

Introduction to

Excel 97 and 2000

June 11, 2002

University of Maryland Libraries

Staff Learning and Development

Clare Sebok

Skills you will learn in this Excel class:

- ◆ *rename worksheets*
- ◆ *navigate between worksheets*
- ◆ *enter and edit text*
- ◆ *navigate on a worksheet*
- ◆ *extend column and row size*
- ◆ *enter numerical data*
- ◆ *format numerical data*
- ◆ *use Autofill*
- ◆ *customize Autofill*
- ◆ *insert new rows, columns, and sheets*
- ◆ *use AutoSum*

- ◆ *add, subtract, multiply, and divide with formulas*
- ◆ *copy a formula to another area*
- ◆ *use the Average, Sum, Min, and Max functions*
- ◆ *Include data from different worksheets in a formula*
- ◆ *format a worksheet with the toolbar*
- ◆ *format a worksheet with the Format Cells menu*
- ◆ *save a workbook*
- ◆ *sort worksheet data*
- ◆ *convert worksheet data to a graph*

1. Rename a worksheet

⇒ Right-click on worksheet tab.

⇒ Select **Rename**.

⇒ Type new name.

2. Go back and forth between worksheets

⇒ Click on worksheet tab.

⇒ Use arrows if all tabs are not visible.

3. Enter and edit text

⇒ Type text in active cell (cell with black border).

⇒ To edit text already entered, make corrections in the
formula bar, not the cell.

⇒ When finished, press **Enter** or **Tab**.

4. Navigate around the spreadsheet

- ⇒ **Enter** (go to next row).
- ⇒ **Tab** (go to next cell in same row).
- ⇒ Use arrow keys.
- ⇒ Use the mouse (point and click on any cell).

5. Extend column or row size

- ⇒ To make a column wider, click and drag the line between column headers (A|B).
- ⇒ Another way to make a column wider is to double click on the line between column headers (A|B).
- ⇒ To make a row taller, click and drag the line between row numbers.

6. Enter numerical data

- ⇒ Be consistent with decimal points.
- ⇒ Format the whole column at once.

7. Format numbers

⇒ Select column (click on column header or click on last cell in column and drag upwards.)

- ⇒ Right-click on selected area.
- ⇒ Choose **Format Cells**.
- ⇒ Select **Currency**.
- ⇒ Click **OK**.

8. Use Autofill

- ⇒ Type the first item in a series (examples: January or Sunday).
- ⇒ Click and drag the square in the lower-right corner of the cell.

(When you want Excel to recognize a pattern in a series of numbers, you have to enter and select two items in the series before dragging the little square.)

To create your own Autofill list :

- ⇒ Click on **Tools**.
- ⇒ Click on **Options**.
- ⇒ Click on **Custom Lists**.
- ⇒ Click on **Add**.
- ⇒ Type your list in the box or copy a list from your worksheet by entering the cell range in the window next to "**Import list from cells**" and clicking on the **Import** button.
- ⇒ Click **OK**.

9. Insert new rows, columns, and sheets

- ⇒ Click on **Insert**.
- ⇒ Click on **Rows**, **Columns**, or **Worksheet**.

*(The new one will go **before** the active cell or sheet.)*

10. Use AutoSum

- ⇒ Click on an empty cell under the column of numbers you want to add.
- ⇒ Click on the **Sigma** icon on the toolbar.
- ⇒ Press **Enter**.

11. Add, subtract, multiply, and divide with formulas

See separate handout.

12. Copy a formula

⇒ Click on the cell that has the formula you want to copy. (The formula of the active cell appears in the formula bar.)

⇒ Click on **Edit**.

⇒ Click on **Copy**.

⇒ Click on the new cell where you want the formula to go.

⇒ Click on **Edit**.

⇒ Click on **Paste**.

*(Keyboard shortcuts in Windows are **Control-C** to copy and **Control-V** to paste.)*

13. Use the Average, Sum, Max , and Min functions

See separate handout.

14. Include data from different worksheets in a formula

⇒ Start typing a formula in the cell where you want the answer to appear.

⇒ When you get to the part of the formula that requires information from another sheet, go to that sheet and click on the cell you want to include.

⇒ Press **Enter**.

You can also enter the entire formula by hand. Here is an example:

=B13 - sheetname!B7

15. Experiment with formatting options (font, size, text color, background color, justification, borders) using the toolbar

⇒ Highlight the area to be formatted.

*(Use **Control-A** to select the entire sheet.)*

*(Use **Control-Z** to undo your previous step.)*

The following elements of the toolbar appear from left to right:

Font: Use menu.

Size of font: Use menu.

Bold, italic, or underline: Use letters on toolbar.

Justification: Use icons with lines.

Borders: Use icon with squares. (Click on little arrow to show options.)

(The gray default borders will not appear on a printout. You have to add borders if you want them to print. When you add these borders, they will be black on your screen.)

Background color: Use paint bucket icon. (Click on little arrow to show options.)

Text color: Use **A** icon. (Click on little arrow to show options.)

16. Experiment with formatting options (font, size, text color, background color, borders, patterns) using the Format Cells menu

⇒ Highlight the area to be formatted.

*(Use **Control-A** to select the entire sheet.)*

⇒ Right-click on the highlighted area.

⇒ Choose **Format Cells**.

⇒ Click the appropriate tab.

⇒ Select options.

⇒ Click **OK**.

*(The **Format Cells** menu has options not found on the toolbar.)*

17. Save a workbook

⇒ Select the **File** menu.

⇒ Click on **Save**.

⇒ Enter the file name.

⇒ Click on **Save**. *(This saves all the spreadsheets as one file.)*

18. Sort worksheet data

⇒ Select all cells to be sorted, *including other columns that will be affected*.

⇒ Select the **Data** menu.

⇒ Click on **Sort**.

⇒ Choose the column to sort by.

⇒ Choose **ascending** or **descending** order (to alphabetize text, choose **ascending**).

⇒ Choose **Header Row** or **No Header Row**.

⇒ Click **OK**.

19. Convert worksheet data to a graph

⇒ Select the cells containing the information to be converted. (The original spreadsheet will remain intact; the graph just copies the data.)

⇒ Click on **Chart Wizard** (In Excel 97, the icon is on the toolbar to the left of the globe icon. In Excel 2000, the Chart Wizard is at the left of the ? icon.)

⇒ Choose a type of chart (try **Column** or **Bar**).

⇒ Press the button that says **Press and Hold to View Sample**.

⇒ Click **Next**.

⇒ Check the data range to make sure it includes what you want the chart to cover.

⇒ Click **Next**.

⇒ Type a title for the chart.

⇒ Click **Next**.

⇒ Choose where to place the chart.

⇒ Click on **Finish**.

⇒ Change the size of the chart by dragging the squares. If some of the sections are not labeled, enlarging the chart may make more text appear.

⇒ If you want to change fonts and colors, right click on an area of the graph, choose **Format _____**, and change menu options.

20. Future practice

For more help in learning Excel, you can borrow a book from the Staff Training Library. The following books covering Excel are available:

[Excel 2000 for Windows for Dummies:Quick Reference](#)

[Running Microsoft Excel 97](#)

[Teach Yourself Microsoft Office 97](#)

[Teach Yourself Microsoft Office 2000](#)

Learn more about the Staff Training Library:

<http://www.lib.umd.edu/TRAINING/trlibrary.html>

You can also use Steve Spohn's Excel tutorial on the Staff Development Web page:

<http://www.lib.umd.edu/TRAINING/stfdevelop.html>

Keyboard Shortcuts

Control-A **Select All**

Control-C **Copy**

Control-V **Paste**

Control-X **Cut**

Control-Z **Undo**