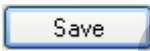
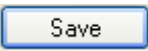
1	In your web browser, type: www.cherylprice.co.nz
2	Press Enter on the keyboard to display the Cheryl Price website.
3	Click on the Resources tab as shown at the right. 
4	Click on <u>Easy Way – Microsoft Excel 2007</u>
5	Click on the <u>Free download</u> hyperlink, ie Excel 2007, Level 2 Free download The File Download dialog box will display.
6	If you have Winzip use the following instructions otherwise move to step 7.
	a Click on  .
	b Click on the  of the  button.
	c If My Documents folder is not displayed click on Set default unzip folder at the bottom of the list. Ensure My Documents is selected then click on Select Folder .
	d Click on the  of the  button and click on the My Documents folder. The files will be unzipped.
7	Click on  and ensure My Documents folder is displayed. Click on 
8	Click on Open Folder which will display My Documents folder. Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files. You will need to double click on this folder to use the exercise files in this book.

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Section

1

Creating, Saving, Formatting and Editing Worksheets

Note

Section 1 revises some of the learning covered in the Cheryl Price book for Easy Way Excel 2007 – Level 1. It is recommended that you work through this section.

Learning Outcomes

At the end of this section you should be able to interpret -

☐ Theory

- Understand what a spreadsheet is, how it works and why you would use one.

☐ Spreadsheet Basics

- Create a new worksheet
- Enter and edit data in a worksheet
- Save and close a workbook
- Apply formatting to a worksheet – fonts, font size, borders, colour, alignment, number formats, etc
- Preview and print a worksheet
- Apply currency formats to data
- Copy and move data using the Clipboard or mouse
- Calculate dates and times

Sample Document

Spreadsheets

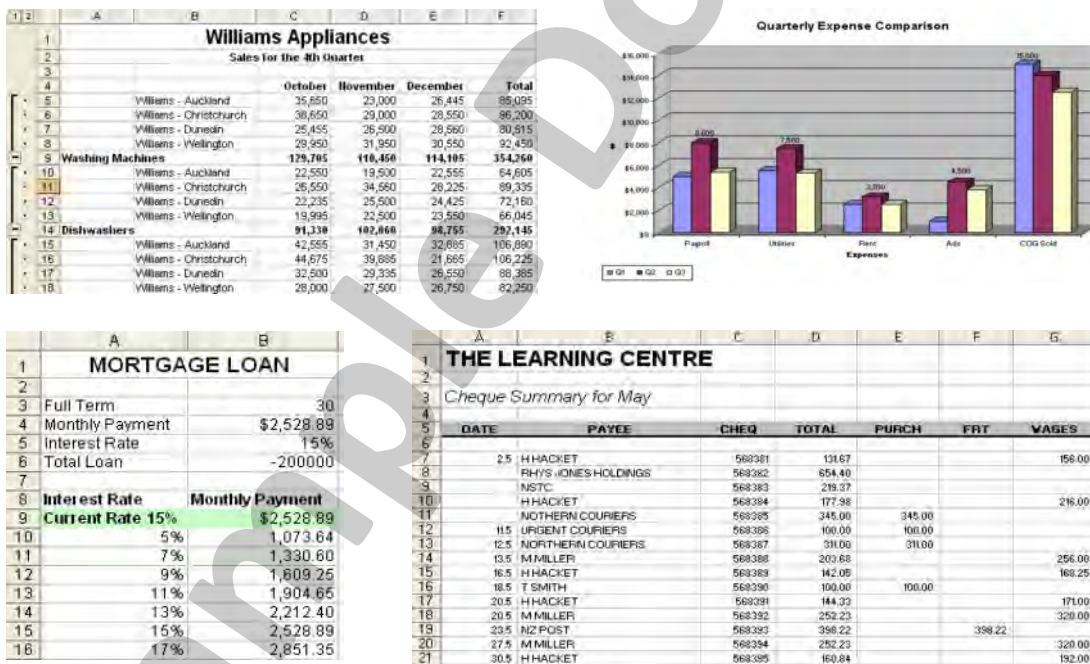
A spreadsheet is essentially a large working area composed of rows and columns. Electronic spreadsheets are very flexible and are widely used in industry and commerce for tasks such as financial accounts, forecasting results, recording and comparing data, and storing valuable information eg personnel details. Home users can create a budget, work out a savings scheme or calculate travelling expenses, while a school may use it to calculate and store examination results and student records.

In addition to Excel 2007, other spreadsheet programs include Lotus 1-2-3, Corel Quattro Pro, SuperCalc.

Advantages of Electronic Spreadsheets

- Calculations are performed quickly and easily.
- If data is altered, the results of calculations that use the data automatically adjust.
- Charts can be used to visually display data, eg bar, column, pie, line.
- Data can be manipulated, grouped and sorted into a specific order for lists, databases, etc.
- Data within a well organised spreadsheet can be quickly located.

Samples of Spreadsheets



Spreadsheet/Worksheet

The word *spreadsheet* is a general term for any document created by a spreadsheet program; a spreadsheet is referred to in Excel 2007 as a *worksheet*. Both of these terms are used throughout this book but they refer to the same thing.

The Workbook

A workbook is a single file in Excel. In each new workbook there are worksheets. When you open a new workbook it contains three blank worksheets by default. These worksheets are initially named *Sheet1*, *Sheet2*, *Sheet3*, but can be renamed. Multiple worksheets are normally used to display different data, eg a company might use a worksheet for each sales branch, then a final worksheet which totals all sales figures from each branch and displays a summary. Charts (graphs) can be created on separate chart sheets which are initially named *Chart1*, *Chart2*, etc., but these can also be renamed to something more descriptive.

Sheet tabs are displayed at the bottom of the screen. You can move from worksheet to worksheet by clicking on each sheet tab OR by pressing Ctrl & Page Up, or Ctrl & Page Down. If the space for displaying sheet tabs is not wide enough for all the tabs to be seen, the Tab Scroll buttons are used to scroll them.



Sydney

JESSIE'S CLOTHING STORES				
SALES FOR 1ST QUARTER 2010 - SYDNEY				
	January	February	March	TOTALS
Cogee	1,060	2,156	3,265	6,481
Mossman	2,387	2,555	2,896	7,838
Lane Cove	1,050	1,195	1,195	3,440
Padstow	1,457	1,895	1,895	5,247
TOTAL	\$ 5,954	\$ 7,801	\$ 9,251	\$ 23,006

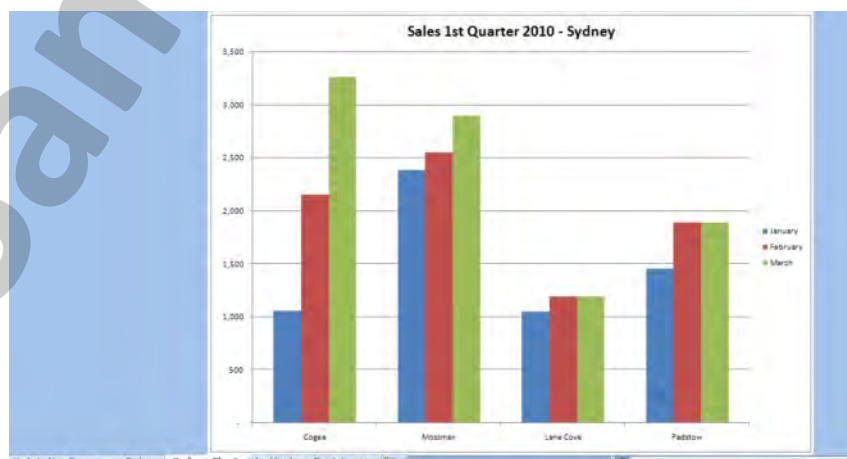
Auckland

JESSIE'S CLOTHING STORES				
SALES FOR 1ST QUARTER 2010 - AUCKLAND				
	January	February	March	TOTALS
Avondale	1,200	1,350	1,475	4,025
St Lukes	1,245	1,145	1,330	3,720
Shore City	1,345	1,435	1,545	4,325
Central	1,600	1,550	1,890	5,040
TOTAL	\$ 5,390	\$ 5,480	\$ 6,240	\$ 17,110

Christchurch

JESSIE'S CLOTHING STORES				
SALES FOR 1ST QUARTER 2010 - CHRISTCHURCH				
	January	February	March	TOTALS
Avonhead	1,500	1,350	1,295	4,145
Papanui	1,455	2,300	1,655	5,410
Woodend	1,267	1,500	1,676	4,443
Lyttleton	1,056	1,875	1,555	4,486
TOTAL	\$ 5,278	\$ 7,025	\$ 6,181	\$ 18,484

Each sheet tab can contain a break down of different areas/costings, etc within a workbook. A chart can be placed on a separate chart sheet.



Sydney Chart

Formulas

Basic Formulas

In an electronic spreadsheet a formula always starts with =

This identifies that the cell contains a formula and not general data. Cell references, numbers, and operators are used to create formulas.

Cells and Cell References

A cell is where a column and row meet in a spreadsheet. A cell reference (the name of a cell) is made up of two parts - the column letter, eg C and the row number, eg 5. The example below has the value 380 entered into cell C5.

	A	B	C	D	E	F
1	Car Valet Sales before GST					
2	January-March 2011					
3						
4		January	February	March	Total	
5	Full Car Valet	780	380	570	1730	
6						

Operators

Operators are used in a formula to specify mathematical operations. There are five basic operations that can occur in formulas: exponentiation, multiplication, division, addition, and subtraction.

Operator Symbols

+	Addition	/	Division
-	Subtraction	*	Multiplication
^	Exponentiation		

A few examples of formulas are shown below.

	A	B	C	D	E	F	G
1	Car Valet Sales before GST						
2	January-March 2011						
3							
4		January	February	March	Total	GST	Average Sales
5	Full Car Valet	780	380	570	1730	259.50	576.67
6							

The formula in cell E5 is: =B5+C5+D5 It is adding up the numbers in B5, C5 and D5.

The formula in cell F5 is: =E5*15% It is calculating the GST amount by multiplying the Total by the current GST rate of 15%.

The formula in cell G5 is: =E5/3 It is calculating the average monthly sales by dividing the total in E5 by 3 (for the three months January, February and March).

Formulas and Functions

Formulas can be straightforward calculations as shown in the previous example, or more complicated formulas or functions.

Functions are pre-defined calculations that are part of the Excel program.

The basic syntax for a function is =FUNCTION NAME(Arguments). The arguments are usually references to the cells containing the values that the function will use.

Function names often give you an idea of what the function does, eg SUM adds up all the cells in a given range, while AVERAGE calculates the average amount in a given range of cells.

It would have been simpler to use functions to calculate the Total and Average sales in the previous example.

The function in E5 would read: =SUM(B5:D5)

The function in F5 would read: =AVERAGE(B5:D5)

The colon (:) indicates an inclusive range of cells, ie in these examples, B5 through D5.

Parentheses

If a formula includes more than one operation (eg multiplication and subtraction), Excel follows a strict “order of precedence” when it carries out a calculation. Any exponentiation (using the ^ operator) is done first; then multiplication (*) and division (/); finally addition (+) and subtraction(-). If you want to override that sequence, you must put parentheses (ie brackets) around that part of the formula that you want done first. Look at the following examples and see how parentheses can affect the result.

	A	B	C	D	E	F
1						Result
2	Example 1	4	4	4	=B2+C2+D2/2	10
3	Example 2	4	4	4	4=(B3+C3+D3)/2	6

Example 1:

This example follows the standard sequence. The division is done first, and the result of that is added to the remaining two numbers.

Example 2:

In this example parentheses have been placed around the addition operations, so they are carried out first. The result of that is then divided by 2, giving a different result.

Exercise 1

- If you were to calculate the following sums in a worksheet taking into account the effect parentheses has on a calculation, what would the answers be?

$$6+6+8/2 = \dots\dots\dots$$

$$(6+6+8)/2 = \dots\dots\dots$$

Creating a Workbook

In the following exercise you will create a new spreadsheet in an Excel 2007 workbook.

Exercise 2

- Click on the Start button at the bottom left of your screen, select Programs, Microsoft Office then click on Microsoft Office Excel.

A new workbook is displayed on the screen.

Entering Cell Contents

Data can be entered into any cell in a worksheet. Data can be text, numbers, or formulas. Remember, a formula always begins with the = sign. Data can be entered into a worksheet when the mode indicator at the bottom left of the screen displays *Ready*. If this is not displayed press the Esc key on the keyboard until *Ready* appears.

Text

Text is any combination of letters, numbers, spaces, punctuation, etc. Text data is automatically aligned at the left of the cell. If the text is wider than the cell, it will display over the top of the adjacent cell(s).



D
May



In the exercise that follows you will enter data into a cell.

Exercise 3

- 1 Ensure cell A1 is selected.
- 2 Type: **Car Valet Sales before GST**

	A	B	C
1	Car Valet Sales before GST		

When data is entered into a cell, two buttons appear to the left of the Formula Bar, the Enter button  and Cancel button .

- Clicking on the Enter button  will enter the data you have just typed into the cell and keep the same cell selected.
- Pressing Ctrl Enter will also enter the data and keep the same cell selected.
- Pressing the Enter key will enter the data and move down to the next cell in the column.
- Clicking on the Cancel button  will cancel the entry.
- Pressing the Esc key will also cancel the entry.

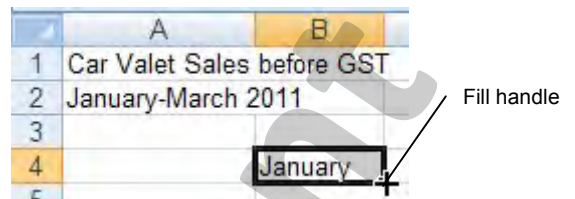
- 3 Press the Enter key.
- 4 Type: **January-March 2011**
- 5 Press Enter.

	A	B
1	Car Valet Sales before GST	
2	January-March 2011	

Entering Months using the Fill Handle

Exercise 4

- 1 Click on cell B4.
- 2 Type: **January** and press Ctrl Enter (to stay in cell B4).
- 3 Position the mouse pointer on the fill handle of the cell, as shown at the right.
- 4 Hold the left mouse button and drag to the right to cell D4. Release the mouse button. You should now have January through to March entered into cells B4 to D4.
- 5 Click on cell E4 and type: **Total** Press Enter.
- 6 Click on cell A5 and type: **Full Car Valet** Press Enter.
- 7 Press Ctrl Home to move to cell A1.



Widening Columns

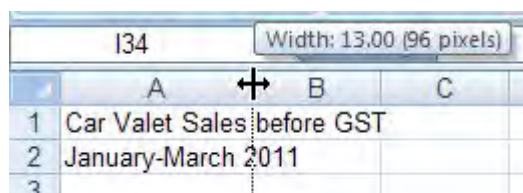
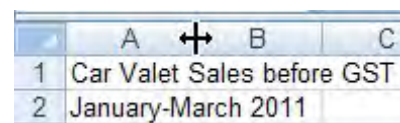
When data is inserted into a cell it may extend beyond the width of the column.

- Text that is wider than the column width may be displayed across several cells: the data is still contained within the one cell, it just covers other cells. If the adjacent cell(s) contain their own data that takes precedence, and the display of the data in the left cell will be truncated, although the full data remains in the cell.
- Numbers entered that exceed the column width will display an exponential figure or will display ##### within the cell. The column will widen slightly.

Changing the Width of a Single Column

Exercise 5

- 1 To widen column A so that cell A5 can display all its data, position the mouse pointer between the column A and column B header as shown at the right.
- 2 Click and hold down the left mouse button. Drag to the right to increase the column width. A box will indicate the width of the column. Drag to the right until 13.00 appears as displayed below, then release the left mouse button.



Entering Data into a Spreadsheet

By pre-selecting cells you can ensure that the data you type is entered only into those selected cells.

Exercise 6

- 1 Click and drag across cells B5 to D5.
- 2 Type: **780** Press Enter. This will move the cursor to the next cell.
- 3 Type: **380** Press Enter.
- 4 Type: **570** Press Enter.
- 5 Turn off cell selection by clicking on another cell or moving to another cell using one of the arrow keys.

	A	B	C	D
1	Car Valet Sales before GST			
2	January-March 2011			
3				
4		January	February	March
5	Full Car Valet	780	380	570

If you have made an error, select the incorrect cell and amend it using the Editing techniques described below.

Editing Within a Cell

Exercise 7

Cell entries can be altered directly within the cell. You will now change the entry in cell A2 to read *January-March 2012*.

- 1 Double click on cell A2 (OR with cell A2, selected press F2). Press the End key to move to the end of the text. When you double click on a cell the insertion point is positioned where you double clicked.
- 2 Press the Backspace key once, then type: **2**
- 3 Click on the Enter button ☒ OR press Ctrl Enter.

Deleting

To delete the contents of a cell, click on the cell and press the Delete key. To delete the contents of a range of cells, select the cells then press the Delete key.

Exercise 8

- 1 Click on cell A5.
- 2 Press the Delete key.

The Delete key will remove only the *contents* of the cell.

For other options, click on  Clear in the Editing group of the Home tab. Select the most appropriate action from:



<i>Clear All</i>	clears all formats, cell contents and notes
<i>Clear Formats</i>	clears format settings, ie cell alignments, font styles, etc
<i>Clear Contents</i>	clears only the cell contents
<i>Clear Comments</i>	clears any comments attached to the cell

Undo


If you make an error when editing, the Undo feature allows you to cancel your last action.




Exercise 9

- Ctrl Z ➤ Click on the Undo button  on the Quick Access Toolbar. This will redisplay the text Full Car Valet in cell A5.
- Clicking on the Undo drop-down arrow  displays a list of previous actions, from which you can select an action to undo. The most recent action will be at the top of the list. Selecting an action will undo it and any other actions above it in the list.

Redo


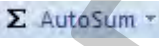
The Redo button is used to reverse the Undo command. (By clicking on the drop-down arrow  you can see a list of “redo” actions, used in the same way as for Undo.)

Exercise 10

- Ctrl Y 1 Click on the Redo button  on the Quick Access Toolbar.
- 2 Click on Undo again so that the text Full Car Valet reappears in cell A5.


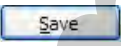
Applying Bold to text and Totalling a Row

Exercise 11

- 1 Press Ctrl Home to move to cell A1. With the cell selected click on the Bold button  on the ribbon. (You will learn more about formatting on page 9.)
- 2 Click on cell E5. Click on  twice. This will create a Sum function that will calculate the total sales. (You will learn more about functions later in this book).

Saving the Workbook File


Exercise 12

- Ctrl S 1 Click on the Save button  on the Quick Access Toolbar. The Save in: box will display the default folder (My Documents).
- 2 With Book1 selected in the File name: box type: **Car Valet**
- 3 Click on .

The workbook file has been saved into your working folder (usually My Documents). For the exercises in this book continue to save and open all workbook files from/to the default folder.

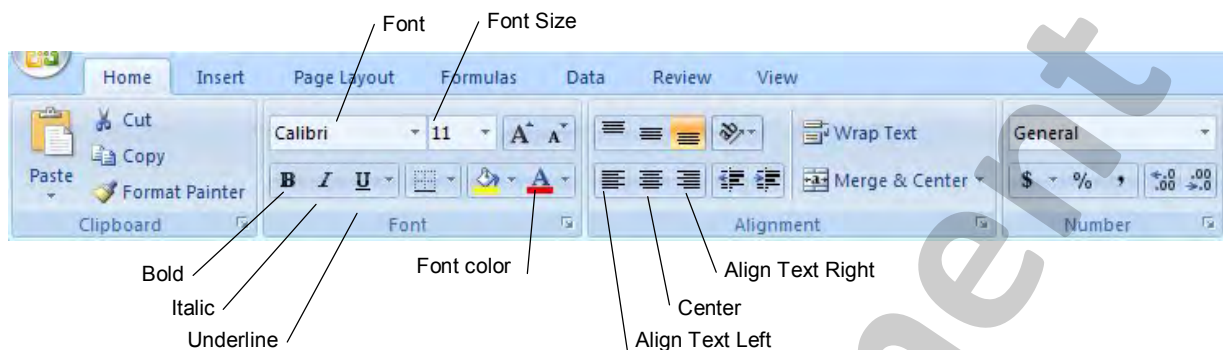
Closing a Workbook

Exercise 13

- Alt F4 ➤ Click on the Close Window button . Before the workbook is closed, you may be asked to save any changes made: if this happens click on Yes.

Fonts

A font is an individual typeface design. Changing the font type and size allows you to emphasise areas in a worksheet.



In addition to using the Formatting buttons shown above, options can be changed in the Format Cells dialog box where fonts and formatting changes can be previewed before applying them to cells. Ensure fonts used fit the purpose and style of the worksheet.

Format Cells, Font tab Dialog Box

a) Select the cells to be formatted.

Ctrl 1 b) Right-click on the selection and choose Format Cells...
The Format Cells dialog box is displayed.

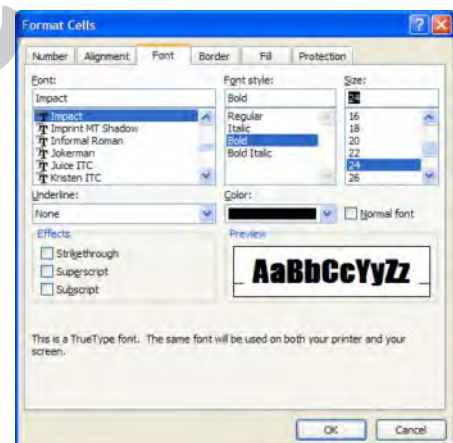
Note The Format Cells dialog box can also be

displayed by clicking on on the Home tab,
and then choosing Format Cells...

c) Click on the Font tab.

d) Select the font, font style, size and any other formatting required.

e) Click on OK.




Tips

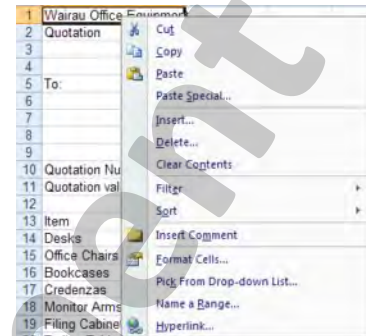
- In Excel 2007 individual words or characters in a cell can contain different formatting, eg **Sale Prices - December 2010**
- To alter the default font for every workbook, click on the Microsoft Office Button , then on Excel Options. Select options from the *Use this font:* and *Font size:* shown below. Click on OK.





Formatting your Worksheet

Exercise 14

- 1 Open the workbook called **Wairau Office Equipment**.
- 2 Right-click on cell A1. A drop down menu appears as shown at the right.
- 3 Choose  **Format Cells...**. The Format Cells dialog is displayed. Click on the Font tab.
- 4 Apply the font called Impact and change the font size to 24 pt.
- 5 Click on Bold in the Font style: box then click on OK.

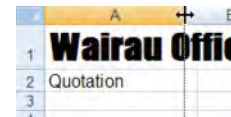


Use the Formatting buttons on the ribbon to change fonts and effects as follows.

- 6 Change the font for the subtitle in cell A2 to Arial 12 pt.
- 7 Click on cell A5. Click on the Bold button  and the Italic button .
- 8 Format cells A10 and A11 to italics.
- 9 Select cells A13 to D13. Click on the Bold button.
- 10 Apply bold to cell A26.

The Formatting buttons on the ribbon are a quick and efficient method of applying fonts and formats. Features such as Bold or Italic can be turned on or off by clicking on the appropriate button.



- 11 Widen column A until all the text in cells A10 to A24 are displayed.
- 12 Save the workbook.

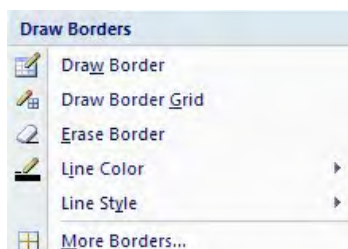


	A	B	C	D
1	Wairau Office Equipment			
2	Quotation			
3				
4				
5	To:			
6				
7				
8				
9				
10	<i>Quotation Number:</i>			
11	<i>Quotation valid till:</i>			
12				
13	Item	Quantity	Price	Total Cost
14	Desks	10	300	
15	Office Chairs	15	175	
16	Bookcases	5	95	
17	Credenzas	8	195	
18	Monitor Arms	6	85	
19	Filing Cabinets	4	300	
20	Trolley Tables	2	50	
21	Reception Desk	1	1200	
22	Reception Chairs	4	75	
23	Lunchroom Table	1	350	
24	Boardroom Table	1	550	
25				
26	TOTAL			


Borders and Patterns

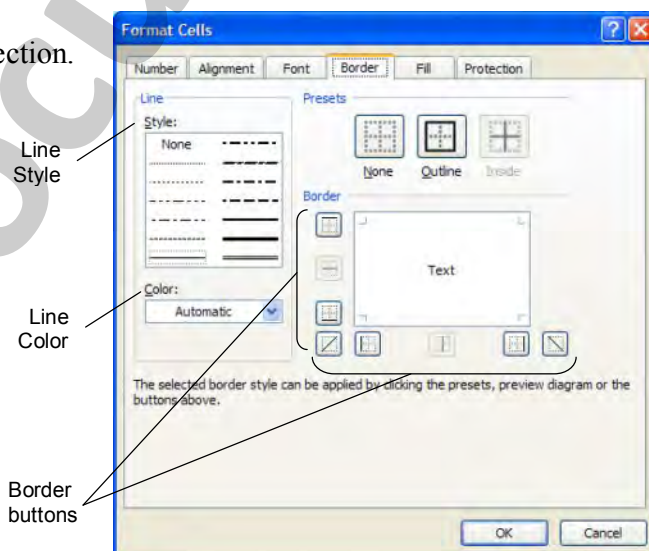
Borders Button

Borders (lines) can be inserted into a worksheet using the Borders button . From the Borders button you can click on the  and select the style of border required. Also, a line style and colour can be applied using the buttons displayed under the Draw Border section in the Borders drop down menu as shown below.










Format Cells, Border tab Dialog Box

- Ctrl 1
- Select the cells required and right-click on the selection.
 - Choose  **Format Cells...**. Click on the Border tab in the Format Cells dialog box.
 - Select the line style and line colour required in the Line section.
 - Click on a preset button OR click on a Border button to apply a border. To remove a border click on the relevant Border button to turn off the border OR select None.
 - Click on OK.



Removing Borders

Borders can be removed as follows.

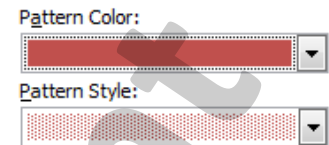
- Select the cells with the border style applied. Click on the  of the Borders button and choose  **No Border**.
- Select the cells with the border style applied and right click on the selection. Choose  **Format Cells...**. Click on the Border tab in Format Cells. Click on None. Click on OK.
- Select the cells with the border style applied. Choose  **Clear** in the Editing group on the Home tab. Choose  **Clear Formats** (remember this will also clear number formats and alignments).
- Click on the  of the Borders button and choose  **Erase Border**. This turns the mouse pointer into an eraser so lines can be removed by selecting them with the mouse.

Adding Colour



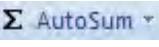
A colour fill can be applied to cells using the Fill Colour button  in the Font group on the ribbon.

Adding a Pattern

Patterns can be applied to cells by selecting the cells, right clicking on the cells, choosing Format Cells from the menu, and selecting a Pattern Color and Pattern Style from the Fill tab in the Format Cells dialog box.



Exercise 15

- 1 Use the Borders button  to apply border formats to the worksheet as indicated below.
- 2 Apply fill colours using the Fill Colour button .
- 3 Calculate the Total Cost column (Quantity x Price).
- 4 Use  to calculate the Total in cell D26.
- 5 Save the workbook.

	A	B	C	D
1	Wairau Office Equipment			
2	Quotation			
3				
4				
5	To:			
6				
7				
8				
9				
10	Quotation Number:			
11	Quotation valid till:			
12				
13	Item	Quantity	Price	Total Cost
14	Desks	10	300	3000
15	Office Chairs	15	175	2625
16	Bookcases	5	95	475
17	Credenzas	8	195	1560
18	Monitor Arms	6	85	510
19	Filing Cabinets	4	300	1200
20	Trolley Tables	2	50	100
21	Reception Desk	1	1200	1200
22	Reception Chairs	4	75	300
23	Lunchroom Table	1	350	350
24	Boardroom Table	1	550	550
25				
26	TOTAL			11870

Apply a bright yellow fill colour

To apply the fancy border use the Format Cells dialog box, Border tab

Top and Bottom Borders applied to cells

Calculate the Total Cost column

Top and Double Bottom Border applied to cells

Calculate using the AutoSum button