Microsoft Excel 2007: Module 2

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Objectives

Upon completion of this module, participants will be able to:

1. Automatically number rows;
2. Sort the worksheet;
3. Format the cells to currency;
4. Format the cells to percent;
5. Insert a chart into another Microsoft Office Document;
6. Insert a graphic into a worksheet;
7. Create IF Statements;
8. Insert a comment into a worksheet;
9. Use autoformat to format the body of a worksheet;
10. Use conditional formatting to format the body of a worksheet;
11. Format the header and footer of a worksheet;
12. Set up a workbook to be shared simultaneously.
Automatically Number Rows

Due to headings there will be instances when you will want to have the rows numbered automatically, starting at row 2.

1. Open the Excel workbook Excel 2.
   A. Click the Office Button.
   B. Click Open.
   C. Select the folder in which the document is stored.
      e.g. Desktop>PDWS Workshops>Excel>Excel II>Excel2007_M2.xlsx>Rows sheet.

2. Click on Column A.

3. From the Home tab>Cells group, click on Insert>Insert Sheet Column. The column is inserted before the original column A. The new column is now column A.

4. In cell A2 type the number 1.

5. Use the fill handle to drag the numbers to the last cell number that you need.

6. The AutoFill options box appears in the low right corner of the last cell.

7. Click the down triangle and select Fill Series.
Sort the Worksheet

After creating your Excel worksheet, you can sort your columns and rows in ascending or descending order.

1. In the current Excel document, select all cells to be sorted, by highlighting the cells. 
   Ex. cells B1:D4.

2. From the Home tab>Editing group, click Sort & Filter. The Sort & Filter menu opens. Select Custom Sort.

3. If the first row in your selection contains column headings, then select My data has headers.

4. Click the Down Arrow under Sort by. Choose the column to be sorted. Ex. Score 1.

5. Select Smallest to Largest.

6. Click OK.

Sort the Worksheet

Sort by Score 2.
Format Cells to Currency Style

The Format Cells Menu allows you to format your cells to currency style.

1. In the current Excel Workbook, select the Currency sheet tab.
2. Highlight all cells that require the currency format.
3. From the Home tab>Number group, click the Currency button.

Note: All cells have the $ symbol. In true accounting format, only the first number and totals should have the $ symbol.

4. To remove the $ symbol from unneeded rows, highlight those cells.
5. From the Home tab>Cells group, click Format > Format Cells. The Format cells dialog box opens.
6. Select the Number tab; select Currency.
7. Click the down triangle under symbol and select None.
8. Click OK.

Note: You can also select the triangle next to the $ button and select More Accounting Formats.
Format Cells to Percent Style

The Format Cells Menu allows you to format your cells to percent style.

1. In the current Excel Workbook, select the Percent sheet tab.
2. Highlight all cells that require the percent format.
4. Select the Number tab. Under Category, select Percentage.
5. Under Decimal places, use the arrows to select 0.
6. Click OK.

Note: You can also use the Percent Icon in the Home tab>Number group.

Changing Cells to Percent

In the current spreadsheet, type Score 3 in cell D1. Add scores for all students. Change the score values to show percentage.
Insert a Chart into a Different Office Document

After creating charts in Excel, you can insert them into a PowerPoint Presentation or any other Microsoft Office document.

1. In the current Excel Workbook, select the Chart sheet tab.
2. Open a PowerPoint Presentation.
3. In the Excel document, right click on the chart.
4. Select Copy.
5. In the PowerPoint document right click in a blank slide.
6. Click Paste.
7. The chart is inserted into a PowerPoint Presentation.

Insert a Chart

Insert a chart into a Word document. Open a blank Word document and follow the steps to place the chart.
Insert Clip Art into a Worksheet

Worksheets can contain graphics or logos.

1. In the current Excel Workbook, select the Clip Art sheet tab.
2. From the Insert tab>Illustrations group, click Clip Art.
3. The Insert Clip Art Task Pane opens on the right side of the screen.
4. In the Search Text Box, type School.
5. Click Go.
Insert Clip Art into a Worksheet Cont.

6. Select the desired clip art by double-clicking on the image.

7. The image is inserted into the Excel worksheet.

Inserting a Logo

Insert an HCC Logo into a blank sheet. Go to Insert tab>Illustrations group>Picture. Use the following picture file Desktop>PDWS Workshops>Excel>Excel II> hcc_logo.jpg
Using an IF Statement

The IF function is useful when you want to assign a value to a cell based on a logical test.

1. In the current Excel Workbook, select the IF Statement sheet tab.
2. Select cell C2, click on fx icon on the formula bar. The Insert Function dialog box appears.
3. In the Search for a function box, type in IF.
4. Click Go.
5. Select IF from the Select a Function box.
6. Click OK. The Function Arguments dialog box opens.
8. In Value_if_true box type Pass.
9. In value_if_false box type Fail.
10. Click OK.
11. Use the Fill handle to fill in the remaining cells.

In Column D, Create an IF Statement for any passing student to receive a certificate.

*Any text used in formulas needs to be in Quotes.
Insert a Comment into an Excel Worksheet

Comments are used to identify entries that would otherwise be difficult to understand or to provide overall workbook comments.

1. In the current Excel Workbook, select the Comment sheet tab.
2. Click cell A6.
3. From the Review tab>Comments group, click New Comment.
4. Type the comment into the comment box.
5. Press Enter.
6. Note the red triangle at the top right corner of cell A6.
7. Move the mouse over the red triangle and the comment box is displayed.

To View the Comments on the Screen

8. From the Review tab>Comments group, click on Show All Comments.

To Delete the Comments on the Worksheet

9. Select the cell that has a comment.
10. From the Review tab>Comments group, click on Delete.
Autoformat a Worksheet

Autoformatting a worksheet allows you to format the body of the worksheet in a professional looking style.

1. In the current Excel Workbook, select the Autoformat sheet tab. Click on a cell in the data range that you want to autoformat.
2. From the Home tab>Styles group, click Format as Table.
3. The Autoformat box appears. You will see a preview of the style in the drop down panel. Select a style by clicking on it.
4. Select OK, if you see a dialog box asking to verify the range of your data. The worksheet format changes to the selected style.
5. An additional group of commands also appears, in the Table Tools/ Design tab to further customize your table.

Autoformat

In the open worksheet, choose a different style format using Autoformat.
Conditional Formatting

Conditional formatting allows you to apply formatting that appears only when the value in a cell meets a specified condition.

1. In the current Excel Workbook, select the Conditional sheet tab.
2. Select cells D2:D5.
3. From the Home tab>Styles group, click Conditional Formatting.
4. The Conditional Formatting menu appears. Select less than from the Highlight Cells Rules submenu.
5. In the Less Than dialog box, enter 0.
6. In the color drop down box, select a color combination.
7. Click OK.
8. Note the changes to the worksheet.

Follow the steps that you just learned and use greater than, 50 and change the color format to another combination.
Format the Header and Footer

There are many features than can be included in the three sections of the header and footer of a document. Some options are the page number, date, time, file path, sheet name and an image.

1. Go to the View tab>Workbook Views group and select Page Layout.
2. To add a header, double click on Click to add header.
3. Click on the Header & Footer Tools/Design tab. Click in the left section of the header and select to insert the date.
4. Click in the center section of the header and type an appropriate title for the worksheet.
5. Click in the right section of the header. Select the button to insert a picture.
6. Navigate to the picture and click Insert.

Note: You can select Gridlines and Print to print gridlines from the Page Layout tab.

Select the More Options button in the lower right corner of the Sheet Options group for the Page Setup dialog box.

Header and Footer

Set up the header to include the file name, sheet name and the date. Set up the footer to include the HCC logo and the page number.
Share a Workbook

If you have a workbook in which more than one person needs to add or modify data at the same time, you can make the file shareable.

1. Go to the Review tab>Changes group and click on Share Workbook.
2. Select the Allow changes by more than one user... checkbox.
3. You can view a list of people that have the file open.
4. Select the Advanced tab. Make any necessary changes to the settings for tracking changes, update changes and conflicts.

Note: Each time you save the shared workbook, you can view the changes that other users have saved.

When you save changes to a shared workbook, another person might have edited the same cells. When this happens, you are prompted with a conflict resolution dialog box so you can choose which changes to keep.