

University Information Technology Services

# Microsoft Office Excel 2016 for Mac

Introduction to Excel

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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# **University Information Technology Services**

# Microsoft Office: Excel 2016 for Mac Introduction to Excel

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#### Introduction

This booklet is the companion document to the Excel 2016: Intro to Excel workshop. It includes an introduction to the Microsoft Office 2016 interface and covers the various aspects of creating, formatting, editing, saving, and printing a workbook in Excel 2016.

# **Learning Objectives**

After completing the instructions in this booklet, you will be able to:

- Identify the components of the Office 2016 interface
- Understand the layout of the spreadsheet
- Enter text and numbers
- Modify a spreadsheet
- Change the appearance of text and numbers within the spreadsheet
- Apply borders
- Insert graphics
- Add headers and footers
- Insert hyperlinks
- Add and edit shapes
- Print a spreadsheet
- Save a worksheet

**Note:** This document frequently refers to right-click. If your set-up does not include a mouse with two buttons, Mac users can configure their single-button mouse to do a right-click by accessing the *System Preferences > Mouse* settings and setting the right-button to **secondary button**. Right-click can also be enabled by holding **Control + click**.

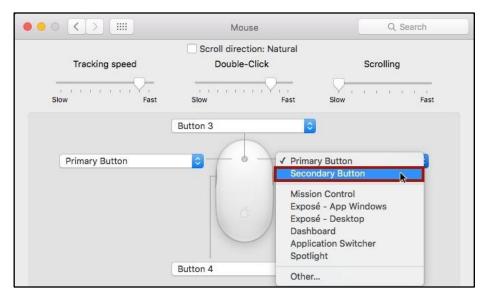


Figure 1 - Mouse Settings

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#### The Excel 2016 Interface

The following describes the Excel 2016 interface.

#### The Backstage View

When first opening the program, the user will be presented with options to open recent workbooks, start a new blank workbook, or select from a number of templates. The following explains how to enter the *Backstage View* after creating your workbook:

1. Click the **File** button located on the *Quick Access Toolbar* above the *Ribbon*.

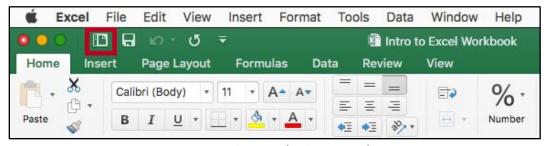


Figure 2 - File Button (Backstage View)

**Note:** If you do not see the *File* button on the *Quick Access Toolbar*, on the *Menu Bar*, click **File**, then **Open** to access the *Backstage View*. See *The Quick Access Toolbar* section for more information.

- 2. The Backstage View will open, presenting the following actions:
  - a. **New** Create a new workbook from a blank or pre-formatted template (See Figure 3).
  - b. Recent Open a recent workbook from your computer (See Figure 3).
  - c. Open Open an existing workbook (See Figure 3).

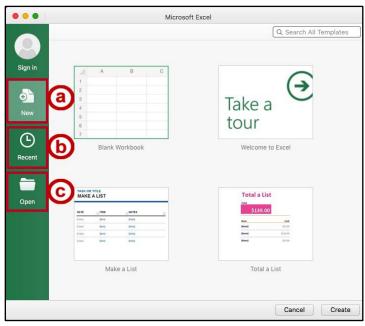


Figure 3 - Backstage View

#### The Ribbon

The *Ribbon* is a panel that contains functional groupings of buttons and drop-down lists organized by tabs. Each application in the Office Suite has a different set of tabs (with some tabs in common) that pertain to the functionality of that particular application. Each tab is further divided into groups (of buttons), such as the *Font* and *Alignment* groups, which are shown in Figure 4.

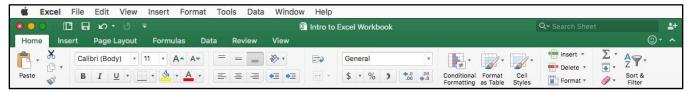


Figure 4 - Ribbon

If the button contains a drop-down arrow to the right, there are additional options available to view and select. Clicking the **drop-down arrow** opens the menu containing further option selections.

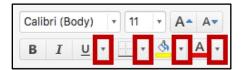


Figure 5 - Dialog Box Launcher

Additional formatting options can also be accessed through *Format* on the *Menu* bar at the top of the screen.

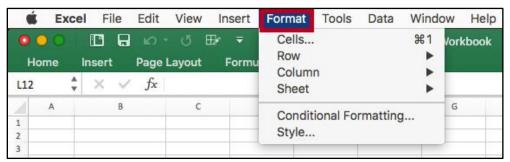


Figure 6 - Format

There are also *contextual tabs* that appear, depending on what you are working on. For example, if you have inserted pictures, the *Picture Format* tab appears whenever a picture is selected.

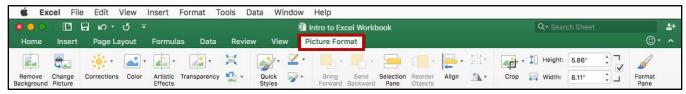


Figure 7 - Contextual Tab

#### The Quick Access Toolbar

The *Quick Access Toolbar* is located in the upper-left part of the main Excel window, above the *Ribbon*. It provides easy access to commands that you use often and can be customized to your preferences.



Figure 8 - Quick Access Toolbar

To customize the Quick Access Toolbar:

1. Click the **Customize Quick Access Toolbar** drop-down arrow.

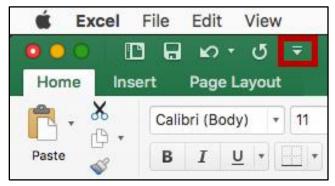


Figure 9 - Add Drop-Down Arrow

2. From the menu, you can add or remove items from the toolbar by selecting or deselecting a menu item or click **More Commands...** to view more options.

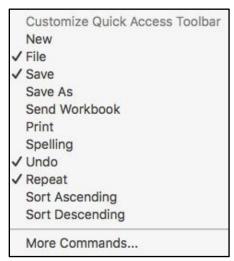


Figure 10 - Quick Access Toolbar Menu

Another method to customize your Quick Access Toolbar is by using the *Menu* bar. The following explains how to customize using the Menu bar:

- 1. In the Menu bar, click Excel (See Figure 11).
- 2. Click Preferences (See Figure 11).



Figure 11 - Customize Quick Access Toolbar

3. The Excel Preferences window will appear. Click Ribbon & Toolbar.

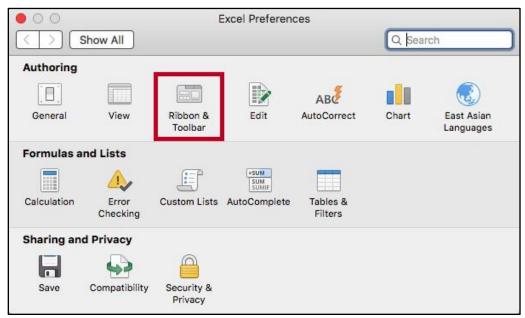


Figure 12 - Ribbon & Toolbar

- 4. The *Quick Access Toolbar* customization window will open. From the column on the left, select a **command** from the list under *Choose commands from* to add to your *Quick Access Toolbar* (See Figure 13).
- 5. Click the Add button (See Figure 13).
- 6. Click the Save button (See Figure 13).

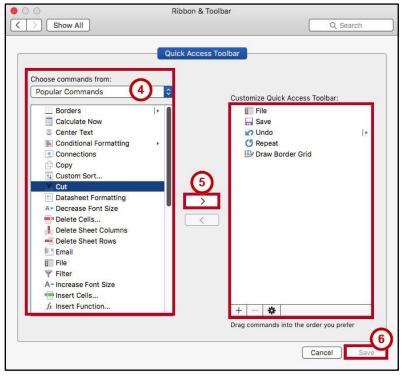


Figure 13 - Select a Command

## **Get Help with Excel**

To receive Microsoft Word Help:

1. On the *Menu* bar, click **Help**.



- 2. A drop-down will appear. In the Search field, type what you want help with (See Figure 14).
- 3. A list of results will appear. Hover over **Menu Items** to have their location pointed out (See Figure 14).
- 4. Click on a **Help Topic** to open *Excel Help* and additional help topics (See Figure 14).



Figure 14 - Search Help

#### The Smart Lookup Tool

**Smart Lookup** uses *Bing* to provide you with search results for your selected term or phrase. It is located under *Tools* in the *Menu Bar*. The following explains how to use the *Smart Lookup* functionality:

- 1. Click the **cell** containing the word or phrase you want to find information about (See Figure 15).
- 2. In the *Menu Bar*, click **Tools** (See Figure 15).
- 3. Click Smart Lookup... (See Figure 15).
- 4. The Smart Lookup pane displays the information relevant to your selection (See Figure 15).
- 5. To close the *Smart Lookup* pane, click the **Exit (X)** button in the top right corner of the pane. (See Figure 15).

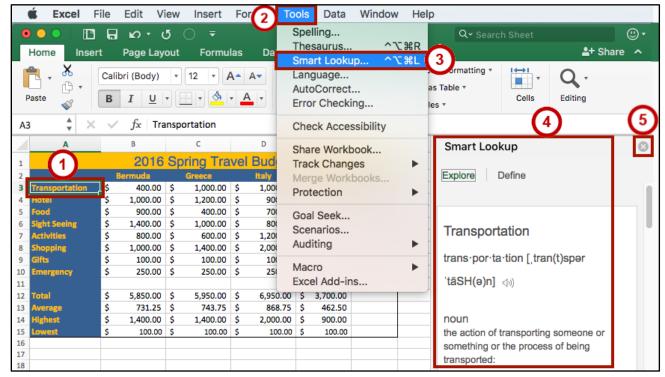


Figure 15 - Smart Lookup

#### The Status Bar

The *Status Bar* is located at the bottom of the Excel window and gives you an "at a glance" snapshot of important information regarding your current workbook (e.g. count, sum, view settings, etc.).



Figure 16 - The Status Bar

#### **Customize the Status Bar**

The following explains how to customize your status bar display:

- 1. Right-click the Status Bar (See Figure 17).
- 2. In the Customize Status Bar drop-down menu, click an option to add it (See Figure 17).

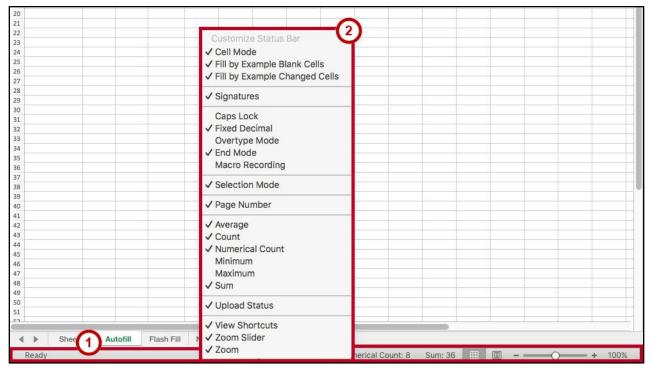


Figure 17 - Customize Satus Bar

3. When finished, click anywhere **outside** the *Customize Status Bar* to close the window.

#### The File Menu

The File Menu is located in the *Menu Bar*. When you click the *File Menu*, you have numerous options for managing your files:

- Create a new workbook
- Open files and/or recent files created and edited
- Save and close workbooks
- Share workbooks
- Add passwords to workbooks
- Set page orientation, scaling, page numbers, margins, and other page settings
- Set a print area and print workbooks
- Obtain workbook property information

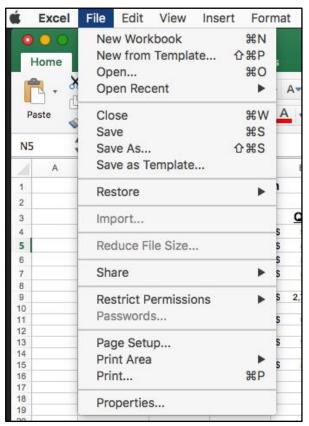


Figure 18 - The File Menu

## **Columns and Rows**

**Column** - A vertical line of cells. A letter identifies each column. Notice the *Name Box* field contains the column letter and row number of the first cell of the highlighted range of cells in the column.

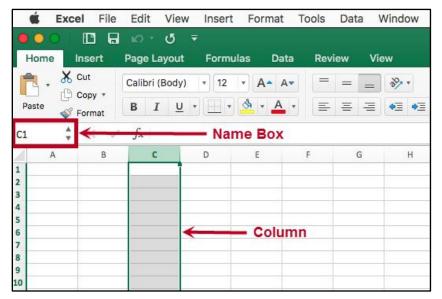


Figure 19 - Columns

**Row** - A horizontal line of cells. A number identifies each row. Notice the *Name Box* field contains the column letter and row number of the first cell in the highlighted range of cells in the row.

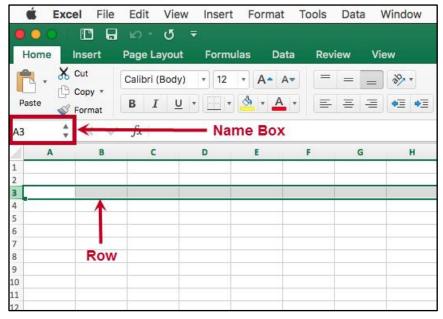


Figure 20 - Rows

# **Entering Text**

The following instructions explain how to enter text into cells:

- 1. Click the **cell** where you want to enter data and type the **text** or **numbers** (See Figure 21)
- 2. The data you type appears in the active cell and in the formula bar (See Figure 21).

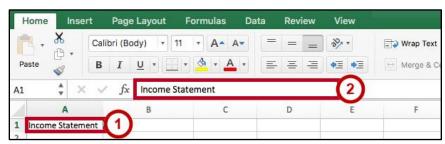


Figure 21 - Entering Text

- 3. If you make a typing error, press the **Delete** key on your keyboard to remove the incorrect data.
- 4. To enter the data and move down one cell, press the **Return** key on your keyboard.
- 5. To enter data and move in any direction, press either the **Tab Key** or the **Arrow Keys** on your keyboard. Repeat the previous steps until you have finished entering in all the data.

# **Long Words and Numbers**

Long words and long numbers are displayed differently in Excel, depending on what information is in the ajoining cell:

**Long Words** - When text is too large for the cell, the text will spill into the neighboring cell. If the neighboring cell contains data, Excel will display as much of the text as the column will allow (See Figure 22).

**Long Numbers** – When numbers are too large for the cell, Excel will display the number as number signs (##) (See Figure 22).

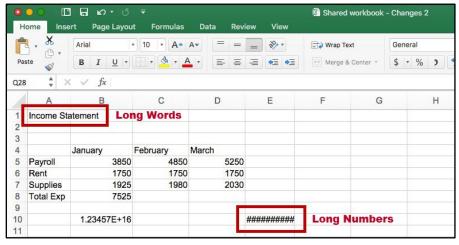


Figure 22 - Long Words and Numbers

# **Completing a Series**

Instead of entering data manually on a worksheet, you can use the *Auto Fill* feature to fill cells with data that follows a pattern or that is based on data in other cells. The following instructions explain how to complete a series using the *Auto Fill* feature in Excel:

- 1. Enter the **text** or the **numbers** that will begin your series (example: January).
- 2. Position the mouse over the **square** in the *bottom right corner* of the selected cell until the white plus-sign turns into a black plus-sign.

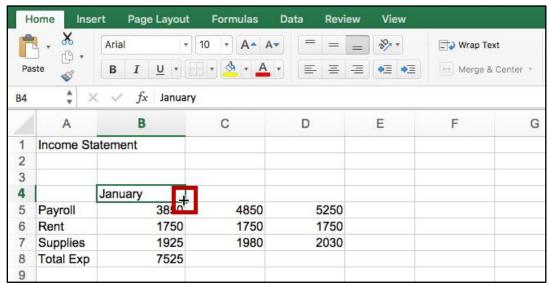


Figure 23 - Complete a Series

3. Left-click and hold the **mouse button** down while dragging the mouse pointer over the cells that you want to include in your series. Your series will be complete.

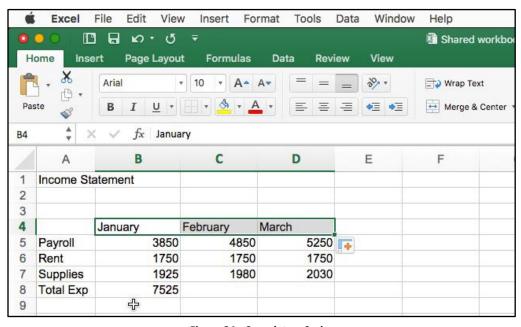


Figure 24 - Complete a Series

4. After using *Auto Fill,* the *Auto Fill Options* button will appear. Click the **Auto Fill Options** button to display additional options for your auto fill selection, then click the **option** that you want.

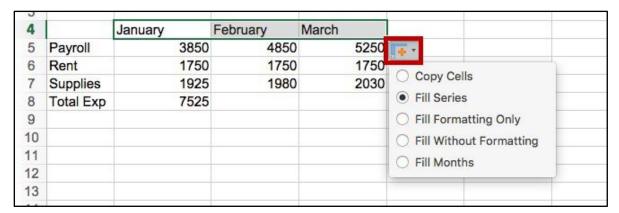


Figure 25 - Auto Fill Options

# **Selecting Multiple Cells**

The following instructions explain how to select multiple cells at once:

- 1. To select text and/or numbers, click and hold the **left mouse button** down over the first cell in the group that you want to select.
- 2. Drag the **mouse** until you have selected the cells that you want to manipulate.

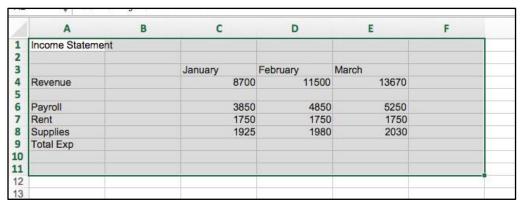


Figure 26 - Selection

3. Once the area is selected, you can edit using the functions and tools located in the *Ribbon*.

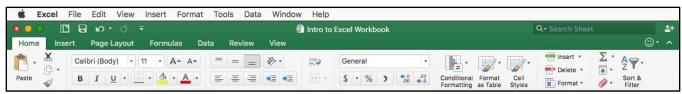


Figure 27 - Ribbon

4. You can also delete the selection by pressing the **Delete** key on your keyboard.

# **Moving Text and Numbers**

In Excel, you can move text and numbers without having to delete the text/numbers and type them again. The following instructions explain how to move text and numbers:

- 1. Select the **cells** containing the data that you want to move.
- 2. Position the **mouse** over a border of the selected cells. The cursor changes from a white plus sign to a hand figure.

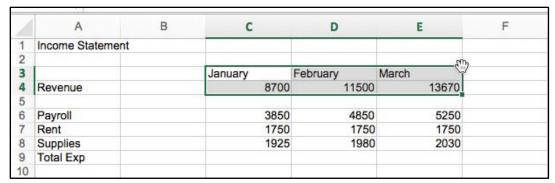


Figure 28 - Select Cells

- 3. Click and hold the left mouse button and **drag** the mouse to where you want to place the data.
- 4. Release the **left mouse** button.

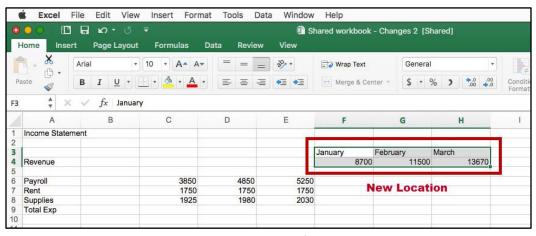


Figure 29 - Moving Text/Numbers

To move text and numbers, you can also *cut and paste* by using the buttons on the *Home* tab. The following instructions explain how to *cut and paste* text and numbers:

- 1. Highlight the cells containing the data to be moved (See Figure 30).
- 2. In the Ribbon under the Home tab, click the Cut button (See Figure 30).
- 3. Then, move your cursor and select the **cells** where you want to move the data (See Figure 30).
- 4. Click the Paste button (See Figure 30).

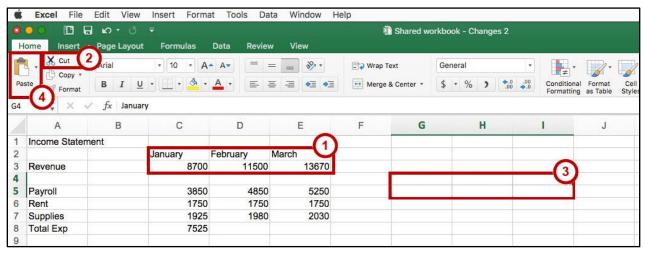


Figure 30 - Cut and Paste

5. The data will appear in the new location.

# **Copying Data**

In Excel, you can copy data without having to type it over again. The following instructions explain how to copy data:

1. **Highlight** the cells containing the data that you want to copy.

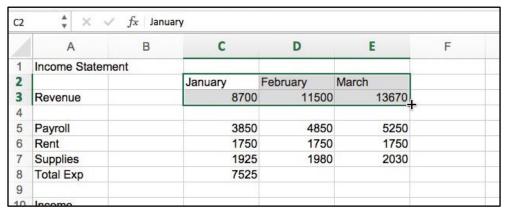


Figure 31 - Select Cells

- 2. Press and hold down the **Ctrl + C** on the keyboard. A dotted line will appear around the items to be copied (See Figure 32).
- 3. Drag the mouse pointer over the cells where you want to place the copy and press **Ctrl + V** on the keyboard to paste into the selected location (See Figure 32).
- 4. Click the **Paste** icon to display additional options for destination formatting (See Figure 32).

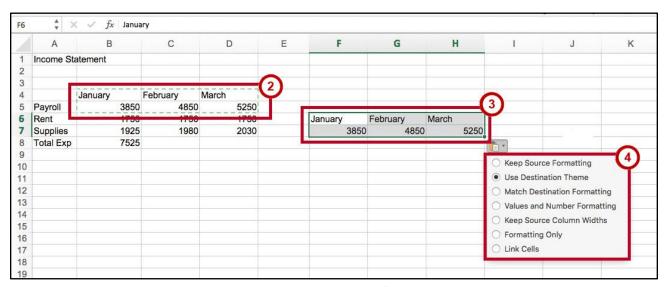


Figure 32 - Copying Cells

You can also copy data by using the buttons on the *Home Tab*. The following instructions explain how to copy data:

- 1. Highlight the area that you would like to copy (See Figure 33).
- 2. Click on the Copy button (See Figure 33).
- 3. Click to select the empty cells where you want the copied data to appear (See Figure 33).
- 4. Click on the **Paste** button. Notice that the original text remains in its original position (See Figure 33).

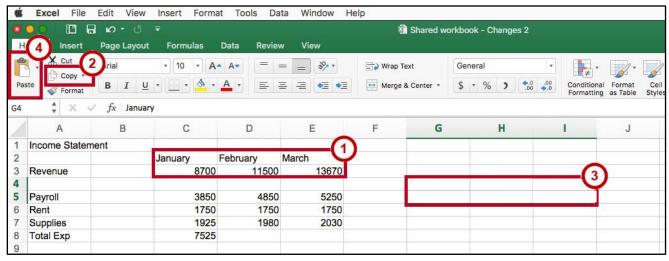


Figure 33 - Copy and Paste

5. The data will appear in the new location.

#### **Insert a Row or Column**

To insert a row, follow the steps below:

1. Select a row by clicking on the **row number**.

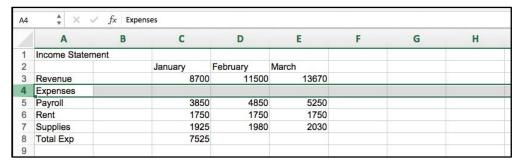


Figure 34 - Select Row

2. Click on the **Insert** button on the *Home* tab.

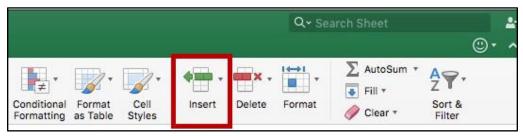


Figure 35 - Insert Button

3. Click **Insert Sheet Rows** from the drop-down menu that appears.

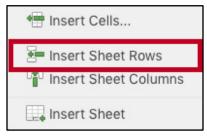


Figure 36 - Insert Sheet Rows

4. The new row appears and all the rows that follow shift downward.

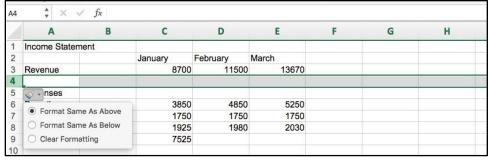


Figure 37 - New Row

To insert a Column, follow the steps below:

1. Select a column by clicking on the column letter.

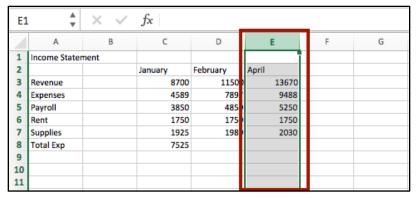


Figure 38 - Select Column

2. Click on the **Insert** button on the *Home* tab.

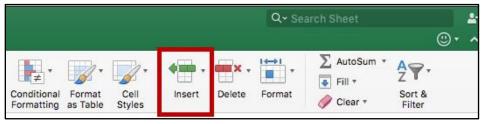


Figure 39 - Insert Button

3. Click **Insert Sheet Rows** from the drop-down menu that appears.

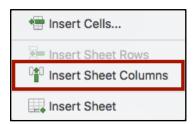


Figure 40 - Insert Sheet Columns

4. The new row appears and all the rows that follow shift downward.

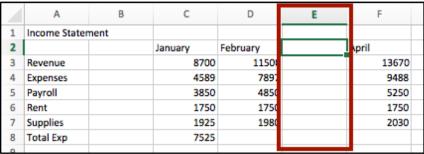


Figure 41 - New Column

#### **Delete a Row or Column**

To delete a Row, follow the steps below:

- 1. Select the row that you want to delete by clicking on the row number (See Figure 42).
- 2. Click the **Delete** button on the *Home* tab (See Figure 42).

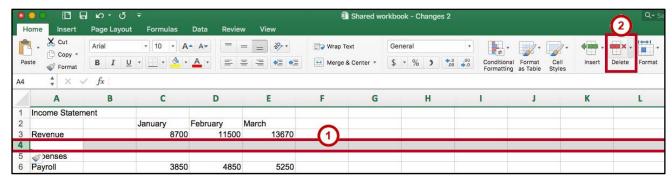


Figure 42 - Delete a Row

3. Click Delete Sheet Rows.

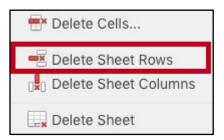


Figure 43 - Delete Sheet Rows

4. The row will disappear and all the rows that follow will shift upward.

To Delete a Column, follow the steps below:

- 1. Select the column that you want to delete by clicking on the column letter (See Figure 44).
- 2. Click on the **Delete** button on the *Home* tab (See Figure 44).

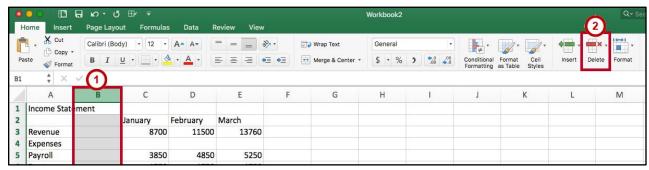


Figure 44 - Deleting a Column

3. Click **Delete Sheet Columns** in the menu that appears.

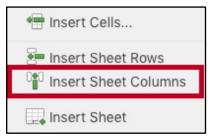


Figure 45 - Delete Sheet Columns

4. The column will disappear and all the columns that follow after will shift over.

# **Changing Column Width and Row Height**

When entering data into your worksheet, you may need to change the column width or row height. The following instructions explain how to change the column and row sizes:

#### **Column Width**

1. To change the width of a column, position the mouse pointer (white plus sign) over the right edge of the column heading until it changes to a double headed arrow.

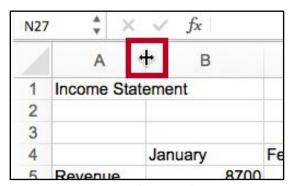


Figure 46 - Adjusting Columns

- 2. Hold down the **left-mouse button** and **drag** left or right until the column width adjusts to the size that you want.
- 3. Release the **left mouse button** and the column will display the new width.

#### **Row Height**

1. To change the height of a row, position the mouse pointer (white plus sign) between the row numbers until it changes to a double headed arrow.

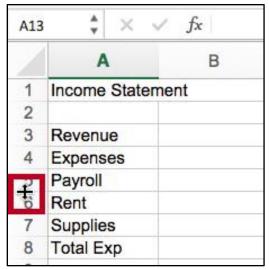


Figure 47 - Adjusting Rows

- 2. Hold down the **left-mouse button** and **drag** the mouse up or down until the height adjusts to the size that you want.
- 3. Release the **left mouse button** and the column will display the new width.

#### **Automatically Adjusting the Column Width and Row Height**

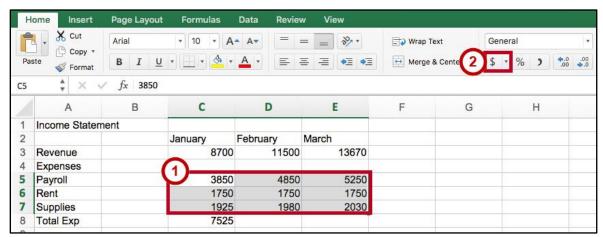
You can have *Excel* adjust a column width automatically to fit the longest item in the column. To do this, double-left-click the right edge of the **column heading**. The column will automatically be changed to fit the longest text or number within the column.

The row height can be changed in a similar manner, the only difference being that the placement of the cursor will be located between the row headings instead of the column headings.

# **Formatting Numbers**

You can easily change the format of numbers in your worksheet. The following explains how to adjust the format of numbers to *Currency*:

- 1. Select the **cells** containing the numbers that you want to format (See Figure 48).
- 2. Click the **Currency (\$)** button on the *Home* tab (See Figure 48).



**Figure 48 - Formatting Numbers** 

3. The currency format will be applied to the selected numbers.

**Note:** If you see number signs (####) appearing in a cell instead of the data that you entered, this is due to the column not being wide enough to display the entire number. Refer to Changing Column Width and Row Height, to make the necessary adjustment.

4. To access additional number formats, click the **Number Formatting** drop-down arrow.

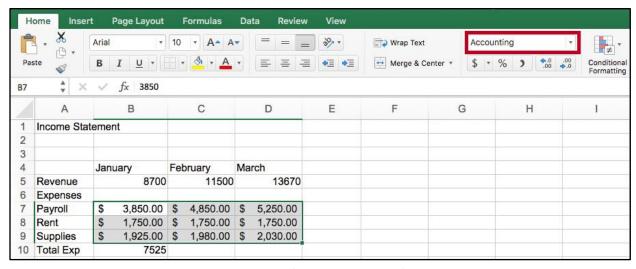


Figure 49 - Number Formatting Drop-down

5. A drop-down menu will appear with number formatting options for the selection. Click an **option** to apply the format to your selected cells.

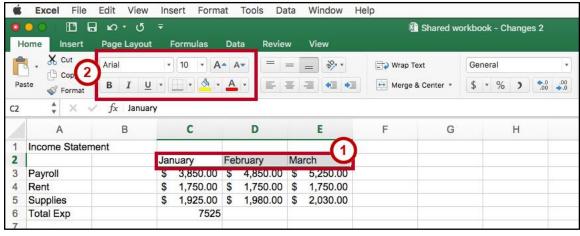


Figure 50 - Number Formatting Options

## **Formatting Text and Numbers**

You can easily change the appearance of your text and numbers look. The following instructions explain how to format text and numbers:

- 1. Select the text that you want to format (See Figure 51).
- 2. From the *Home* tab, select any of the formatting options you want to use (See Figure 51).



**Figure 51 - Formatting Text and Numbers** 

3. Your data will now appear with the formatting options you chose.

#### **Changing the Font Style**

The following instructions explain how to change the font style:

- 1. Select the **cell** containing the data.
- 2. From the *Home* tab, click the **Font Style** drop-down arrow and select the font of your choice (e.g. *Calibri*).



Figure 52 - Fonts

## **Borders**

Borders can be added to enhance the appearance of your worksheet. The following explains how to add borders:

- 1. Select the **cells** where you want to add borders (See Figure 53).
- 2. From the *Home* tab, click the **Border** drop-down arrow (See Figure 53).

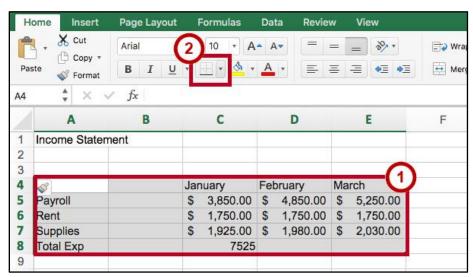


Figure 53 - Select Borders

3. Click on a border style option from the options listed in the drop-down menu.

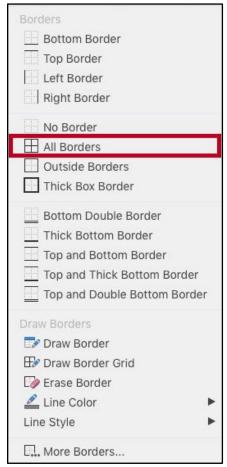


Figure 54 - Border Style Options

4. The selected border will be added to the worksheet.

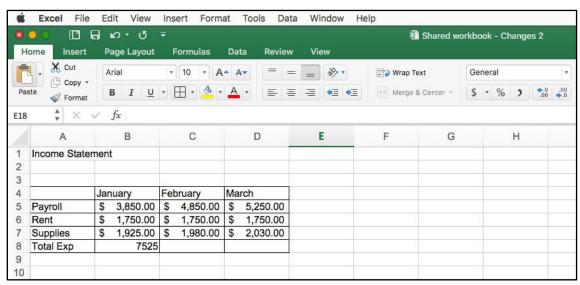


Figure 55 - Borders

# **Graphics**

Another way to add emphasis to your worksheet is through visual aids or graphics, such as pictures or shapes.

### Images from a File

Images from your own collection and experiences may add value to your worksheet. You must have the image saved prior to adding it to your worksheet. To insert an image into your workbook:

- 1. Select the **Insert** tab (See Figure 56).
- 2. Click Pictures (See Figure 56).



Figure 56 - Insert Pictures

3. From the drop-down, click Picture from File.

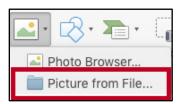


Figure 57 - Select Picture from File

4. Select the **picture** you wish to insert from your computer.

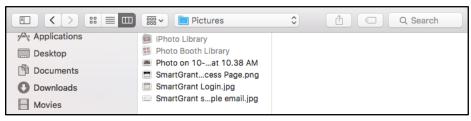


Figure 58 - Insert Picture Dialog Box

5. Click the **Insert** button. Insert

**Note:** Searching for and inserting *Clip Art* or pictures from other online sources from within Excel isn't currently supported in Excel 2016 for Mac.

6. The picture will be insterted into your spreadsheet.

# **Printing**

After creating your worksheet, you may want to print it to have a hard copy. The following explains how to print:

- 1. On the Menu Bar, click File (See Figure 59).
- 2. Select Print (See Figure 59).



Figure 59 - File > Print

3. The *Print* window will appear, which also gives you a preview of your worksheet(s).

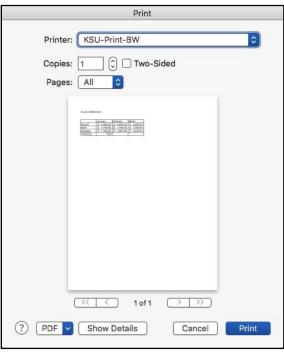


Figure 60 - Print

- 4. Review and select the print options in the *Print* window:
  - a. Select the **Printer** to which you want to print (See Figure 61).
  - b. Enter the **number of Copies** you would like to print (See Figure 61).
  - c. Select the Pages in your worksheet you want to print (See Figure 61).
  - d. Choose **Orientation**, whether to print in *Portrait* or *Landscape* (See Figure 61).
  - e. Select **Print** to send to the selected printer (See Figure 61).

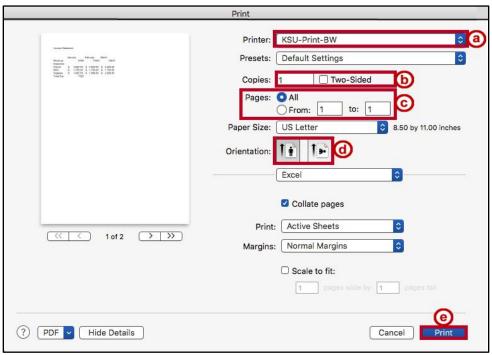


Figure 61 - Select Print Options

# Saving

Saving your workbook to your computer will allow you to stop work to resume at another time, or send the workbook to a collegue for review. To save your work:

- 1. On the Menu Bar, click File (See Figure 62).
- 2. Click Save As (See Figure 62).

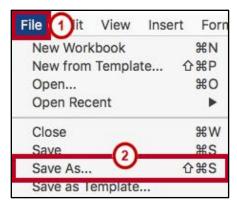


Figure 62 - Save As

**Note:** Select **Save As** to save your workbook:

- for the first time, in a different location.
- to create a copy of your workbook in the same location.
- to create a copy of your workbook in another location.
- 3. The Save As window will appear. Enter a File Name in the Save As field (See Figure 63).
- 4. In the *Where* field, select a **location** on your computer to save the document (the default will be your *Documents* folder) (See Figure 63).
- 5. Click Save (See Figure 63).

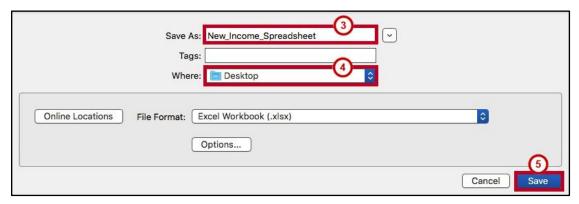


Figure 63 - Save Spreadsheet

# **Additional Help**

For additional support, please contact the KSU Service Desk:

#### KSU Service Desk for Faculty & Staff

• Phone: 470-578-6999

Email: <u>service@kennesaw.edu</u>Website: <u>http://uits.kennesaw.edu</u>

#### **KSU Student Helpdesk**

• Phone: 470-578-3555

• Email: studenthelpdesk@kennesaw.edu

• Website: <a href="http://uits.kennesaw.edu">http://uits.kennesaw.edu</a>