This sheet accompanies TechCamp Online: Basic Excel 2008 for Mac users. This contains step-by-step instructions for the skills we covered in the online training.

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## Orient Yourself in Excel

The strip along the top containing Menus: , **Word**, **File**, **Edit**, **View**, **Insert**, **Format**, **Font**, **Tools**, and so forth.

File: in the upper left-hand corner where you’ll find **Save**, **Save** **As**, **Print**, and more.

Notice this is similar to how things are laid out in Word 2008.

## Learn the Lingo

**Cell** – (A1) one square in the grid. This holds one piece of information.

**Column** (A, B, C) – vertical line of cells in document

**Row** (1, 2, 3) – horizontal line of cells in document. Often called a record when referring to all the related information stored in one row (i.e. all the info associated with .

**Sheet** – one single grid of cells/rows/columns.

**Workbook** – the whole Excel document, often containing multiple sheets.

## Format Spreadsheets & Data

### Resizing

**Columns** – move the cursor over the columns labels (A, B, C, etc.) and let it hover on the line between two columns. The cursor changes shape to a plus sign with arrows pointing out horizontally. You can now click down and resize the column by dragging left or right.

**Rows** – do the same thing as for columns, but hold the cursor on the line between the row headings (1, 2, 3, etc.) until it changes shape. Click and hold down, moving up or down to resize.

### Naming/Renaming Sheets

Double-click on the tab in the lower left-hand corner that says Sheet1. This will allow you to type in a new name. Call it EVENT.

### Saving an Excel Document

Click the **File** > **Save As**. Choose where you want to save the file and navigate there. Here, you may choose to save the file as an .xlsx file, which means it’s in the 2008 format. If you will be sharing the document with people who use older versions of Excel, you may want to choose the .xls (older) format. However, often sharing the newer documents doesn’t present problems, so you don’t *have* to use .xls.

### Understanding Data Types: Label, Value, Date/Time, Formula

Excel needs to know what type of information/data is in the sheet. It’s smart so if you tell it what kind of data it’s dealing with, it can make some of your work easier. Look at the practice Excel file that accompanies this TechCamp Online called **Practice File for Basic Excel**.

* **Labels:** used for headings/identifying columns of data. Labels can contain letters and numbers.
* **Values**: numerical, are used for calculations
* **Date/Time:** used for dates/times, usually automatically recognized by Excel if entered in a standard format such as 9/8/11 or 12:04PM
* **Formulas**: calculations/manipulations of numbers (values)

### Formatting Columns, Column Headings, Cells

Some formatting is done from the Toolbox. This is similar to Word. Excel-specific formatting, such as formatting cells, is in the menu **Format**. Excel is only smart about some things, but can be stupid about a lot. Don’t forget – Excel’s the stupid one, not you. You need to let it know specifically what you want to do with the information.

**Column Headings** – Name them according to useful categories of info. You should have only one piece of information in each row to have the most flexibility in manipulating your data. For example, first name and last name should be in separate columns.

**Bold** & **Center** the **Heading Row –** Move your mouse over to the 1 at the beginning of the first row, hovering until the cursor is a black horizontal arrow. Click to select the entire row. Now hit **Bold** in the Toolbox (or +b). With the row still selected, click the **Center** button in the **Alignment & Spacing** panel in the **Toolbox**.

**Bold** the first two columns – Move your mouse over the A column header, click and hold down while moving towards B on top of the second column. You’ve selected both columns now. Click **Bold**. All text in both columns should be bold.

### Format Cells to Match the Data Type

**Format Cells:** Tell Excel how to treat your data through the **Format Cells** command.

Some format types include **Number**, **Currency**, **Date**, **Time**, **Text**, and more. The **General** type is assigned by default to any new data and treats numbers as numbers and text as text. This seems like a good idea, but it isn’t always. For example, if you’re storing zip codes (which look like numbers), you’ll want to change their **Data Type** to **Text**.

This is because they aren’t actually numbers that are going to go into an equation. Some zips have leading zeroes (01234) and without instructions, Excel will think that’s a number and remove the 0. This is a big problem for keep your data accurate.

Select the cell or column you’d like to change. Right-click and select **Format cells**. You can alternately click **Format** > **Cells**.

#### Currency

For the **Event Fee** column in Sheet2 of the Practice File for Basic Excel, select the column. Right-click, select Format Cells, and click **Currency**. You have options about how the currency is displayed when it’s negative (it can show up in red, or with a negative sign, etc.) and what currency symbol is used. Click **OK**.

#### Text

Do the same for the **Zip** code column. Change to **Text**. A small green triangle appears to let you know Excel thinks there’s something weird about treating a number like text. Ignore that – you actually do want the zip to be treated as text!

#### Date

Change **Registration** **Date** to **Date** format using the same steps.

### Adding Borders to your Document

Delineate certain information in your data with a table by adding borders.

Select the cells that you want to add borders to. In the **Toolbox**, in the **Borders & Shading** panel, select the little box that looks like a window or table. Choose **All Borders** for a table; choose **Inside Horizontal Border** to create horizontal lines only.

### Insert Columns & Rows

Go to the header letter or number of the column or row (A or 1). **Right-click** and select **Insert** to add a column before the one you’ve selected. **Right-click** and select **Insert** to add a row above the one you’ve selected.

### Delete

Follow the steps to insert, but select **Delete** instead.

### Copy & Paste

Insert a row above Chad Foster’s row. Now select Chad Foster’s whole record (remember, record means row in an Excel doc with rows of related information, i.e. all info about Chad Foster is a record). Right-click and select Copy. Right click on the blank row above it and click Paste. You can alternately click **Insert Copied Cells** and you’ll create a new row with all the data in it. (This way, you don’t have to insert a blank row first.)

### Printing Spreadsheet & Viewing

Click **File** > **Print…** to see how your document will print.

Change the orientation of your document if your document would fit better on a horizontal orientation (called **Landscape**) rather than a vertical one (**Portrait**).

Click the **Page Setup**. Select **Landscape**.



## Use Formulas

### Sum

Add all the numbers that are in the same column (in the practice file, find out what the Event Fee total is). Below the Event Fee column in M21, type **=SUM(M2:M20)**. The colon “:” means “everything between”. So O5:O25 indicates everything starting at M2 going through M20 – it’s a range, in other words.

### CountIf

This is a way of “adding up” text instead of values. In the practice file, we want to know how many students came to the event, and count them up.

In an empty cell, type **=CountIf(L2:L20, “Student”)**. Note: it may not work to copy and paste this formula from Word to Excel. Make sure you actually type the formula from scratch.

## Filtering & Sorting

### Filtering

Filtering is a way of narrowing down the data you’re looking at. An example is that you want to see only event attendees from Houston. Click any cell in the document – no need to select anything.

Click **Data** > **Autofilter** to be able to apply a filter to any column in your spreadsheet. In the City column, click the arrow that appeared in the heading cell and you’ll see a dropdown of all the values in the menu. Click Houston and all records with *other* values in that column disappear (but don’t worry, they’re just hidden, not deleted).

When a filter has been applied, the arrow turns blue so you can easily see which columns have filters applied.

To remove the filter, you can click the arrow again in the header of that column and select Show All. If you have applied multiple filters, you can get rid of them all at once by returning to **Data** in the menu, and clicking **Autofilter** again, which deselects Autofilter.

### Sorting

Sorting is useful to automatically order data.

Click **Data** > **Sort…**. Select **Header Row** under **My data has** at the bottom, and now under **Sort by,** select the column that you want to sort (i.e. City). Finally, decide whether the order should be ascending or descending.

If it’s text, it will be put in alpha order; if numbers, in numerical order.

You can sort further by choosing a column under **Then by**.

## Link Spreadsheets

#### Refer to Info in One Sheet in Another Sheet

This allows you to refer to calculations from another sheet on a new sheet. We’ll refer to the Event Fee sum that we created on the sheet called EVENT. Go into a blank sheet. In A1, type Event Total. In A2, type **=EVENT!M21** if M21 is where the total event fee that you summed up lives. You should see the contents of M21 in A2. If M21 changes, A2 will reflect that change.

#### Link Sheets with a Calculation

On a blank sheet, we want to get a count of how many event participants were members. In a blank cell like B3, type **=CountIf(EVENT!L2:L20, “Member”)**. You should get a total count of members in the type column from the EVENT sheet. (Remember, copying and pasting from Word into Excel may not work, so type out the formula from scratch.)