

# Microsoft Excel 2003: The Basics

## Getting Started with Microsoft Excel


---

1. Start **Excel** by clicking the **Start** button.
2. Select **All Programs**.
3. Click on **Microsoft Office**.
4. Click on **Microsoft Excel**.

## Using an Excel Menu

---

To use an Excel menu, click the menu name with the mouse pointer. You can also press the [Alt] key and the letter that is underlined in the menu name. Example: [Alt] [F] will open the File Menu.

Occasionally, Excel 2003's personalized menus may hide uncommon commands from view. To display commands that are hidden from view, click the downward-pointing arrow  at the bottom of the menu.

If you would like to change how a menu works, please do the following:

1. Click **View**.
2. Click **Toolbars**.
3. Click **Customize** and check or clear Always Show Menus Full Menus or Show Menus After a Short Delay by placing or removing a checkmark next to the option.
4. Click **Close**.


## Using Toolbars and Creating a New Workbook

---

Using Excel's Toolbars is easy and provides you with various options. To view the features of a toolbar, place the mouse pointer over each button on the toolbar. A screen tip will appear with what the button does.


### Stacking the Standard and Formatting Toolbars in Separate Rows:

To "stack" [or place] the Standard and Formatting toolbars into two rows if they are not already displayed that way, click

the  button on either toolbar. Once you have done that, simply click **Show Buttons on Two Rows** from the list. The toolbars will now be stacked one on top of the other.

## Starting a New Excel Document


---

Once you are ready to begin a new Excel Document, simply click the  **New** Blank Workbook button on the Standard toolbar. You can also do the following:

1. Click **File**.
2. Click **New**.
3. Click **Blank Workbook** and then click **OK**.

## Opening an Excel Workbook

---

To open a Excel workbook that is already created and saved on your computer, click the **Open** shortcut on the Standard Toolbar,  or follow these simple steps:


1. Click **File**.
2. Click **Open**.

Find the document wherever you have saved it to, click on it to select [highlight] the document, and then click the **Open** button within this window.

- You can also double-click on the document to open it, without clicking on the **Open** button.
- The Excel workbook will now open.
- You can also press the [**Ctrl**] [**O**] keys simultaneously on your keyboard to browse to open an existing workbook.

## Saving an Excel Workbook

---

It is always wise to save your Excel workbook every now and then as you are working on it. To save your workbook, click the **Save**  button on the Standard Toolbar, or do the following:

1. Click **File**.
2. Click **Save**.
  - You can also press the [**Ctrl**] [**S**] keys simultaneously on your keyboard to save your workbook.

**If you want to save your document to a new location or under a different name, please do the following:**

1. Click **File**.
2. Click **Save As**.
  - Pick a new location to save your document in if you wish to save it in a different location or type a new name for the document if you wish to rename it.
  - The original document will still be retained without your latest additions or corrections to the text, and a copy, which has all your recent additions and corrections to the text, will be saved with a new name.

## Moving the Cell Pointer & Navigating a Worksheet

---

Moving around in an Excel spreadsheet is easy, simply select the cell you want to move to or edit by clicking on it with the mouse pointer, or do the following:

1. Move the cell pointer by pressing the keyboard arrow key that corresponds to the direction you want to move.
2. Pressing the [**Enter**] key on your keyboard will move the cell pointer down.
3. Pressing the [**Tab**] key on your keyboard will move the cell pointer to the right.
4. Pressing the [**Shift**] [**Tab**] keys simultaneously on your keyboard will move the cell pointer to the left.
  - You can also use the horizontal and vertical scroll bars and buttons to view portions of the worksheet that are located off-screen.

**Navigating a Worksheet with your keyboard keys:**

1. Pressing the [**Page Up**] key on your keyboard will move up one screen.
2. Pressing the [**Page Down**] key on your keyboard will move down one screen.
3. Pressing the [**Ctrl**] [**Home**] keys simultaneously on your keyboard will move to the first cell (A1) in a worksheet.
4. Pressing the [**Ctrl**] [**End**] keys simultaneously on your keyboard will move to the last cell with data in a worksheet.
5. Pressing the [**F5**] key on your keyboard will open the Go To dialog box, where you can specify a cell address to move to.

## Entering Labels & Values in a Worksheet

---

Entering labels and values in a worksheet is easy in Excel. Excel treats information beginning with a letter as a label, and left-aligns it in the cell. Excel treats numbers, dates, and times as values and automatically right-aligns it in the cell. To enter values in a worksheet, do the following:

1. Click the first cell or select [highlight] a cell range.
2. Type in your text or numerical data.


**Selecting a cell or more than one cell:**

1. Drag the mouse pointer to the last cell of the range, highlighting all of the cells that you need.
  - You can also press the [**Enter**] [**Shift**] keys simultaneously on the keyboard and while doing so, use the arrow keys to move the mouse pointer to the last cell of the range. Before doing this, make sure the active cell is the first cell of the cell range.

# Using AutoSum to Calculate Values

To use the **AutoSum** feature to calculate values in your Excel spreadsheet, follow these steps:

1. Click the cell where you want to insert the total.

2. Click the **AutoSum**  button on the Standard Toolbar.
- Verify that the cell range you have selected is the correct cell range you want total.

# Using AutoFill

To use the **Autofill** function to automatically rather than manually add data, such as a series of dates, enter a least two values into adjacent cells, and then select [highlight] those cells.

Once the cells are highlighted, click and drag the cell pointer's fill handle to complete the series in the cells you select. Example: 1990, 1991..., or January, February..., etc.


# Entering Formulas in Excel

When entering formulas in an Excel worksheet, remember that every formula must start with the equal symbol (=). To enter a formula, select the cell where you want to insert the formula, and follow these quick and easy steps:

1. Press the [=] (the equals sign) key on your keyboard.
2. Enter the formula using **values**, cells references, etc.
3. Press **Enter**.
  - To reference a cell in a formula, simply type the cell reference or click the cell you want to reference.

# Creating a Chart

Creating a chart in Excel is easy when you use the Chart Wizard. To create a chart with the Chart Wizard, select [highlight] the cell range that contains the data that you want displayed in the chart, and follow these steps:

1. Click the **Chart Wizard**  button on the Standard Toolbar.
  - You can also click **Insert**, click **Chart** from the menu.
2. Select the chart type that you want by clicking on its image, and click **Next**.
3. Verify the cell range used in the chart is correct, and click **Next**.
  - Adjust the chart options by clicking the categorized tabs and selecting any of the options listed.
4. Click **Next**.
  - Specify where you want to place the chart.
5. Click **Finish**.

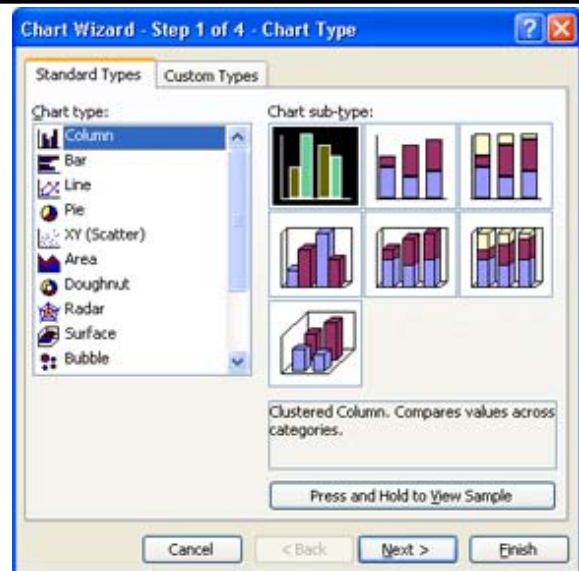


Figure 1. Select Chart type using the Chart Wizard.

# Moving and Resizing a Chart

Moving and resizing a chart in Excel is a simple process and you can do so easily if you follow these steps:

To resize a chart, click the **chart** to select it, and then drag its sizing handles, which are located along the edges of the chart, until the chart is the size that you need.

To move a chart, click and hold down the **mouse button** on the blank area around a chart. Next, drag the picture to a new location in the workbook, and then release the **mouse button**.

# Formatting Objects in a Chart

To format an object in a chart, first **select** the chart object by clicking on the object or by clicking on the chart objects **list arrow** on the **Chart Toolbar**, and select the object. To format a chart object, simply do the following:

1. **Double-click** the object or select the object.
2. Click the **Format** button on the **Chart Toolbar**.
  - You can also format a chart object by **right-clicking** the object and selecting **Format** from the shortcut menu.

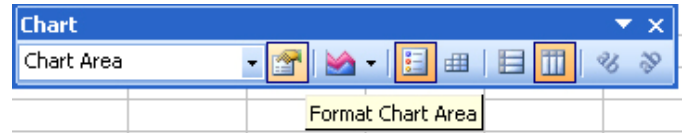


Figure 2. Chart Toolbar.

# Changing a Chart's Source Data

To change a chart's Data Source, you must select the **Chart Source Data** from the menu. Then do the following:

1. Click the **Data Range** tab.
2. Click in the **Data Range** box.
  - Select the cell range you want to base the chart on.
  - If necessary, click the **Collapse Dialog** box button. The **Collapse Dialog** button temporarily shrinks and moves the dialog box so that you enter a cell range by selecting cells in the worksheet.
3. Once you finish, click the button again or press the **[Enter]** key on your keyboard to display the entire dialog box.
  - If you would like to select non-adjacent cell ranges, press and hold the **[Ctrl]** key while you select additional cells.

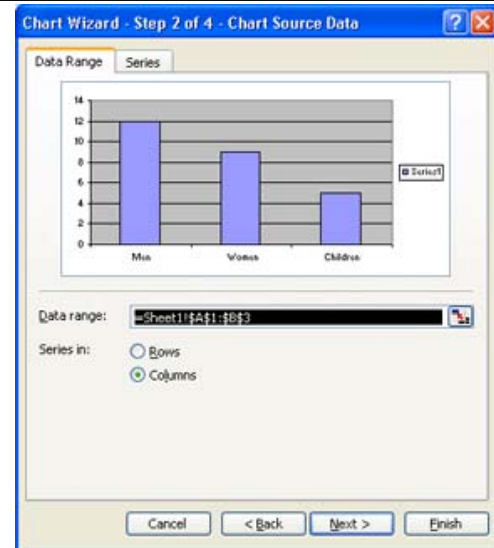


Figure 3. Data Range in the Chart Wizard.

# Adding or Changing Titles in a Chart

When creating your chart, it is very likely that you will want to add or even change titles in a chart. To add or change titles, select **Chart**, and then follow these simple steps:

1. Click **Chart Options** from the menu.
2. Click the **Titles** tab.
  - Enter or change the information in the text boxes that correspond to the chart titles.

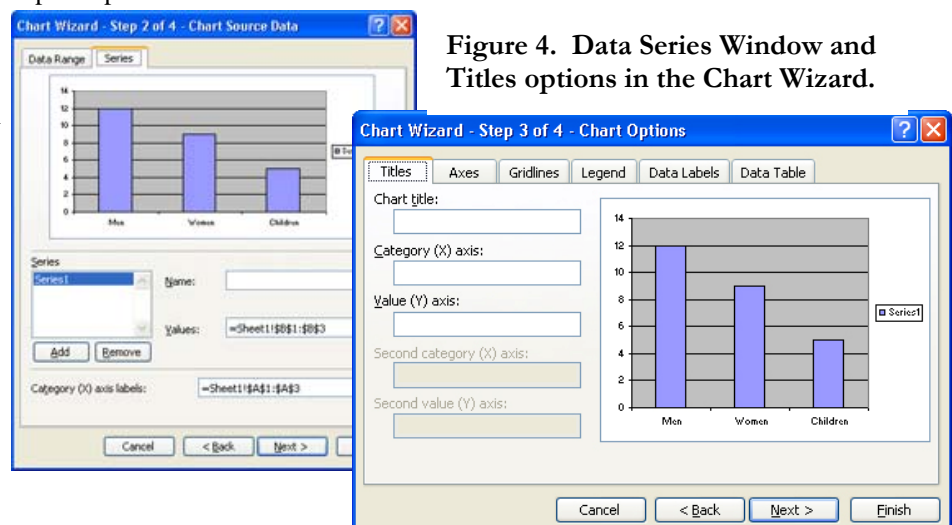


Figure 4. Data Series Window and Titles options in the Chart Wizard.

# Adding or Removing Chart Data Labels

When creating your chart, it is very likely that you may want to add or remove a chart data label. To add or remove such labels, follow these easy steps:

1. Select **Chart**.
2. Click **Chart Options** from the menu.
3. Click the **Data Labels** tab.
4. **Check** or uncheck the check boxes to display or hide the chart data labels depending on your preference.

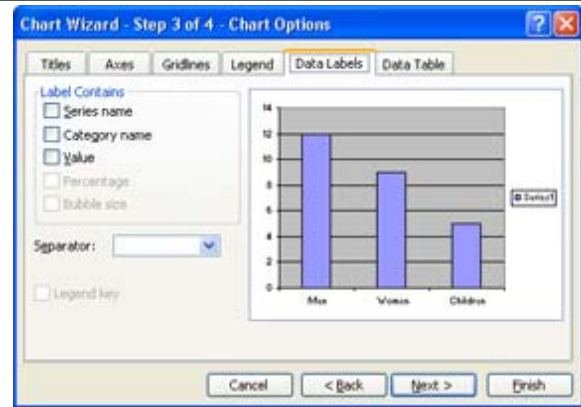



Figure 5. Data Labels options in the Chart Wizard.

# Saving an Excel Workbook

It is always wise to save your Excel document every now and then as you are working on it. To save your work, click the **Save**  button on the Standard Toolbar, or do the following:

1. Click **File**.
2. Click **Save**.

If you want to save your workbook to a new location or under a different name, please do the following:

1. Click **File**.
2. Click **Save As**.
  - Pick a new location to save your document in if you wish to save it in a different location or type a new name for the document if you wish to rename it.
  - The original document will still be retained without your latest additions or corrections to the text, and a copy, which has all your recent additions and corrections, will be saved with a new name.

# Need Help with Excel? Get it from the Office Assistant

If you are puzzled about how to accomplish a task in Microsoft Excel, a good resource that is easily available to you is the Office Assistant. To ask a question of the Office Assistant, follow these quick and easy steps:


1. Press [**F1**] to open the Office Assistant.
  - Type your question in normal English. Example: How do I create a chart?
2. Click **Search**.
  - The Office Assistant will provide you with a list of options to select from. More often than not, you will

find what you are looking for in this list. If you do not, retype your question in another way.



If you want to hide the Office Assistant cartoon character that sometimes appears right-click the Office Assistant character and click Hide from the shortcut menu.

# Printing and Previewing an Excel Worksheet

To preview your Excel data before printing is always wise. To view your Excel worksheet(s) for formatting and content before sending it to your printer, you can click the **Print Preview**  button on the Standard Toolbar, or you can follow these steps:


1. Click **File**.
2. **Print Preview** from the menu.
  - Your worksheet(s) will appear as it will print.

**To print your Excel worksheet(s) you can click the **Print**  button on the **Standard Toolbar**, or you can follow these steps:**

1. Click **File**.
2. Click **Print**.

# Closing a Excel Workbook

---

To close your workbook and exit from Microsoft Excel, simply click the **Close**  button or do the following:

1. Click **File**.
2. Click **Exit**.