

CHAPTER

1

Excel Basics



Are you new to Excel, or upgrading to the latest version? This chapter shows you how to move around the Excel 2007 program window and work with new features.

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An Introduction to Excel

Microsoft Excel is the most popular spreadsheet program on the market today. You can use Excel to manipulate numeric data like a pro. You can also use the program to track and manage large quantities of data, such as inventories, price lists, expenses and expenditures, and much more. You can even use Excel as a database, entering and sorting records.



Crunch Numbers

Microsoft Excel is best known for its number-crunching features. For example, you can use Excel to quickly tally sales figures, figure averages, and summarize performance numbers for your entire department. You can also use Excel to track your home finances, set up budgets, and forecast future spending. Using Excel's built-in functions, you can perform any kind of mathematical calculation, from the simplest equation to the most complex formula.



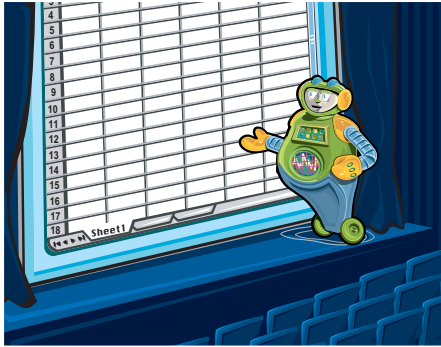
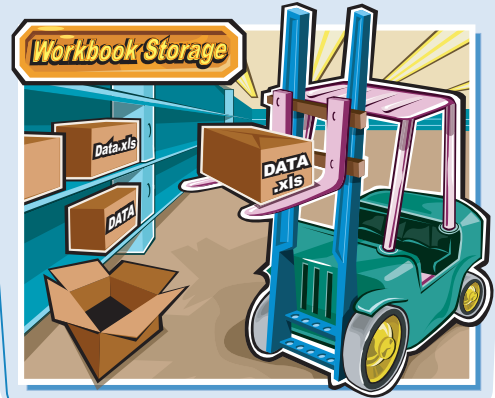
Organize Data

Microsoft Excel is also a great tool for organizing data, whether it is a large inventory list for a warehouse of items or simply a small collection of valuables in your home. The row and column format of an Excel spreadsheet is perfect for entering many types of data you need to track. After entering the data, you can perform various sorting operations to control how the data is listed.



Store Data in Worksheets and Workbooks

Data you enter into Excel is stored in a file, called a *workbook*. Excel 2007 workbooks are stored using the .xlsx file extension. Within each workbook, you can store numerous individual *worksheets* to hold your data. You can give your worksheets distinct names, link the data between worksheets, and add and delete worksheets as needed. Learn more about working with workbooks and worksheets in Chapters 2 and 4.



Present Data

You can use Excel's formatting tools to make your spreadsheet data easier to read and interpret. For example, you can add shading to cells, change the number format, or change the font and size of your data. Learn more about formatting worksheets in Chapter 7. You can present your worksheet data to others using charts and graphs. Excel's graphing and charting tools make it easy to turn your data into meaningful visuals, such as pie charts, bar charts, and more. You can learn more about creating charts in Chapter 10.

Share Data

You can share your Excel data with other users, add comments, track changes, e-mail workbooks, and more. You can import data from other sources into your Excel worksheets, or export your data into other file formats. You can also save your data as a PDF, XPS, or HTML file to share with others or post on the Internet. Learn more about sharing Excel data in Chapters 13 and 14.



Start and Close Excel

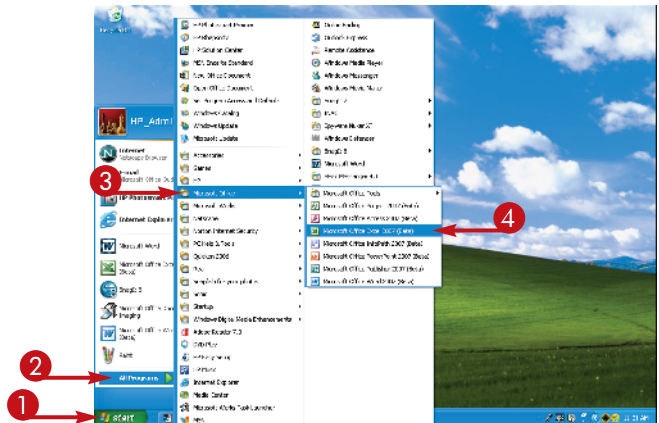
Before you begin working with Excel, you must open the program window. When you finish your work, you can close the window. If you want to save your work, do so before exiting Excel completely.



Start and Close Excel

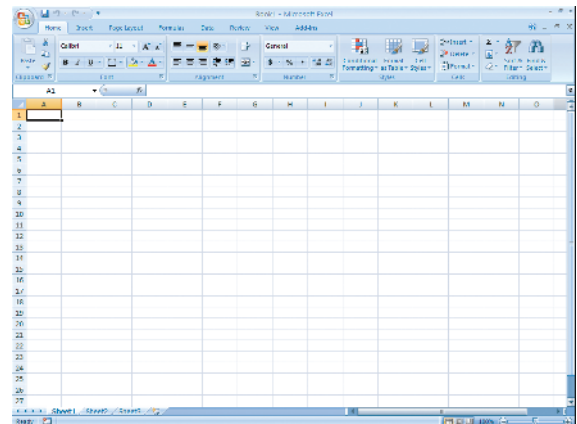
Start Excel

- 1 Click **Start**.
- 2 Click **All Programs**.
- 3 Click **Microsoft Office**.
- 4 Click **Microsoft Office Excel 2007**.



The Excel program window opens.

Note: See the section “Navigate the Excel Program Window” to learn how to identify different areas of the program window.



Close Excel

- 1 Click the **Close** icon (✕).

If this is the only open workbook, both the workbook and Excel will close.

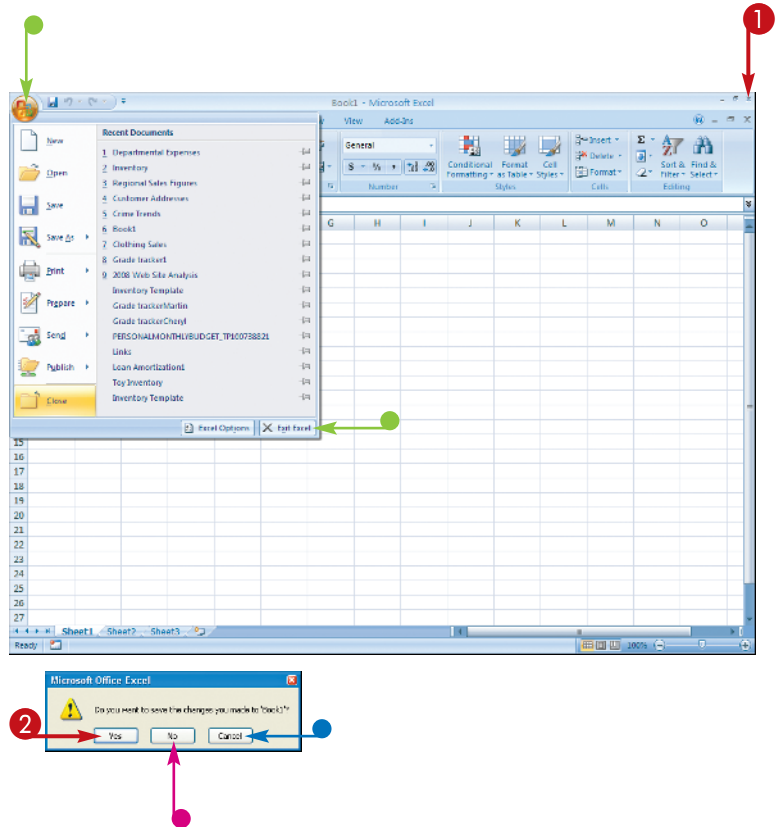
- You can also click the **Office** button (📌) and then click **Exit Excel**.

If you have not yet saved your work, Excel prompts you to do so before exiting.

- 2 Click **Yes** to save.

The Excel program window closes.

- If you click **No**, the program closes without saving your data.
- If you click **Cancel**, the program window remains open.



TIP

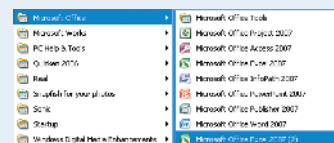
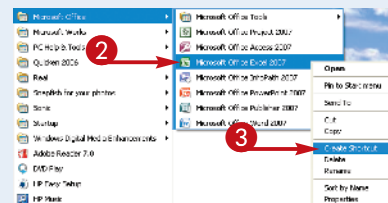
Can I create a shortcut icon for Excel?

Yes. You can create a shortcut icon that appears on the Windows desktop. Any time you want to open Excel, simply double-click the shortcut icon. Follow these steps:

- 1 Follow steps 1 to 3 in the subsection "Start Excel."
- 2 Right-click **Microsoft Office Excel 2007**.
- 3 Click **Create Shortcut** in the menu that appears.

- The shortcut appears at the end of the Microsoft Office menu.

- 4 Click and drag the shortcut to your desktop.



Navigate the Excel Program Window

The Excel 2007 program window displays several common elements found in most Office 2007 programs, including a Office button, the Ribbon, the Quick Access toolbar, and scroll bars. In addition, the Excel window features a Formula bar for entering mathematical formulas. If you are new to Excel 2007, take a moment and familiarize yourself with the on-screen elements.

Microsoft Office Button

Displays the File menu where you find commands to open, save, print, send, and publish files. In addition you can use commands here to close a file or exit Excel, and set Excel options.

Quick Access Toolbar

Displays frequently used features such as Save, Undo/Redo, and Print.

Title Bar

Displays the name of the open workbook file.

Formula Bar

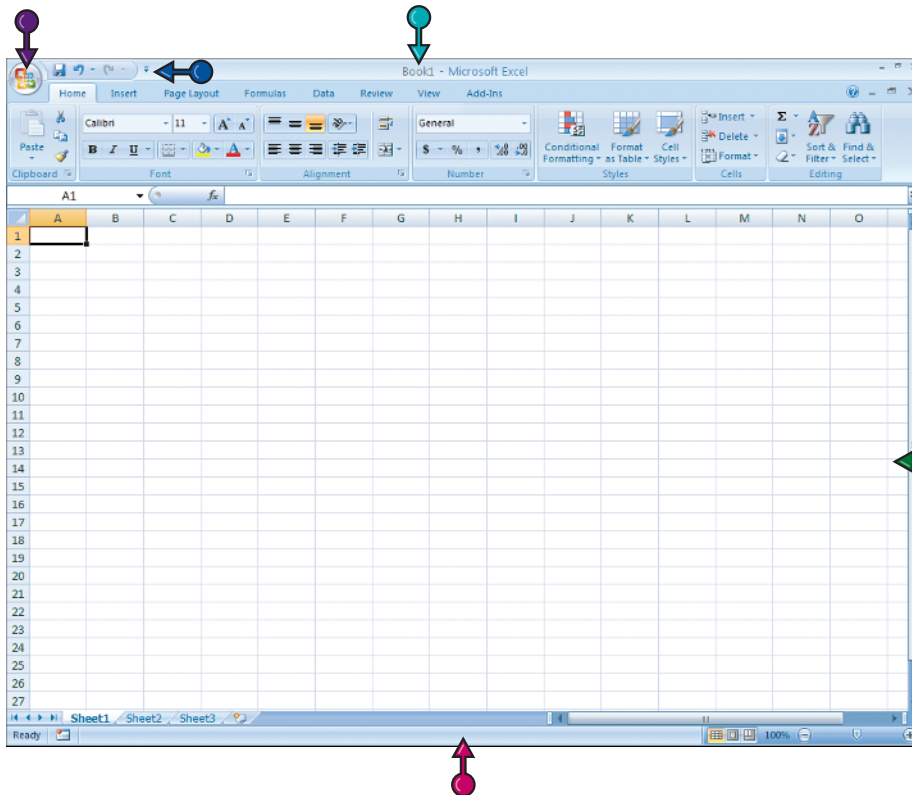
Use this bar to enter and edit formulas and perform calculations on your worksheet data.

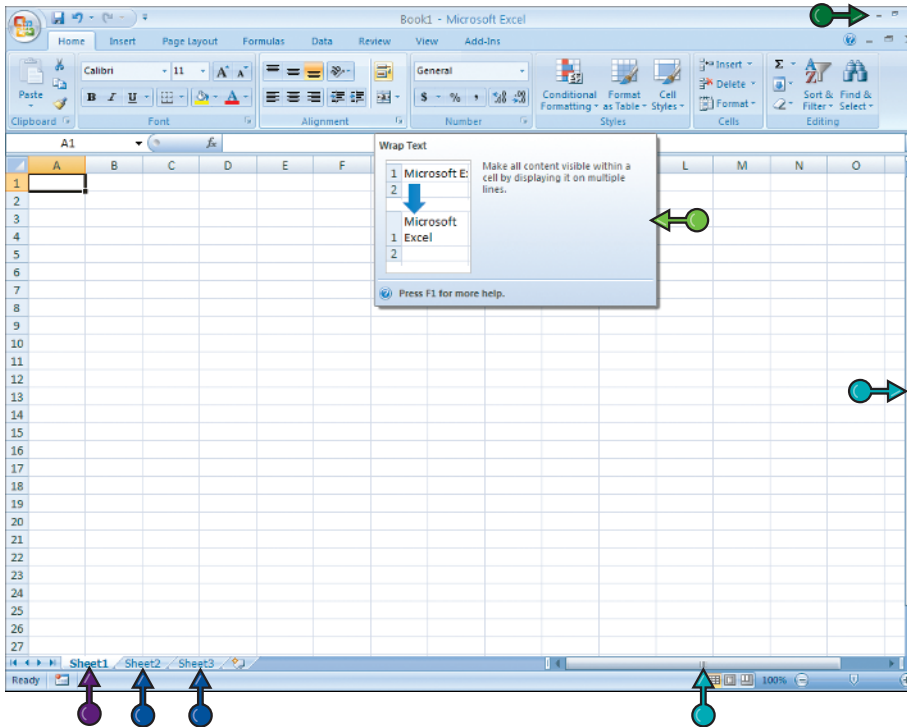
Worksheet

The worksheet consists of rows and columns that intersect to form cells. Cells hold your worksheet data.

Window Frame

Displays status information for the current worksheet or file, as well as view buttons and zoom controls.





Program Window Controls

Use these three buttons to minimize, maximize, or close the worksheet window.

Super Tooltip

Appears when you place your mouse over a choice on the Ribbon, explaining what a feature does and providing a link to related help information.

Active Worksheet

The active worksheet appears in the Excel work area, and its tab appears highlighted.

Worksheet Tabs

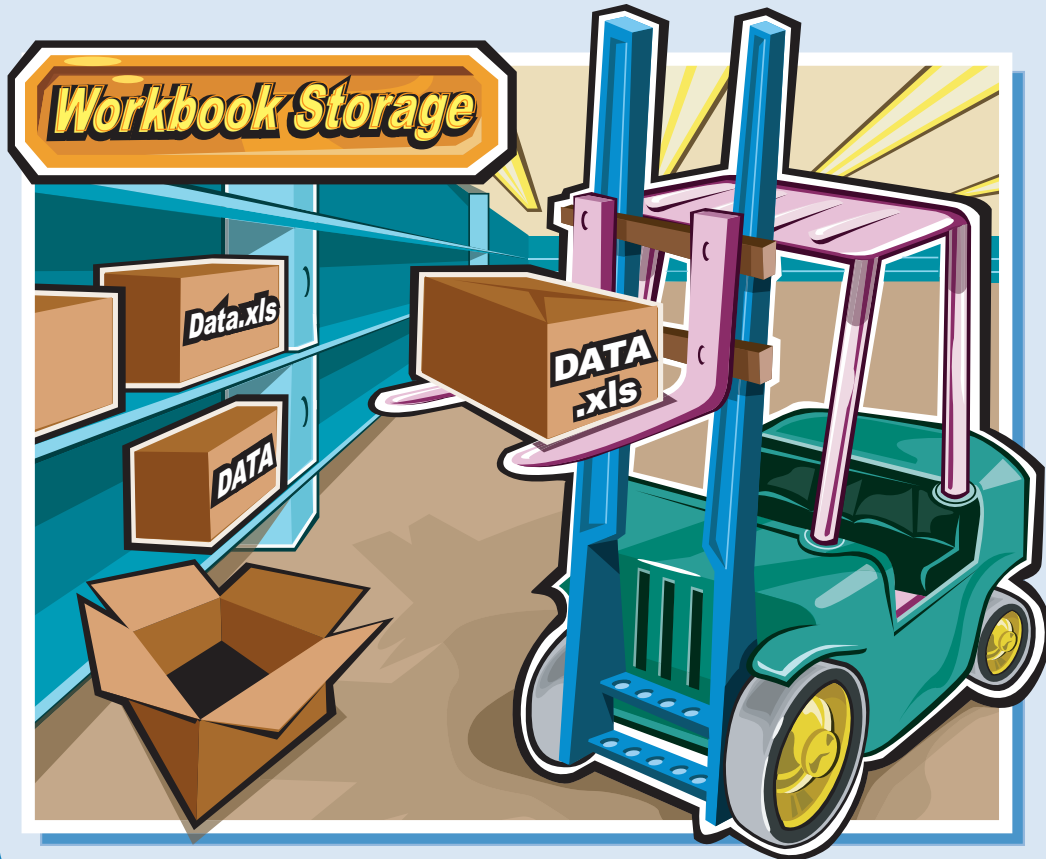
You can use worksheet tabs to view different worksheets in your workbook file.

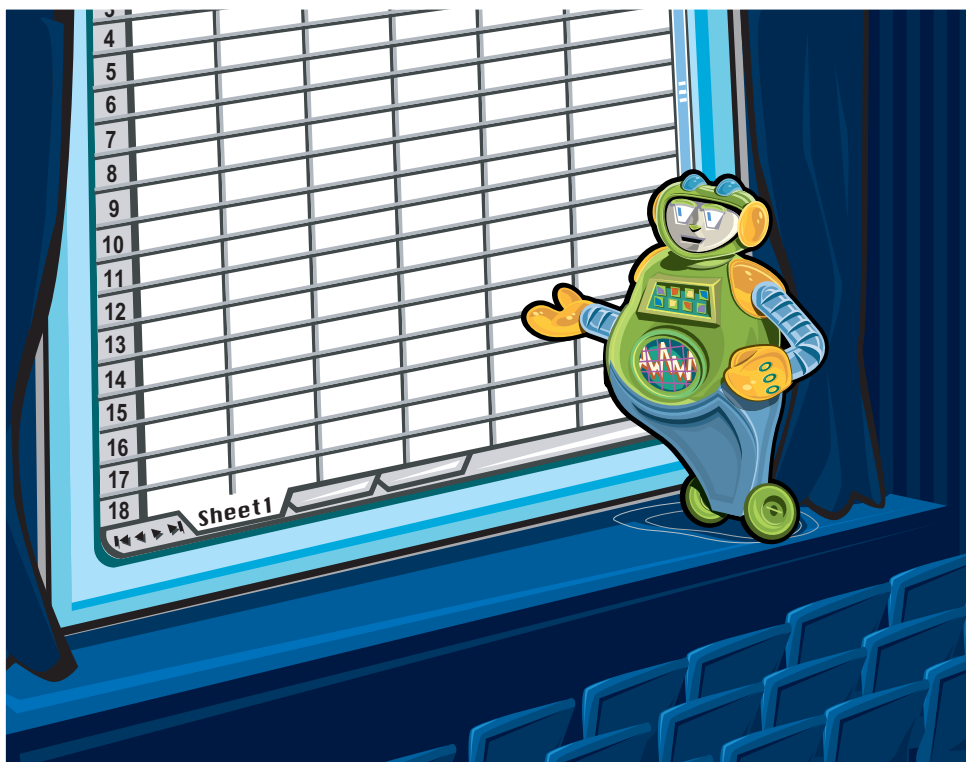
Vertical and Horizontal Scroll Bars

Scroll vertically or horizontally through a worksheet.

Understanding the Ribbon, Galleries, and Contextual Tools

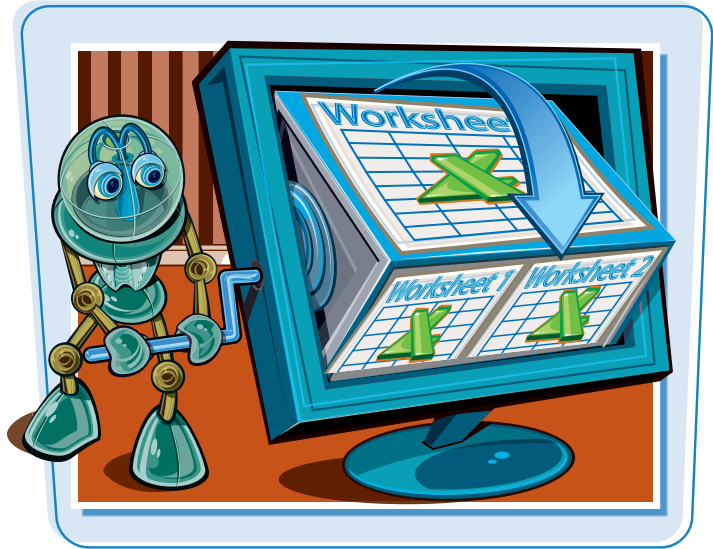
The Excel 2007 program window has many new tools to help you accomplish your work. The Ribbon replaces toolbars and menus in previous editions of Excel. Galleries of options allow you to preview results of choices before you apply them. Contextual Tools appear when and where you need them.





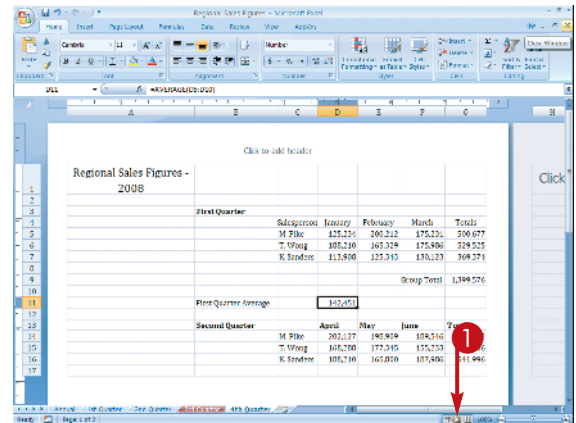
Change Views

Excel offers different views of your worksheets, depending on what you are currently doing. The Normal view shows one continuous page of columns and rows. The Page Layout view displays your worksheets on individual pages that correspond to printed pages. The Page Break Preview indicates page breaks with lines; you can click and drag these lines to modify where pages break.

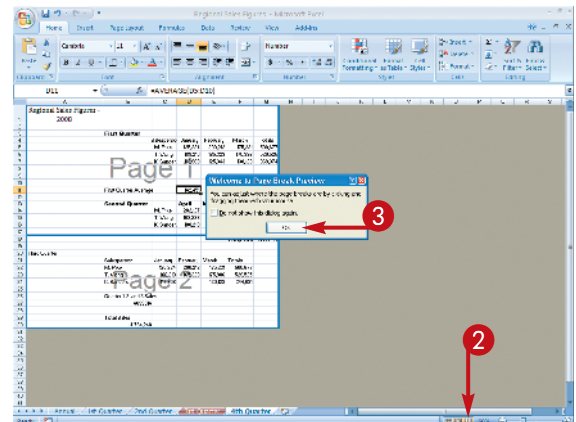


Change Views

- 1 Click the **Page Layout View** icon () .
- The Page Layout view appears.

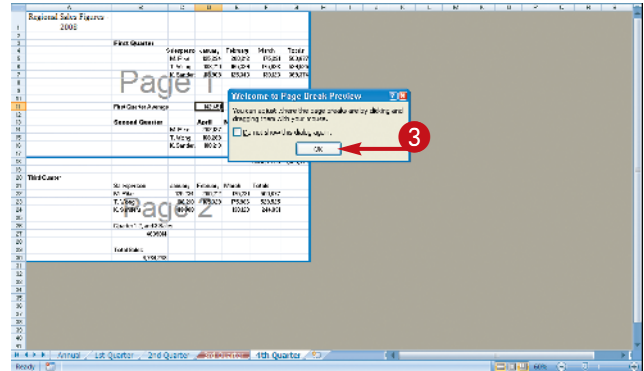


- 2 Click the **Page Break Preview** icon () .



The Welcome to Page Break Preview dialog box appears.

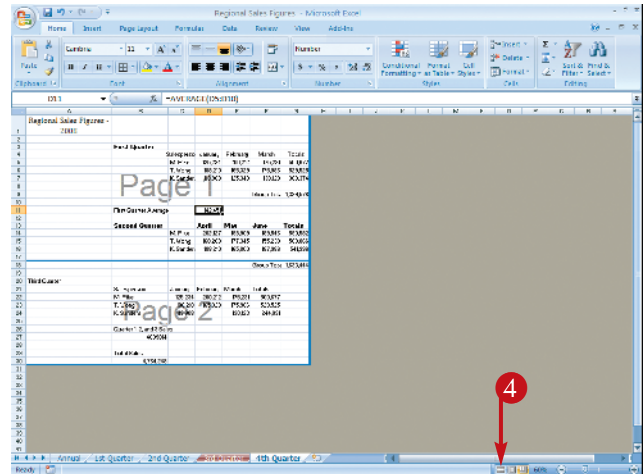
3 Click **OK**.



Note: If you do not want to see this dialog box when you enter this view, click **Do Not Show This Dialog Again** (☐ changes to ☒) before Step 3.

4 Click the **Normal icon** (🏠) to return to Normal view.

The Normal view is displayed.



TIPS

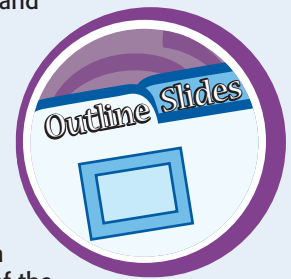
Why would I want to use the Page Break view?

You can preview where a printed page will break and move around page breaks before printing by using a click and drag method. See Chapter 9, Previewing and Printing, for more about inserting page breaks.



Can I view my Excel worksheet without the various tools showing?

Yes. Click the **View** tab and then click the **Full Screen** button. This removes the Ribbon and title bar from your view. To go back to the regular Excel screen, just press @@Esc or click the Restore Down button in the upper-right corner of the



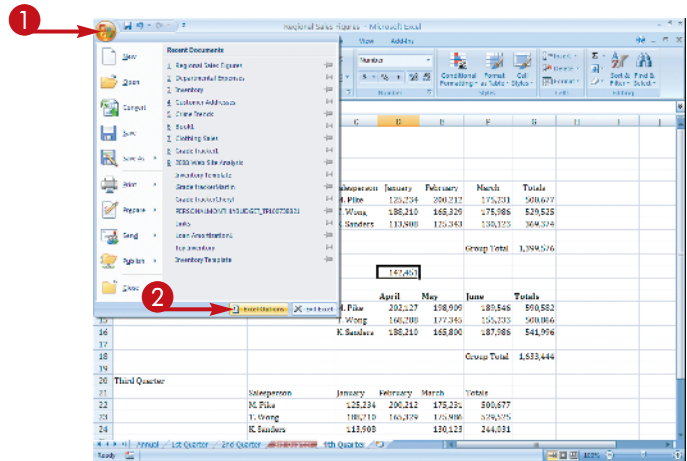
Customize the Quick Access Toolbar

The Quick Access Toolbar contains four tools by default: Save, Undo, Redo, and QuickPrint. If there are other tools you often use and want immediate access to, for example, the command to create a new file, you can place them on the Quick Access Toolbar.



Customize the Quick Access Toolbar

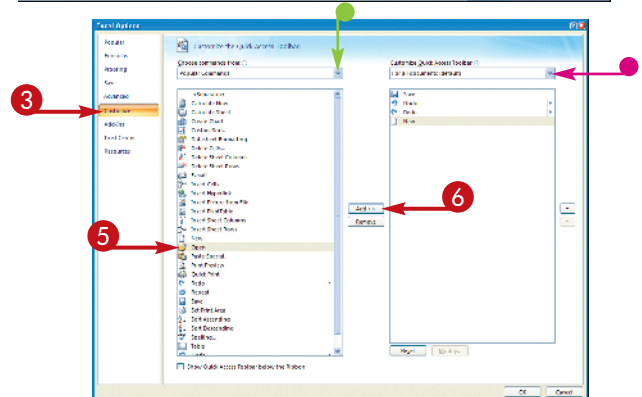
- 1 Click .
- 2 Click **Excel Options**.



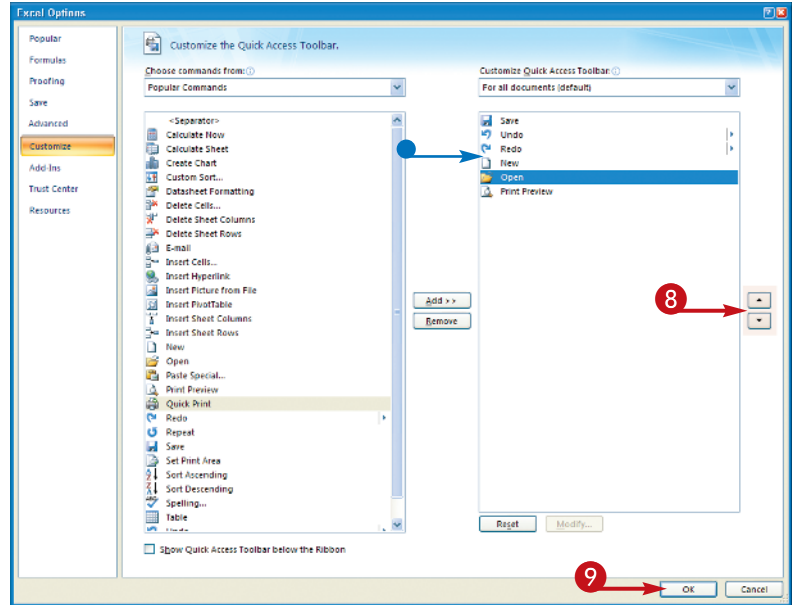
- 3 Click **Customization**.
- 4 Make any of these selections:

- Click here to select the category of commands.
- Click here to specify whether changes are for this document only or for all documents.

- 5 Click a command.
- 6 Click **Add**.



- 7 Repeat steps 4 through 6 to add other commands.
- The commands appear in the list of Quick Access commands.
- 8 Click these arrows to move commands up or down in the list.
- 9 Click **OK** to save your changes.



- Click any tool to use a Quick Access command.



TIPS

Can I get back to the original Quick Access Toolbar settings?

Yes. In the Customize area of Excel Options, click **Reset**. This removes any commands you added. In the confirmation box that appears click **OK** to save the changes.



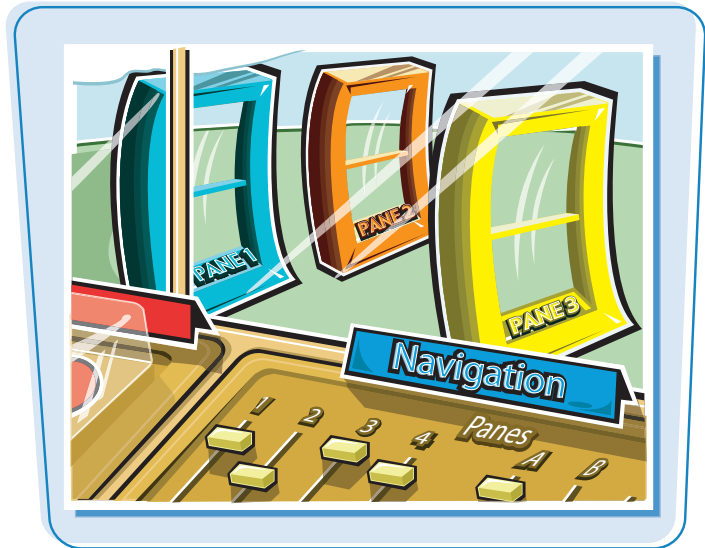
Is there a quicker way to add or remove a tool to the Quick Access Toolbar?

Yes. Right-click any tool on the ribbon and choose Add to Quick Access Toolbar. To remove a tool on the toolbar, right-click it and choose Remove from Quick Access Toolbar.



Display Task Panes

Task panes are like onscreen dialog boxes that allow you to search or insert information on specific topics. For example, you can display a Research task pane to search for information on a topic or a Clip Art task pane to search for art in various media. You can close task panes at any time to free up workspace on-screen.

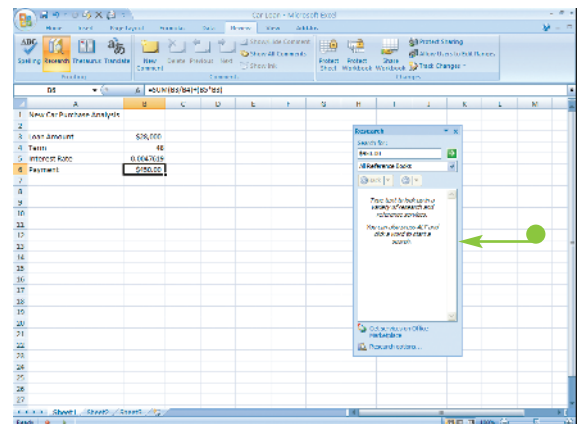
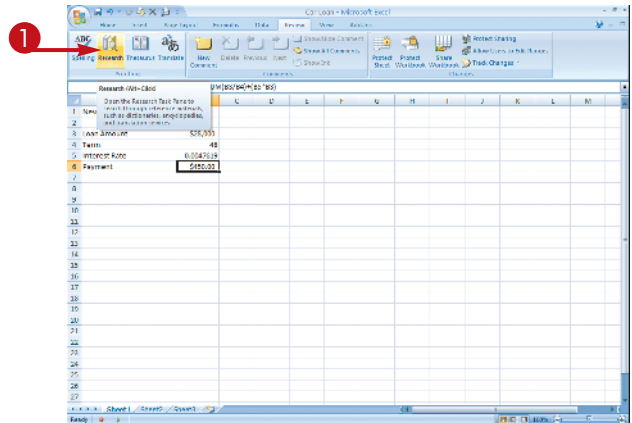


Display Task Panes

Display Panes

- 1 Click an item in the ribbon that displays a task pane (such as Proofing, Research, or Clip Art).

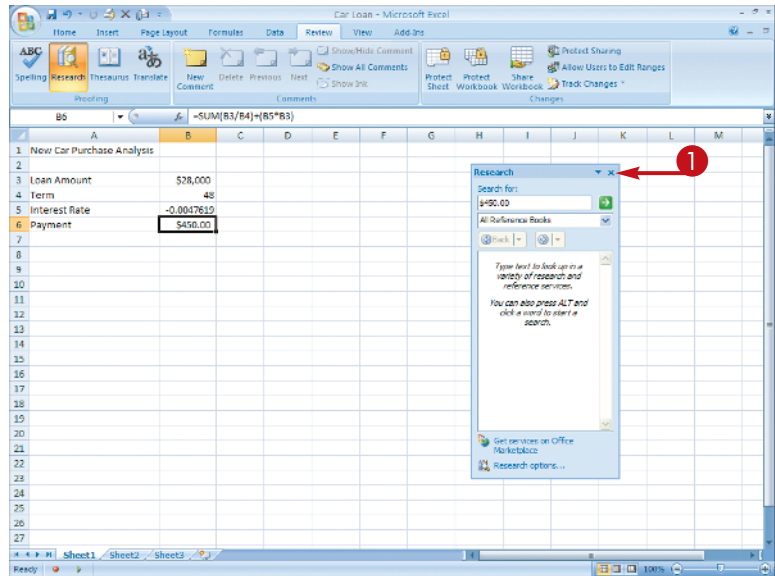
- Excel displays the pane.



Close the Pane

1 Click .

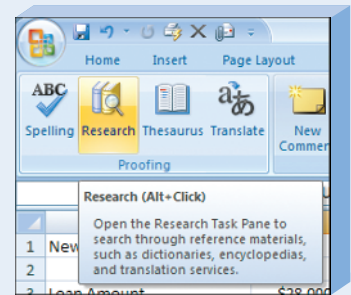
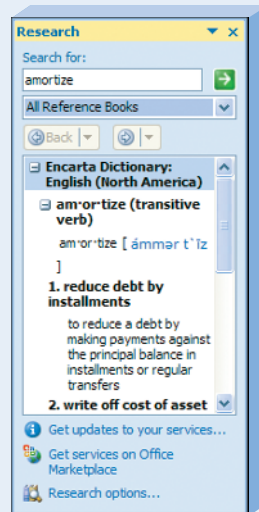
The pane closes.



TIP

Can I switch between panes?

In Office 2003, you could use a navigation tool in any task pane to display others. In Excel 2007, navigation tools are not available. You must first click the appropriate tab and then the appropriate tool to display a task pane. Consider task panes to be a variation of a dialog box; clicking a tool on a tab might display a dialog box or a task pane, and either one is easily used to do what you need to do.



Find Help

You can use the Excel Help tools to assist you when you run into a problem or need more explanation about a particular task. With an Internet connection, you can use Microsoft's online Help files to quickly access information about an Excel feature. The Help window offers tools for searching for topics you want to research.

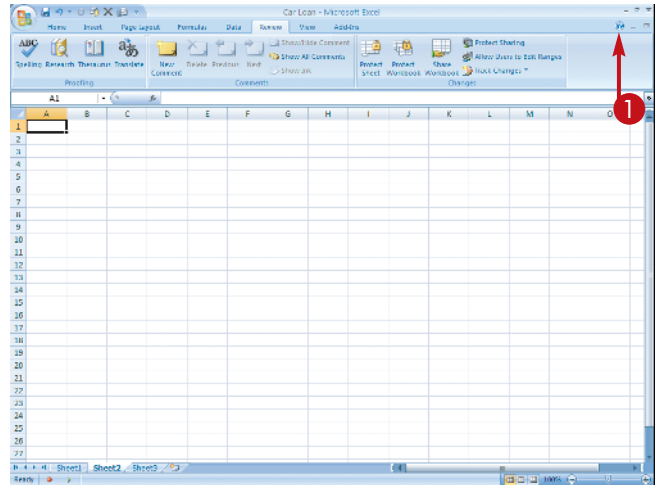
You must log onto your Internet connection in order to use the online Help files.



Finding Help

1 Click the **Help** icon (🔍).

Note: See the section "Display Task Panes" to learn more about viewing task panes.



The Excel Help window opens.

2 Type a word or phrase you want to research.

3 Click **Search**.

You can also press **Enter** to start the search.


4 You can click the **Show Table of Contents** icon (📖) to look for topics in the table of contents.

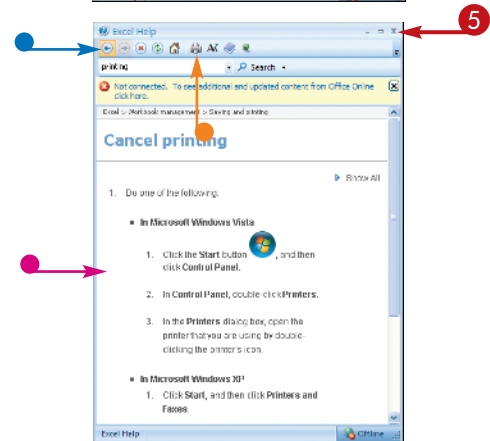
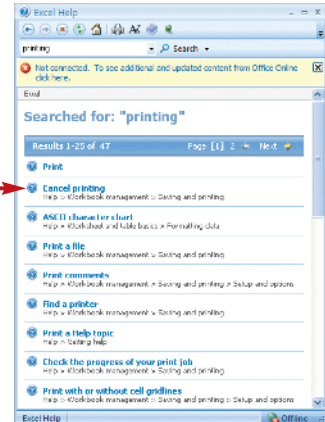


Help displays a list of possible matches.

- 4 Click a link to learn more about a topic.


The Microsoft Excel Help window opens, and you can read more about the topic.

- You can click links to learn more about a subject.
- You can click the **Back** icon (←) and the **Forward** icon (→) to move back and forth between Help topics.
- You can click the **Print** icon (🖨) to print the information.
- 5 Click  to close the window.



TIP

Can I keep the Help window open as I work through a problem?

Yes. To keep the Help window open even as you work within your document, click the **Keep on Top** icon (📌) in the Help window. When you no longer need the window, click .

