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Learn the Essentials in 8 Hours or Less

### Simply Learning Excel® 2007

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With deep gratitude to some very loving people who helped me to grow up.

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## Introduction

Welcome to Simply Learning Microsoft Excel 2007. I wrote this book with one primary purpose – to help you learn the most commonly used and most powerful, essential features of Microsoft Excel 2007 in the least amount of time. You may notice this book does not cover every icon, function, formula or feature. That's by design. Once you've gone through this book, you will have the knowledge and confidence to figure out how to use other less essential features in Excel 2007.

This is a "learn by doing" book. Rather than spending lots of time talking about Excel 2007, we use it, together. I believe this is a very effective way of learning almost anything.

In this book, we build a workbook that tracks what we earn and spend. This has two benefits. First, it offers a reason to use Excel regularly. Second, if you don't already have a method to effectively track what you earn and spend, the workbook we build will help you do that efficiently.

Thank you for the opportunity to help you learn Excel 2007. I hope you enjoy both the book and Microsoft Excel.

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# **Chapter 1: The Very Basics**

If you have never used Microsoft Excel before, I think you're in for a treat. Whatever interest drew you to this book – tracking money for yourself or an organization, making a schedule, keeping a list, etc. – Excel offers not only the ability to easily correct a mistake or make a change, but powerful features that give you the ability to organize, analyze and present information... and much more!

If you have used a prior version of Microsoft Excel, you will immediately notice a tremendous change in the look of Excel 2007. You may have already experienced frustration trying to find features in this version. There are two things I'd like to share with you. First, you are not alone! I, and others, had a similar experience. Second, the change is for the better in my opinion. Features that used to be buried down in three or four levels of menus are now more visible, and, therefore, able to be used more quickly and easily.

Let's get started. <u>Click</u> means move the mouse pointer until it points to what is described in italics, and then press and release the left mouse button. <u>Right-click</u> means move the mouse pointer until it points to what is described in italics, and then press and release the right mouse button. <u>Press</u> means press and release the key(s) on the keyboard identified in italics. <u>Type</u> means type the characters that are in bold.

A special note about what you see on your screen: While following the steps in this book, you will probably see, in Excel, the year that you are using this book, rather than 2009. That's to be expected. You may also find that when a sheet is inserted, you see it labeled Sheet2 or Sheet3 instead of Sheet1. That's also understandable and expected, since the sheet number Excel uses depends on whether Excel has been closed and reopened during the course of using this book.

In this chapter, we'll use some of the most basic, yet still powerful, features of Excel. We'll enter, change, copy, format and save data, and we'll enter a formula.

- 1) We'll begin by opening Microsoft Excel.
  - a) <u>Click</u> the Start button. The Start button is located in the bottom left corner of the screen for most computers.
  - b) Click All Programs.
  - c) <u>Scroll up or down as needed</u> to find and then <u>click</u> *Microsoft Office*.
  - d) In the list that appears, <u>click</u> <u>Microsoft Office Excel 2007</u>. If you have an Operating System other than Vista, you will have a similar but slightly different method of starting Excel 2007.
  - e) The upper left area of the worksheet should look as shown in Figure 1-1. The dark box around Cell A1 means it is the active cell.



Figure 1-1: The worksheet immediately after opening Excel.

- f) Rather than spend time explaining everything you see, let's just start using it. I suspect you'll probably understand a lot just by doing that, but I'll also be adding further explanation where I think it might be necessary.
- 2) Let's enter data in some of the cells in this worksheet.

a) Type **Check#** and press the Enter key. The upper left portion of the worksheet should look as shown in Figure 1-2.

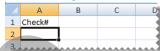


Figure 1-2: The worksheet after entering a label in Cell A1.

- b) Cell A2 is now the active cell. On the keyboard, <u>press</u> the right arrow key, and then <u>press</u> the up arrow key. The arrow keys are located on the right side of most keyboards.
- c) Cell B1 is now the active cell. Type **Date** and press the Enter key.
- d) Cell B2 is now the active cell. Click Cell C1. Clicking a cell is another way of selecting a cell in the worksheet.
- e) In Cell C1, type **Description** and press the Enter key. Did you notice that the letters go slightly past the right edge of the cell? Please ignore that for now. We'll address that in a few minutes.
- f) Cell C2 is now the active cell. Press the right arrow key, and then press the up arrow key.
- g) Cell D1 is now the active cell. It may appear that if we try to type something in this cell, it will interfere with the word Description that we just entered, but it won't. Type **Amount** and press the Enter key.
- h) Cell D2 is now the active cell. <u>Press</u> the right arrow key, and then <u>press</u> the up arrow key.
- i) Cell E1 is now the active cell. Type **Balance** and press the Enter key.
- i) Cell E2 is now the active cell.
- k) Click Cell D2. Type **100** and press the Enter key.
- I) Cell D3 is now the active cell. Type **600** and press the Enter key.
- m) Cell D4 is now the active cell. Type **-50** and press the Enter key.
- n) Cell D5 is now the active cell. Type **-575** and press the Enter key.
- o) Cell D6 is now the active cell. Type **-110** and press the Enter key.
- p) Cell D7 is now the active cell. Type -25 and press the Enter key.
- q) Cell D8 is now the active cell. Type -70.50 and press the Enter key.
- r) Cell D9 is now the active cell. Type **-40** and press the Enter key.
- s) Cell D10 is now the active cell. Type -15 and press the Enter key.
- t) Cell D11 is now the active cell. Type **600** and press the Enter key.
- u) Cell D12 is now the active cell. Type **-50** and press the Enter key.
- v) Cell D13 is now the active cell.

w) The worksheet should look as shown in Figure 1-3.

		Α	В	С	D	E	E>
	1	Check#	Date	Description	Amount	Balance	
	2				100		
	3				600		- 3
	4				-50		
4	5				-575		
	6				-110		
	7				-25		
	8				-70.5		
N	9				-40		
	10				-15		
	11				600		
	12				-50		
	13						

Figure 1-3: The worksheet after entering values in Column D.

- 3) Let's change the value of Cell D7.
  - a) Double-click Cell D7.
  - b) Press the left or right arrow keys until the blinking cursor is between the numbers 2 and 5.
  - c) Press the Backspace key. The Backspace key is located in the right side of most keyboards.
  - d) Type 3 and press the Enter key. The value of Cell D7 should now be -35.
- 4) Let's save the file for the first time.
  - a) Click the Office button, circled in Figure 1-4.



Figure 1-4: The Office Button.

- b) In the menu that appears, <u>place the mouse pointer</u> (don't click yet) over the words Save As, circled in Figure 1-5. Please spend a few moments looking at the list to the right, noticing that we can save this file in many different file formats.
- c) Click Excel Workbook at the top of the list on the right, as shown in Figure 1-5.

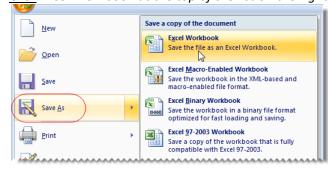


Figure 1-5: The Save As menu.

d) In the box that pops up labeled Save As, in the box to the right of the words File name, <u>click</u> somewhere to the right of the characters that are already in that box (probably Book1).

- e) Press the Backspace key until the box is empty.
- f) Type Checkbook.
- g) The bottom area of the Save As box should look as shown in Figure 1-6, if using the Vista Operating System.



Figure 1-6: The bottom of the Save As box, if using the Vista Operating System.

- h) Note: The bottom of this box on your screen may have the letters .xlsx both after the file name and after the words Excel Workbook. Those letters are called file extensions. Whether or not those letters appear depends on the settings of your computer operating system. If those letters do appear, please leave them that way.
- i) Click the Save button.
- 5) Let's enter descriptions corresponding to the amounts we just entered.
  - a) Click Cell C2.
  - b) <u>Type</u> **Beginning Balance** and <u>press</u> *the Enter key*. We can't see the word Balance, but we will in a few minutes after we use a feature in Excel.
  - c) Cell C3 is now the active cell. Type **XYZ company** and press the Enter key.
  - d) Cell C4 is now the active cell. Type **People's bank** and press the Enter key.
  - e) Cell C5 is now the active cell. Type **Dependable bank** and press the Enter key.
  - f) Cell C6 is now the active cell. Type **Green power company** and press the Enter key.
  - g) Cell C7 is now the active cell. Type **ABC phone company** and press the Enter key.
  - h) Cell C8 is now the active cell. Type **farmer's market** and press the Enter key.
  - i) Cell C9 is now the active cell. Type **GasNGo** and press the Enter key.
  - j) Cell C10 is now the active cell. Type **cash withdrawal** and press the Enter key.
  - k) Cell C11 is now the active cell. Type **X** and press the Enter key. Note that Excel automatically entered XYZ Company into Cell C11. This is a feature of Excel called AutoComplete.
  - I) Cell C12 is now the active cell. Type **P** and press the Enter key. Note that Excel automatically entered People's bank into Cell C12
  - m) Cell C13 is now the active cell.

В C D Α Е 1 Check# Date Descriptic Amount Balance 2 Beginning 100 3 600 XYZ compa People's b -50 Dependak -110 Green pov ABC phon -35 -70.5 farmer's n GasNGo -40 cash with -15 11 XYZ compa 600 12

n) The worksheet should look as shown in Figure 1-7.

Figure 1-7: The worksheet after entering labels in Column C.

6) Let's take a few moments to discuss the top portion of the screen, which Microsoft has named the Ribbon, since we're going to start using it. A portion of the Ribbon is shown in Figure 1-8.



Figure 1-8: The Ribbon, which includes the Quick Access Toolbar, Tabs, Groups, and all icons.

- 7) The Ribbon includes:
  - a) The Quick Access Toolbar;
  - b) Tabs, such as Home (currently selected) and Page Layout;
  - c) Groups, such as Font and Alignment; and,
    - i) Please note that the Groups that are displayed change depending on the Tab selected.
  - d) Icons.
    - i) Move the mouse pointer until it is directly over the Save icon in the Quick Access Toolbar and hold it there for a moment, as shown in Figure 1-9. Do you see the little description box that popped up displaying the name of the icon? That little description box will pop up every time we move and hold the mouse pointer over any icon.



Figure 1-9: The Ribbon, with the mouse pointer held over the Save icon.

ii) Note: If the Wrap Text and Merge & Center icons appear as shown in Figure 1-10, where they do not have a label to the right as shown earlier in Figure 1-8, you have several choices: Do

nothing (Excel will still display the label if you move and hold the mouse pointer directly over either of these icons), make sure the Excel window is maximized, or, if possible, increase your screen resolution. This note applies to any situation where an icon in a screen image in this book has a description next to it, but the icon on your screen does not.



Figure 1-10: A view of the Ribbon that may appear on your screen, showing no labels next to the Wrap Text and Merge & Center icons.

- 8) <u>Click</u> the Save icon in the Quick Access Toolbar. This is a faster way to save the workbook, and we're going to use this method to save the file from this point forward.
  - a) A note about saving: When I was growing up, I asked my father how much money I should carry around with me. He suggested carrying as much money as I could afford to lose. I thought that suggestion was wise as it relates to carrying money, and I also think that same wisdom applies to saving a file. Since saving only takes a second, and I don't like to lose what I just did as can happen, albeit infrequently, but never at a good time I save quite frequently, and I suggest you do the same.
- 9) Let's use a formula to calculate our checkbook balance.
  - a) Click Cell E2.
  - b) Type =
  - c) Click Cell D2 and press the Enter key. The value 100 should now be in Cell E2.
  - d) Cell E3 is now the active cell. Type =
  - e) Click Cell E2.
  - f) Type +
  - g) Click Cell D3. Before we press the Enter key, the worksheet should look as shown in Figure 1-11.

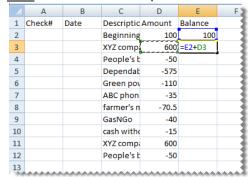


Figure 1-11: The worksheet while entering a formula in Cell E3.

- h) Press the Enter key. The value 700 should now be in Cell E3.
- 10) We'll now copy this formula to other cells in this column.

a) Right-click Cell E3. In the menu that appears, click Copy, circled in Figure 1-12.

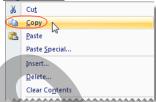


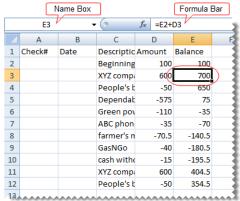
Figure 1-12: The right-click menu.

- b) Click, hold and drag Cell E4 thru Cell E12.
- c) Right-click anywhere in the highlighted area. In the menu that appears, click Paste.
- d) <u>Press</u> the Esc key. The Esc key is located in the upper left corner of most keyboards. This will make not only the dotted lines around Cell E3 go away, but also the little icon in Cell F13.
- e) Click Cell A1, or any cell, to remove the highlights from the worksheet.
- f) The worksheet should look as shown in Figure 1-13.

1	А	В	C	D	E	Æ
1	Check#	Date	Descriptio	Amount	Balance	
2			Beginning	100	100	
3			XYZ compa	600	700	
4			People's b	-50	650	
5			Dependat	-575	75	
6			Green pov	-110	-35	
7			ABC phon	-35	-70	
8			farmer's n	-70.5	-140.5	
9			GasNGo	-40	-180.5	
10			cash with	-15	-195.5	
11			XYZ compa	600	404.5	
12			People's b	-50	354.5	
13						

Figure 1-13: The worksheet after copying the formula to other cells in Column E.

- 11) Click the Save icon in the Quick Access Toolbar.
- 12) Before we go on to the next task, let's take a closer look at the formulas we just copied. We'll do this by focusing on the Formula Bar, shown in Figure 1-14.



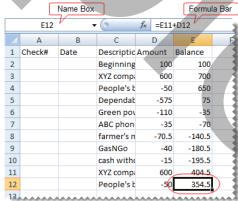


Figure 1-14: Two views of the worksheet, each showing the Name Box and Formula Bar. Cell E3 is the active cell in the view on the left, while Cell E12 is the active cell in the view on the right.

- a) Click Cell E3. The formula in this cell, shown in the left side of Figure 1-14 is =E2+D3. Now, click Cell E12. The formula in this cell, shown in the right side of Figure 1-14 is =E11+D12. Did you notice how Excel automatically adjusted each formula? In Cell E3, the formula we entered adds together the cell just above (Cell E2) and the cell immediately to the left (Cell D3). In Cell E12, the cell references change to Cells E11 and D12 but Excel still adds together the cell just above (Cell E11) and the cell immediately to the left (Cell D12). These formulas are called relative reference formulas, because the cells named in the formula change depending on their relative reference to the cell containing the formula. We'll talk about this concept (relative reference versus absolute reference formulas) in more detail in Chapter 4: More about Functions, Formulas Using More than One Worksheet.
- 13) Let's make this worksheet look clearer before we enter any more data. We'll bold and center the titles in Row 1, format the values in Column D and Column E as numbers with commas, and automatically resize all the columns so that we can completely see the contents of every cell.
  - a) <u>Click Row 1</u>. Do this by moving the mouse pointer all the way to the left of the worksheet where you'll see sequentially numbered rows. <u>Click when the mouse pointer is on top of the number 1</u>. The right arrow and the highlighted Row 1 should look as shown in Figure 1-15.

	Α	В	С	D	E	F	G	H
∌	Check#	Date	Descriptio	Amount	Balance			
2			Beginning	100	100			
3			XYZ compa	600	700			
4			People's b	-50	650			
5			Dependat	-575	75			3

Figure 1-15: The worksheet showing Row 1 highlighted.

b) In the Home tab, in the Font group, click the Bold icon, circled in Figure 1-16.

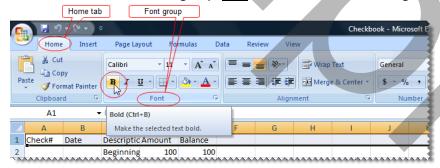


Figure 1-16: The Ribbon, with the mouse pointer paused over the Bold icon.

c) In the Home tab, in the Alignment group, click the Center icon, circled in Figure 1-17.



Figure 1-17: The Center icon, in the Home tab, in the Alignment group.

- d) Click, hold and drag Column D thru Column E.
  - i) Here are more detailed instructions in case you need them: This will be very similar to the way we selected Row 1 just a few moments ago. Start by moving the mouse pointer all the way to the top of the worksheet where you'll see alphabetically ordered columns labeled A, B, C, and so on. Move the mouse pointer until it's over the letter D. Click Column D, hold and drag to Column E, then let go of the mouse button. Column D and Column E should now be highlighted.
- e) In the Home tab, in the Number group, <u>click</u> the Comma Style icon, circled in Figure 1-18. This will format the values in Column D and Column E as numbers with commas to separate thousands, and with brackets for negative numbers.



Figure 1-18: The Comma Style icon, in the Home tab, in the Number group.

f) <u>Click</u> the small empty box above Row 1, and to the left of Column A, circled in Figure 1-19. This will highlight the entire worksheet.



Figure 1-19: Clicking the small empty box which will highlight the entire worksheet.

g) In the Home tab, in the Cells group, click the Format icon, circled in Figure 1-20.



Figure 1-20: The Format icon, in the Home tab, in the Cells group.

- h) In the menu that appears, <u>click</u> AutoFit Column Width. Notice how all the columns widths automatically adjusted to fit the contents of all the cells.
- i) Click Cell A1 to remove the highlights from the worksheet.

j) The worksheet should look as shown in Figure 1-21.

4	А	В	С	D	Е	Ę
1	Check#	Date	Description	Amount	Balance	
2			Beginning Balance	100.00	100.00	- 3
3			XYZ company	600.00	700.00	3
4			People's bank	(50.00)	650.00	
5			Dependable bank	(575.00)	75.00	
6			Green power company	(110.00)	(35.00)	
7			ABC phone company	(35.00)	(70.00)	
8			farmer's market	(70.50)	(140.50)	
9			GasNGo	(40.00)	(180.50)	
10			cash withdrawal	(15.00)	(195.50)	
11			XYZ company	600.00	404.50	
12			People's bank	(50.00)	354.50	
13.						

Figure 1-21: The worksheet after applying various formatting features.

- 14) Click the Save icon in the Quick Access Toolbar.
- 15) Let's enter some data in Column A, and add some formatting.
  - a) Click Cell A5. Type **220** and press the Enter key.
  - b) Cell A6 is now the active cell. Type **221** and press the Enter key.
  - c) Cell A7 is now the active cell. Type **222** and press the Enter key.
  - d) Cell A8 is now the active cell. Type **debit card** and press the Enter key.
  - e) Copy the contents of Cell A8 to the next two cells in this column.
    - i) Right-click Cell A8.
    - ii) In the menu that appears, click Copy.
    - iii) Click, hold and drag Cell A9 thru Cell A10.
    - iv) Right-click anywhere in the highlighted area.
    - v) In the menu that appears, click *Paste*.
  - f) Press the Esc key to make the dotted lines go away, as well as the little icon in Cell B11.
  - g) Click Column A.
  - h) Please use Figure 1-22 for the next few steps in this section.



Figure 1-22: The Format icon, in the Home tab, in the Cells group and the Center icon, in the Home tab, in the Alignment group.

- i) In the Home tab, in the Cells group, click the Format icon, circled in Figure 1-22.
- ii) In the menu that appears, <u>click</u> AutoFit Column Width.
- iii) In the Home tab, in the Alignment group, <u>click</u> the Center icon, also circled in Figure 1-22. Clicking it once will only remove the center formatting from Cell A1 that we had added earlier.

- iv) Click the Center icon again. This will add the center formatting to every cell in Column A.
- i) Click Cell A1 to remove the highlights from the worksheet.
- j) The worksheet should look as shown in Figure 1-23.

A	A	В	С	D	Е	F.
1	Check# Date		Description	Amount	Balance	
2			Beginning Balance	100.00	100.00	
3			XYZ company	600.00	700.00	
4			People's bank	(50.00)	650.00	
5	220		Dependable bank	(575.00)	75.00	
6	221		Green power company	(110.00)	(35.00)	
7	222		ABC phone company	(35.00)	(70.00)	
8	debit card		farmer's market	(70.50)	(140.50)	
9	debit card		GasNGo	(40.00)	(180.50)	
10	debit card		cash withdrawal	(15.00)	(195.50)	
11			XYZ company	600.00	404.50	
12			People's bank	(50.00)	354.50	
13						

Figure 1-23: The worksheet after formatting Column A.

- 16) Click the Save icon in the Quick Access Toolbar.
- 17) Finally, we'll add date formatting to Column B so that dates appear in the format M/D/YYYY, and then enter some dates.
  - a) Click Column B.
  - b) In the Home tab, in the Number group, <u>click</u> the drop-down arrow to the right of the word *General*, circled in Figure 1-24.



Figure 1-24: The drop-down arrow which activates the Number Format menu, in the Home tab, in the Number group.

c) In the Number Format menu that appears, click Short Date, as shown in Figure 1-25.



Figure 1-25: The Number Format menu with Short Date selected.

- d) Click Cell B2.
- e) <u>Type</u> **4/1** and <u>press</u> the Enter key. Note that the date that appears in Cell B2 already has the year. Entering the entire date including the year is not necessary unless we want to enter a date for a year other than the current year. Note also that the column automatically became wider.

Using the AutoFit Column Width feature ensures that the column width will automatically adjust to fit the date entered.

- f) Cell B3 is now the active cell. Type 4/9 and press the Enter key.
- g) Cell B4 is now the active cell. Type **4/9** again and press the Enter key.
- h) Cell B5 is now the active cell. Type 4/10 and press the Enter key.
- i) Copy the contents of Cell B5 to the next five cells in this column.
  - i) Right-click Cell B5. In the menu that appears, click Copy.
  - ii) Click, hold and drag Cell B6 thru Cell B10.
  - iii) Right-click anywhere in the highlighted area.
  - iv) In the menu that appears, click Paste.
- j) Press the Esc key to make the dotted lines go away, as well as the little icon in Cell C11.
- k) Click Cell B11.
- I) Type 4/16 and press the Enter key.
- m) Cell B12 is now the active cell. Type 4/16 again and press the Enter key.
- n) The upper left area of the worksheet should look as shown in Figure 1-26.

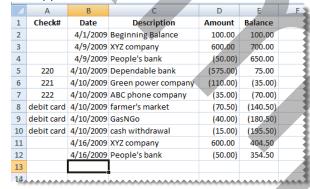


Figure 1-26: The worksheet after entering dates in Column B.

- 18) Click the Save icon in the Quick Access Toolbar.
- 19) To compare your file to the official version, visit www.SimplyLearningExcel.com.