



# Introduction to Excel 2003

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## Workshop Objectives

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- Definition and functions of spreadsheets
- Basic components of Excel
- Creating workbooks and worksheets
- Navigation
- Data entry
- Formatting (data and cells)
- Creating simple formulas
- Printing
- Creating graphs and charts

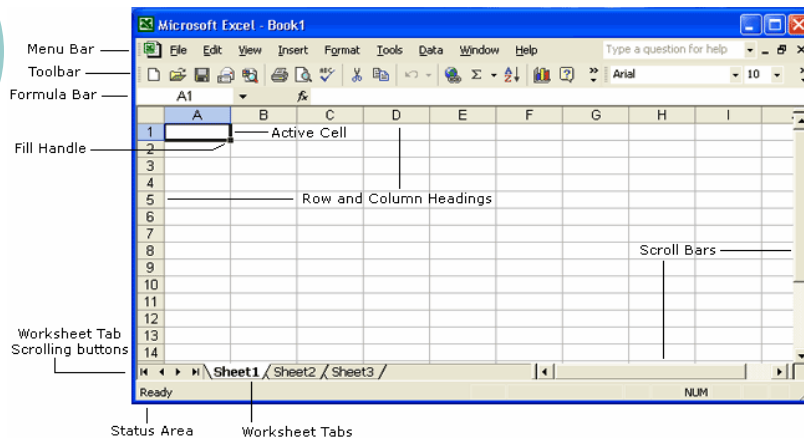
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## Definition and Functions

- An electronic ledger developed to ease time-consuming numeric calculations like budgets, grades, etc.
- Functions as a simple database, allowing easy manipulation of data to include search and sort, etc.

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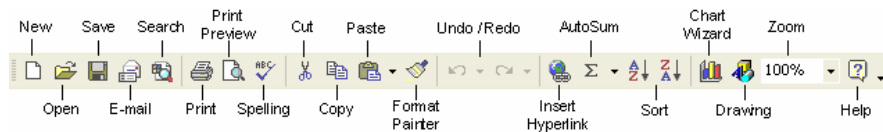
## Basic Terms and Features



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## Basic Terms and Features

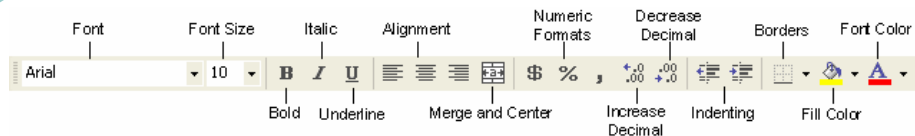
- **Standard Toolbar**
- **The Standard toolbar, located beneath the menu bar, has buttons for commonly performed tasks like adding a column of numbers, printing, sorting, and other operations. Excel let's you customize the toolbar or even display multiple toolbars at the same time. The Standard Excel XP toolbar appears in the figure below.**



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## Basic Terms and Features

- **Formatting toolbar**
- **The Formatting toolbar, located beneath the Standard toolbar bar, has buttons for various formatting operations like changing text size or style, formatting numbers and placing borders around cells.**

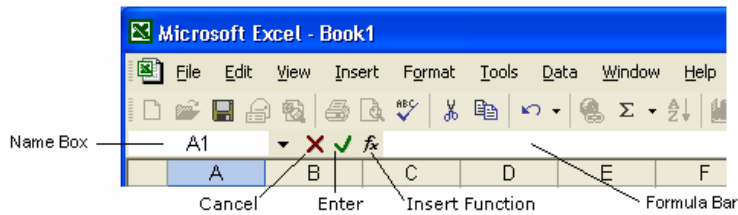


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# Basic Terms and Features

- o **Formula bar**

The formula bar is located beneath the toolbar at the top of the Excel worksheet. Use the formula bar to enter and edit worksheet data. The contents of the active cell always appear in the formula bar. When you click the mouse in the formula bar, an X and a check mark appear. You can click the check icon to confirm and completes editing, or the X to abandon editing.

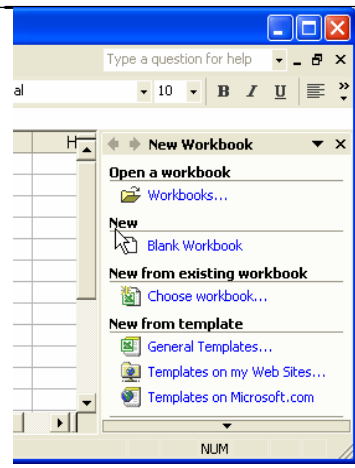


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# Creating a New Workbook

- o **File** menu, choose **New**  
Task Pane will open

- o **Toolbar**



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## Creating/Adding a Worksheet

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- Select **Insert**, then **Worksheet**
- Go to a worksheet tab, right click on your mouse, choose **Insert**, if worksheet icon is highlighted in blue, hit **OK**

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## Naming/Renaming a Worksheet

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- Move cursor to the worksheet tab you want to name
- Right click on your mouse
- Choose **Rename**
- The worksheet tab will be highlighted
- Hit the delete key to erase current name
- Type in the new name for the worksheet
- Select **File, Save, or Save As** or use toolbar icon to save changes

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## Naming a New Workbook

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- Go to **File**, then **Save**, or toolbar icon of a diskette
- Delete highlighted name in the **File Name:** box
- Type in desired file name and click **Save** to complete the save procedure

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## Practice #1

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- Create a new workbook
- Name the workbook "Fall\_2006"
- Create and label four worksheets
- Name worksheet #1 "Dec 06"
- Name worksheet #2 "Sep 06"
- Name worksheet #3 "Oct 06"
- Name worksheet #4 "Nov 06"

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## Moving/Copying a Worksheet

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- Go to the worksheet tab you wish to copy
- Right click on your mouse
- Select **Move** or **Copy**
- Check the box for **Copy** if you wish to retain the original worksheet where it is currently located
- **To book** (use drop down box to select desired workbook)
- **Before Sheet** will place your worksheet in front of the one highlighted in the box

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## Practice #2

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- Open a new workbook "Spring\_2006"
- Go back to workbook "Fall\_2006" and move the worksheets so that the sheets are in month order (Sept, Oct, Nov, Dec)
- Add four more worksheets to the "Fall\_2006" workbook. Name the worksheets Jan 06, Feb 06, Mar 06, April 06, May 06
- Move these new worksheets into the "Spring\_2006" workbook

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## Navigation

Refer to the table below for additional information on using the keyboard to navigate a worksheet.

To move	Press this key
One cell left	Left Arrow
One cell right	Right Arrow
One cell up	Up Arrow
One cell down	Down Arrow
To top of worksheet (cell A1)	Control Home
To last cell containing data	Control End
To end of data in a column	Control Down Arrow
To beginning of data in a column	Control Up Arrow
To end of data in a row	Control Right Arrow
To beginning of data in a row	Control Left Arrow

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## Data Entry

- **Entering Data**
  - Label (text)
  - Values (numbers and dates)
- **Editing Data**
  - Select the cell and retype entry (works well with numbers)
  - Use the formula bar (works well with text)
- **Clearing Cell Contents**
  - Choose **Clear** from the **Edit** menu
  - Press the **Delete** key

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## Data Entry

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- **Undoing Mistakes**

- Use the **Undo** command on the **Edit** menu
- Use the **Undo** tool to correct the mistake

- **Copy Data**

- Copy selected data from one cell to another with the **Copy** and **Paste** commands
- Use the **Drag and Drop** procedure

- **Move Data**

- Use the **Cut** and **Paste** commands
- Use the **Drag and Drop** procedure

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## Practice #3

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Type in the following data:

	Equipment	Travel	Personnel Total
Dept 1	\$ 1,000.00	\$ 15,000.05	\$36,400.00
Dept 2	\$ 4,800.00	\$ 6,659.98	\$20,005.00
Dept 3	\$ 7,230.98	\$ 34,647.23	\$56,122.47
Total			

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## Formatting Columns/Rows

- o Select column(s) you wish to change, go to **Format** menu, choose **Column** then **Width**, then type a number (represents the no. of characters that will fit in the cell. Default is Helvetica 10pt) or choose **Best Fit** to automatically widen the largest label
- o By dragging column borders
- o Repeat same steps to format rows. Select **Row** instead of column

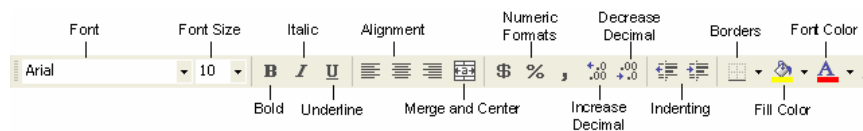
ABC.XLS		
C	D	E

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## Formatting Data

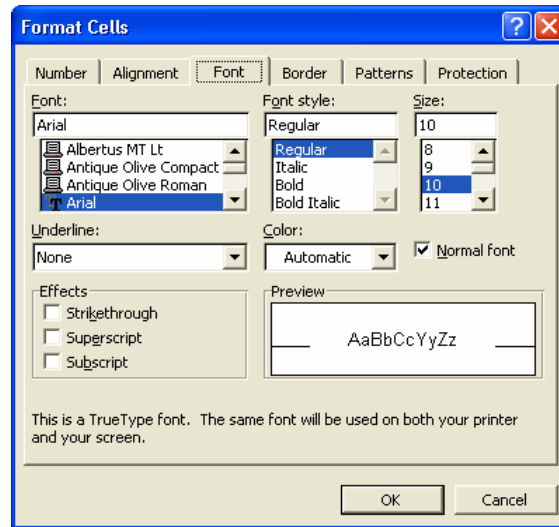
### Changing formats using the toolbar

Excel has a **Formatting toolbar** to simplify basic formatting tasks. The **Formatting toolbar** appears in the figure below.

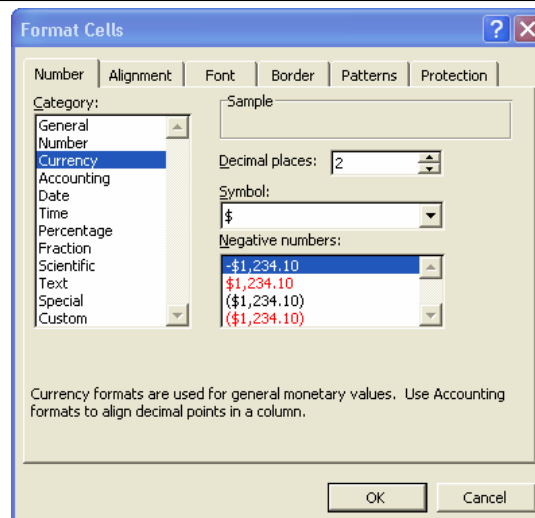


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## Formatting Cells (Font)

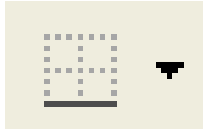


## Formatting Cells (Numbers)



## Formatting Cell (Borders/Shading)

- Format Dialog box
- Toolbar



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## Practice #4

Format your data to resemble the example below:

	Commodities	Equipment	Personnel	Total
Dept. 1	\$ 1,000.00	\$ 15,000.05	\$ 36,400.00	
Dept. 2	\$ 4,800.00	\$ 6,659.98	\$ 20,005.00	
Dept.3	\$ 7,230.98	\$ 34,647.23	\$ 56,122.47	
<b>Total</b>				

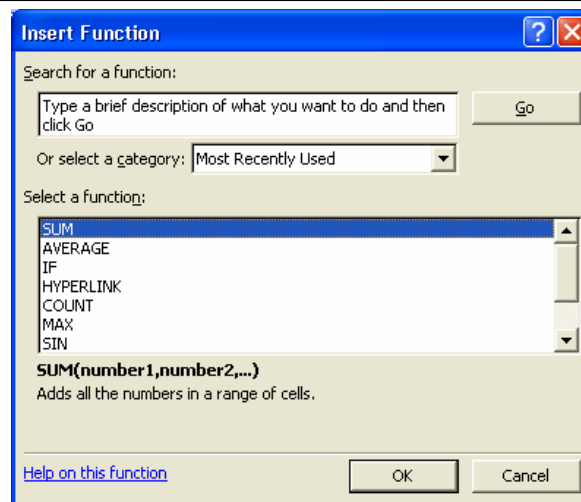
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## Building a Formula

- Select the cell in which you want the results to appear
- Go to **Insert Function**
- The **AutoSum** screen will appear
- Move the highlighted bar to the desired function (Sum, If, Average, etc.) or category

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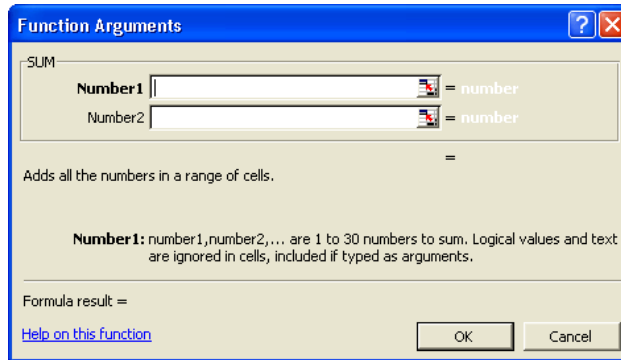
## Formula (AutoSum)



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## Copying Formula

- Position the mouse on the Fill Handle at the bottom, right corner of the cell
- When the mouse changes into a crosshair, press and drag over the cells you want included in your formula
- Watch the cells show up in the function argument box. Hit OK when all values have been selected.



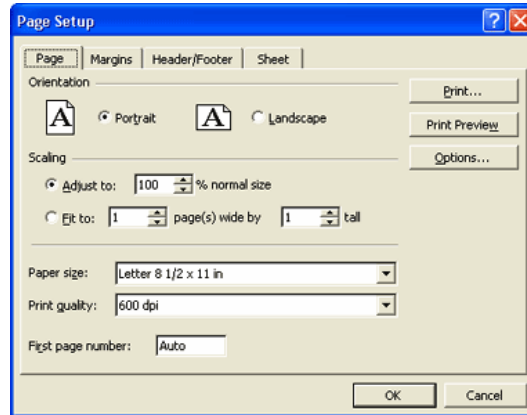
## Practice #5

- Use the **AutoSum** function to add up the totals for the departments and the budget categories
- Bold and increase the size of the fonts for the total figures
- Save changes

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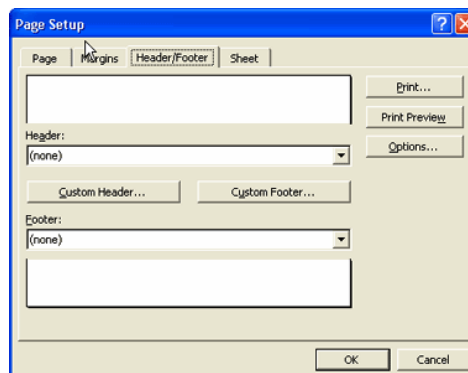
# Printing

- Adjusting page set up
  - Change page margins
  - Change page orientations



# Printing (contd.)

- A header is text that prints at the top of each page. A footer is text that prints at the bottom of each page
- The header and footer are divided into three sections (left, center and right). Press <Tab> or <Shift Tab> to move from section of the header or footer to another.



## Printing (contd.)

### o Print Preview



• The Print Preview screen also has several buttons at the top of the screen for making adjustments. For example, the Setup button opens the Page Setup dialog box and the Margins button lets you change page margin and column widths to fit more information on one page.

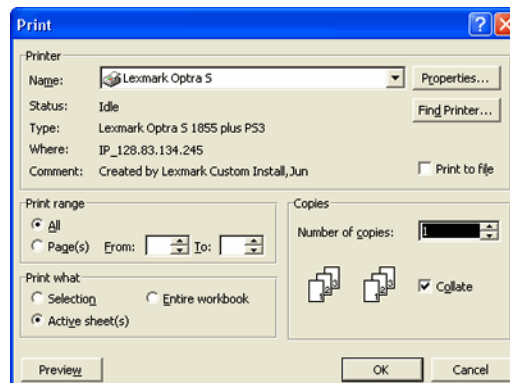
• If you are satisfied with how the output appears in the Print Preview screen, the Print button lets you send your output directly to the printer.

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## Printing (contd.)

oGo to **File** menu, **Print** option


oToolbar icon



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## Making a Chart or Graph


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- Highlight the portion of the worksheet that you want to depict graphically
- Select the **Chart Wizard** icon 
- Go through Step 1-4
- Charts/graphs can be printed independently of worksheets by selecting the chart/graph

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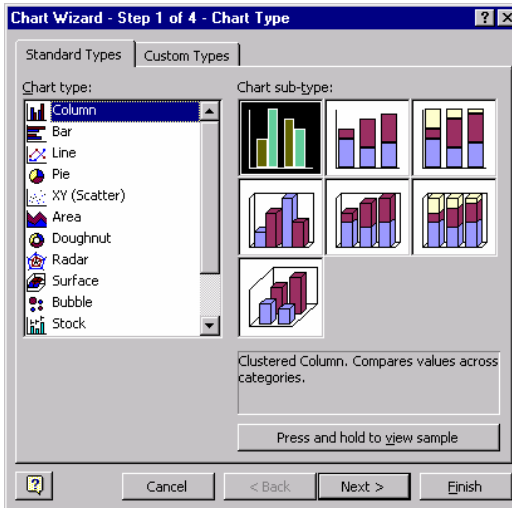
## Chart Wizard

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- To create a chart in Microsoft Excel, select the data you wish to graph and choose **Chart...** from the **Insert** menu, or click on the **Chart Wizard**  button on the standard toolbar.
- Step 1
  - Select **Standard** or **Custom Chart Type**; select **Chart sub-type**
  - The **Press and hold to view sample** button will show you a tiny preview of your data's chart

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## Chart Wizard (Step 1)



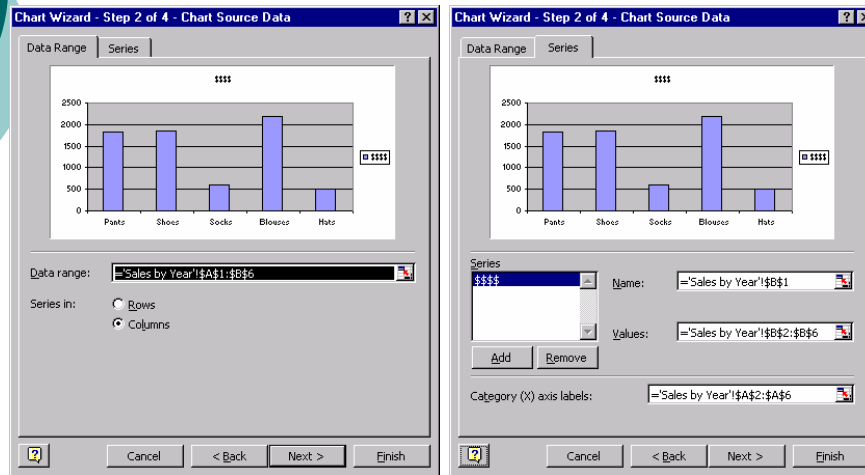
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## Chart Wizard (contd.)

- Step 2:
  - Step two allows you to choose the Chart's Source Data. This is the data you want to graph. Here we can also see a sample of the chart. If Excel is charting the wrong data, simply click on the **collapse** button ("go out and get it" button) ( ) and choose the data you wish to graph, once it is selected, press enter to return to this window.
  - From this Data Range tab you can also change the **Series in:** option, such that instead of charting the data by **column**, it will chart the data by **row**.

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## Chart Wizard (Step 2)



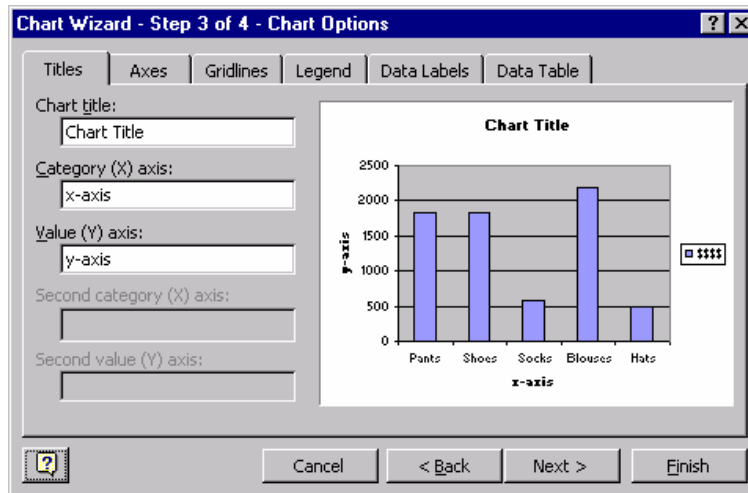
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## Chart Wizard (contd.)

- Step 3:
  - Each part of the Chart can be changed with in the options. After the chart is created you will still be able to change these options
  - The **Chart title**: goes across the top of the graph, the **Category (X) axis**: goes under our X-axis labels (shown here as Pants, Shoes, Socks...), the **Value (Y) axis**: will be the label for the vertical labels (shown here as 2500, 2000, 1500...)
  - These titles will not show up on your sample chart until you have left that text box. (Click somewhere else in the window)

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## Chart Wizard (Step 3)



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## Chart Wizard (contd.)

- Step 4:
  - This final step is to determine the location of your chart. You can place it as a new sheet, which will insert a new worksheet into your workbook and completely fill the tab with the chart such that when you print you will only get the chart
  - If you place the graph as an object in an existing worksheet, it will size to fit within the window trying not to cover existing data. With this option when you print you will get the data on that sheet and the graph

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## Chart Wizard (Step 4)

Chart Wizard - Step 4 of 4 - Chart Location

Place chart:

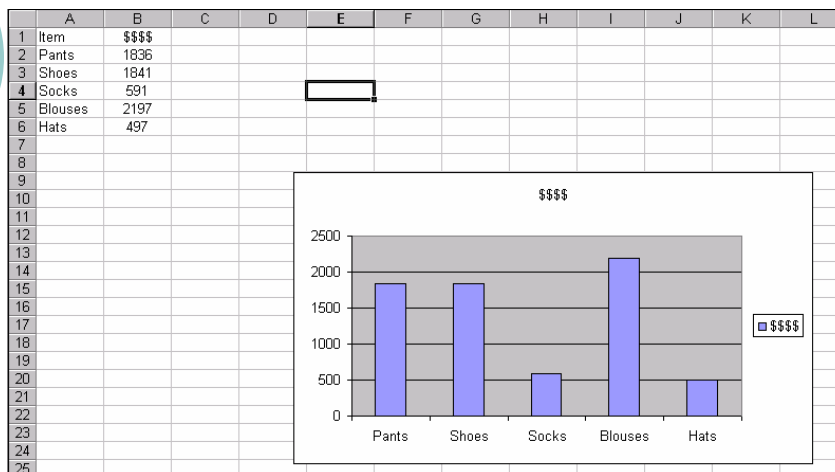
As new sheet: Chart1

As object in: Sales by Year

Cancel < Back Next > Finish

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## Chart Wizard (contd.)



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## Practice #6

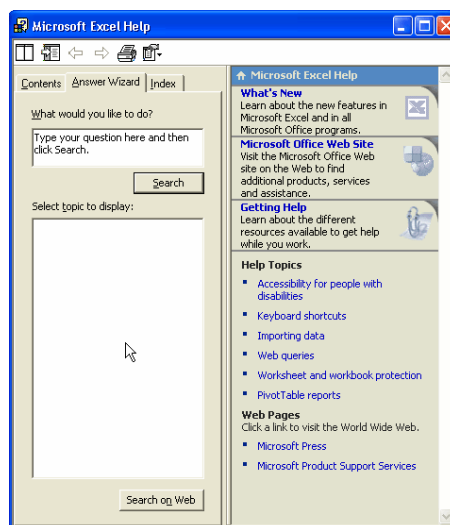
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- Develop a pie chart to depict the expenditures for Dept 1
- Paste pie chart in worksheet Oct 06
- Paste the pie chart in a separate document

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## Help

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