

Section 2 The Basics

By the end of this section you will be able to:

- Understand and use common Windows elements
- Launch Excel
- Understand the concept of a spreadsheet
- Recognise Excel screen elements
- Work with Toolbars
- Use Menus
- Get Help

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Windows Concepts

Excel is an application that runs under the Windows graphical user interface. When launched, Excel sits in its own “window” – the box that surrounds the application elements. The window can be moved, sized, closed, minimised and maximised using the features common to the Windows environment – these are listed below:

WINDOW BORDERThe box that surrounds the Excel screen when it is not maximised is called the window border. When the mouse is over the border, the pointer changes from a single to a double-headed arrow – clicking and dragging with this shape allows the window to be resized.

TITLE BARThe coloured bar that appears at the top of the Excel window. The title bar tells you which application you are using and if the workbook you are in is maximised, it will also contain the name of the workbook. If the Excel window is not maximised, by positioning the mouse over the title bar and clicking and dragging, you can move the Excel window to a new location on the screen.



MAXIMISE BUTTONWhen working in a workbook, the Excel screen contains two windows, an application window and a workbook window. You can maximise both windows to capitalise on the space you have on-screen. If you would like the window that your Excel application is in to fill up the whole screen, click the outermost maximise button. You may find that the workbook you are in can still be bigger – click the inner maximise button to fill the remaining space within the Excel application window.



MINIMISE BUTTONThis button is very useful if you need to temporarily switch from Excel into another application without closing Excel down completely. Click the minimise button to shrink Excel to an icon on the task bar; you will then be able to view other icons and applications you may wish to access. When you are finished and ready to continue, click the Excel icon from the task bar to resume. The innermost minimise button will minimise the current workbook window.



RESTORE BUTTONThis button only appears when a window is maximised. A maximised window has no border and you cannot see what is behind it. If you want to put the window back inside its border so that you can move and size it, click the restore button.



CLOSE BUTTON This button is used to close a window. If you click the close button for a workbook window you close the document. The last button will close the Excel application.



DIALOG BOX LAUNCHER this button launches dialog boxes specific to the part of the ribbon you see them the category will be named such as **FONT**, **CLIPBOARD** etc.

Menus

Menu's are no longer used in Excel they have been replaced by Ribbons and will be referred to as such throughout the manual.

Ribbons

Ribbons are tabs that show different commands with respect to what you wish to do.



The **HOME** ribbon shows basic commands of formatting.

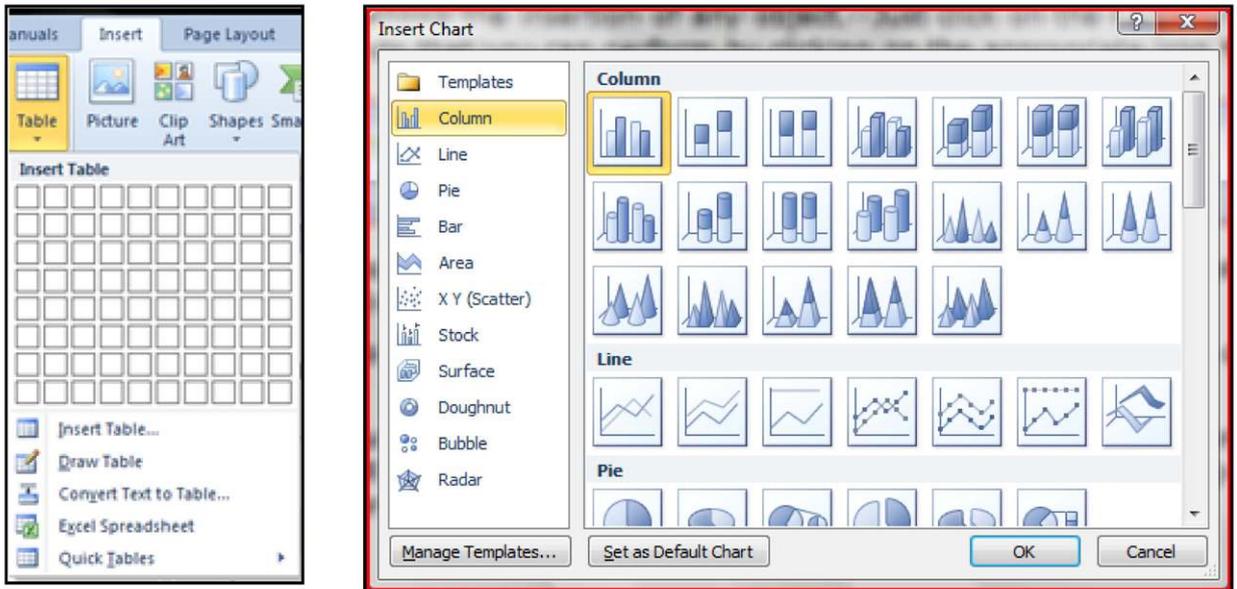
The **INSERT** ribbon allows the insertion of any object. Just click on the named ribbon to see list of commands that you can perform by clicking on the appropriate icon.

By holding your mouse over an icon, a helpful hint will appear to show you what that command will do. Clicking will apply that command.

Any Icon on the ribbon with a down arrow offers other options and sometimes a dialog box such as the down arrow on the **TABLE** button. Any option within the menu that has a series of dots after it will usually display a dialog box.



Choosing to insert a chart from the **INSERT** ribbon's **CHART** button will open a dialog box directly and offer a number of varieties of charts to insert.



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Dialog Box

Within each tab, the available icons are separated into different 'Groups'. The name of the group is shown under the icons, at the bottom of the ribbon e.g. Font, Paragraph etc. To the right of the Group name you may see a small icon with an arrow in it. This is the Dialogue Box launcher and allows you to launch/view the dialogue box associated with that group – simply click on the relevant dialogue box launcher.



When the dialog box is open, make a choice from the various options and click **OK** at the bottom of the dialog box. If you wish to change your mind and close the dialog box without making a choice then click on **CANCEL**. The dialog box will close without any choice being applied. If you would like help while the dialog box is open then click on the “?” in the top right hand corner. This will bring up a help window that will display the relevant topics.

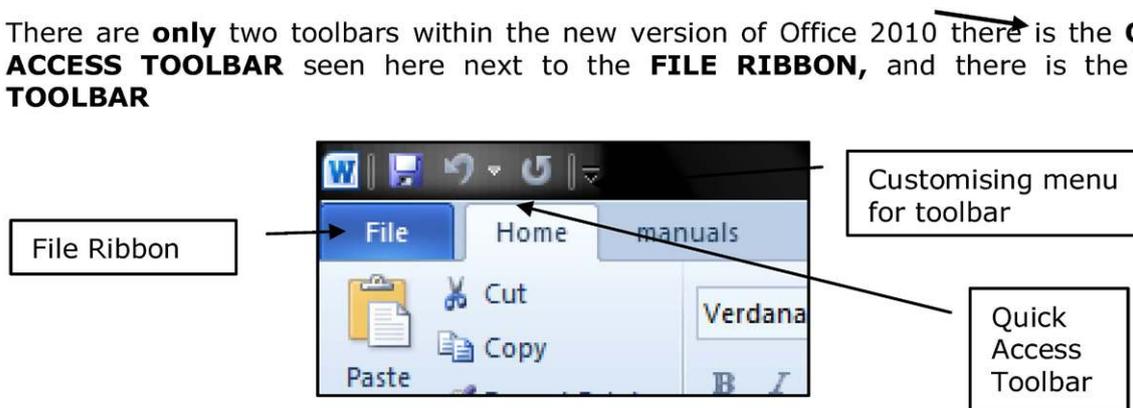
Many dialog boxes may be more familiar if you have used EXCEL before.

File Ribbon

The **FILE RIBBON** is the key ribbon within excel and has many important commands and options. Such as excel settings, opening, saving, printing and closing files. This will be looked into much further later in the manual.

Toolbars

There are **only** two toolbars within the new version of Office 2010 there is the **QUICK ACCESS TOOLBAR** seen here next to the **FILE RIBBON**, and there is the **MINI TOOLBAR**

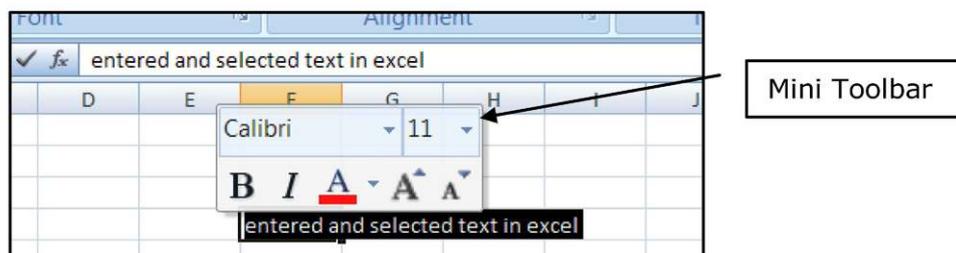


Quick Access Toolbar

By default there are only three buttons on the **QUICK ACCESS TOOLBAR** but these can be edited and other regularly used buttons can be placed there. Using the drop down menu next to the **QUICK ACCESS TOOLBAR** will allow the customisation of this toolbar adding your most often used commands.

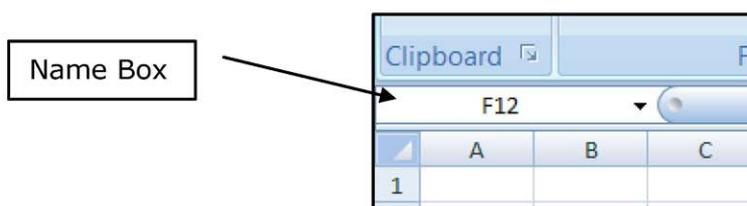
Mini Toolbar

Whenever text is selected within excel a small formatting toolbar will appear above the highlighted text it will disappear if the mouse cursor is moved away from the toolbar and will reappear when the mouse cursor is moved over the highlighted text again.



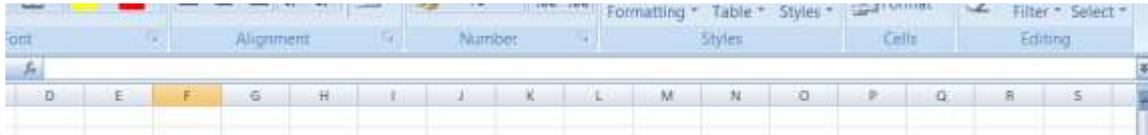
Name Box

The **NAME BOX** is the small white box to the left of the **FORMULA BAR** as we will discover later has a number of useful features such as navigation, the creation and selection of named cells and ranges. Entering a cell reference and pressing return will navigate you to the specific cell entered. Using the drop down arrow to the right of it will allow you to select any specified names in the workbook. When creating functions the box will have a different appearance and will allow you to choose the most popular functions used in that workbook.



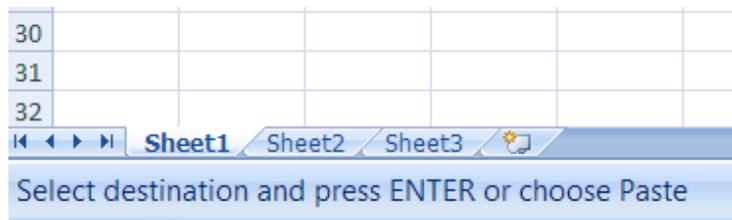
Formula Bar

The **FORMULA BAR** is the white bar to the right of the **NAME BOX** and is used for entering and editing data. Creating and editing functions and formulae. The construction of Formulae and functions can be seen in this bar even when the cell containing the formula is showing a calculated value. (Unless cell is formatted to **HIDDEN** and the sheet protected). The **fx** button on the left of the bar is a tool to create functions and formulae



Worksheets

You use worksheets to list and analyse data. You can enter and edit data on several worksheets simultaneously and perform calculations based on data from multiple worksheets. When you create a chart, you can place the chart on the worksheet with its related data or on a separate chart sheet. The names of the worksheets appear on tabs at the bottom of the workbook window. The name of the active sheet is bold.



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...I finally learned to speak it in just six lessons”

Jane, Chinese architect



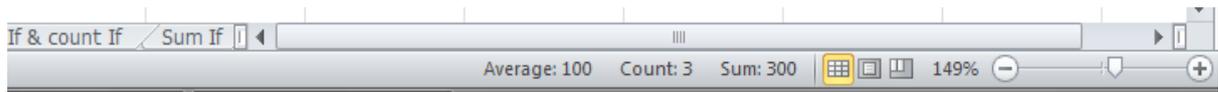
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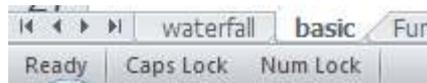




Status Bar

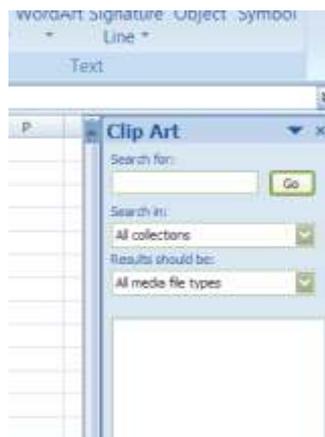


The Status bar, across the bottom of the screen, displays different information at different times. To the left is an indicator, which will display Ready, Edit etc. depending on the mode in which the user is currently working. If menus are being accessed, this area will usually give details on the currently highlighted menu option. If you are in the middle of a task – copying data for example – this area will often display messages and prompts instructing you on what to do next.



To the Left on the Status bar, keyboard status indicators reveal whether the Num Lock etc. are switched on.

Task Pane



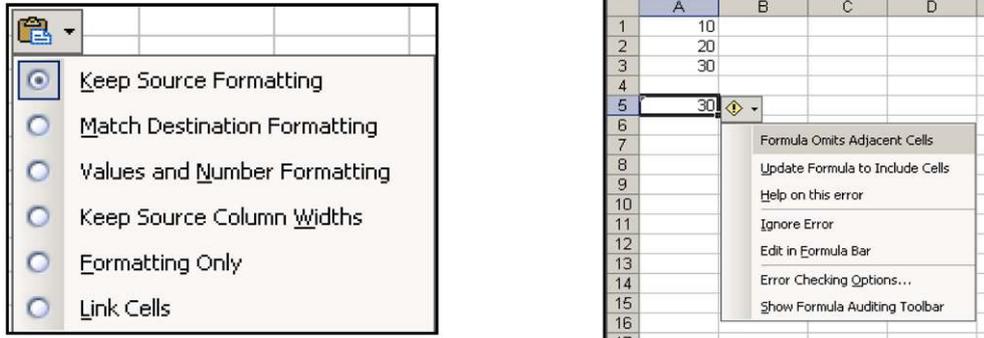
A task pane is a window that collects commonly used actions in one place. The task pane enables you to quickly create or modify a file, perform a search, or view the clipboard.

It is a Web-style area that you can either, dock along the right or left edge of the window or float anywhere on the screen. It displays information, commands and controls for choosing options. Like links on a Web page, the commands on a task pane are highlighted in blue text, they are underlined when you move the mouse pointer over them, and you run them with a single click.

A task pane is displayed automatically when you perform certain tasks, for example when you choose **INSERT**, Ribbon and then **CLIPART** to insert a picture

Smart Tags

Smart Tags, first introduced in Microsoft Office XP, make it easier for you to complete some of the most common tasks and provide you with more control over automatic features.



You do not have to complete any additional steps to make the Smart Tags appear or disappear in Excel. The Paste Options, AutoFill Options, Trace Error and Insert smart tags appear automatically to allow you to quickly choose actions and remain in place until you begin another action. For example, when you complete a paste operation, the **Paste Options** button remains in place alongside your text until you begin typing new text.

This feature alerts you via a smart Tag of a possible error in a cell. You can select a command to resolve the error, ignore it, or access further Error Checking options.

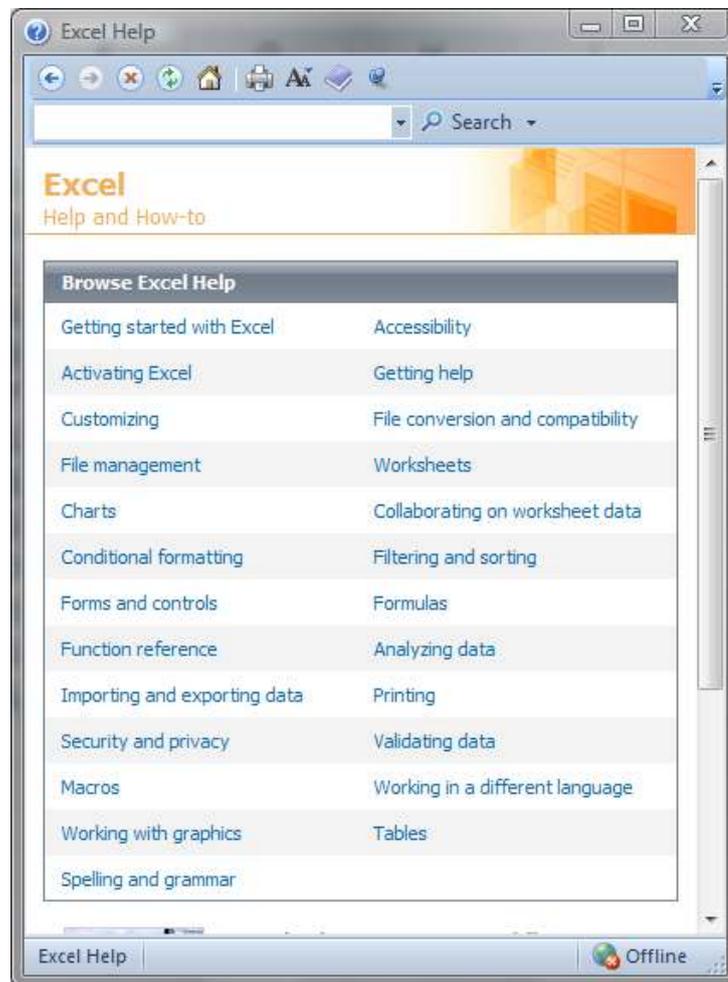
The example above right shows the use of a smart tag where a formula has been written into a cell with a possible error i.e. =Sum (A1:A2) may need to read =Sum (A1:A3). If you hover over the tag, the message, *the formula in this cell refers to a range that has additional numbers adjacent to it*, appears then the options drop down.

Getting Help

Excel offers several quick ways to get help when performing particular tasks. You can select from a list of topics provided by Help, or you can even type a help request in plain English, and Excel will supply the answer using the *Answer Wizard*.

Microsoft Excel Help

To Access Help:



1. Click “?” On the title bar OR press **F1**. The Help window will open:
2. This is very similar to a web page
3. You may enter search criteria and press ENTER (like a search when on the internet)
4. The window will display the topics that match your search. Click on a topic in order for it to be displayed

Find A Specific Topic

1. The contents page allows you to select from a list of topic headings. Like search results on the internet these are **HYPERLINKS** to help files.
2. You may need to be online to access some of the help links. The search will be more extensive if you are online as it will search online help files from Microsoft.