## ECDL Module 4:

## Spreadsheets

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# ECDL Module 4: Spreadsheets <br> ECDL - the European PC standard 

by David Stott

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## Preface

This book is intended to help you successfully complete the test for Module 4 of the European Computer Driving Licence (ECDL). However before we start working through the actual content of the guide you may find it useful to know a little bit more about the ECDL in general and where this particular Module fits into the overall framework.

## What Is The ECDL?

The European Computer Driving Licence (ECDL) is a European-wide qualification that enables people to demonstrate their competence in computer skills. It certifies the candidate's knowledge and competence in personal computer usage at a basic level and is based upon a single agreed syllabus.

This syllabus covers a range of specific knowledge areas and skill sets, which are broken down into seven modules. Each of the modules must be passed before the ECDL certificate can be awarded, though they may be taken in any order but must be completed within a three year period.

Testing of candidates is at audited testing centres, and successful completion of the test will demonstrate the holder's basic knowledge and competence in using a personal computer and common computer applications.

The implementation of the ECDL in the UK is being managed by the British Computer Society. It is growing at a tremendous rate and is set to become the most widely recognised qualification in the field of work-related computer use.

## The ECDL Modules

The seven modules which make up the ECDL certificate are described briefly below:

Module 1: Basic Concepts of Information Technology covers the physical make-up of a personal computer and some of the basic concepts of Information Technology such as data storage and memory, and the uses of information networks within computing. It also looks at the application of computer software in society and the use of IT systems in everyday situations. Some basic security and legal issues are also addressed.

Module 2: Using the Computer and Managing Files covers the basic functions of a personal computer and its operating system. In particular it looks at operating effectively within the desktop environment, managing and organising files and directories, and working with desktop icons.
Module 3: Word Processing covers the use of a word processing application on a personal computer. It looks at the basic operations associated with creating, formatting and finishing a word processing document ready for distribution. It also addresses some of the more advanced features such as creating standard tables, using pictures and images within a document, importing objects and using mail merge tools.
Module 4: Spreadsheets covers the basic concepts of spreadsheets and the ability to use a spreadsheet application on a personal computer. Included are the basic operations for developing, formatting and using a spreadsheet, together with the use of basic formulas and functions to carry out standard mathematical and logical operations. Importing objects and creating graphs and charts are also covered.
Module 5: Database covers the basic concepts of databases and the ability to use a database on a personal computer. It addresses the design and planning of a simple database, and the retrieval of information from a database through the use of query, select and sort tools.
Module 6: Presentation covers the use of presentation tools on a personal computer, in particular creating, formatting and preparing presentations. The requirement to create a variety of presentations for different audiences and situations is also addressed.
Module 7: Information and Communication is divided into two main sections, the first of which covers basic Web search tasks using a Web browser and search engine tools. The second section addresses the use of electronic mail software to send and receive messages, to attach documents, and to organise and manage message folders and directories.

## This guide focuses upon Module 4.

## How To Use This Guide

The purpose of this guide is to take you through all of the knowledge areas and skill sets specified in the syllabus for Module 4. The use of clear, non technical explanations and self paced exercises will provide you with an understanding of the key elements of the syllabus and give you a solid foundation for moving on to take the ECDL test relating to this Module. All exercises contained within this guide are based upon the Windows 98 operating system and Office 97 software.

Each chapter has a well defined set of objectives that relate directly to the syllabus for the ECDL Module 4. Because the guide is structured in a logical sequence you are advised to work through the chapters one at a time from the beginning. Throughout each chapter there are various review questions so that you can determine whether you have understood the principles involved correctly prior to moving on to the next step.

## Conventions Used In This Guide

Throughout this guide you will come across notes alongside a number of icons. They are all designed to provide you with specific information related to the section of the book you are currently working through. The icons and the particular types of information they relate to are as follows:

Additional Information: Further information or explanation about a specific point.

Caution: A word of warning about the risks associated with a particular action, together with guidance, where necessary on how to avoid any pitfalls.

Definition: A plain English definition of a newly introduced term or concept.

> Short Cuts: Short cuts and hints for using a particular program more effectively.

As you are working through the various exercises contained within this guide, you will be asked to carry out a variety of actions:

- Where we refer to commands or items that you are required to select from the PC screen, then we indicate these in bold, for example: Click on the Yes button.
- Where you are asked to key text in to the PC, then we indicate this in italics, for example: Type in the words 'Saving my work'.

You should now be in a position to use this guide, so lets get started. Good luck!

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## Introduction

This module of the BCS training course for ECDL qualification is concerned with the subject of Spreadsheet applications and is based on Microsoft's Excel 97 software.

Before embarking on the task of learning how to use Excel it is important to understand what Spreadsheet packages are and what role they play in modern PC based computing.

> Definition: The modern spreadsheet package is a tool that can be used to create, edit, modify, process, and display information in tabular form. Essentially this means data that is normally arranged in rows and columns, as for example in an accounting ledger. However, spreadsheet software is not only suitable for dealing with accounting data and can be used for practically any task that involves the need to process numbers or perform calculations.

Like most other spreadsheet packages, Excel is based on the principle of providing the user with a very large 'virtual' sheet of paper on which to record and manipulate information on-screen. This concept of using a large sheet of paper is a fundamental aspect of the typical spreadsheet package and if you were to compare Excel's virtual spreadsheet to a physical piece of paper, then the paper would be approximately 5 metres wide and 325 metres long! Computer spreadsheets are generally divided up into rows and columns in the form of a grid of small rectangles called 'cells', where data is recorded. However, the primary feature of the spreadsheet is its ability to perform calculations on the data stored in cells and once 'programmed' a spreadsheet can update itself automatically

Most modern windows based spreadsheet packages like Excel provide extensive formatting facilities so that data doesn't have to appear in rather plain looking tables. Using these facilities it is possible to produce spreadsheets with a much more attractive and professional looking appearance. In addition, Excel can also be used to process raw data and present it in a pictorial form such as charts and graphs.

Microsoft Excel 97 has many important features which make it suitable for performing a wide variety of data processing tasks and we shall cover a number of these in this module. Using Excel you can perform the following tasks:

- Create, edit and save spreadsheets.
- Modify existing spreadsheets.
- Publish spreadsheet data on Internet web pages.
- Create spreadsheets containing text, charts, images, audio, and video.
- Copy, move, delete, or rearrange spreadsheets within main spreadsheet files called Workbooks.
- Copy, move, delete, or rearrange data stored in areas of a spreadsheet.
- Perform various calculations on data held in spreadsheets.
- Sort spreadsheet data into ascending or descending order.
- Modify and format text and numerical data.
- Modify and format cells, rows, and columns.
- Incorporate information from other packages into spreadsheets.
- Print whole of parts of spreadsheets in various formats.
- Generate graphs and charts based on spreadsheet data.

This guide is structured in chapters that are designed to be followed in a logical sequence, therefore you are advised to work through the guide one chapter at a time from the beginning. At the end of each chapter there are some review questions so that you can determine whether you have understood the principles involved correctly.

## Getting Started

## In this chapter you will learn how to

Open and close a spreadsheet application.
Make modifications to an existing spreadsheet.
Save a new or existing spreadsheet.
Use the application Help functions.

- Change the spreadsheet view mode.

Use the page view magnification tool/zoom tool.
Modify the toolbar display.
Save an existing spreadsheet under another file format.

### 1.1. First Steps with Spreadsheets

Before we begin we need to check whether Microsoft Excel is already installed on your PC. Click on the Start button and select the Programs option. You should see a list of installed programs, Excel may be listed here or it may be under the Microsoft Office option, this depends on how your system has been setup, as in the example in Figure 1.1.


Figure 1.1 Starting Excel from the Start button.
Note that there may be other Microsoft Office programs also installed on your PC, such as Word, Access, or PowerPoint. However, it should be fairly obvious whether Excel is installed or not.

> If Microsoft Excel is not already installed on your PC you should follow the instructions for setting up the software as detailed in the Office 97 "Getting Started" guide. These instructions are quite straightforward but if you have any difficulty installing the software then seek advice from your computer supplier or system administrator.

Assuming that Excel is installed on your PC we are now ready to start learning how to use it to create and edit spreadsheets. Excel is an extremely flexible package and can be used to create a wide variety of different spreadsheets that can be used for different purposes. Your Excel spreadsheets can be as simple or as complicated as you like and you will soon learn how to create basic spreadsheets that can be enhanced to produce professional looking reports.

In this initial section we will look at some basic procedures which will allow us to:

- Open a spreadsheet application.
- Open an existing spreadsheet - make some modifications and save.
- Open several spreadsheets.
- Create a new spreadsheet and save.
- Save an existing spreadsheet onto the hard disk or a diskette.
- Close the spreadsheet.
- Use application Help functions.
- Close the spreadsheet application.


## Exercise 1.1

In this exercise we will look at what happens when you start Excel and how to proceed to open, close and save spreadsheets (also referred to as Workbooks). We will also look at how you can access the Help facilities within Excel as and when you need them.

> Spreadsheet, Workbook, and Worksheets: Whilst Excel is recognised as a spreadsheet application Microsoft have adopted the terms Workbook and Worksheet to describe two different aspects of the package. The term Workbook refers to the actual spreadsheet file and a Workbook can consist of a number of separate Worksheets. In other words a Workbook is a collection of spreadsheets. Things will become clearer when we look at each of these elements in turn.

1. Open Excel by selecting it from the Start I Programs option on the Task Bar as in the example in Figure 1.1 above.

Each time you start the Excel program you will see that a new blank Workbook is automatically opened at the same time and by default this Workbook
contains 3 separate Worksheets shown as tabbed sections at the bottom of the screen, labelled Sheet1, Sheet2, and Sheet3, as in Figure 1.2.


Figure 1.2 Excel opens a new blank spreadsheet when it is started.

Here you have the choice of using the blank Workbook to create your own spreadsheets from scratch or opening an existing Workbook.
2. For the moment we will ignore the creation of new spreadsheets and concentrate on opening an existing Workbook instead. To open an existing Workbook click on the File I Open... option on the Menu Bar at the top of the screen.

The Open file dialogue box should appear and by default the folder My Documents is displayed, as in Figure 1.3.


Figure 1.3 The Open File dialogue box showing the My Documents folder.

Don't be alarmed if there are no Workbooks displayed for you to open. The chances are that if this is the first time you have run Excel there will be no Workbooks in the My Documents folder so we will need to look somewhere else to find some existing Workbooks to open.

Using the Look in: drop down list, select C:Windows\Program Files Office970ffice folder. Once selected you should see an entry called XI8galry.xls and you should now select this and click on the Open button.

The XI8galry Workbook should now be loaded and your screen should look as in Figure 1.4.


Figure 1.4 Excel main screen after opening the XI8galry Workbook file.

The instructions above assume that when Microsoft Office was installed on your computer the standard default locations were used. If this is not the case then the file XI8galry-xls may be located somewhere else and you will have to use the Find options in the Open file dialogue box to locate it. If the file does not exist on your hard disk you can open it from the Office folder on the Microsoft Office CD-Rom.

> Once XI8galry.xIs has been opened in Excel you may think that it doesn't look much like a spreadsheet and you would be right because this particular Workbook consists solely of charts or graphs, a feature of Excel which we will cover later. For the moment however, we will use this Workbook just to demonstrate some of the file management procedures available in Excel.
3. Before we proceed any further we will make a copy of the Workbook

XL8galry.xls by saving a new version of it in the My Documents folder via the following steps:
4. On the Menu Bar click on File I Save As... and the Save As dialogue box will appear, as in Figure 1.5.


Figure 1.5 The Save As dialogue box with the file name highlighted.
5. Select the My Documents folder using the Save in: drop down list and type the filename Excel1 in the File name: box, check that the Save as type: box says Microsoft Excel Workbook and click on the Save button.

You can Open several different Excel Workbooks at the same time by following steps 1 and 2 above and selecting the appropriate folders from which to load files. Similarly you can save any Excel Workbooks by following steps 4 and 5 changing both the folder and filenames as appropriate.
6. To close a Workbook click on the File I Close option on the Menu Bar.

If you have made any changes to an open Workbook, then when you try to close it you will be asked whether you wish to save the changes you have made to the file, for example as in Figure 1.6


Figure 1.6 The warning displayed if you attempt to close an unsaved Workbook.

If you click on the Yes button then the file will be saved with the existing filename - overwriting the original version. However, if you wish to keep the original version of the file you should click on the No button and use the File I Save As... option from the Menu Bar to save the current open Workbook with a different filename from the original.

Finally in this exercise we will look at the Help facilities available in Excel which can provide you with online assistance when you need it. There are several different ways to trigger the Help functions within Excel and we will deal with each method in turn.
7. When you started Excel you may have noticed a small window as shown in Figure 1.7. (If this window doesn't appear simply press the F1 key on your keyboard.)


Figure 1.7 The Office Assistant.
This is the Office Assistant and it is designed to provide you with help if you encounter problems when using the Excel program. The Office Assistant like the normal Microsoft Help facilities is context sensitive which means that it tries to provide help based on what you are doing at the time.

There are several different "characters" available to act as Office Assistants and depending on how your version of Microsoft Office has been configured you may see any of the following characters shown in Figure 1.8.


Figure 1.8 The various Office Assistant "characters".

If you click on the Office Assistant then the following pop up dialogue box appears, as in Figure 1.9.


Figure 1.9 The Office Assistant asks you what you would like to do.

As you can see from the example in Figure 1.9 one of the best features of the Office Assistant is that you can simply type in a question and it will try to find the most appropriate help for you.

For example, type in the words Saving my work and click on the Search button. The Office Assistant should display a list of topics similar to that in Figure 1.10 for you to choose from.


Figure 1.10 Performing a query using the Office Assistant.
Clicking on an item in the list will display the relevant Help topic.
8. As well as the Office Assistant you can access Help by clicking on the Help I Contents and Index option on the Menu Bar. This displays a window with 3 tabbed sections: Contents, Index and Find.


Figure 1.11 The Help Topics Contents tab showing sub sections.

The Contents tab presents you with a list of Help contents for you to select from. Note that the main sections may have sub-sections, as in Figure 1.11.


Figure 1.12 You can search for keywords in the Index section.

The Index tab displays a list of indexed keywords that are available in the help system. You simply click on the index word you want and then click on the Display button as in Figure 1.12.


Figure 1.13 The Find sections let you look for words or phrases.

The Find tab allows you to search for any word or phrase and the Help system will then show you any matches that it can find. Once again you can
simply click on any found topic and click on the Display button to see it, as in Figure 1.13.

> Help is always available in Excel no matter what task you are performing. The quickest way to get help is to press the F1 on your keyboard.

Whichever method you use to access the Help system in Excel you will be able to see step by step help on most topics as in Figure 1.14.

| ? Microsoft Excel |  |  |  |
| :---: | :---: | :---: | :---: |
| Help Iopic: | Back | Options |  |
| Open a workbook on your hard disk or a network <br> 1 Click Open <br> 2 In the Look in box, click the drive, folder, or internet location that contains the workbook. <br> 3 In the folder list, double-click folders until you open the folder that contains the workbook you want. <br> If you cant find the workbook in the folder list, you can search for it 븨 How? <br> 4 Double-click the workbook you want to open. <br> Note Only Microsoff Excel files are listed in the dialog box initially. To open another type of file, click the file format you want in the Files of type box, and then double-click the file name in the folder list. You can also type the file name extension in the File name box, and then click Find Now; for example, type '.wk4 to find Lotus 1-2-3 Release 4.0 files. <br> Tip To open a file youve used recently, click the file name at the bottom of the File menu. If the list of recently used files isnt displayed, click Options on the Tools menu, click the General tab, and then select the Recently used file list check box |  |  |  |

Figure 1.14 A specific Help Topic on how to Open a Workbook.

## Summary

In this initial section on Excel we have covered the procedures necessary to start the application and to open any existing Workbook files. We have also looked at how to save Workbooks and how to use both the Office Assistant and the Help system to obtain help relevant to the procedures being carried out.

Fortunately, these basic tasks are common to all the modules in Microsoft Office, so once you have mastered these procedures in Excel you should be able to cope with the same tasks in the other applications, such as Word or PowerPoint.

### 1.2. Adjust Basic Settings

Now that we have looked at starting Excel and opening and saving Workbooks we need to investigate the main Excel screen in more detail.

In this section we will learn how to:

- Change the spreadsheet view mode.
- Use the page view magnification tool/zoom tool.
- Modify the toolbar display.


## Exercise 1.2

In this exercise we will look at how you can alter the way that Excel displays information and how you can alter the appearance of Excel itself.

If it is not already open you should start Excel and, if for some reason a blank Workbook isn't displayed simply click on File I New... on the Menu Bar and a tabbed dialogue box as shown in Figure 1.15 should be displayed.


Figure 1.15 Creating a new blank Excel Workbook.

Click on the OK button to create a new blank Workbook and your display should now look like the example in Figure 1.16. If the Office Assistant window is displayed then close it by clicking on the Close button in the top right hand corner.


Figure 1.16 A blank new Workbook with a cell selected.

The example in Figure 1.16 shows the Normal view of an open Workbook but there are some options available for changing the display.

1. First of all click on cell reference E9 with the mouse and type the word Test followed by the Return or Enter key on your keyboard.
2. Next, select View I Page Break Preview on the Menu Bar and you should see the dialogue box shown in Figure 1.17. Just click on the OK button and it should disappear. Now you will see something like the example in Figure 1.18. This is the Page Break Preview view which shows us where the word Test would be printed on a piece of paper. Select View I Normal to return to the standard view of the Workbook.


Figure 1.17 Welcome to Page Break Preview.


Figure 1.18 The Page Break Preview view.
3. Also on the View menu we can select Full Screen view which just displays the Menu Bar and the Workbook itself without any toolbars or the status bar visible, as in Figure 1.19. To return to the Normal view click on the Close Full Screen button.


Figure 1.19 The Full Screen view with the Close Full Screen button.

As well as switching views as just described, Excel offers a Zoom feature which basically allows us to magnify the current Worksheet being displayed.

Controlling the magnification or zoom level can be achieved in two ways:
4. By using the Zoom icon control drop down list on the Standard Toolbar, as in Figure 1.20.


Figure 1.20 Using the Zoom icon to change magnification.
5. Or, by using the View I Zoom... option from the Menu Bar, which displays a window as in Figure 1.21. Here you can select several preset levels of magnification or type in your own preference in the Custom: box.


Figure 1.21 The Zoom control window.
6. Whichever method you use to adjust the Zoom level the area of the screen displaying the Worksheet will magnify or shrink the image relative to the main Excel window, as in Figure 1.22.


Figure 1.22 Different Zoom levels, 200\% on the left and $50 \%$ on the right.

Notice that the Menu Bar and the toolbars are the same size but the spreadsheet area is a different size.

Finally in this exercise we shall look at how you modify the Toolbar displayed in Excel

Excel has a total of 13 separate toolbars available. However, by default only 2 of these are displayed at the top of the screen. The topmost is normally the Standard Toolbar (Figure 1.23) and just below it is the Formatting Toolbar (Figure 1.24).

Figure 1.23 The Standard Toolbar (top of screen by default)

## 

Figure 1.24 The Formatting Toolbar (top of screen by default)
7. You can control which of the 13 toolbars are visible by using the View I

Toolbars option on the Menu Bar. Toolbars currently displayed are shown with a tick next to them as in Figure 1.25.

| Normal <br> Rage Break Preview |  |
| :---: | :---: |
| Ioolbars * | $\checkmark$ Standard |
| $\checkmark$ Eormula Bar | $\checkmark$ Formatting |
| $\checkmark$ status Bar | Chart |
| Header and Footer... | Control Toolbox |
| 國 Comments | nal Data |
| Custom Views... | Forms |
| 回 Full Screen | Picture |
| Zoom... | PivotTable |
|  | Reviewing |
|  | Visual Basic |
|  | Web |
|  | WordArt |
|  | ¢ustomize... |

Figure 1.25 Selecting toolbars for displaying.

Finally, close the Workbook by clicking on File I Close on the Menu Bar. Despite the fact that this spreadsheet only has a single entry in one cell we will use it in the next exercise, so, when you are asked whether you want to save the changes you made to Book1.xIs you should click on Yes and save the Workbook in the My Documents folder with the name Test.

## Summary

In this section on Excel we have looked at how you can display Worksheets in various ways such as the Normal view, the Page Break Preview view, and the Full Screen view. We have also looked at how you can use the Zoom controls to increase or decrease the size of the Worksheet image being viewed. In addition, we looked at how to control the displaying of Toolbars in Excel.

You should now have a better understanding of the main elements of the Excel screen and how to control and manage the display of information.

### 1.3. Document Exchange

Excel uses its own file format with the file extension .xls for storing Workbooks. However, there may be occasions when you need to save a spreadsheet in a different format, for example, to transfer text into a word processing package or to use spreadsheet data in a database.

In this section we will look at how you can:

- Save an existing spreadsheet under another file format: txt file, document template, software type or version number etc.
- Save a document in a format appropriate for posting to a Web Site.


## Exercise 1.3

This exercise will look at how you can save Excel spreadsheets or parts thereof in different formats.

If it is not already open you should start Excel and open the Test.xls Workbook which we saved in the My Documents folder in Exercise 1.1.

1. When you click on the File I Save As... option on the Menu Bar the Save As... dialogue box appears, as in Figure 1.26.


Figure 1.26 The Save As... dialogue box where you can decide on the target folder and file name.
2. As well as being able to specify a filename and a location (folder) for saving the Workbook you can also specify the file type by clicking on the drop down list on the Save as type: box as in Figure 1.27.


Figure 1.27 Using the Save as type option to save a Worksheet in a different file format.

Excel allows you to save a spreadsheet in the following file formats:

## Save as type

Excel 97 \& 5.0/95 Workbook
Excel 97 Template

Excel version 5.0/95 Workbook .xls

## Extension <br> Use to save

xls
.xit

A normal Excel spreadsheet.
A Workbook as a template for creating similar spreadsheets.
A spreadsheet for use with a previous version of Excel.

| Excel version 4.0 Workbook | .x\|s | A spreadsheet for use with a previous version of Excel. |
| :---: | :---: | :---: |
| Excel version 4.0 Worksheet | .x\|s | A spreadsheet for use with a previous version of Excel. |
| Excel 3.0 Worksheet | .x\|s | A spreadsheet for use with a previous version of Excel. |
| Excel 2.x Worksheet | .x\|s | A spreadsheet for use with a previous version of Excel. |
| Lotus 1-2-3 Release 4 | .wk4 | An Excel spreadsheet suitable format for use with a specific version of Lotus 1-2 <br> 3. |
| Lotus 1-2-3 Release 3 | .wk3 | An Excel spreadsheet suitable format for use with a specific version of Lotus 1-2- <br> 3. |
| Lotus 1-2-3 Release 2.x | .wk1 | An Excel spreadsheet suitable format for use with a specific version of Lotus 1-2- <br> 3. |
| Lotus 1-2-3 Release 1.x | .wks | An Excel spreadsheet suitable format for use with a specific version of Lotus 1-23. |
| Quattro Pro for MS-DOS | .wq1 | An Excel spreadsheet suitable format for use with Quattro Pro. |
| dBASE | .dbf | Spreadsheet data in a specific database format. |
| CSV (Comma delimited) | .csv | Spreadsheet data in a general database format. |
| Text (Tab delimited) | .txt | Spreadsheet data for use in a word processing application. |

In addition, you can save the data in an Excel Workbook in a format that is suitable for creating Web pages on the Internet. However, you cannot do this with the normal File I Save As... option on the Menu Bar and instead you have to use another menu option.
3. Clicking on the File I Save as HTML... option on the Menu Bar starts the

Save as HTML Wizard which displays the dialogue box shown in Figure 1.28.


Figure 1.28 Using the Save as HTML wizard to save a Worksheet as a Web page.

From here all you need to do is click on the Next button and then follow the instructions to save your Excel Workbook data in a format suitable for publishing Web pages on the Internet.

> Wizard: A Wizard within Microsoft applications is a special feature which is designed to guide the user step by step through a complex process. There are many different types of Wizards included as standard with Microsoft Office. In addition if you have access to the Internet you can download other Wizards that you might find useful from:
http://www.microsoft.com/downloads/search.asp?

## Summary

In this section we have covered the ways that you can save Excel spreadsheets in various formats so that the information they contain can be used in other applications such as Microsoft Word or other spreadsheet packages like Lotus 1-2-3. We have also seen how it is possible to generate Web pages so that Excel spreadsheet data can be used on the Internet.

## Review Questions

1. What is the basic procedure for starting Excel from the Windows desktop?
2. What is the difference between a Worksheet and a Workbook?
3. When you start a new Workbook how many blank Worksheets are provided as standard?
4. Which keyboard key should you press to invoke the online Help in Excel?
5. Which 2 toolbars are displayed onscreen by default in Excel?
6. Which Menu Bar option would you use to save a spreadsheet in a format suitable for publishing as a Web page?
7. What is a Wizard?

## Basic Operations

## In this chapter you will learn how to

Enter numbers, text and simple Formulas into a cell.
Use the undo command.
Select cells, rows and columns.
Use the Copy and Paste tools to duplicate and move cell contents.

Move or Copy cell contents between active Worksheets and Workbooks.

Delete cell contents in a selected cell range.
Search and replace specified cell content.
Insert and delete rows and columns.

- Modify column width and row height.

Sort selected data in alphabetic or numerical order.
© The British Computer Society 2000 covered the First Steps with Spreadsheets it is time to look at the Basic Operations that can be performed with Excel.

However, before we delve into the package too deeply we need to understand a few preliminary concepts regarding navigating our way around spreadsheets.

As described in the introduction to this guide, spreadsheets consist of a vast number of cells arranged in the form of a grid. In Excel each cell is referenced by a set of co-ordinates based on its column and row position, for example, A1, D12, AD1020, etc. Each Worksheet has a total of 256 columns referenced as A through IV and 65536 rows number consecutively 1 through 65536. This means that a single Excel Worksheet has a total of $16,777,216$ individual cells for us to use.

By default in Excel, gridlines are used to display the individual cells on a Worksheet and the currently active cell is evident by means of a dark border, as in Figure 2.1.


Figure 2.1 The current active cell marker.

You can move the active cell marker in two ways. Using the cursor control keys on the keyboard up, down, left or right and by clicking on any inactive cell with the mouse. Note that the mouse pointer is displayed as a when moved across the grid of cells. As you change from one active cell to another the cell reference is automatically updated. Try out these two different methods so that you become familiar with both. Understanding how to navigate around a spreadsheet is a basic skill which is essential for the next step of this guide.

### 2.1. Insert Data

We have now reached the point were we can start to insert data into a Worksheet and begin to see how Excel can be used for a variety of different tasks.

In this section you will learn how to:

- Enter numbers in a cell.
- Enter text in a cell.
- Enter symbols or special characters in a cell.
- Enter simple Formulas in a cell.
- Use the undo command.


## Exercise 2.1

This exercise will involve creating a new Workbook and looking at the options available for entering various types of data and Formulae into spreadsheet cells. We will also see how it is possible to correct any mistakes that we make by taking advantage of Excel's 'Undo' Function.

1. If it is not already running start Excel and create a new Workbook by selecting File I New... from the Menu Bar. Your screen should now look like the example in Figure 2.2.


Figure 2.2 Excel with a new Workbook opened.
2. Next, with the active cell marker at position $\mathbf{A 1}$ type the digits 34 and press the Return or Enter key on your keyboard. The active cell marker should automatically move down to cell $\mathbf{A 2}$. (If $\mathbf{A 2}$ is not the active cell use the cursor keys or the mouse to make it active.) Now following the same procedure enter the following numbers in these specific cells:

## Cell Reference Value

A2 11
A3 25
A4 9

Your Worksheet should now look like the example in Figure 2.3. Notice how the numbers which we have entered have been aligned on the right hand side of the cells, this is the default action in Excel when you enter numeric values.


Figure 2.3 Entering numeric data into a Worksheet.
3. Now move the active cell marker to position B1 either by using the cursor keys on the keyboard or by clicking on cell $\mathbf{B 1}$ with the mouse. Once cell B1 is active, type the word Apples and press the Return or Enter key on your keyboard. Again the active cell marker should automatically move downwards so that cell $\mathbf{B 2}$ becomes active. Following the same procedure enter the following text in these specific cells:

| Cell Reference | Text |
| :--- | :--- |
| B2 | Oranges |
| B3 | Bananas |
| B4 | Melons |

Your Worksheet should now look like the example in Figure 2.4. Notice how the text has been aligned towards the left hand side of the cells, this is the default action in Excel when you enter text.


Figure 2.4 Entering text into a Worksheet.

Occasionally you might need to enter a symbol or special character in a cell, for example the $\geqslant$ (Yen) currency character or a symbol such as a © (copyright). Normally these characters are not readily available directly from the keyboard unless a specific font such as Symbol or Wingdings is being used. Fortunately there are two ways in which you can insert special characters into a cell. Method one - if you know the right code (refer to an ASCII table) you can hold down the Alt key on your keyboard and simply type in the relevant numbers, then when you release the Alt key the character or symbol will appear. For example, Alt and 0165 produces the $¥$ symbol and Alt 0169 generates the © symbol. Method two - start the standard Windows Character Map application by selecting Programs I Accessories I System Tools I Character Map from the Start button on the Taskbar. Using this program you can select any of the characters or symbols displayed to be inserted into your spreadsheet cell. The advantage of the second method is that you can actually see the characters that you wish to select and if necessary change to a different font such as Wingdings to find a particular character or symbol.

As well as entering numbers and text in cells we can also enter Formulas which can be used to perform calculations. Let's start by entering a simple Formula in cell A5 to add up all the Apples and Oranges. Make sure that cell A5 is the active cell and type in the following Formula: $=a 1+a 2$
5.

When you press the Return or Enter key Excel automatically performs the calculation and displays the result in the cell containing the Formula. Your Worksheet should now look like the example in Figure 2.5.


Figure 2.5 Entering a simple Formula into a cell.
6. If you now move the active cell marker back to cell $\mathbf{A 5}$ you will see that the Formula used to add the number of Apples and Oranges is displayed in the Formula Bar as in Figure 2.6.


Figure 2.6 The Formula used in A5 is displayed in the Formula Bar.
7. Excel provides hundreds of Formulas which can be used to make lots of different types of calculations. Let's try out another type of calculation by typing in the following, also into cell $\mathbf{A 5}$ thereby overwriting the existing simple addition of two numbers:
=sum(a1:a4)

Once again when you press Return or Enter the result of the calculation appears in cell $\mathbf{A 5}$ as in the example shown in Figure 2.7.

|  | A5 $\quad$ - |  |  | $=$ =SUM(A1:A4) |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A |  | B | C | D |
| 1 |  |  | Apples |  |  |
| 2 |  | 1 | Oranges |  |  |
| 3 |  |  | Bananas |  |  |
| 4 |  | 9 | Melons |  |  |
| 5 |  |  |  |  |  |
| 6 |  |  |  |  |  |
| 7 |  |  |  |  |  |

Figure 2.7 Using the Sum Formula to total a series of numbers.
In this instance the Formula tells Excel to add up all the numbers in cells $\mathbf{A 1}$,
A2. A3, and A4 to produce a total of all the fruit. We could have achieved the same result using the Formula $=A 1+A 2+A 3+A 4$ but Excel allows us to specify a range of contiguous cells by using the colon character (:) between the cell references in the Formula. This is very useful when you wish to perform a calculation on a long list of numbers. Before we move on to the next step type the word Total in cell $\mathbf{B 5}$ just to remind us to what the figure in $\mathbf{A 5}$ refers.

> Excel has a very useful feature known as AutoSum which is available on the Standard Toolbar. If you click once on this icon then Excel will highlight a range of cells adjacent to the active cell as a 'best guess' to what requires summing, as in Figure 2.8 . If you wish to accept the selected range then you simply press the Return or Enter key and Excel will automatically place the correct Formula in the active cell for you.

|  | Sum | $\checkmark \times \vee=$ =SUM(A1:AA) |  |  |
| :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D |
| 34,Apples |  |  |  |  |
| 2 | 11:Oranges |  |  |  |
| 3 | 25!'Bananas |  |  |  |
| 4 | 9 9'Melons |  |  |  |
| 5 | -SUMAA A A |  |  |  |
| 6 |  |  |  |  |
| 7 |  |  |  |  |

Figure 2.8 Using the AutoSum feature.
8. By default all Formulas in Excel Worksheets are recalculated automatically. This means that if we alter any of the numbers referenced by a Formula the result will change accordingly. For example, move the active cell marker to cell $\mathbf{A 2}$ and type the number 12 to replace the $\mathbf{1 1}$ that is already there. This time when you press the Return or Enter key, the total figure (79) automatically changes to $\mathbf{8 0}$ as shown in Figure 2.9.

|  | 3 | * | = |  |
| :---: | :---: | :---: | :---: | :---: |
|  | A | B |  | C |
| 1 |  | Apples |  |  |
| 2 |  | Oranges |  |  |
| 3 |  | Bananas |  |  |
| 4 |  | Melons |  |  |
| 5 |  | Total |  |  |
| 6 |  |  |  |  |
| 7 |  |  |  |  |

Figure 2.9 Automatic recalculation of the Total in action.
This is probably the most important feature of a spreadsheet application such as Excel. The ability to perform calculations automatically and to recalculate the results when the underlying data changes, make spreadsheets a practically essential tool for many users, especially in the business world.
9. Excel has a special feature called 'Undo' which can be extremely useful if we make a mistake when entering data. Using our current example Worksheet if you select the Edit I Undo option from the Menu Bar then the contents of cell $\mathbf{A 2}$ will revert back to the original value of $\mathbf{1 1}$ (as it was before we
replaced it with the number $\mathbf{1 2}$ ). Notice also that the Total is recalculated to reflect the change as well, as in Figure 2.10.

The actual wording of the Edit I Undo option on the Menu Bar depends on whatever the last operation carried out by Excel was. As a result the word Undo could be followed by other words which describe what the last action was and what will be undone when you execute the command.

| A 2 |  |  |  |
| :---: | :---: | :---: | :---: |
|  | A | B | $=11$ |
| 1 | 34 | Apples |  |
| 2 | 11 | Oranges |  |
| 3 | 25 | Bananas |  |
| 4 | 9 | Melons |  |
| 5 | 79 | Total |  |
| 6 |  |  |  |

Figure 2.10 The example Worksheet after performing an Undo command.

You can access the Undo feature quickly by clicking once on the Undo icon on the Standard Toolbar. Each time you click on it the last action in undone, therefore you can undo several mistakes or previous changes if necessary.
O. Finally in this section you should save the current Workbook in the My Documents folder using the file name Fruit.

When you enter digits into a cell Excel recognises them as numbers and conversely when you enter letters Excel interprets them as text. Mixing digits with letters always results in Excel interpreting the entry as text. However, on occasion you may need to enter digits or numbers so that they are treated solely as text. To do this simply place a single quote character at the beginning of the numbers you wish to enter, like this '1999 or '2000 and they will appear as text in the cell.

## Summary

In this section we have seen how both numbers and text can be entered into Worksheet cells. Remember that by default, numbers are aligned to the right and text aligned to the left within cells. We have also seen that Formulas can be placed in cells to perform various types of calculation and if the referenced data changes then the Formula automatically recalculates the result.

In addition, we have learned that the Undo feature of Excel allows us to step backwards and reverse any actions which we have previously carried out.

### 2.2. Select Data

Now that we have a simple spreadsheet of our own to work with we can start looking at the various ways that we can select areas of a Worksheet in order to perform actions on complete ranges of cells. In this section you will learn how to do the following:

- Select a cell or range of adjacent or non-adjacent cells.
- Select a row or column.
- Select a range of adjacent or non-adjacent rows or columns.


## Exercise 2.2

1. If it is not already running start Excel and Open the Workbook called Fruit which we saved earlier in the My Documents folder. Your screen should now look like the example in Figure 2.11.


Figure 2.11 The Fruit Workbook after opening.
2. To select multiple cells simply click on any cell and whilst holding hold the left mouse button drag the pointer across the grid of cells and they will turn black as they are selected. Release the mouse button when your selection is complete. On the Fruit Worksheet use this method to select all the cells in the range D6 to $\mathbf{G 1 4}$ and your display should look like Figure 2.12.


When selecting cells with the mouse, if you drag the pointer to any of the window boundaries then Excel will simply scroll the Worksheet automatically to allow you to extend the selection beyond the area normally visible.


Figure 2.12 Cells D6 to G14 selected.

To deselect a selected range of cells simply click once with the left mouse button on any non-selected cell and the selection will disappear.

An alternative method of selecting a range of cells is by using the keyboard. If you hold down the Shift key and use the cursor control keys you can extend the range of selected cells outwards from the current active cell.
3. Normally cell range selection is done on adjacent cells but if you need to select non-adjacent cells you can do this simply by holding down the Ctrl key on the keyboard and then clicking on the desired cells with the pointer, as shown in Figure 2.13.


Figure 2.13 Selecting non-adjacent cells.

Once again clicking on any non selected cells after releasing the Ctrl key will deselect everything.
4. To select an entire row of cells simply click with the pointer on any row number. Try selecting row number 6, as shown in the example in Figure 2.14.


Figure 2.14 Selecting entire rows.
5. Likewise if you need to select a complete column of cells just click with the pointer on any column letter. Try selecting column D in our Fruit Worksheet as the example in Figure 2.15 shows.

|  | D1 | $\cdots$ | = |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D 4 | E |
| 1 | 34 | Apples |  |  |  |
| 2 | 11 | Oranges |  |  |  |
| 3 | 25 | Bananas |  |  |  |
| 4 | 9 | Melons |  |  |  |
| 5 | 79 | Total |  |  |  |
| 6 |  |  |  |  |  |
| 7 |  |  |  |  |  |
| 8 |  |  |  |  |  |
| 9 |  |  |  |  |  |
| 10 |  |  |  |  |  |
| 11 |  |  |  |  |  |
| 12 |  |  |  |  |  |
| 13 |  |  |  |  |  |
| 14 |  |  |  |  |  |

Figure 2.15 Selecting an entire column of cells.

Just as when selecting adjacent cells, you can drag the pointer across multiple rows of numbers or column letters in order to select complete adjacent rows or columns.
6. Now suppose you need to select multiple non-adjacent rows or columns, well you can do this as well by holding down the Ctrl key whilst clicking with the R pointer on the rows or columns you want to select, as shown in Figure 2.16. You can even select non adjacent rows and columns at the same time as in the example in Figure 2.17.


Figure 2.16 Non-adjacent rows selected.


Figure 2.17 Multiple rows and columns both adjacent and non-adjacent selected.
7. Finally on the subject of selecting cells there is a very quick and easy way to select the entire Worksheet. Simply click once with the pointer on the small grey box called the Select All button at the junction of the row numbers and column letters as shown in Figure 2.18 and all the cells will be selected.


Figure 2.18 Selecting the entire Worksheet.

## Summary

As we have seen, selecting cells is an important factor when using Excel and there are several different ways that this can be achieved. Adjacent ranges of cells can be selected as can adjacent rows or columns. Remember that to select non-adjacent cells, rows or columns you must hold down the Ctrl key whilst performing the selection process. Lastly we saw how to quickly select the entire Worksheet by just clicking on the Select All button.

### 2.3. Copy, Move, Delete

Now that we have seen how to select cell, rows, and columns we can put these procedures into some practical use by looking at copying, moving and deleting the contents of specific areas in our Worksheet.

In this section we will see how to:

- Use the Copy and Paste tools to duplicate cell contents in another part of a Worksheet.
- Use the Cut and Paste tools to move cell contents within a Worksheet.
- Move or Copy cell contents between active Worksheets.
- Move or Copy cell contents between active Workbooks.
- Delete cell contents in a selected cell range.


## Exercise 2.3

1. If it is not already running start Excel and Open the Workbook called Fruit which we saved earlier in the My Documents folder. Your screen should now look like the example in Figure 2.19.


Figure 2.19 The Fruit Worksheet.
2. Using the pointer select the cells in the range B1:B5 and your Worksheet should now look like Figure 2.20.


Figure 2.20 Selecting a cell range to copy.
3. Next, click on Edit I Copy on the Menu Bar. This makes a copy of the selected cells in the Windows Clipboard. Now, click once on cell C7 to make it active and select Edit I Paste from the Menu Bar. An exact copy of the cell range B1:B5 should now appear in the cell range C7:C11 as the example in Figure 2.21 shows.

> You may have noticed the dotted, flashing outline that appear around the range B1:B5 when we copied it to the Clipboard. This is called the 'Marquee' and it is used to indicate which cells have been copied. To remove the Marquee press the Esc key on your keyboard.


Figure 2.21 Pasting copied cells in a new location.
4. Next, select the cell range A1:A5 and click on Edit I Cut on the Menu

Bar. You will notice that the data in the range disappears as it has been removed from its original location and placed in the Clipboard. Make cell D7 active and click on Edit I Paste on the Menu Bar. The contents of cell range A1:A5 should now appear in the range D7:D11 as shown in Figure 2.22.


Figure 2.22 Moving a cell range using Cut and Paste.

> Instead of using the Menu Bar to perform Copy, Cut and Paste Functions via the Clipboard you can click on the appropriate icons on the Standard Toolbar.
5. As well as using the Copy, Cut and Paste Function either to copy or move a cell range within an active Worksheet they can be used to copy or move items to other Worksheets and even other Workbooks. For example, select the
range C7:D11 and Copy it to the Clipboard. Next, click once on the tab labelled Sheet2 which is near the bottom of the screen. This displays Worksheet number 2 in our Workbook which should be blank. Make cell A1 active and now if you select Edit I Paste from the Menu Bar the contents of cell range C7:D11 on Sheet1 will be pasted into the cell range A1:B5 as shown in Figure 2.23. Switch back to Sheet1 by clicking on the appropriate tab and you will notice that its contents are still intact.


Figure 2.23 Sheet $\mathbf{2}$ after copying a range of cells from Sheet1.
6. To copy or move a cell range to another Workbook we can use the same procedure as described in step 5 above but instead of switching to Sheet2 after copying or cutting to the Clipboard we need to switch to a different Workbook. For example, copy the cells C7:D11 on our Fruit Workbook Sheet1, click on File I New on the Menu Bar and then click on OK to create a new Workbook. Now select Edit I Paste on the Menu Bar and the copied range of cells will appear in range A1:B5 in our new Workbook, as shown in Figure 2.24. To switch back to our original Fruit Workbook select Window 12 Fruit.xls from the Menu Bar as shown in Figure 2.25.

> The Windows Clipboard only stores one item at a time. Whenever you use the Edit I Paste Function, then whatever was last cut or copied to the Clipboard is pasted and this might not always be what you intended. Therefore you should consider Cut and Paste or Copy and Paste as a combined Function.


Figure 2.24 Copying between Workbooks.

| New Window |
| :---: |
| Arrange... |
| Hide |
|  |
| Sote |
| Ereeze Panes |
| $\checkmark 1$ Book2 |
| 2 Frut ${ }^{\text {ds }}$ |

Figure 2.25 Switching between Workbooks.
7. Now that we are back to our Fruit Workbook there is one final thing we can do in this section. Reselect cell range B1:B5 as shown in Figure 2.26 and press the Delete key on the keyboard and the contents of the selected range will be deleted.

|  | 81 | $\cdots$ | = Apples |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D | E | F | G | H | - |
| 1 |  | Apples |  |  |  |  |  |  |  |
| 2 |  | Oranges |  |  |  |  |  |  |  |
| 3 |  | Bananas |  |  |  |  |  |  |  |
| 4 |  | Melons |  |  |  |  |  |  |  |
| 5 |  | Total |  |  |  |  |  |  |  |
| $\frac{5}{6}$ |  |  |  |  |  |  |  |  |  |
| 7 |  |  | Apples | 34 |  |  |  |  |  |
| 8 |  |  | Oranges | 11 |  |  |  |  |  |
| 9 |  |  | Bananas | 25 |  |  |  |  |  |
| 10 |  |  | Melons | 9 |  |  |  |  |  |
| 11 |  |  | Total | 79 |  |  |  |  |  |
| 12 |  |  |  |  |  |  |  |  |  |
| 13 |  |  |  |  |  |  |  |  | - |
| 14 |  |  |  |  |  |  |  |  |  |
| 15 |  |  |  |  |  |  |  |  |  |
| 16 |  |  |  |  |  |  |  |  |  |
| 17 |  |  |  |  |  |  |  |  | $\stackrel{\square}{*}$ |
| 14.4 | H | t1 Sheet | LSheet3 |  |  |  |  |  |  |

Figure 2.26 Deleting the contents of the selected range.

Whilst we can delete the contents of cells by selecting them and pressing the Delete key on the keyboard, we can achieve the same effect by simply omitting the Paste Function after performing an Edit | Cut operation.
8. Finally, save the Fruit Workbook using File I Save on the Menu Bar and close Excel by choosing the File I Exit option on the Menu Bar. You will be prompted as to whether you wish to save the changes to Book2 as shown in Figure 2.27 and you should select $\mathbf{N o}$ in this instance as we don't need to keep this Workbook.


Figure 2.27 Prompt to save changes.

## Summary

In this section we have seen how we can use the Windows Clipboard combined with Excel's Cut, Copy, and Paste Functions to copy, move, or delete the contents of spreadsheet cells both within a Worksheet or between Worksheets or Workbooks. You might like to practice these procedures so that you become more familiar with the principles involved.

### 2.4. Search and Replace

As data is entered into a spreadsheet it can become quite large and sometimes it can be difficult to find specific items. Fortunately Excel has some features that can make the task of finding information much easier than having to scroll through a large Worksheet.

In this section we will see how we can:

- Use the search command for specified cell content.
- Use the replace command for specified cell content.


## Exercise 2.4

1. If it is not already running start Excel and Open the Fruit Workbook. In order to make this exercise more effective we will start by copying the cell range C7:D11 to a remote area of the Worksheet. Once selected and copied to the Clipboard, make cell BX500 active and paste the contents of the Clipboard into this new position on the Worksheet, as in Figure 2.29. Use the scroll bars to see the full range of the pasted selection.

You can go quickly to a specific cell by using the Edit I Go To... option on the Menu Bar as in Figure 2.28. Here you can enter a cell Reference: and when you click on OK you will be positioned at the desired location.


Figure 2.28 Using the Go To option.


Figure 2.29 Selection pasted into cell BX500.
2. Now, return to the previous position in the Worksheet by pressing the Home key whilst holding down the Ctrl key on the keyboard. This takes you back to make $\mathbf{A 1}$ the active cell. Next, select Edit I Find... on the Menu Bar and the dialogue box shown in Figure 2.30 will be displayed.


Figure 2.30 Using the Find option.
3. Type the word Apples in the Find what: box and click once on the Find Next button. Excel searches for the text string that you have entered and finds it first in cell C7. If you then click on the Find Next button, again Excel will look for the next occurrence of Apples in the Worksheet and it should find it in cell BX500. Note that the Find dialogue box stays on the screen until you close it.
4. Now return to cell A1 and this time select the Edit I Replace... option on the Menu Bar and the dialogue box shown in Figure 2.31 will be displayed. We can use this option to replace the contents of a cell with something else. For example, in the Find what: box type the word Melons and in the Replace with: box type the word Lemons. Now you can choose whether you want Excel to replace all the occurrences of Melons with Lemons or just to replace the first occurrence that it finds. For this exercise we will change all Melons to Lemons so click on the Replace All button.


Figure 2.31 Using the Replace option.
5. The Replace dialogue box will disappear and you will see that all the occurrences of Melons now read Lemons. Go to cell BX503 and check it!

You can use the Edit I Replace... option to change Formulas as well as text stored in cells.

## Summary

Both the Find and Replace options are extremely useful features of Excel especially when you are working with very large spreadsheets. Used wisely they can save you a considerable amount of time when you need to make repetitive changes to the contents of multiple cells.

### 2.5. Rows and Columns

We have seen previously how we can move the contents of cells by using the Copy, Cut, and Paste Functions in Excel. However, there is another way that we can move things around in a Worksheet by means of inserting or deleting selected rows or columns.

In this section we will see how we can:

- Insert rows and columns.
- Modify column width and row height.
- Delete selected rows or columns.


## Exercise 2.5

1. If it is not already running start Excel and Open the Fruit Workbook. Select row 11 and then click on Insert I Row on the Menu Bar. Notice how the original contents of row $\mathbf{1 1}$ are pushed downwards to become row $\mathbf{1 2}$ and a new blank row $\mathbf{1 1}$ has been inserted in the Fruit Worksheet as in the example in Figure 2.32.


Figure 2.32 Inserting a blank row.
2. We can perform a similar operation with columns. For example, select column B and click on Insert I Column on the Menu Bar. In this instance the contents of both columns $\mathbf{C}$ and $\mathbf{D}$ are shifted over to the right to make room for the newly inserted blank column as shown in Figure 2.33.


Figure 2.33 Inserting columns.

If you need to insert several additional rows then simply select multiple adjacent rows and then perform an Insert I Row operation. The equivalent number of new rows will be inserted into your Worksheet. The same applies to columns as well.
3. So far we have only been entering a short amount of text in cells on our Worksheet but if we select cell D12 and click on the Formula Bar we can add the word amount after the word Total, then press Return or click on the button to accept the change. Now you will see that the text is too wide to fit in the column as shown in Figure 2.34. Therefore we need to increase the width of the column to accommodate the extra letters.

|  |  |  |
| :--- | ---: | ---: |
| Apples | 34 |  |
| Oranges | 11 |  |
| Bananas | 25 |  |
| Lemons | 9 |  |
| Total amot | 79 |  |
|  |  |  |

Figure 2.34
4. To increase the width of column $\mathbf{D}$ select the entire column and then click on the Format I Column I Width... option on the Menu Bar. A dialogue box as shown in Figure 2.35 will be displayed and if we enter a value of 12 and click on OK the width of column $\mathbf{D}$ will be increased accordingly. See the example in Figure 2.36.


Figure 2.35 Setting a column width.

| C | D | E | F |
| :---: | :---: | :---: | :---: |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  | Apples | 34 |  |
|  | Oranges | 11 |  |
|  | Bananas | 25 |  |
|  | Lemons | 9 |  |
|  |  |  |  |
|  | Total amount | 79 |  |
|  |  |  |  |
|  |  |  |  |

Figure 2.36 Column D set to width 12.
5. We can perform a similar procedure with rows. For example, select row $\mathbf{1 2}$ and click on Format I Row I Height... on the Menu Bar. A dialogue box will display and you should enter a value of 25 and click on $\mathbf{O K}$ as in Figure 2.37. This time the height of row $\mathbf{1 2}$ is increased as shown in the example in Figure 2.38.


Figure 2.37 Changing the row height.


Figure $\mathbf{2 . 3 8}$ Row 12 increased to 25.
6. Previously in this section we have seen how rows and columns can be inserted into a Worksheet and the existing data will be automatically moved to accommodate the changes. The same principle applies when we delete a row or column, however there is one very important difference. When inserting rows or columns it doesn't matter whether there is any data already in the row or column selected but if you delete a row or column containing data then the data will be deleted along with the row or column itself. To see this in action select column $\mathbf{C}$ in our Fruit Worksheet and click on Edit I Delete on the
Menu Bar. The data in the columns to the right of column $\mathbf{C}$ is shifted leftwards to take up the space vacated by the deleted column as shown in the example in Figure 2.39. Notice how the data that was originally in cells D7:E12 is now in C7:D12.


Figure 2.39 The Fruit Worksheet after deleting column C.
7. However, if we now select column $\mathbf{D}$ which contains the quantities of fruit and delete that column the data is also deleted as demonstrated in Figure 2.40. Either click on Edit I Undo or the Undo icon to reverse the column deletion action.


Figure 2.40 Deleting columns or rows with data removes the data as well.
8. Finally, Close the Fruit Worksheet saving any changes we have made so far.

## Summary

Using row or column insert and delete operations is an ideal way of rearranging the data in a Worksheet. However, you may need to be careful when using row or column delete otherwise you might accidentally delete cell contents.

In this section we have also seen how we can alter the width of columns and the height of rows. This can be useful in helping to make a spreadsheet more readable.

### 2.6. Sort Data

When people enter data into a spreadsheet they frequently don't think too much about the order of things. Often, as in our Fruit example, items are entered in a fairly arbitrary way. However, sometimes it may be necessary to maintain a list of items in strict alphabetical or numerical order.

In this section we will see how this can be easily achieved and you will learn how to:

- Sort selected data in ascending or descending numeric order.
- Sort selected data in ascending or descending alphabetic order.


## Exercise 2.6

1. Once again we will make use of our Fruit Worksheet. If it isn't already loaded then start Excel and Open Fruit.xls which should now look like Figure 2.41.


Figure 2.41 The Fruit Worksheet.
2. Start by selecting the cell range D7:D10 and then click on Data I Sort... on the Menu Bar. A Sort Warning dialogue box will appear as shown in Figure 2.42 and this tells us that there is data alongside our selected range which we might wish to include in the sorting operation. For now we will ignore the labels next to the numbers and simply sort the numbers themselves, so select Continue with current selection and click on the Sort... button.


Figure 2.42 The Sort Warning dialogue box.
3. Another dialogue box will now appear called Sort as shown in Figure 2.43 . Here we can specify certain criteria for carrying out the sorting process but for now we will just accept the default settings and click on the OK button.


Figure 2.43 Setting the Sort criteria.
4. The Sort dialogue box disappears and instantly the list of numbers has been sorted in ascending order as shown in Figure 2.44. Note: Once you have verified the fact that the numbers have been correctly sorted in ascending order, undo the sort operation by selecting Edit I Undo or by clicking once on the Undo $\rightsquigarrow$ icon on the Standard Toolbar.

|  |  |  |  |
| :--- | :--- | ---: | ---: |
|  |  |  |  |
|  | Apples | 9 |  |
|  | Oranges | 11 |  |
|  | Bananas | 25 |  |
|  | Lemons | 34 |  |
|  |  |  |  |
|  |  | 79 |  |
|  |  |  |  |

Figure 2.44 Numbers sorted in ascending order.
5. Next, we will sort the list of fruit into alphabetical order but this time we will include the quantities in the sorting operation. So, select the cell range C7:D10 and click on Data I Sort... on the Menu Bar. Now you will notice that no Sort Warning dialogue box appears. On the Sort criteria window make sure that the sort is carried out on the fruit names by selecting Column $\mathbf{C}$ in the Sort by drop down list and then we can proceed with the sort by clicking on the OK button. Once again our selected range is sorted instantly with all the fruit and their associated quantities arranged in alphabetical order as shown in Figure 2.45.


Figure 2.45 The sorted list of fruit and quantities.

> Instead of using the Data I Sort... option on the Menu Bar you can use the two Sort buttons on the Standard Toolbar, the Sort Ascending button and the Sort Descending button. However, when you use these buttons to perform a sort you will not be warned about any data in adjacent cells which you might wish to be included within the sort.

When sorting multiple columns or rows the sorting order is dependant on the position of the cursor. Therefore when you click on either the Sort Ascending or Sort Descending icons on the Toolbar the sort operation will be carried out on the column or row that contains the cursor at the end of the selection process.
6. Finally, Close the Fruit Workbook saving any changes that you have made.

## Summary

By using the Sort facilities provided in Excel it is possible to completely rearrange the data stored in cells. This can be extremely useful if you need to maintain say a list of people's names in alphabetical order or sort a group of numbers into ascending or descending order of value. Most sorting within Excel takes place on columnar lists but you can also sort data in rows. In addition, the more
advanced sorting features in Excel allow you to perform multi-level sorting, so for example you could sort a list of people by age in alphabetical order.

## Review Questions

1. Approximately how many cells are there in a single Excel Worksheet?
2. Which keyboard character is used to define a contiguous range of cells in a Formula?
3. Which Menu Bar option would you use to reverse the last operation that you carried out?
4. How would you enter a series of numerical digits into a cell so that they are treated as text?
5. Which keyboard key do you need to use if you want to select a non-contiguous range of cells?
6. Whereabouts on the screen would you click with the mouse to select an entire:
a. Row?
b. Column?
c. Worksheet?
7. How many items can be stored in the Windows Clipboard at any one time?
8. What procedure would you use to:
a. Switch between Worksheets?
b. Switch between any open Workbooks?
9. Other than using the Delete key on the keyboard, how could you delete the contents of a range of cells?
10. What Menu Bar option would you use to move the active cell marker to a specific cell reference?
11. How would you increase the width of a Worksheet column?
12. Which tool icon on the Standard Toolbar would you use to sort a list of names into reverse alphabetical order?

# Formulas and Functions 

## In this chapter you will learn how to

Use basic arithmetic and logical Formulas to perform a range of calculations.
Use the AutoFill and Copy Handle tools to copy or increment data entries.

Use relative and absolute cell referencing in Formulas or Functions.

Use the COUNT and AVERAGE functions.

We have already seen how you can use a Formula to perform a calculation based on the data stored in spreadsheet cells and as mentioned previously this is really the most useful feature of any spreadsheet package. However, so far we have only scratched at the surface when it comes to using Formulas in Excel and therefore we need to expand our knowledge in order to be able to produce more sophisticated and advanced spreadsheets.

As well as Formulas, Excel offers a range of Functions which can also be used to calculate and process spreadsheet data. Formulas and Functions work in slightly different ways so it is important to understand what they are and how they work.

Formulas: A Formula is basically an equation that is used to analyse and process the data stored in a Worksheet. Formulas can perform very simple operations such as addition, multiplication, subtraction, and division, or they can be extremely complex using sophisticated mathematical, conditional and logical processing techniques to calculate their results.

> Functions: Functions are predefined Formulas that perform calculations by using specific values, called arguments, in a particular order, known as the syntax. For example, the SUM Function adds values for ranges of cells where the range being totalled is the argument of the Function being performed. As with Formulas, Functions can be either simple or highly complex.

Both Formulas and Functions can refer to other cells on the same Worksheet, cells on other sheets in the same Workbook, or cells on sheets in other Workbooks.

### 3.1. Arithmetic and Logical Formulas

In this section we will look at Formulas in more detail and you will learn how to:

- Use basic arithmetic and logical Formulas to perform a range of calculations in a spreadsheet e.g. addition, subtraction, multiplication, and division.
- Recognise standard error messages associated with Formulas.
- Use the AutoFill tool and Copy Handle tool to copy or increment data entries.
- Understand and use relative cell referencing in Formulas or Functions.
- Understand and use absolute cell referencing in Formulas or Functions.


## Exercise 3.1

For this exercise we will start with a new blank Workbook.

1. If it is not loaded, then start Excel and a new blank Workbook will be created for us to work with. If Excel is already running then Close any open Workbooks and click on File I New on the Menu Bar or the New $\square$ icon on the Standard Toolbar.
2. In our blank Worksheet enter the following data in the specified cells:

| Cell reference | Value |
| :--- | :--- |
| B2 | 27 |
| B3 | 49 |
| B4 | 11 |
| B5 | 19 |
| C2 | 50 |
| C3 | 22 |
| C4 | 3 |
| C5 | 6 |

3. Next, in cell D2 type in the Formula $=B 2+C 2$ and press Return or Enter on the keyboard. In cell D3 type in the Formula $=B 3-C 3$. In cell $\mathbf{D 4}$ type in the Formula $=B 4^{*} C 4$. And, finally, in cell $\mathbf{D 5}$ type in the Formula $=B 5 / C 5$. Your Worksheet should now look exactly like the example shown in Figure 3.1.

|  | D6 | $\cdots$ | , |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D | E |
| 1 |  |  |  |  |  |
| 2 |  | 27 | 50 | 77 |  |
| 3 |  | 49 | 22 | 27 |  |
| 4 |  | 11 | 3 | 33 |  |
| 5 |  | 19 | 6 | 3.166667 |  |
| 6 |  |  |  |  |  |
| 7 |  |  |  |  |  |
| 8 |  |  |  |  |  |

Figure 3.1 Simple arithmetic.

Notice how the result of dividing 19 by 6 in cell D5 is displayed as 3.166667, this is because by default Excel displays numbers to 15 digit precision but in this instance the column is not wide enough to display all of them and therefore the number is truncated to fit the space available.
4. As well as actually typing cell references in Formulas we can use Excel to select them and automatically enter them into Formulas. For example, make cell $\mathbf{B 6}$ active and type in an = sign. Now using either cursor control keys or the mouse, position the cell marker at $\mathbf{B 2}$. You will notice that the cell referenced (B2) now appears after the $=$ sign in cell $\mathbf{B 6}$. Press the + sign key on the keyboard and then move to cell B3. Notice how a special cell marquee is used to highlight the cell you are selecting, see Figure 3.2. Press the + sign key again and then move to cell B4. Press the + once more and move to cell B5. Finally press the Return or Enter key and you will see that cell $\mathbf{B 6}$ now contains the number $\mathbf{1 0 6}$ which is the result of $\mathbf{B 2 + B 3 + B 4 + B 5}$ as per the Formula we have generated. Using this method of entering cell references into Formulas by pointing to them means that you are less likely to make mistakes when typing references in via the keyboard.

| SUM |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D | E |
| 1 |  |  |  |  |  |
| 2 |  | 27 | 50 | 77 |  |
| 3 |  | 491 | 22 | 27 |  |
| 4 |  | 11 | 3 | 33 |  |
| 5 |  | 19 | 6 | 3.166667 |  |
| 6 |  | = $\mathrm{B} 2+\mathrm{B} 3$ |  |  |  |
| 7 |  |  |  |  |  |
| 8 |  |  |  |  |  |

Figure 3.2 Entering a Formula by pointing to cell references.

> Excel Formulas can contain 'constants', i.e. fixed values for use in calculations rather than just cell references. So, it is perfectly valid to enter a Formula such as $=72^{\star} 0.2$ to calculate 20 percent of $\mathbf{7 2}$ giving the answer 14.4 .
5. Occasionally you may need to combine arithmetic Functions in a Formula in order to produce certain calculations. Here you must be aware that the order in which you enter mathematical symbols can effect the result of a calculation.

For example, in cell C6 enter the Formula $=C 2-C 3^{*} C 4$ and Excel will calculate the result as $\mathbf{- 1 6}$ because the multiplication is actually carried out before the subtraction, despite the fact that in the sum the - sign appears first. Basically, Excel uses an order of precedence when it comes to calculation. The order used is Division, Multiplication, Addition, then Subtraction. Therefore, if in our example we want Excel to perform the subtraction before the multiplication we have to use brackets in our Formula. Try this out by entering the Formula $=(C 2-C 3)^{*} C 4$ into cell C7. You will now see that although we are referencing the same cells and using the same arithmetic operators the results are completely different with the new calculation using the brackets producing $\mathbf{8 4}$ as the result as shown in Figure 3.3.

|  | C7 | $\pm=(C 2-C 3)^{*} C 4$ |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D | E |
| 1 |  |  |  |  |  |
| 2 |  | 27 | 50 | 77 |  |
| 3 |  | 49 | 22 | 27 |  |
| 4 |  | 11 | 3 | 33 |  |
| 5 |  | 19 | 6 | 3.166667 |  |
| 6 |  | 106 | -16 |  |  |
| 7 |  |  | 84 |  |  |
| 8 |  |  |  |  |  |
| 9 |  |  |  |  |  |

Figure 3.3 Using brackets to change the calculation order within a Formula.
6. When you enter a Formula Excel will check to see if it is syntactically correct. If it detects a mistake then an error value is generated. Error values can be the result of using text where a Formula expects a numeric value, deleting a cell that is referenced by a Formula, or using a cell that is not wide enough to display the result. For example, in cell B8 on our Worksheet enter the Formula $=B 6+I O$ where what looks like the digit $\mathbf{1}$ is in fact a capital letter $\mathbf{i}$, which is a common typing error. When you press the Return or Enter key an error is generated as shown in Figure 3.4. This is because we have mixed text in with numbers in our Formula and Excel cannot resolve the calculation.

|  | 88 | $\cdots$ | = $=\mathrm{B} 6+10$ |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D | E |
| 1 |  |  |  |  |  |
| 2 |  | 27 | 50 | 77 |  |
| 3 |  | 49 | 22 | 27 |  |
| 4 |  | 11 | 3 | 33 |  |
| 5 |  | 19 | 6 | 3.166667 |  |
| 6 |  | 106 | -16 |  |  |
| 7 |  |  | 84 |  |  |
| 8 |  | 武NAME? |  |  |  |
| 9 |  |  |  |  |  |

Figure 3.4 An error resulting from an invalid Formula being entered.

Some of the typical error values that you might encounter are as follows:

## Error value

\#NAME?
\#REF!
\#VALUE!
\#NUM!
\#N/A
\#NULL!
\#\#\#\#\#\#\#\#\#
\#DIV/0

## Typical cause

Text not recognised in a Formula.
The cell being referenced is not valid.
The wrong type of argument or operand is being used.
An error in a number used in a Formula.
The value being used in a Formula is not available.
The two areas referenced do not intersect.
The result calculated is too long to display in the cell.
Division by zero not allowed.

After encountering an error, if you don't fully understand what has caused it and how to rectify the problem use the Excel Help system to find more information about the error value displayed.
7. Close the Workbook without saving the changes and then Open a new blank Workbook.
8. On occasions you might need to enter the same value in a number of consecutive cells on a Worksheet. Whilst you could use Copy and Paste to do this, Excel has another feature called AutoFill which can prove useful and once mastered is much quicker. For example, on our new blank Worksheet enter the number 14 in cell A1 and then select the cell range A1:A6. Now click on Edit I Fill I Down on the Menu Bar. Excel will automatically fill the range with the value entered in cell A1, as shown in Figure 3.5.

| A1 |  | - | $=14$ |
| :---: | :---: | :---: | :---: |
|  | A | B | C |
| $\mathbf{1}$ | 14 |  |  |
| 2 | 14 |  |  |
| 3 | 14 |  |  |
| 4 | 14 |  |  |
| 5 | 14 |  |  |
| 6 |  | 14 |  |
| 7 |  |  |  |
| 8 |  |  |  |

Figure 3.5 Filling a range of cells.

You can use the Edit I Fill options to AutoFill a range of selected cells adjacent to the source cell in 4 different directions, Up, Down, Right or Left.
9. Even quicker than using the Edit I Fill I Down option on the Menu Bar you can populate a range of cells with identical values using the mouse. For example, delete the contents of cells A1:A6 and type the word Grape in cell $\mathbf{A 1}$ and reposition the active cell marker at A1. Now, if you look carefully at the active cell marker you will see that there is a small black control handle in the bottom right hand corner called the Fill Handle as shown in Figure 3.6. (Note that this image has been magnified so that you can see the Fill Handle more easily.)


Figure 3.6 The Fill Handle.
10. Move the normal pointer over the Fill Handle and it changes to a $\uparrow$ pointer. Now if you click on the Fill Handle and drag downwards with the mouse to $\mathbf{A 6}$ as shown in Figure 3.7, when you release the mouse button the word Grape will fill the selected cells. Notice the small box showing you what will be placed in the target cells, this is useful when you are filling a large range and still cannot see the source cell on the screen.

| A1 |  |  | - |  |
| :--- | :--- | :--- | :--- | :--- |
|  | A | B | Crape |  |
| 1 | Grape |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |
| 7 |  |  |  |  |
| 8 |  | Grape |  |  |
| 9 |  |  |  |  |

Figure 3.7 Using the Fill Handle to AutoFill a range of cells.
11. Whilst filling a range of cells with identical values is certainly useful from time to time, you are more likely to need to fill a range of cells with a group of consecutive values or a progressive series. For example, a product serial number or a list of employee numbers. Fortunately. Excel comes to our assistance once again with the AutoFill Series feature. Let's start by deleting the contents of the cell range A1:A6 and entering the number 140020 in cell B2. This time we use the Fill Handle press and hold down the Ctrl key on the keyboard whilst dragging the mouse to cell B7. When you hold down the Ctrl key the $\boldsymbol{\Psi}$ pointer is supplemented by a tiny + sign like this $\boldsymbol{\Psi}^{+}$. As you drag the mouse downwards you will notice that the prompt box displays an increasing series of numbers as shown in Figure 3.8. When you release the mouse button and then the Ctrl key the cell range B2:B7 is automatically filled with a series of consecutive numbers through to $\mathbf{1 4 0 0 2 5}$ as shown in Figure 3.9.

|  | B2 | $\square$ | = 140020 |  |
| :---: | :---: | :---: | :---: | :---: |
|  | A | B | C |  |
| 1 |  |  |  |  |
| 2 |  | 140020 |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |
| 7 |  | $+$ |  |  |
| 8 |  |  | 140025 |  |
| 9 |  |  |  |  |
| 10 |  |  |  |  |

Figure 3.8 Using the Ctrl key to AutoFill a series of numbers.

|  | B2 | $\cdots$ | $=140020$ |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | C | [ |
| 1 |  |  |  |  |  |
| 2 |  | 140020 |  |  |  |
| 3 |  | 140021 |  |  |  |
| 4 |  | 140022 |  |  |  |
| 5 |  | 140023 |  |  |  |
| 6 |  | 140024 |  |  |  |
| 7 |  | 140025 |  |  |  |
| 8 |  |  |  |  |  |
| 9 |  |  |  |  |  |
| 10 |  |  |  |  |  |

Figure 3.9 A simple number series created in a range of cells.
12. We can also apply the Series feature to text and the most frequent use of this facility is when we wish to type in consecutive days of the week or months of the year. For example, delete the contents of the cell range B2:B7 and type
the word Sunday in cell B2. Now drag the Fill Handle to cell H2 and when you release the mouse button you will see the other days of the week have been automatically entered into consecutive cells, as shown in Figure 3.10.


Figure 3.10 Using AutoFill to quickly enter the days of the week.

As well as using the mouse and the Fill Handle to AutoFill ranges you can use the Edit I Fill I Series... option on the Menu Bar. This displays a dialogue box as shown in Figure 3.11 where you can fine tune the way in which a series of cells is automatically filled.


Figure 3.11 Defining how a series will be filled.

For example, you may wish to use a negative Step value: or to limit the AutoFill operation to a certain number of cells defined by the Stop value: box.
13. Close the Workbook without saving the changes and then Open a new blank Workbook.
14. So far, when we have been entering cell references in Formulas we have simply been typing things like B2,C6:C10, or A1:D9. This format is called Relative addressing and it means that when a Formula is copied across a range of cells, the Formula in each cell changes automatically to reflect the new source cells. In our blank Worksheet enter the following data in the specified cells:

| Cell reference | Value |
| :--- | :--- |
| B2 | 45 |
| B3 | 12 |
| B4 | 62 |
| C2 | 23 |
| C3 | 102 |
| C4 | 19 |

15. Next, make cell $\mathbf{B 5}$ the active cell and double click on the AutoSum $\Sigma$ icon on the Standard Toolbar. This should result in the total $\mathbf{1 1 9}$ being displayed. Now, drag the Fill Handle to AutoFill cell C5 and when you release the mouse button and select cell $\mathbf{C 5}$ you will see that the Formula that has been copied has automatically adapted itself to refer to the range C2:C4, calculating the appropriate total of $\mathbf{1 4 4}$, as shown in the Formula Bar in Figure 3.12.

|  | C5 | $\checkmark$ | = =SUM(C2:C4) |  |
| :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D |
| 1 |  |  |  |  |
| 2 |  | 45 | 23 |  |
| 3 |  | 12 | 102 |  |
| 4 |  | 62 | 19 |  |
| 5 |  | 119 | 144 |  |
| 6 |  |  |  |  |
| 7 |  |  |  |  |

Figure 3.12 An example of Relative addressing.

Normally, this action is precisely what we require Excel to achieve and on most occasions Relative addressing is the appropriate format to use.
16. However, sometimes we need to use a specific fixed cell reference in a range of Formulas. This can be done in Excel by using a technique known as Absolute addressing. As an example let's assume we wish to calculate the VAT on a range of values in cells.
17. Close the existing Workbook without saving the changes and then Open a new blank Workbook. In our blank Worksheet enter the following data in the specified cells:

Cell reference
A1
B2
B3
B4
C2

## Value

0.175

10
60
45.95

B2*A1

## 18. Now, make cell C2 the active cell and use the Fill Handle to AutoFill the

 cell range C3:C4. When you do this something strange happens. Instead of the new Formulas calculating the VAT the values of $\mathbf{0}$ have appeared. This is because the Formula in $\mathbf{C 2}$ is using a Relative address for the reference to the VAT rate in cell $\mathbf{A 1}$ and the cells $\mathbf{C 3}$ and $\mathbf{C 4}$ are referring to cells $\mathbf{A 2}$ and $\mathbf{A 3}$ respectively, which are empty. Hence, the wrong results have been produced as shown in Figure 3.13.|  | C4 | $\square$ | = $=84^{*} \mathrm{~A}$ |  |
| :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D |
| 1 | 0.175 |  |  |  |
| 2 |  | 10 | 1.75 |  |
| 3 |  | 60 | 0 |  |
| 4 |  | 45.95 | 0 |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |

Figure 3.13 Incorrect VAT calculation.
19. We can correct this error by using Absolute addressing in the Formula in cell C2. To use an Absolute address we need to use $\$$ signs in the cell reference. So, replace the Formula in cell $\mathbf{C 2}$ with $=B 2^{*} \$ A \$ 1$, this then refers to cell $\mathbf{A 1}$ as an Absolute cell address. Now, when we use the Fill Handle to AutoFill cells C3:C4 the correct VAT values are calculated, as shown in Figure 3.14.

|  | C4 | $\checkmark$ | $=\mathrm{B4}{ }^{*}$ \$ |  |
| :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D |
| 1 | 0.175 |  |  |  |
| 2 |  | 10 | 1.75 |  |
| 3 |  | 60 | 10.5 |  |
| 4 |  | 45.95 | 8.04125 |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |

Figure 3.14 Using Absolute addressing to perform a correct VAT calculation.
20. Close the existing Workbook without saving the changes.

> In our example VAT Worksheet we could simply put a constant value in our Formula to calculate the VAT, like so =B2*0.175. This would work perfectly well in most circumstances but if the VAT rate changes we would need to edit the Formulas in our spreadsheet. This is why we have designated a specific cell which holds the value of the current VAT rate and refer to it in our Formula. In this way if the VAT rate changes we only have to change it in one place in the spreadsheet. This is precisely why Absolute addressing can be useful.

## Summary

After completing this section you should now have an appreciation of how important Formulas are when using a spreadsheet package like Excel. In effect the use of Formulas is a bit like programming the Worksheet, since once they have been entered correctly the recalculation of their results is completely automatic. This is what makes products like Excel so useful. When entering complex Formulas it is quite easy to make mistakes and you should now understand some of the types of error values that you may encounter in Excel. In addition, we have seen how using the AutoFill facilities provided in Excel can save an awful lot of time entering repetitive or serial data.

Lastly, in this section we have covered the differences between Relative and Absolute addressing and seen why we might need to use the different types of cell referencing within Formulas.

### 3.2. Working with Functions

As mentioned earlier, Functions are a type of in-built Formula that can be used to perform calculations in a similar way to Formulas. Excel provides a huge range of Functions both general purpose and more specialist, covering areas such as engineering, statistics, finance, mathematics, and trigonometry.

We have already covered the use of one of Excel's most commonly used Functions - SUM - in Exercise 2.1, Step 7, so in this section we will see how to:

- Use the COUNT Function.
- Use the AVERAGE Function.


## Exercise 3.2

1. If it is not loaded then start Excel and a new blank Workbook will be created for us to work with. If Excel is already running then Close any open Workbooks and create a new one.
2. In cell B2 enter the number 1989 and then using the AutoFill feature generate a series of sequential numbers in the cell range $\mathbf{B 3}: \mathbf{B 2 2}$ finishing with the number 2009. Next, make cell D10 the active cell and then select Insert I Function... on the Menu Bar. A dialogue box called Paste Function will appear as shown in Figure 3.15.


Figure 3.15 The Paste Function dialogue box.
3. Here we can select the specific Function that we want to use. On the left is a list of Function categories and on the right is a list of specific Functions within a category. By default Excel displays a list of the Most Recently Used Functions, assuming that we might want to use one of these again. However, the COUNT Function is not listed here so we need to select another category. The Function we need resides in the Statistical category so select this on the left and then using the scroll bar on the right hand box select the COUNT Function as shown in Figure 3.16.


Figure 3.16 Selecting the COUNT Function.

Instead of selecting Insert | Function... on the Menu Bar you can click on the Paste Function icon on the Standard Toolbar.
4. When you click on $\mathbf{O K}$ in the Paste Function box it disappears and a new type of pop-up dialogue box appears in the top left hand corner of the Worksheet as shown in Figure 3.17.


Figure 3.17 Pop-up dialogue box which appears after selecting Paste Function.
5. This window can now be used to enter the arguments for the COUNT Function, so in the Value1 box you should enter B2:B22 and then click on OK. The pop-up window will disappear and you will see that the cell D10 now contains the answer 21, which is the number of items in the list B2:B22 as shown in Figure 3.18.

|  | D10 | $\rightarrow$ | $=\mathrm{COUNT}(\mathrm{B} 2: \mathrm{B22})$ |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D | E |
| 1 |  |  |  |  |  |
| 2 |  | 1989 |  |  |  |
| 3 |  | 1990 |  |  |  |
| 4 |  | 1991 |  |  |  |
| 5 |  | 1992 |  |  |  |
| 6 |  | 1993 |  |  |  |
| 7 |  | 1994 |  |  |  |
| 8 |  | 1995 |  |  |  |
| 9 |  | 1996 |  |  |  |
| 10 |  | 1997 |  |  |  |
| 11 |  | 1998 |  |  |  |
| 12 |  | 1999 |  |  |  |
| 13 |  | 2000 |  |  |  |
| 14 |  | 2001 |  |  |  |
| 15 |  | 2002 |  |  |  |
| 16 |  | 2003 |  |  |  |
| 17 |  | 2004 |  |  |  |
| 18 |  | 2005 |  |  |  |
| 19 |  | 2006 |  |  |  |
| 20 |  | 2007 |  |  |  |
| 21 |  | 2008 |  |  |  |
| 22 |  | 2009 |  |  |  |
| 23 |  |  |  |  |  |

Figure 3.18 The result of using the COUNT Function on the list of numbers.

> When using a pop-up window to enter the arguments for a Function you can use the mouse to select cells and ranges on the Worksheet itself rather than typing in cell references. However you might find that the pop-up window is obscuring the area of the Worksheet containing the cells you wish to select. If this is the case then you can move the pop-up window out of the way by clicking anywhere on the grey background and then dragging the window to a new position.
6. You might argue that counting a list of numbers is easy, especially as there are row numbers to help us. However, the COUNT Function can also be used to count the entries in any range of cells. For example, make a copy of B2:B22 in both A2:A22 and C2:22. Now, redefine the COUNT Function in D10 so that the range being counted is A2:C22 (you can do this by simply editing the COUNT Formula in the Formula Bar after selecting cell D10). You will see that the result of the COUNT Function is now $\mathbf{6 3}$ as shown in Figure 3.19 .

| D10 |  | $\cdots$ | $=$ = COUNT(A2.C22) |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D | E |
| 1 |  |  |  |  |  |
| 2 | 1989 | 1989 | 1989 |  |  |
| 3 | 1990 | 1990 | 1990 |  |  |
| 4 | 1991 | 1991 | 1991 |  |  |
| 5 | 1992 | 1992 | 1992 |  |  |
| 6 | 1993 | 1993 | 1993 |  |  |
| 7 | 1994 | 1994 | 1994 |  |  |
| 8 | 1995 | 1995 | 1995 |  |  |
| 9 | 1996 | 1996 | 1996 |  |  |
| 10 | 1997 | 1997 | 1997 | 63 |  |
| 11 | 1998 | 1998 | 1998 |  |  |
| 12 | 1999 | 1999 | 1999 |  |  |
| 13 | 2000 | 2000 | 2000 |  |  |
| 14 | 2001 | 2001 | 2001 |  |  |
| 15 | 2002 | 2002 | 2002 |  |  |
| 16 | 2003 | 2003 | 2003 |  |  |
| 17 | 2004 | 2004 | 2004 |  |  |
| 18 | 2005 | 2005 | 2005 |  |  |
| 19 | 2006 | 2006 | 2006 |  |  |
| 20 | 2007 | 2007 | 2007 |  |  |
| 21 | 2008 | 2008 | 2008 |  |  |
| 22 | 2009 | 2009 | 2009 |  |  |
| 23 |  |  |  |  |  |

Figure 3.19 Using COUNT on a larger cell range.
7. Next, delete the contents of cells A5, A13, B8, B18, C3, C10, and C21. Notice how the cell D10 now shows the answer $\mathbf{5 6}$ as shown in Figure 3.20, this is because the COUNT Function will only count cells that contain numbers. Similarly, if a cell in a range being counted contains text it will be ignored.

|  | D10 | $\square$ | m = COU | (A2:C2 |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D | E |
| 1 |  |  |  |  |  |
| 2 | 1989 | 1989 | 1989 |  |  |
| 3 | 1990 | 1990 |  |  |  |
| 4 | 1991 | 1991 | 1991 |  |  |
| 5 |  | 1992 | 1992 |  |  |
| 6 | 1993 | 1993 | 1993 |  |  |
| 7 | 1994 | 1994 | 1994 |  |  |
| 8 | 1995 |  | 1995 |  |  |
| 9 | 1996 | 1996 | 1996 |  |  |
| 10 | 1997 | 1997 |  | 56 |  |
| 11 | 1998 | 1998 | 1998 |  |  |
| 12 | 1999 | 1999 | 1999 |  |  |
| 13 |  | 2000 | 2000 |  |  |
| 14 | 2001 | 2001 | 2001 |  |  |
| 15 | 2002 | 2002 | 2002 |  |  |
| 16 | 2003 | 2003 | 2003 |  |  |
| 17 | 2004 | 2004 | 2004 |  |  |
| 18 | 2005 |  | 2005 |  |  |
| 19 | 2006 | 2006 | 2006 |  |  |
| 20 | 2007 | 2007 | 2007 |  |  |
| 21 | 2008 | 2008 |  |  |  |
| 22 | 2009 | 2009 | 2009 |  |  |
| 23 |  |  |  |  |  |

Figure 3.20 Any gaps in the cell range will be ignored by the COUNT Function.
8. Finally, in our brief look at Functions we will use the AVERAGE Function to work out the average value of all the numbers in our range A2:C22. First, click on cell D10 and delete the COUNT Function. Next, select Insert I Function... on the Menu Bar or click on the Paste Function $f_{*}$ icon on the Standard Toolbar. On the Paste Function window select the AVERAGE Function (which is in the Statistical Functions category) and when the AVERAGE pop-up window appears enter the range $A 2: C 22$ as shown in Figure 3.21 or select it using the mouse on the Worksheet area.


Figure 3.21 Using the AVERAGE Function.
9. After clicking on the $\mathbf{O K}$ button you will see that the average value of all the numbers in our selected list has been calculated as $\mathbf{1 9 9 9 . 1 0 7}$ as shown in Figure 3.22. Notice how like the COUNT Function, the AVERAGE Function has ignored the cells without any numbers in them.

|  | D10 | $\cdots$ | = =AVERAGE(A2:C22) |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | A | B | C | D | E |
| 1 |  |  |  |  |  |
| 2 | 1909 | 1989 | 1989 |  |  |
| 3 | 1990 | 1990 |  |  |  |
| 4 | 1991 | 1991 | 1991 |  |  |
| 5 |  | 1992 | 1992 |  |  |
| 6 | 1993 | 1993 | 1993 |  |  |
| 7 | 1994 | 1994 | 1994 |  |  |
| 8 | 1995 |  | 1995 |  |  |
| 9 | 1996 | 1996 | 1996 |  |  |
| 10 | 1997 | 1997 |  | 1999.107 |  |
| 11 | 1998 | 1998 | 1998 |  |  |
| 12 | 1999 | 1999 | 1999 |  |  |
| 13 |  | 2000 | 2000 |  |  |
| 14 | 2001 | 2001 | 2001 |  |  |
| 15 | 2002 | 2002 | 2002 |  |  |
| 16 | 2003 | 2003 | 2003 |  |  |
| 17 | 2004 | 2004 | 2004 |  |  |
| 18 | 2005 |  | 2005 |  |  |
| 19 | 2006 | 2006 | 2006 |  |  |
| 20 | 2007 | 2007 | 2007 |  |  |
| 21 | 2008 | 2008 |  |  |  |
| 22 | 2009 | 2009 | 2009 |  |  |
| 23 |  |  |  |  |  |

Figure 3.22 The result of using the AVERAGE Function on our range of cells.
10. Close the existing Workbook without saving the changes.

## Summary

The Functions in Excel are even more powerful and sophisticated than the Formulas and as we have seen they can be put to very effective use. However, whilst Functions such as, SUM, COUNT, and AVERAGE are fairly easy to use, some of the more specialist Functions in Excel require a significant amount of in-depth knowledge in order to use them efficiently and correctly.

## Review Questions

1. What is the difference between a Formula and a Function?
2. By default to how many digits of precision does Excel display numbers?
3. Which keyboard character is used to denote the start of a Formula or Function?
4. What order of precedence does Excel use when performing a calculation involving mixed arithmetical operators?
5. Why might you need to use brackets in a Formula?
6. What type of error causes \#NAME? to be displayed when entering a Formula?
7. Which Menu Bar option would you use to automatically enter an identical value in a range of cells?
8. Which keyboard key would you hold down when using the mouse to populate a range of cells with a sequence of consecutive numbers?
9. What tool icon on the Standard Toolbar will automatically total numbers in a range of cells?
10. What is the difference between Relative Addressing and absolute addressing of cells?
11. In which Function category in the Paste Function dialogue box would you find the COUNT Function?
12. Which type of cells will be ignored by the AVERAGE Function?


## Formatting

## In this chapter you will learn how to

- Format text and numerical data.

Format ranges of cells.
Use the spell checking tool.

The ability to format various aspects of a spreadsheet can enable you to dramatically change its appearance. In fact some Excel Worksheets end up looking nothing like what you might perceive as a conventional spreadsheet. This is useful when you need to present the results of an analysis or calculation in say a formal report. You can change the format of a cell or range of cells using either the Format Menu or the Formatting Toolbar.

In this section you will learn how to do the following:

- Format Numerical Data.
- Format Text.
- Format Ranges of Cells.
- Check Spelling.

However, before we proceed further we need to create a new Workbook designed to produce invoices with a wide variety of data so that it can be used for the following exercises.

If it is not loaded then start Excel and a new blank Workbook will be created for us to work with. If Excel is already running then Close any open Workbooks and click on File I New on the Menu Bar or the New icon on the Standard Toolbar.

Next, enter the following data in the specified cells:

| Cell reference | Value |
| :--- | :--- |
| A1 | Acme Trading Company |
| A2 | 12 High Street |
| A3 | Newtown |
| A4 | Anywhere |
| A5 | ZZ9 9XX |
| A7 | Tel: 0119-989898 |
| A8 | Fax: 0119-898989 |
| E1 | A |
| E2 | C |
| E3 | M |
| E4 | E |
| C10 | Invoice |
| A12 | Customer: |
| A13 | A/C No: |
| A14 | Oder Date: |
|  |  |
| A15 | Invoice No: |


| B12 | Mr. Smith |
| :--- | :--- |
| B13 | S001 |
| B14 | $12 / 05 / 00$ |
| B15 | 5678 |
| D12 | Delivery Address: |
| D13 | 97 Main Road |
| D14 | Fieldstone |
| D15 | Yorkshire |
| D16 | YY88 8wW |
| A19 | Item Code |
| B19 | Description |
| E19 | Qty |
| F19 | Unit Price |
| G19 | VAT Rate |
| H19 | VAT |
| I19 | Item Total |
| A20 | C001 |
| A21 | D005 |
| A22 | L089 |
| A23 | B012 |
| B20 | Chair |
| B21 | Desk |
| B22 | Lamp |
| B23 | Catalogue |
| E20 | 2 |
| E21 | 5 |
| E22 | 1 |
| E23 | 3 |
| F20 | 5 |
| F21 |  |

Once you have entered all the data detailed above, your spreadsheet should look like the example in Figure 4.1.

You should now Save the Workbook in the My Documents folder using the name Invoice.xls.


Figure 4.1 The Invoice.xls spreadsheet prior to formatting.

### 4.1. Format Cells - Numbers

Spreadsheet cells containing numbers or dates can be formatted in various ways in order to make them more understandable. For example:

- To display different number styles, such as number of decimal places, number of zeros after the decimal point, with or without commas to indicate thousands.
- To display different date styles.
- To display different currency symbols.
- To display numbers as percentages.


## Exercise 4.1

For this exercise we will format the basic invoice which we created earlier so that it looks more professional and business like.

1. If it is not loaded then start Excel and Open the Workbook Invoice.xls.

Next, select cells G20:G30.
2. Select the Format I Cells... option from the Menu Bar.
3. The Format I Cells dialogue box will open and 6 tabbed options are displayed, as shown in Figure 4.2.


Figure 4.2 The Format Cells dialogue box.
4. Next, click on the Number tab if it is not already selected and under Category: select Number - this allows you to change the way that numbers are displayed.
5. Now, make sure that the Decimal places: option is set to $\mathbf{2}$ and click OK
6. The numbers in the selected range will now be displayed to 2 decimal places. Notice also in Figure 4.2 that there is a tick box labelled Use $\mathbf{1 0 0 0}$ Separator (,) which can be used to ensure that large numbers are displayed with commas indicating the thousands.

You can also switch the 1000 Separator in a cell or range of cells on and off by clicking on its icon on the Toolbar.
7. Perform the same procedure on the range H20:H31
8. Select cell B14.
9. Using the Format I Cells option (Number tab again) click on Date in the Category: list.
10. In the Type: list select $\mathbf{0 4}$-Mar-97 - this will format the date using the month name rather than the month number.
11. Click on OK

Excel allows you to format dates in a variety of different styles. For example $4 / 3 / 97$ can be displayed as $04 / 03 / 97$, 04/03/1997, 4-Mar-97, 04-Mar-97, 4-Mar, Mar-97, March-97 or March 4, 1997 depending on which Type you choose in the Format Cells I Number tab dialog box.
12. Select cell 131.
13. Using the Format I Cells option (Number tab again) click on Currency in the Category: list.
14. Next, in the Symbol: list select the desired currency character (£, \$, DM, etc.).
15. Click on OK.

Formatting numbers as currency is a frequent requirement. There is a Currency icon on the Toolbar which you can use to quickly format any selected range of numbers to be displayed using the default currency settings.
16. Finally, select cells G20:G30.
17. Using the Format I Cells option (Number tab again) click on Percentage in the Category: list.
18. Set the number of Decimal places: to 1 - this will format the VAT Rate cells as percentages with a single decimal place.
19. Click on OK and your Invoice.xIs Worksheet should now look like the example in Figure 4.3.


Figure 4.3 Invoice.xls after formatting numbers.
20. Select File I Save on the Menu Bar or click on the Save icon to save the changes we have made so far.

### 4.2. Format Cells - Text

The text data in a spreadsheet can be formatted in a similar way to how text is formatted in a word processing document. Formatting is frequently used for column headings and labels. Different types of formatting can be used to emphasise text or to make it more readable. For example:

- Using bold, italic, or different font types.
- Using different text font colours.
- Using various text orientations.


## Exercise 4.2

For this exercise we will continue formatting our invoice to make it even more presentable.

1. If it is not already loaded then Open the Workbook Invoice.xls
2. Select cells A19:I19
3. Select Format I Cells... from the Menu Bar.
4. Click on the Font tab if it is not already selected - this allows you to change the way that the selected text is displayed, also referred to as the text attributes, as shown in Figure 4.4.


Figure 4.4 The Format Cells I Font tab.

> Text Attributes: Text consists of a font, point size, and a style e.g. Arial font, 16 point, bold, italic, underline. Each of these settings is called an attribute and you can use them to alter the way that text appears both on the screen and when it is printed out.
5. Under the Font style: list select Bold Italic and click on $\mathbf{O K}$ - the column headings will now be emphasised and stand out from the remaining text.

The Formatting Toolbar can be used to quickly change text attributes. Simply select the target cells and click on the appropriate icons on the Toolbar.
6. Perform the same procedure on cells A12:A15, D12, and H31.
7. Now it's time for a little colour. Select cells A1:A8 and click on the Color: list on the Font tab in the Format I Cells... menu option. You can choose any of the colours listed and the text will change accordingly.
8. Perform the same procedures on cells $\mathbf{C 1 0}$ and E1:E4.

As well as changing the font colour you can also change the background colour of selected cells by selecting the Patterns tab. In addition, shading patterns can be used to create some very effective colour schemes.

Certain combinations of font and background colours can produce text that is very difficult to read. In fact it is possible to set both the font and the background to the same colour so that the text is effectively invisible!
9. Lastly in this exercise we will change the orientation of some text. Select cells E1:E4 and open the Format I Cells... option on the Menu Bar again.
10. Click on the Alignment tab and on the right you will see the Orientation control, as shown in Figure 4.5.


Figure 4.5 Changing the alignment of text.
11. Click on the red diamond at the end of the pointer and drag it downwards so that the Degrees indicator shows $\mathbf{- 9 0}$ and release the mouse button.
12. Click on OK and the text spelling out the word $\mathbf{A C M E}$ should now appear on its side, as shown in Figure 4.6. (Note that you cannot see the actual colours used in this formatting example but you should notice that the coloured areas are slightly lighter.)


Figure 4.6 The Invoice.xIs Worksheet after formatting the text.
13. You might want to apply some other attributes such as colour, pattern and point size to make this section of the spreadsheet appear like a company logo.
14. Once again select File I Save on the Menu Bar or click on the Save icon to save the changes we have made so far.

Changing the orientation of text within cells is a useful way of reducing the width of columns where the heading is much longer than the data being stored. Simply align the text vertically and it will take up less column width.

### 4.3. Format Cells - Cell Ranges

When you enter text into cells it is aligned towards the left by default. Numbers on the other hand are by default aligned to the right within cells. However, you can change the alignment of data within cells both horizontally and vertically. You can also format ranges of cells in other ways. For example:

- Centre and align cell contents in a selected cell range: left and right; top and bottom.
- Add border effects to a selected cell range.


## Exercise 4.3

Once again we will continue to smarten up our invoice.

1. Open the Workbook Invoice.xis if it is not already loaded.
2. Select column A and open the Format I Column I Width... menu option and the dialogue box shown in Figure 4.7 should be displayed.


Figure 4.7 Formatting the column width
3. Set the width of column $\mathbf{A}$ to 16 and click on $\mathbf{O K}$.
4. Select cells A12:A15 and open the Format I Cells... menu option again.
5. Click on the Alignment tab and in the Horizontal: list select Right, then click on OK. The text in these cells will now be aligned towards the right hand side of the column. However, whilst the adjacent text in cells B12:B13 now looks fine, the date in cell B14 and the number in cell B15 look decidedly misplaced.
6. Select cells B14:B15 and align them both to the left using the procedure above but selecting Left in the Horizontal: list.
7. Cells $\mathbf{A 1 2 : B 1 5}$ in your spreadsheet should now look like Figure 4.8 .

| 11 |  |  |  |
| ---: | ---: | ---: | :--- |
| 12 | Customer: | Mr. Smith |  |
| 13 | A/C No: | S001 |  |
| 14 | Oder Date: | 12 -May-00 |  |
| 15 | Invoice No: | 5678 |  |
| $\mathbf{1 6}$ |  |  |  |

Figure 4.8 Aligning cells.
8. Next, select row 19 and click on the Centre icon on the Formatting Toolbar. This will align the column headings text centrally within their cells.
9. The cell contents in a selected cell range can also be aligned vertically. Select cell C10 and increase the font size to 20. Notice how the height of the
row is increased automatically to accommodate the new point size. Now increase the height of the row to 50 by using the Format I Column I
Height... menu option. Notice how the text is aligned towards the bottom of the cell.
10. Once again select cell $\mathbf{C 1 0}$ and open the Format I Cells... menu option. Click on the Alignment tab and from the Vertical: list select Center and click on OK. The word Invoice will now be neatly central within the row height, as in Figure 4.9.


Figure 4.9 Vertical alignment within a cell.

Adjusting the width of columns and the height of rows can be achieved more quickly and easily by moving the appropriate column or row boundary using the mouse. When you position the mouse cursor over a column boundary, clicking and dragging allows you to adjust the boundary width, as shown in Figure 4.10.

| I 16 | A |  |
| :--- | :--- | :--- |
|  | $=$ |  |
| 1 | Acme Trading Company Ltd. |  |
| 2 | 12 High Street |  |
| 3 | Newtown |  |
| 4 | Anywhere |  |
| 5 | Z79 9XX |  |

Figure 4.10 Adjusting a column width using the mouse.

To make the column width fit the contents, double-click the boundary to the right of the column heading, or to make a row fit the contents double-click the boundary at the bottom on the desired row.
11. Our last bit of tidying up involves formatting the borders of the ranges of cells.

Select cells A19:130 and click the down arrow next to the Borders button (Figure 4.11) on the Formatting Toolbar which will display a drop down list
(Figure 4.12). Select the second from the left on the bottom row and you will see the selected cells now have borders around them, as shown in Figure 4.13.


Figure 4.11


Figure 4.13 Thin borders round cells.
12. Next, select cells H31:131 and this time select the bottom right hand corner border option. The Totals cells now have a thicker border around them as in Figure 4.14.


Figure 4.14 Thick borders round cells.
13. Whilst the Border tool on the Formatting Toolbar provides a quick and easy way to add or remove borders to a range of cells, its options are fairly limited. The Border tab on the menu option is far more powerful and flexible.
14. Select cells D12:F17, select Format I Cells... and choose the Border tab.
15. Click on the double line in the Line I Style: list and then click on the Outline button. This will create a double lined border around the Delivery Address box on our invoice, as shown in the preview box.
16. Now click on the thick line just above the double line in the Line I Style: list
and then click on the Top Border button which is next to the top left hand corner of the preview box. Click on OK and the Delivery Address box on your invoice should appear like Figure 4.15. Meanwhile the complete Invoice.xls Worksheet should now look like the example in Figure 4.16.

| Delivery Address: |  |
| :--- | :--- |
| 97 Main Road |  |
| Fieldstone |  |
| Yorkshire |  |
| YY88 8WW |  |

Figure 4.15 Formatting of the Delivery Address: box.


Figure 4.16 The Invoice.xls Worksheet after formatting various cell ranges.
17. Once again select File I Save on the Menu Bar or click on the Save icon to save the changes we have made so far.

### 4.4. Spelling

Just as when using a word processor to produce documents it is important to ensure that all the words in a spreadsheet are spelt correctly if you are to create a good impression. Therefore we need to:

- Use a spell-check program and make changes where necessary.


## Exercise 4.4

1. If it is not already open, then Open the Workbook Invoice.xls.
2. Excel has a spelling checker which can be activated by either clicking on the $\sqrt[\text { abC }]{ }$ button on the Standard Toolbar or selecting Tools I Spelling... from the menu options.
3. When triggered the Spelling checker option will check the entire spreadsheet or the currently selected range of cells. Therefore if you want to check the whole of the spreadsheet make sure that the active cell is $\mathbf{A 1}$.
4. When the Spelling checker encounters what it thinks is an incorrectly spelt word it highlights the cell and displays a dialogue box, as in Figure 4.17.


Figure 4.17 The Spelling checker in action.
5. In the example above you can see that the word Order has been typed in as Oder and the Spelling checker has presented a list of suggested corrections. If the correct spelling is listed as a suggestion you can simply double-click on it to accept it. However, in this particular case the correct word (Order) has not been suggested, in which case you can simply type the correct spelling in the Change to: box and then click on the Change button.
6. If the word is not found in the dictionary but you know that it is spelt correctly you can click on the Ignore button (or Ignore All button if there is likely to be more than one occurrence of the word).
7. When you either Change or Ignore an incorrectly spelt word the Spelling checker will then move on to search for the next possible incorrect word in the spreadsheet.
8. Save any changes made to the Workbook.

## Summary

In this chapter we have covered the various ways that certain elements within a spreadsheet can be formatted as a means of enhancing its appearance. Both numbers and text can be altered to produce different effects and you can often apply formatting options to a range of cells. In addition, spelling and the way a spreadsheet is presented on the printed page have also been covered as formatting features.

As you can now appreciate there are numerous options and choices regarding how you can format a spreadsheet and with a little practice you can produce some really professional looking results.

## Review Questions

1. How can you specify the number of decimal places a value in a cell should display?
2. Which Menu Bar option would you use to display a number in a cell as a monetary amount?
3. What is a text attribute?
4. Why do you sometimes need to be careful when changing text fonts and cell background colours?
5. What procedure would you use to produce vertical text in a cell?
6. What happens to the row height when you increase the font size of text in a cell?
7. The Border tool has limited choices so what Menu Bar option will provide better control over cell borders?
8. When using the Spelling check tool what choices are you given when it finds an incorrectly spelt word?


## Printing

## In this chapter you will learn how to

Modify the margin settings of a spreadsheet document.

Change the document orientation.
Adjust the document setup to fit on one page.
Add a Header and Footer.
Select the appropriate basic print options.
Use the Print Preview tool prior to printing a spreadsheet.

- Print a Worksheet or ẄWorkbook.

Print part of a Worksheet or a pre-defined cell range.

### 5.1. Document Setup

Before we move on to actually printing our invoice it is important to understand how we can control the way that a spreadsheet is printed. In this section you will learn how to:

- Setup documents for printing.
- Modify document margin settings.
- Change document orientation, specifying portrait or landscape, page size etc.
- Adjust document setup to fit one page.
- Add a Header and Footer.


## Exercise 5.1

Margins are used to control the blank borders around a printed spreadsheet on the page. They can be adjusted so that the data printed is positioned neatly on the page and frequently you may need to reduce the margins so that more of a spreadsheet can be printed on a page.

1. If it is not already open, then Open the Workbook Invoice.xls.
2. Next, select File I Page Setup... from the menu options and then select the Margins tab, as shown in Figure 5.1.


Figure 5.1 The Page Setup dialogue box.
3. You can adjust the various margin settings by typing in new values (in cms ) or by using the $\frac{\pi}{x}$ control to increase or decrease the values. You need to click on the Print Preview button in order to see the results of any changes that you make.

> The are two check boxes on the Margins tab under where it says "Center on page", these are labelled Horizontally and Vertically. If you select these then the printed data will be automatically centred on the page for you.
4. Now click on the Page tab as shown in Figure 5.2. Here you can set the Orientation of the printed page as either Portrait (this is the default) or Landscape. Because many spreadsheets are often wider than they are long printing them out in Landscape format is a useful feature of Excel.


Figure 5.2 Switching between Portrait and Landscape printing.
5. Just below the Orientation section on the Page tab there is a section called Scaling, as shown in Figure 5.3. These settings can be used to adjust the size of the print on the paper. For example you can increase or shrink the print by a percentage using the Adjust to: control, or force the print to fit on a specific number of pages using the Fit to: controls. Also on the Page tab there are boxes to select the Paper size: and the Print quality: you want to use. However, the settings available in these two drop down lists depend on the type and model of printer that you are using.


Figure 5.3 Adjusting the scale of the print.
6. Next, select the Header/Footer tab on the Page Setup dialogue box, as shown in Figure 5.4.


Figure 5.4 Setting up the Headers and Footers for a Worksheet.
7. Headers and Footers can be printed automatically on every page generated when you print out your spreadsheet. This is very useful when a spreadsheet spans several pages. On this tab there are a selection of predefined Headers and Footers that you can choose, or you can define your own by clicking on the Custom Header... or Custom Footer... buttons, as shown in Figure 5.5 .


Figure 5.5 Specifying a Custom Header.
8. Once again you can click on the Print Preview button to see the effects of any changes that you have made.
9. Save any changes made to the Invoice.xIs Workbook.

### 5.2. Printing Simple Spreadsheet Documents

Now that we have performed the document setup procedures we can actually start to think about printing our invoice. In this section we will learn how to:

- Use basic print options.
- Preview a spreadsheet.
- Print a Worksheet or a Workbook.
- Print part of a Worksheet or a pre-defined cell range.


## Exercise 5.2

1. Once again, if it is not already open then Open the Workbook Invoice.xls.
2. Select the option File I Print... on the Menu Bar and a Print dialogue box like the one shown in Figure 5.6 will appear. This dialogue box can be used to control the actual printing of a Worksheet. At the top you can select the specific Printer that you want to use for this particular print job (normally the current Windows default printer is shown here). There is a Properties button that displays the selected printer settings which you can alter. Note that the actual printers available in the drop down list will depend on what printers have been installed in your Windows system. In the Print range section you can define how much of the Worksheet is to be printed by selecting All or a range of Page(s). The Copies section lets you print multiple copies of a print job and to Collate (assemble in order) the copies if you wish. Finally, on the
Print dialogue box there is a section labelled Print what. Here you can specify whether you want to print a Worksheet Selection, the current Active sheet(s), or the Entire Workbook. Once you are satisfied with the various settings controlling the print job simply click on the $\mathbf{O K}$ button to start the printing process.


Figure 5.6 Controlling a print job.

> Instead of using the File I Print... option from the Menu Bar you can simply click on the Print icon on the Standard Toolbar. However if you do this then you forego the opportunity of changing any Print settings and the printout will be produced using the default settings, which are: the current default Windows printer, print All pages, print 1 Copy, and print the Active sheet(s).

Assuming you are using A4 paper and that you print using the default settings, then when you print the Invoice.xls Worksheet it is likely to print on two pages, with the Item Total column on the second page. This is because the Invoice is too wide to fit on a single sheet of A4 in Portrait format. Therefore if you experience this problem simply select Landscape Orientation on the Page Setup I Page tab and print the document again.
3. Before you actually produce any printed pages you can, if you wish, look at a Preview of the document as it will appear on the page. This can be done in a number of different ways. Select File I Print Preview from the Menu Bar, click on the Print Preview icon on the Standard Toolbar, or click on the Preview button on the File I Print... dialogue box. Whichever method you use, a new window will be displayed in Excel showing you a graphical representation of the printed page(s) as shown in Figure 5.7.


Figure 5.7 The Print Preview window.
4. The Print Preview window has a series of 9 control buttons running along the top as shown in Figure 5.8. Looking at these buttons from left to right the Next button displays the next page if the document has more than one page, whilst the Previous button does the opposite. The Zoom button allows you to magnify or shrink the page image being displayed. The Print... button opens the Print dialogue window. The Setup... button displays the Page Setup dialogue box. The Margins button overlays the page image with the current margin settings so you can see what the printing boundaries are and adjust the margins using the mouse. The Page Break Preview button is probably the most useful, as when you click on it Excel will display the current Worksheet with the page boundaries or print area shown, as in Figure 5.9. Finally the Close and Help buttons are self explanatory.

Figure 5.8 Print Preview control buttons.


Figure 5.9 The Page Break Preview display for our Invoice.xls Worksheet.
5. Normally when printing you will need to print an entire Worksheet and when the document being printed is quite large then Excel will manage the print job and produce the relevant number of pages. However, sometimes you will only need to print a small section of a Worksheet. To do this, first select the range of cells you want to print, for example, D12:F17 in our Invoice.xls Worksheet. Next, select File I Print Area I Set Print Area on the Menu Bar. This defines the area to be printed based solely on the cells selected in the Worksheet. Now, if you perform a Print Preview you will see that just the Delivery Address box on our invoice will be printed as shown in Figure 5.10 .


Figure 5.10 Print Preview of a selected area of our Invoice.xls Worksheet.
6. Finally, before we finish with the printing facilities in Excel, you might on occasion need to print out the actual Formulas used in a Worksheet. To do
this, first select an area of the Worksheet containing some Formulas, for example, in our Invoice.xls Worksheet select the cell range H20:131 and then select Tools I Options... on the Menu Bar and the tabbed dialogue box in Figure 5.11 will be displayed. On the View tab make sure that the Formulas box is ticked and then click on $\mathbf{O K}$. The Worksheet will now display all the Formulas. Reset the Print Area to the current selection and then do a Print Preview which looks like the example shown in Figure 5.12.


Figure 5.11 The Tools Options View tab.


Figure 5.12 Printing Formulas Print Preview.
7. Close the Workbook saving any changes we have made.

## Summary

Printing Worksheets is pretty much an essential operation when using Excel and in this section we have learnt how we can control and manage the printing process. There are lots of things to consider, for example, the printer settings, the page settings, the print settings and even the Worksheet settings. Fortunately, the Print Preview option allows you to check everything on screen before committing anything to paper.

## Review Questions

1. How can you easily ensure that any printing is centred on a page?
2. What procedure would you use to print the date on every page of a printout?
3. What Menu Bar option would you use to check how much of a Worksheet will be printed on a page?
4. You need to print just the top three rows of a particular Worksheet. How would you achieve this?
5. How can you instruct Excel to print on a particular printer?
6. You need 10 copies of your Worksheet but you don't have access to a photocopier. How can you easily produce these?

## More Advanced Features

## In this chapter you will learn how to

- Import objects into a spreadsheet.
- Move and resize imported objects within a spreadsheet.
- Produce different types of charts and graphs from spreadsheet data.
Edit or modify a chart or graph.
- Change the chart type.
- Move and delete charts or graphs.

So far we have looked at the way Excel can be used to produce spreadsheets containing text, numbers, Formulas, and Functions but there are some more advanced features of the package that will allow us to be much more creative.

### 6.1. Importing Objects

As well as allowing us to enter various types of data into a Worksheet, Excel is capable of importing certain objects from external files.

In this section we will learn how to:

- Import objects into a spreadsheet, for example image files, graphs and text files.
- Move and resize imported objects within a spreadsheet.


## Exercise 6.1

For this exercise we will use our invoice spreadsheet to see how we can add a graphical image to a Worksheet.

1. Once again, if it is not already open then Open the Workbook Invoice.xls.
2. To insert a picture on a Worksheet select Insert I Object... on the Menu

Bar. This displays the Object dialogue box as shown in Figure 6.1. Here on the Create New tab you should select Microsoft Clip Gallery then click on $\mathbf{O K}$.


Figure 6.1 The Insert Object dialogue box.


Object: An Object is any element on a Worksheet which is not contained in a cell. Objects can be created with Excel itself by, for example, using the Drawing tools. Alternatively Objects can be 'imported' from an external source by using the Insert | Object... menu option. Whichever method is used to incorporate an Object into a Worksheet, it is treated as a discrete element which is separate from the Worksheet but stored in the Workbook when it is saved. You can resize and move any type of Object but if an Object is imported from another file you cannot edit the contents unless you start the underlying application which was used to create it by double clicking on the Object itself.
3. A new dialogue box will appear called the Microsoft Clip Gallery where you can select a category by clicking on it as in Figure 6.2.


Figure 6.2 Inserting Clip Art into a Worksheet.
4. Select a likely category such as Maps and choose an image.
5. Once you have found a suitable image, if you click on the Insert button the selected image will be inserted into your Worksheet.

Depending on which version of the Microsoft Gallery has been installed on your PC you might see a window which is slightly different than that shown in Figure 6.2 which applies to Gallery version 4.
6. If your system is using Gallery version 5 you will see a dialogue box as shown in Figure 6.3 and when you select a category you will see a new dialogue as in Figure 6.4 from where you can select a specific image.


Figure 6.3 Category display in Gallery version 5.


Figure 6.4 Clip Art image display in Gallery version 5.

7. When you select a Clip Art image in Gallery version 5 a pop up menu appears as in Figure 6.5 so that you can insert the image into your Worksheet.


Figure 6.5 The insert image pop up menu in Gallery version 5.
8. Whichever version of the Microsoft Gallery you are using, the new image will appear in the centre of the Worksheet, as shown in Figure 6.6.


Figure 6.6 Newly inserted Clip Art images appear in the centre of a Worksheet.
9. Obviously having the imported picture appearing in the centre of our Worksheet is not ideal and therefore it needs to be moved to a more appropriate location. To do this you need to position the mouse pointer on the object box boundary so that the cursor changes and then click and drag the box to position it somewhere else on the Worksheet. You can also re-size the object box by dragging on the box size control handles, as in Figure 6.7.


Figure 6.7 Resizing an object.
10. Use the box size control handles and the mouse pointer to resize and move the image to an appropriate position on the Worksheet. For example, as shown in Figure 6.8.


Figure 6.8 Our Invoice.xls with an image inserted.
11. Finally, Close the Workbook saving any changes we have made.

## Summary

In this section we have seen how we can incorporate external Objects, such as, Clip Art into our Worksheets. However, the example used in the exercise only demonstrates one type of Object and you should experiment with the Insert | Object... option to learn more about Excel's ability to use Objects.
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### 6.2. Charts and Graphs

Typically one of the primary uses of spreadsheet packages is to process large amounts of numerical data. However, frequently analysing numbers stored in a spreadsheet can be very difficult and even taking into account Excel's powerful Formulas and Functions it can be quite daunting looking at row after row and column after column of figures.

Fortunately Excel has some excellent features for creating graphs or charts based on the data stored in Worksheets and in this section we will look at how we can:

- Produce different types of charts and graphs from spreadsheet figures to analyse data, e.g. pie charts, column charts and bar charts.
- Edit or modify a chart or graph by adding a title or label, and modifying the colours in the chart or graph.
- Change the chart type.
- Move and delete charts or graphs.


## Exercise 6.2

1. For this exercise we will need some spreadsheet data that is suitable for analysing and turning into a graph. So, if it is not loaded then start Excel and a new blank Workbook will be created for us to work with. If Excel is already running then Close any open Workbooks and click on File I New on the Menu Bar or the New icon on the Standard Toolbar.
2. Next, enter the following data in the specified cells:

| Cell reference | Value |
| :--- | :--- |
| B2 | ACME Trading Company Ltd. |
| B4 | Monthly Sales |
| B6 | Jan |
| C6 | Feb |
| D6 | Mar |
| E6 | Apr |
| B7 | 1025 |
| C7 | 998 |
| D7 | 1147 |
| E7 | 723 |

3. Your Worksheet should now look like the example shown in Figure 6.9.


Figure 6.9 The initial Sales.xls Worksheet.
4. Before we proceed to graph the data, Save the Workbook in the My Documents folder with the name Sales.xls.

Charts in Excel can be created in two different forms; as an Object embedded in a Worksheet, or as a separate 'chart' sheet within a Workbook. The procedure for creating these two types of chart is basically the same and when you use the Chart Wizard you are asked which type of chart you wish to create.
5. Creating Charts in Excel is very easy thanks to the Chart Wizard which guides you step by step through the ' 4 step process' of producing a chart. The first thing to do is to decide on the data that will be used to create the Chart and in our Sales.xls example we want to plot the sales figures for the four months. Therefore, select the cell range B6:E7 and then select Insert I Chart... on the Menu Bar. The Chart Wizard will now automatically start at Step 1 with the Chart Type dialogue box as shown in Figure 6.10.


Figure 6.10 Step 1 of the Chart Wizard - choosing the chart type. Excel is capable of creating a wide variety of different types of charts and you can select the appropriate type from Step 1 of the Chart Wizard. As well as a column chart you can create bar charts, pie charts, line charts, area charts and many others. In addition, most charts have sub types so you can for instance have a 3-D bar chart or a piec chart with the segments split up. Note that the Chart Wizard will automatically prompt you to enter the correct information that is directly relevant to the type of chart being created.

You can start the Chart Wizard by clicking on the Chart Wizard icon on the Standard Toolbar.
6. Step 1 allows you to select both the type and the sub-type of the chart which you wish to create. For the moment we will simply accept the defaults presented i.e. a clustered column chart. Because we selected our chart data before we started the Chart Wizard you can use the Press and hold to view sample button and a preview of our chart will be displayed. Click on the Next button to proceed.
7. Step 2 displays a new dialogue box called the Chart Source Data as shown in Figure 6.11. Here you can specify the cells where the data for the chart can be found but as we have already done this we can proceed to the next step, so click on the Next button to proceed.


Figure 6.11 Step 2 of the Chart Wizard - selecting the data source.
8. At Step 3 another dialogue box called the Chart Options is displayed as shown in Figure 6.12. This multi-tabbed dialogue box allows you to specify a whole range of chart options, such as titles, axis labels, gridlines, legends, data labels, and whether the chart should include a data table. For the moment we will ignore these options and proceed to the final step of the Chart Wizard. So, click on the Next button to proceed.


Figure 6.12 Step 3 of the Chart Wizard - specifying chart options.
9. Step 4 displays the final dialogue box called Chart Location, as shown in Figure 6.13. Here we can decide whether we want the chart to be created As new sheet: with the sheet name Chart1, or As object in: our currently active Worksheet called Sheet1. In this instance we will opt for the latter, so select As object in: if it is not already selected and click on the Finish button.


Figure 6.13 Step 4 of the Chart Wizard - deciding on the chart location.
10. As soon as you click on the Finish button in the Chart Wizard the dialogue box disappears and the newly created chart appears as an Object in the centre of your Worksheet as shown in Figure 6.14. The Chart object is already
selected so you can use the box size control handles and the mouse pointer to resize and move the object to a different position on the Worksheet if you wish. Notice also that the source data range is highlighted with special coloured borders but as soon as you de-select the chart object these borders disappear.

Charts embedded within Worksheets are just like other Objects in that you can move and re-size them in the same way. Similarly, if you want to delete an embedded chart simply select it and press the delete key on the keyboard. The source data from which the chart was created will remain untouched.


Figure 6.14 The new chart embedded as an object in our Worksheet.

Just as Formulas change dynamically when you alter the source data, so Charts in Excel do the same. For example, on the Sales.xls Worksheet select cell $\mathbf{C 7}$ and type in the value 200. As soon as you press the Return or Enter key to accept the change, the chart changes to reflect the new data as shown in Figure 6.15.


Figure 6.15 Charts change when the source data changes.
12. Next, select the chart on the Worksheet, then click on Chart I Chart Options... on the Menu Bar. This displays the Chart Options dialogue box that we originally saw in Step $\mathbf{3}$ of the Chart Wizard (see Figure 6.12) and we can use this tabbed window to change various aspects of our chart. Make sure that the Titles tab is selected and in the Chart title: box type Product Sales by Month. In the Category (X) axis: box type Month, and in the Value (Y) axis: box type Units, as shown in Figure 6.16. You will notice that when you make these changes the chart preview window updates automatically.


Figure 6.16 Entering the chart titles.
13. Next, select the Legend tab and uncheck the Show Legend tick box. In the preview window the legend will disappear and the chart will re-size itself to fill the space available, as shown in Figure 6.17.


Figure 6.17 Removing the Legend.
14. Now select the Data Labels tab and change the Data Labels setting from None to Show value. In the preview window the Unit values will appear just above the columns on the chart, as shown in Figure 6.18.


Figure 6.18 Adding the Data Labels.
15. Finally, click on the OK button and the Chart Options dialogue box will disappear leaving the chart embedded in the Worksheet updated with the changes that we have made, as shown in Figure 6.19.


Figure 6.19 The embedded chart after changing the Chart Options.

When you re-size a chart object on a worksheet the image either shrinks or expands. Note that the scaling of the $\mathbf{X}$ or $\mathbf{Y}$ axis does not alter. If you need to rescale the axis on a chart you should select the axis and then choose Format I Select Axis... and using the Scale tab on the Format Axis dialog box displayed you can adjust properties of the axis such as the maximum and minimum values and the major and minor units used in the axis. In addition, you can reverse the plotting order of the values or apply a logarithmic scale if necessary.
16. Before we proceed further select File I Save on the Menu Bar or click on the Save icon to save the changes we have made so far.
17. A chart consists of many different elements, such as the plotted data series, the axes, and the data labels. Each of these elements can be formatted in their own right to change the look of a chart. For example, suppose we wanted to change the colour or shading pattern used for the columns in our Sales.xls chart. We can do this by selecting the columns with a single click with the left mouse button. Now if we select Format I Selected Data Series... on the Menu Bar a Format Data Series dialogue box appears, as shown in Figure 6.20.


Figure 6.20 Changing the formatting of the data series.
18. On the Patterns tab click on the Fill Effects... button and a new dialogue box called Fill Effects will open as in Figure 6.21. Now, select the Pattern tab and then choose a prominent pattern to use, such as the diagonal lines, as shown in Figure 6.22.


Figure 6.21 The Fill Effects window.

Do not get confused between the Patterns tab on the Format Data Series window and the Pattern tab on the Fill Effects window, they are different. The former allows you to change the way that the borders around elements of a chart appear and the colours used, and the latter enables you to change the actual shading pattern used within a chart element such as a column or a pie slice.


Figure 6.22 Selecting a Fill pattern.
19. Click on OK to close the Fill Effects window and click on $\mathbf{O K}$ to close the Format Data Series window. Your chart should now look similar to the example shown in Figure 6.23.


Figure 6.23 Patterned columns.
20.

Once again, before we proceed further select File I Save on the Menu Bar or click on the Save icon to save the changes we have made so far.
21. Despite the fact that we have created a Column chart it is fairly easy to change the type of chart to something else. Select the chart object and then choose Chart I Chart Type... on the Menu Bar. This displays the Chart Type dialogue box that we originally saw in Step 1 of the Chart Wizard (see Figure 6.10) and we can use this tabbed window to select a new type of chart to be displayed. Click on Pie in the Chart type: list and in the Chart sub-type: window select the top centre 3-D sub-type, as shown in Figure 6.24 .


Figure 6.24 Changing the chart type.
22. In the Options section select the tick box labelled Default formatting as shown in Figure 6.25.


Figure 6.25 Using the default formatting for a chart.
23. Now click on the OK button and our embedded chart will have changed to a 3-D Pie chart like the example in Figure 6.26.


Figure 6.26 The Sales.xls chart changed into a 3-D Pie chart.
D. Stott, ECDL Module 4: Spreadsheets
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24. We mentioned earlier that charts can exist as either objects on a Worksheet or as separate chart sheets within a Workbook. We can convert our embedded chart into a chart sheet by first selecting the chart object and then choosing Chart I Location... from the Menu Bar. This, if you remember, displays the Chart Location dialogue box that we originally saw in Step 4 of the Chart Wizard (see Figure 6.13).
25. When the Chart Location dialogue box is displayed it shows the current chart placement as an object in Sheet1. To change the location simply click on the As new sheet: option as shown in Figure 6.27.


Figure 6.27 Changing the location of a chart.
26. Now, when you click on the $\mathbf{O K}$ button in the Chart Location window the chart will switch from being an embedded object to become a separate chart sheet labelled Chart1 within the Sales.xls Workbook as shown in Figure 6.28 .


Figure 6.28 Our Sales.xls chart as a chart sheet.
27. Finally, Close the Sales.xls Workbook, saving any changes made.
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## Summary

In this chapter we have seen how various types of chart can be generated from source data in a Worksheet. We have learnt how to format charts in lots of different ways and convert a chart from being an embedded object into a chart sheet within a Workbook. Creating charts in Excel can be very rewarding and once you start exploring the capabilities available you can produce some extremely useful results.

## Review Questions

1. What is an object on a Worksheet?
2. How do you resize an object to make it smaller?
3. What happens when you double click on an object that has been inserted from another file?
4. How many Steps are there in the Excel Chart Wizard?
5. Excel charts can exist in two places. What are these two locations?
6. How do you delete an object or chart on a Worksheet?
7. Which Menu Bar options would you use to add a title to a chart?
8. How would you convert a Pie chart to a Column chart?

## Final Summary

Now that you have reached the end of this guide you should have gained a good insight into the principles of using a spreadsheet application. However, this guide is not intended to be a fully comprehensive training manual for Excel 97 and there are many aspects of the package which have not been covered. Excel is the type of application that the more it is used, the more varied tasks you find it can tackle. Therefore, you are encouraged to further explore the capabilities and features of Excel in order to broaden your knowledge of the software.

If you have access to the Internet then you should start by visiting the Microsoft Excel web site where you will find plenty of additional information about the product:
http://www.microsoft.com/office/excel/default.htm

If you don't have access to the Internet, or if you are happier learning from a book, there are numerous published training guides for Excel covering every single facet of using the software.

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