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Session One: Basic Skills

A bad beginning makes a bad ending.

Euripides, Aegaeus (484 BC - 406 BC).

Even if you are a seasoned Excel user, I urge you to take Euripides' advice and complete this session. You'll fly through it if you already know most of the skills covered.

In my classes I often teach professionals who have used Excel for over ten years and they *always* get some nugget of fantastically useful information from this session.

In this session I teach you the absolute basics you need before you can start to do useful work with Excel 2007.

I don't assume that you have any previous exposure to Excel (in any version) so I have to include some very basic skills.

If you're moving to Excel 2007 from an earlier version this session will de-mystify Microsoft's new fluent user interface (Ribbon).

Session Objectives


By the end of this session you will be able to:

- Start Excel and check your program version
- Maximize, minimize, re-size, move and close the Excel window
- Understand the Application and Workbook windows
- Open and navigate a workbook
- Save a workbook
- Pin a document and understand file organization
- View, add, rename, delete and navigate worksheet tabs
- Use the Ribbon
- Understand Ribbon components
- Customize the Quick Access Toolbar and preview the printout
- Use the Mini Toolbar, Key Tips and keyboard shortcuts
- Understand Views
- Use full screen view
- Use the help system

Lesson 1-1: Start Excel and check your program version

If you are using Windows XP the procedure is almost the same as described here. You should be able to figure out the differences!



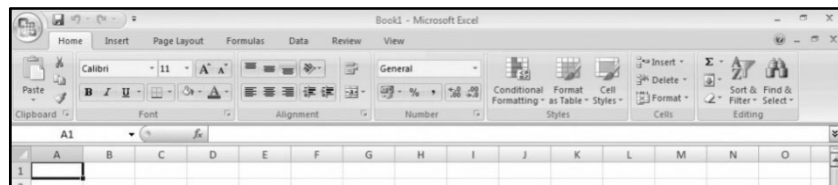
- 1 Click the *Windows Start Button*  at the bottom left of your screen.
- 2 Click the *All Programs* item at the bottom of the pop-up menu.
- 3 Scroll down the list and click on the Microsoft Office item.
- 4 Pin *Microsoft Office Excel 2007* to the start menu.

You'll be using Excel a lot so it makes sense to pin it to the start menu. This will make it appear at the top of the list in future so you'll be able to start Excel with just two clicks.



To pin to the start menu point to Microsoft Office Excel 2007 in the list, right-click your mouse and then choose *Pin to Start Menu* from the shortcut menu.

- 5 Left-click Microsoft Office Excel 2007 to start the application.

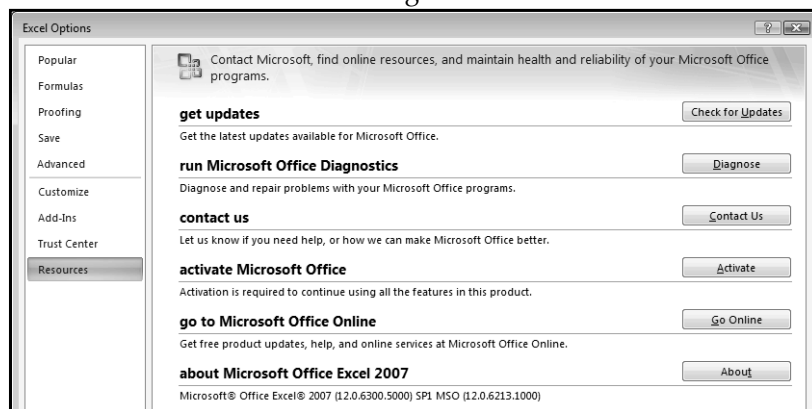
Excel starts and is displayed on the screen:



- 6 Check the program version.

Click the *Microsoft Office button*  at the top left of the screen and then click the *Excel Options* button  at the bottom right of the dialog.

Click *Resources* from the left hand sidebar and you'll see the version number at the bottom of the dialog:



important

Service Packs

When Excel 2007 was first released it had many bugs (as do all computer programs of any size).

Microsoft is very pro-active at fixing bugs that are found and always release these fixes free of charge as a service pack.

Service packs normally only fix bugs found in the original program, but Microsoft sometimes take things a little further by including new, or at least enhanced, features with their service packs.

I had many emails from readers of my book: *Learn Access VBA 2003 with the Smart Method* suggesting that some of the examples didn't work for them. In almost every case the problem was that they were using an out-of-date version of the application or the operating system. After applying the relevant service packs the problems vanished.

For this reason it is important that you make sure your software is up to date.

In this example the Excel version is:

about Microsoft Office Excel 2007

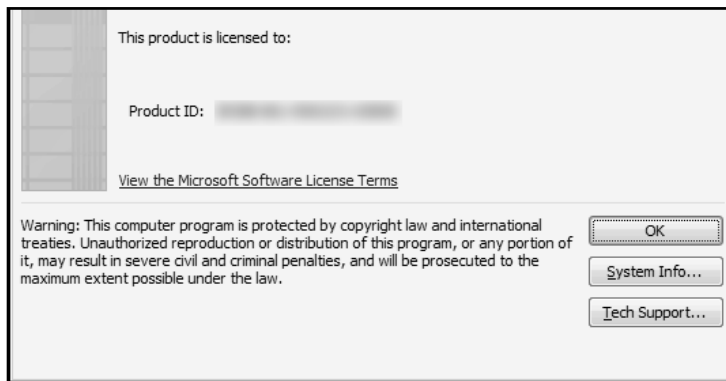
Microsoft® Office Excel® 2007 (12.0.6300.5000) SP1 MSO (12.0.6213.1000)

The important part is the *SP1* denoting that you have *service pack one* installed. If this says SP2, SP3 or an even larger number this is also fine. It simply means that Microsoft have fixed even more bugs in their product since this book was published.

If you do not see any reference to SPn, you have an early, un-patched version of Excel 2007 and you should update it (the update is free) via the Internet.

7 Check the Operating System version.

Click the *About Button* next to *about Microsoft Excel 2007*. A dialog is displayed with information about your copy of Excel.



Click the *System Info...* button. The Operating System (OS) Name and Version will then be visible at the top right of the dialog:

Vista

Item	Value
OS Name	Microsoft® Windows Vista™ Ultimate
Version	6.0.6001 Service Pack 1 Build 6001

Windows XP

Item	Value
OS Name	Microsoft Windows XP Professional
Version	5.1.2600 Service Pack 2 Build 2600

Once again, it doesn't matter if you have Vista running a later service pack than SP1 (or Windows XP running a later service pack than SP2).

If you're running Vista or Windows XP, any edition will suffice (it doesn't have to be the Ultimate or Professional edition).

8 Click the close button  on the top right corner of each dialog to return to the Excel screen.

note

What if I'm unable to upgrade my operating system or I'm using a different operating system?

Sometimes your corporate policy will not allow you to upgrade your operating system or application service pack.

In this case you can still use this book but be aware that it is possible that some of the features described may not work as expected (or may not work at all).

Lesson 1-2: Maximize, minimize, re-size, move and close the Excel window

The great successful men of the world have used their imaginations, they think ahead and create their mental picture, and then go to work materializing that picture in all its details, filling in here, adding a little there, altering this a bit and that bit, but steadily building, steadily building.

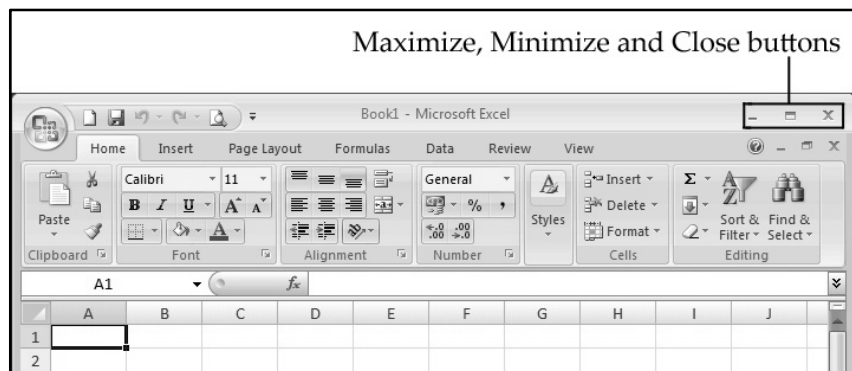
Robert Collier, American motivational author, (1885-1950)

Now that Excel is open you are confronted with a dazzling array of buttons, switches and other artifacts.

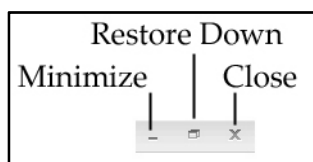
For now let's explore the big picture by looking at how the Excel window can be sized and moved. The details will come later.

1 Understand the Maximize, Minimize and Restore Down buttons

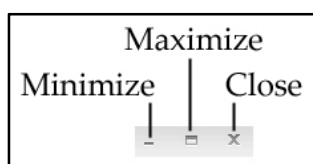
At the top right corner of the Excel window you'll see three buttons.



The buttons that you see will depend upon how the Excel window was left last time the application closed down. Normally the Excel screen is Maximized to fill the screen and you'll see:



But if you had reduced the size of the Excel window so that it didn't fill the screen you'll see this instead:



Try clicking the *Maximize*, *Minimize* and *Restore Down* buttons but be careful to click the group of three buttons at the very top of the

window and not the similar group beneath (we'll be visiting those in the next lesson).

- *Maximize* makes the Excel window completely fill the screen.
- *Minimize* reduces Excel to a button on the bottom task bar.

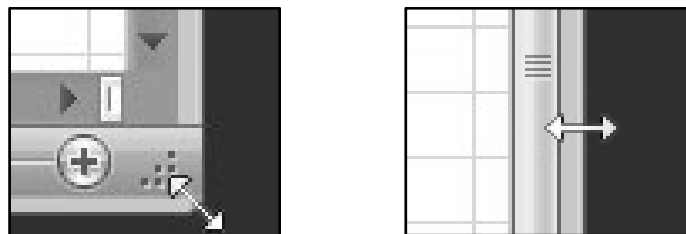


Click this button again to restore the window to its previous size.

- *Restore Down* makes the Excel window smaller allowing you to re-size the window.

2 Re-size the window

After clicking the *Restore down* button you are able to re-size the window. Hover over either the side of the window, or a corner of the window, with your mouse cursor. The cursor shape will change to a double-headed arrow.



When you see either cursor shape, hold down the left mouse button and move the mouse (this is called *click and drag*) to re-size the window.

Clicking and dragging a corner allows you to change both the height and width of the window.


Clicking an edge allows you to change only one dimension.

3 Move the window.


Click and drag the Title Bar (the bar at the very top of the window) to move the Excel Application window around the screen.

4 Close Excel

There are two common ways to close down Excel and three lesser used methods (see sidebar). Most people will use one of the following methods:

Click on the *Close button*  at the top right of the Excel application window.

OR

Click on the *Office button*  at the top left of the screen and then click on the *Exit Excel* button at the bottom right of the dialog.

note

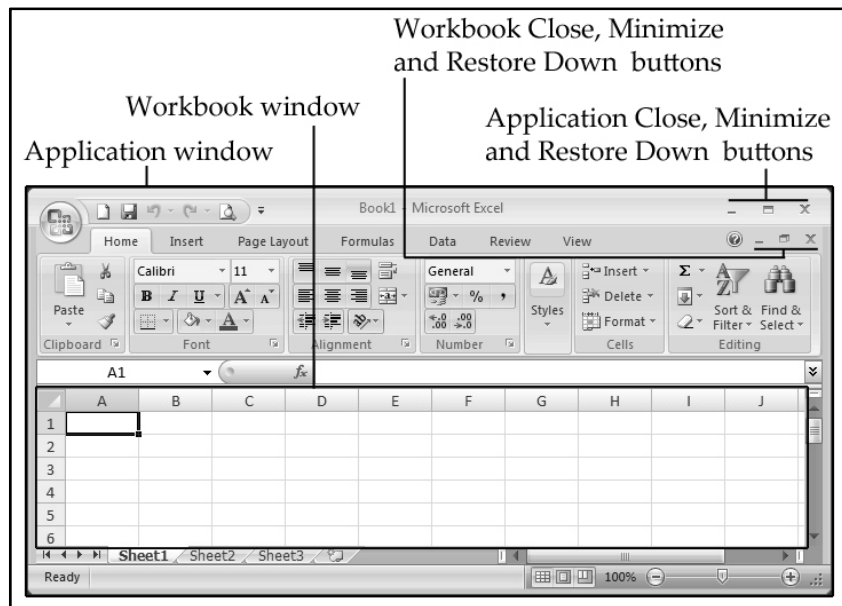
Other ways to close down Excel

There are three expert ways of closing Excel that will save a second or two of your time.

1. Double click the Office button at the top left of your screen.
2. Press the <Ctrl>+<W> keys on your keyboard. We'll be learning more about keyboard shortcuts later in this session.
3. Press the <Alt>+<F4> keys on your keyboard.

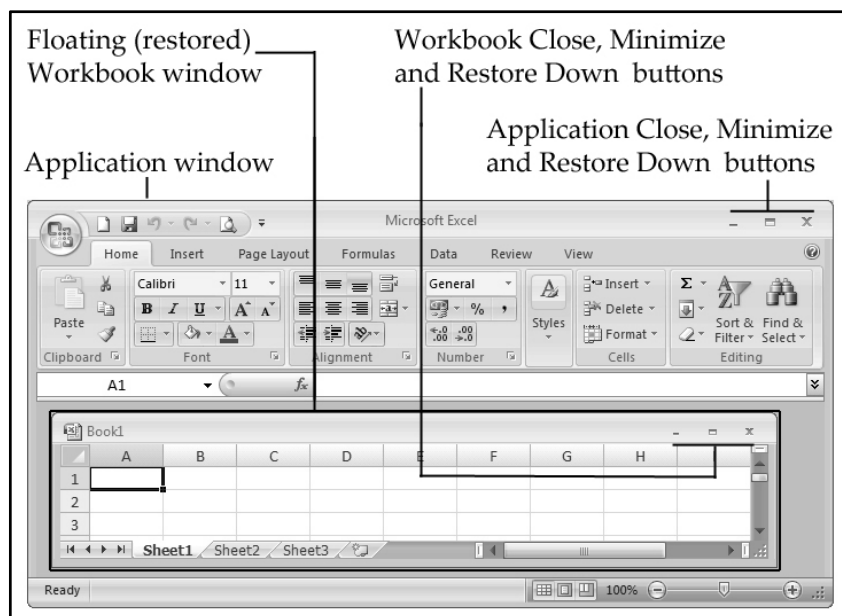
Lesson 1-3: Understand the Application and Workbook windows

Excel can be thought of as a frame (the *Application window*) containing one or more *Workbook windows*. Most of the time you will work with one *Application window* containing one *Workbook window*.



The screen grab above shows the normal way of working. The Workbook window is maximized within the Application window.

If the Workbook (that's the lower group of three buttons) *Restore Down* button is clicked the workbook window floats within the frame provided by the Application window.



1 Close Excel down and re-start it again.


note

What's the point of having a floating worksheet window?

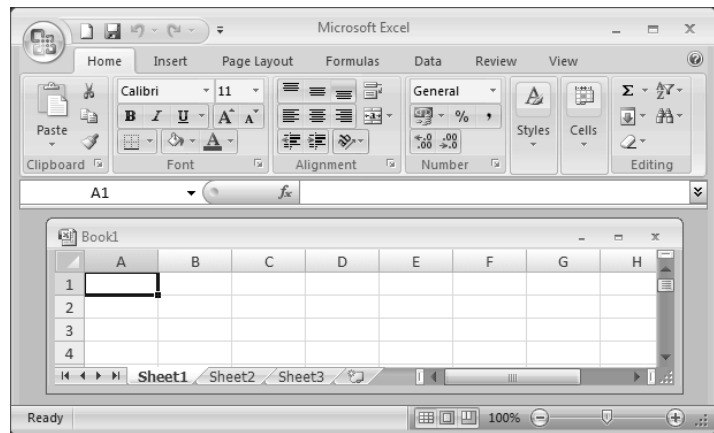
At this stage in your journey of discovery, none at all.

You need to know how to maximize, minimize and restore down the workbook window because you might do it by accident and need to fix things up again.

In *Lesson 2-2: Create a new workbook and view two workbooks at the same time*, you'll see how Excel is able to display more than one Workbook window within the Application window. This allows you to view two worksheets at the same time.

- Click the Workbook's Restore Down button (that's the one in the lower group of three buttons). 

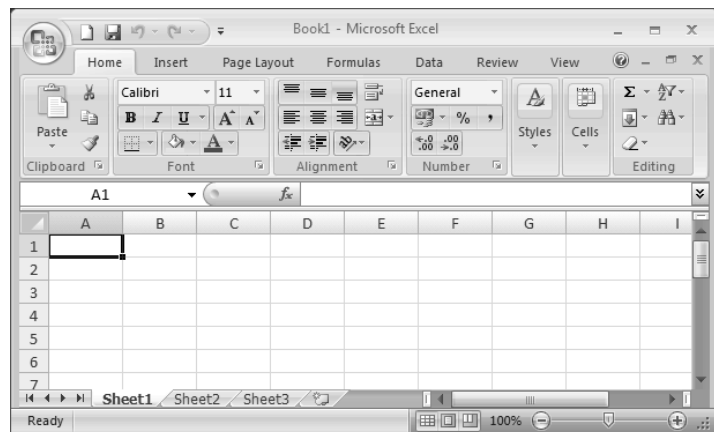
The workbook floats within the Application window:



Notice that the workbook's *Maximize*, *Minimize* and *Restore Down* buttons are now on the top right corner of the floating window.

- Click the Workbook's Maximize button.

The workbook completely fills the Application window:



- Understand the two close buttons.

You've probably noticed that there are two close buttons on screen. One for the Application window, and one for the Workbook window. How these buttons work is quite quirky.

Application close button

- Closes both the application and workbook windows when only one workbook is open, or no workbooks are open.
- Closes only the active workbook (that's the one that is currently on display), when more than one workbook is open.

Workbook close button

- Closes the workbook but always leave the application window open.

Lesson 1-4: Open and navigate a workbook

important

Organizing your sample files folder!

When you complete a lesson that involves a sample file that is changed, you will be instructed to save the file with a postfix.

By the time you've completed the course you'll have sample files such as:

Sales
Sales-1
Sales-2
Sales-3 ... etc

The first file is a sample file that you downloaded, and the others (with the number postfix) are interim versions as you complete each lesson.

The sample file set includes the sample file *and all interim versions*.

The interim versions are provided for two reasons:

1. If your work-in-progress becomes unusable (for example after a system crash) you can continue without starting at the beginning again.
2. If a lesson doesn't seem to give the results described, you can load the example to give some clues about what has gone wrong.

It is a good idea to place the sample files in a different folder to your saved work. If you don't do this you'll be overwriting the sample interim files (such as Sales-1, Sales-2 etc) with your own finished work.

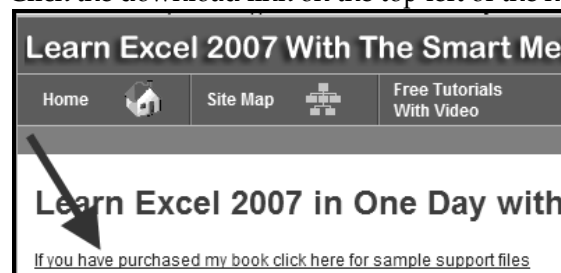
Excel uses the analogy of a book that has many pages. In Excel terminology we use the term: *Workbook* for the book and *Worksheet* for each of the pages. We'll be learning more about worksheets later in this session in *Lesson 1-7: View, add, rename, delete and navigate worksheet tabs*.

1 Download the sample files (if you haven't already done so).

1. Open your web browser and type in the URL:

www.learnmicrosoftexcel.com

2. Click the download link on the top left of the home page.



3. Download the sample files.

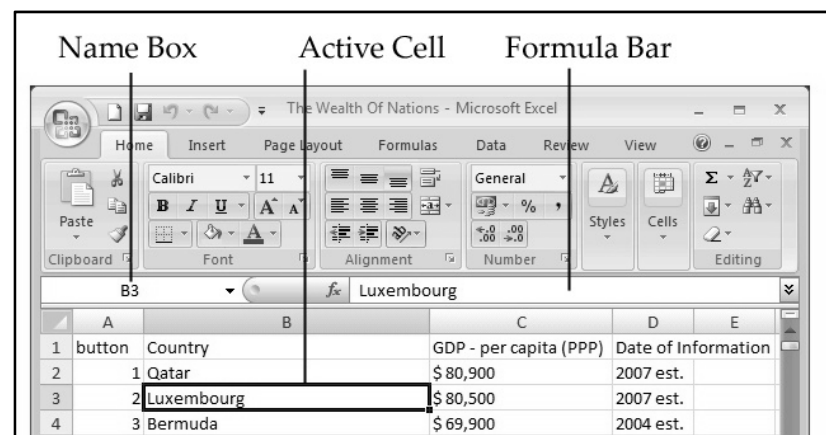
2 Open the sample workbook: *The Wealth of Nations*.

Open Excel and then click on the Office button  at the top left of the screen.

Select *Open* from the drop down menu. Navigate to the folder containing the sample files and double click *The Wealth of Nations* to open the sample workbook.

If you prefer to use the keyboard, another way to open a workbook is to hold down the <Ctrl> key and then press the <O> key.

3 Go to Cell Z3 using the Name box.



Excel uses the letter of the column and the number of the row to identify cells. This is called the *cell address*. In the above example the cell address of the active cell is B3.

The Wealth of Nations

note

Excel 2007 is big!

"Space is big - really big - you just won't believe how vastly, hugely mind-bogglingly big it is. You may think it's a long way down the road to the chemist, but that's just peanuts to space".

Douglas Adams, The Hitchhikers' Guide to the Galaxy

A compelling reason to upgrade from Excel 2003 to the new 2007 version is the sheer size of worksheets that can now be manipulated.

Excel versions 97-2003 were limited to 65,536 rows and 256 columns.

Many of my clients have needed to overcome the "65,000 row problem" in earlier Excel versions. Until now that meant moving to Access (Microsoft's database management application).

Excel 2007 worksheets can have up to 1,048,576 rows and 16,585 columns.

Put into more understandable terms.

- You could create a single worksheet with the name of every human being on the planet and you wouldn't run out of cells (in fact, you wouldn't have even used half of your worksheet).
- If you filled every cell and printed out the worksheet it would be 3.25 miles (5.24 kilometres) long and 320 yards (293 Metres) wide – that's a lot of paper.

Believe it or not, some of my clients aren't even happy with this and are now running into the "million row problem"!

In Excel 2007 there are a little over a million rows and a little over sixteen thousand columns. You may wonder how it is possible to name all of these columns with only 26 letters in the alphabet.

When Excel runs out of letters it starts using two: X,Y,Z and then AA, AB, AC etc. But even two letters is not enough. When Excel reaches column ZZ it starts using three letters: ZX, ZY, ZZ and then AAA, AAB, AAC etc.

The currently selected cell is called the *Active Cell* and has a black line around it. The Active Cell's address is always displayed in the *Name Box* and its contents are displayed in the *Formula Bar*.

We can also use the Name Box to move to a specific cell.

To see this in action, type **ZZ3** into the *Name Box* and then press the **<Enter>** key. You are teleported to cell ZZ3:



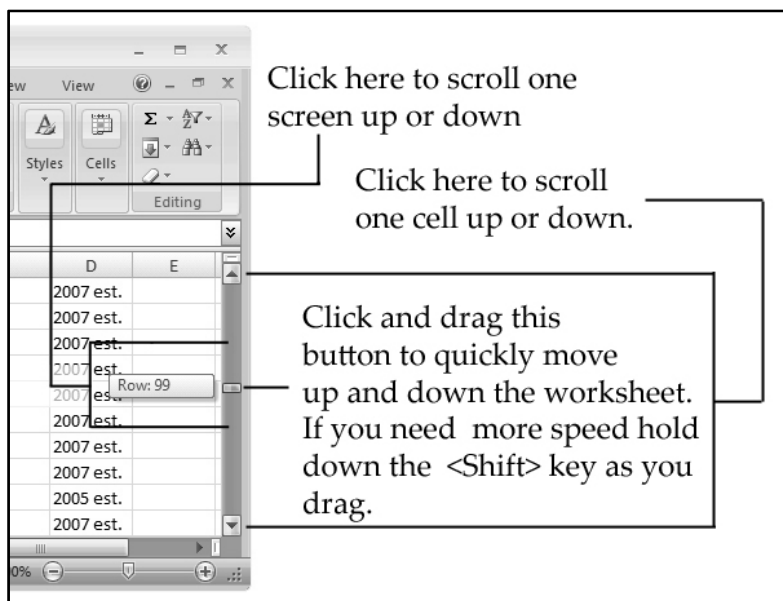
- 4 Return to Cell A1 by pressing **<Ctrl>+<Home>**.
- 5 Go to the end of the worksheet by pressing **<Ctrl>+<End>**.
- 6 Use the Scroll Bars.

There are two scroll bars for Excel's workbook window.

The vertical scroll bar runs from top to bottom of the worksheet window and allows you to quickly move up and down the worksheet.

The horizontal scroll bar is at the bottom right hand side of the workbook window and allows you to move to the left and right in wide worksheets.

Here's how the scroll bars work:



Lesson 1-5: Save a workbook

note

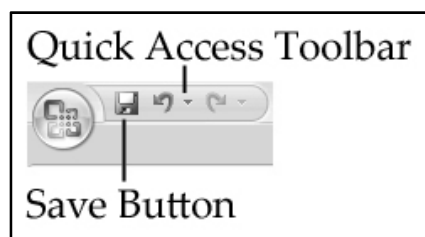
You can also use the <Ctrl>+<S> keyboard shortcut to save your work.

1 Save the workbook

When you are editing a workbook, the changes you make are only held in the computer's memory. If there is a power cut or your computer crashes you will lose any work that has been done since the last save.

For this reason you should get into the habit of regularly saving your work.

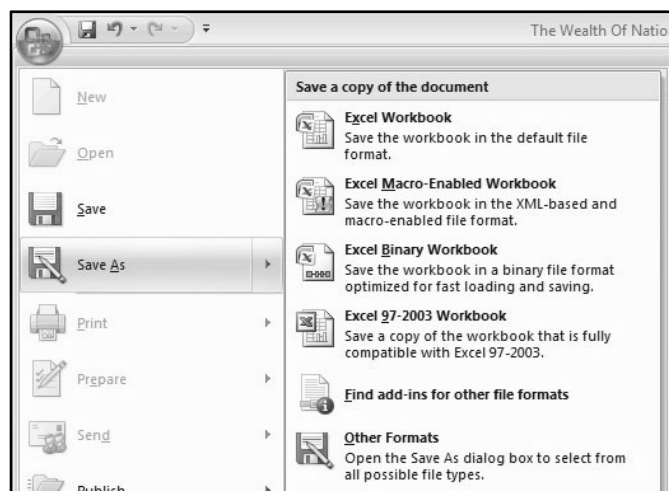
Even though we haven't changed this worksheet, let's save it now by clicking the Save button on the Quick Access Toolbar at the top left of the screen.



2 Save the workbook with a different name.

Click the *Office button* and then hover over the *Save As* item in the drop-down dialog.

You can see that it is possible to save your file in many different formats.



3 Understand file formats.

Excel Workbook (the Open XML format)

Until very recently every program stored its information on the hard disk in a completely different way. These incompatible formats are called *binary formats*. This made it very difficult to write applications that could be used together.

All of this has changed with the new file format: *Office Open XML*.

note

How users of earlier office versions can read your OpenXML files

Microsoft has a free download: The Microsoft Office Compatibility Pack.

If users of Excel XP (2002) or 2003 install this they will be able to read and save Word, Excel and PowerPoint 2007 files in the new OpenXML format.

If the user has Office 97 or Office 2000 they are out of luck. You'll have to save your files in the old 97-2003 format if you need to share them.

The Smart Method still runs many Excel 2000 courses (especially for clients in the banking and finance sector). These users have no solution to read an Open XML workbook other than to upgrade.

Of course, as the years pass this will become less of an issue.

Microsoft have published exactly how this format works and given it away free to the world's developer community. This allows other programs to easily work with Excel workbook files. For example, Apple's iPhone already supports Office Open XML Email attachments.

Unfortunately the future has to co-exist with the past and there are a lot of people in the world using the older versions of Office (97, 2000, 2002 and 2003). If you save your files in the new Open XML format only people running Office 2007 will be able to read them (but see the sidebar for a potential solution to this problem).

Excel Macro Enabled Workbook

The Excel Macro Enabled Workbook is simply a workbook that has program code (called Macro code) embedded within it. Macros are beyond the scope of this book but are covered in our Excel Expert Skills book

Macro programming (also called VBA programming) is a vast subject of its own and is not useful to the vast majority of Excel users. The Smart Method run comprehensive Excel VBA courses but they are usually only taken by scientists and engineers who need to add very advanced functionality to Excel.

Earlier versions of Excel could potentially allow a workbook to infect your machine with a macro virus because all Excel files were capable of carrying macros. By separating the formats it is easier to avoid opening potentially infected files.

Excel 97-2003 Workbook

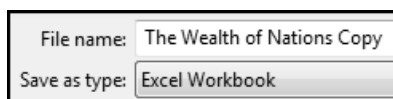
This is the old binary format that allows users with earlier versions of Excel to read your workbooks. Some features won't work in earlier versions and if you've used those in your workbook Excel will display a warning and tell you which features will be lost.

Excel Binary Workbook

An oddity in Excel 2007 is a new binary format: Excel Binary Workbook. This is a binary alternative to Open XML but it can't be read by earlier versions of Excel. The advantage of this format is that it loads and saves more quickly than Open XML.

4 Save the workbook with a different name.

1. Click on the *Excel Workbook* icon.
2. Type: **The Wealth of Nations Copy** into the *File name* text box.
3. Click the *Save* button.



Notice that the name of the workbook in the title bar (at the top of the window) has now changed indicating that you are now viewing the new workbook that you have just saved.

Lesson 1-6: Pin a document and understand file organization

tip

Increasing the number of items in the recent documents list.

Excel remembers the seventeen most recently opened documents.

As you open more documents the seventeenth oldest is removed from the Recent Documents list unless you pin it.


If you'd like to increase Excel's memory up to a maximum of fifty items here's how it's done:

1. Click the Office button at the top left of the screen.
2. Click the *Excel Options* button at the bottom right of the dialog.
3. Choose *Advanced* from the left hand pane.
4. Scroll down the right-hand list until you find the Display category. You'll see *Show this number of Recent Documents: 17*.
5. Change the number to the number of recent documents you'd prefer Excel to remember (up to a maximum of fifty).

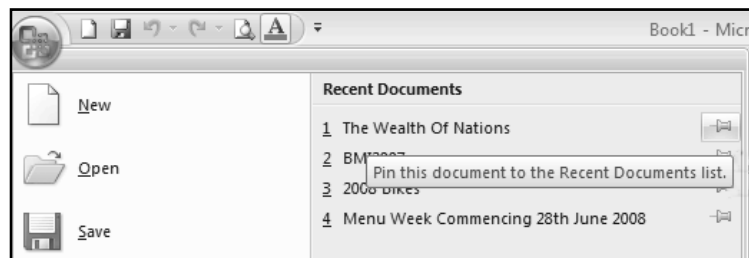
1. Close down and restart Excel.
2. Pin a workbook to the Recent Documents list.

1. Click the Office Button at the top left of the screen.

On the right hand side of the dialog is a list of all recently opened documents beginning with the most recent (probably the *Wealth of Nations* worksheet opened during the last lesson).

Note that there is a pin icon  next to each workbook name.

When you hover over the pin a tooltip is displayed saying: *Pin this document to the Recent Documents list*.



This can be a great time saver as it enables any workbook that you use a lot to always be in the *Recent Documents* list. You won't have to waste time looking for it on the hard drive.

2. Click the pin icon. The icon changes from unpinned  to pinned. 



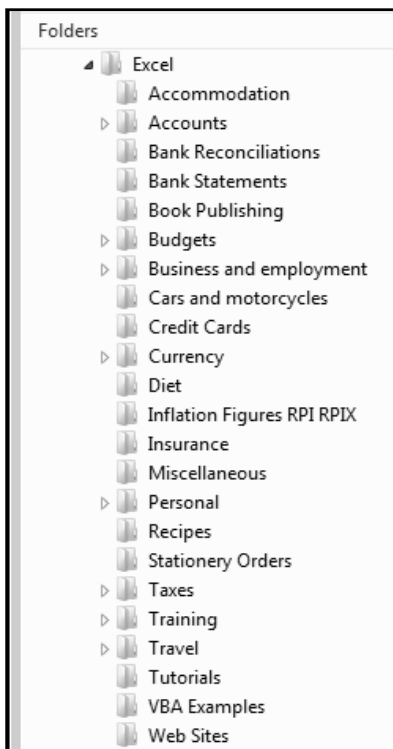
3. Click on *The Wealth of Nations* to open the workbook.

3 Understand file organization.

By default Excel saves all workbooks into your documents folder along with other Office documents (such as Word and PowerPoint files). This clearly is going to cause problems when you have a few hundred files.

Better to organize yourself from the start by setting up an orderly filing system.


I create a folder called *Excel* beneath the Documents folder. In this folder I create subfolders to store my work. You can see a screen grab of my Excel folder in the sidebar (of course, your needs will be different to mine).



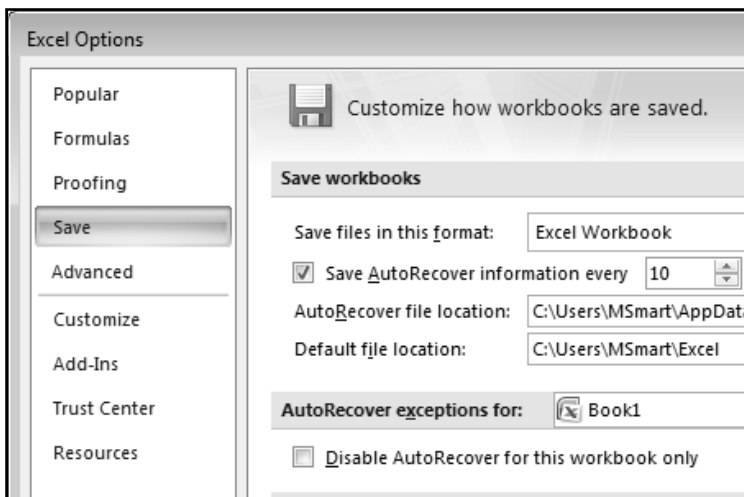
4 Set the default file location.

If you take my advice and create an Excel folder you will waste a mouse click every time you open a file because Excel will take you to the *documents* folder by default.

Here's how to reset the default file location to your new Excel folder:

1. Click the Office button  at the top left of the screen.
2. Click the Excel Options button at the bottom right of the dialog.
3. Choose the Save category from the left hand side of the dialog.
4. Change the default file location.

You have to actually type in the default file location. Microsoft seems to have forgotten to add a browse button!



When you click Office→Open in future you'll automatically be taken to your Excel folder ready to choose a category.

During the remainder of the book I'll explain the above sequence of choices like this:

Click Office→Excel Option→Save and then change the default file location.

This will save a lot of time and forests!

Lesson 1-7: View, add, rename, delete and navigate worksheet tabs

When you save an Excel file onto your hard disk, you are saving a single workbook containing one or more worksheets.

You can add as many Worksheets as you like to a Workbook.

There are two types of worksheet. Regular worksheets contain cells (just like the one you're looking at now). Chart sheets, as you would expect, each contain a single chart (we'll be exploring charts in depth in: *Session Five: Charts and Graphics*).

When you save an Excel file onto your hard disk you are saving a single workbook containing one or more worksheets.

- 1 Open *The Wealth of Nations* from your sample files folder (if it isn't already open).
- 2 Move between worksheets.

Look at the tabs on the bottom left corner of your screen. Notice that this sample workbook contains three worksheets: GDP, Life Expectancy and Mobile Phones. Click on each tab in turn to view the different worksheets.



- 3 Add a new worksheet.
 1. Click the Insert Worksheet tab (the tiny tab next to Mobile Phones). A new tab appears named *Sheet1*.
 2. Double-click the *Sheet1* tab.
 3. Type the word **Population** followed by the <Enter> key.

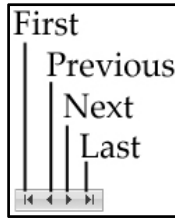


- 4 Move a worksheet's tab.
 1. Click on the Population tab (you may have to do this twice).
 2. Drag to the left. As you drag you'll notice an icon of a page and a black arrow telling you where the tab will be placed.
 3. Release the mouse button to move the tab to the location of your choice.



- 5 Understand the tab scroll buttons

Because this workbook only has four tabs, there's no need to use the tab scroll buttons (in fact, they won't work at all when all tabs are visible).



When there are more tabs than will fit on the screen the *tab scroll buttons* are used to move between tabs.

6 Move between worksheets using the keyboard.

You can move between worksheets using only the keyboard by pressing the <Ctrl>+<PgUp> and <Ctrl>+<PgDn> keyboard shortcuts to cycle through all of the tabs in your workbook.

7 Change tab colors.

The colored tab feature was only added in Excel 2003 and most users have yet to discover that they can color code their tabs. Others will be very impressed if you color code yours!

1. Right-click on any of the tabs and choose Tab Color from the shortcut menu.
2. Choose any color.
3. Repeat for the other tabs on the worksheet.

8 Delete a worksheet.

Right click on the Population tab and select *Delete* from the shortcut menu.

9 Delete several worksheets at the same time.

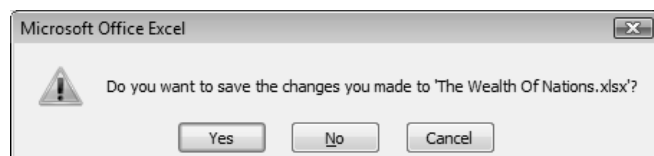
1. Hold down the <Ctrl> key.
2. Click each tab you want to delete in turn. Don't select them all as it isn't possible to delete every worksheet in a workbook.
3. Right click any of the selected tabs and select Delete from the shortcut menu.

Don't worry about the missing tabs. We're going to close the workbook without saving it so you won't overwrite the original workbook.

10 Close the workbook without saving it.

1. Click Office→Close.

A dialog is displayed:



2. Click *No* so that you don't over-write the workbook.

Because you haven't saved the workbook it will remain in its original state when you next open it.

note

Older versions of Excel hid all of their best features underneath an arcane system of menu navigation. Many users didn't know that half of the features were there at all.

Because only the standard and formatting toolbars were visible on screen, users didn't explore the menu options and, instead, used only a tiny subset of Excel's features.

The Ribbon makes Excel seem overwhelming because all of those features are right in your face.

Hardly anybody in the workplace today understands every one of Excel's features. You'll be doing productive work with Excel by session two of this book while using a tiny subset of the full feature set. By the end of the book you'll be thoroughly competent working with Excel.

note

The Ribbon shows more if you have a wide screen

When I work with Excel I use a 22 inch widescreen monitor running at 1,680*1,050 pixels.

Excel uses the extra screen space to display extended descriptions of each feature on the Ribbon.

For example, the Styles pane on the Home Ribbon expands to show buttons for nine common cell styles allowing them to be applied with a single click rather than two clicks.

Lesson 1-8: Use the Ribbon

Look what they've done to my song, Ma
 Look what they've done to my song
 Well it's the only thing I could do half right
 And it's turning out all wrong, Ma
 Look what they've done to my song

Song lyric by Melanie (M. Safka)

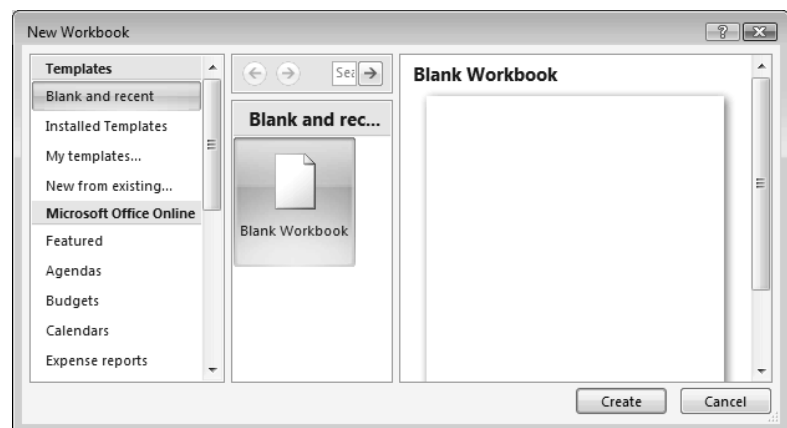
The Ribbon causes huge frustration for seasoned Excel 97 to 2003 users as everything seems to be in the "wrong place". "Look what they've done to Excel" they cry. But it's a better, and an entirely new, way of working.

The sheer breadth of Excel features can seem overwhelming. This book will gently introduce all of the most important features, one at a time. By the end of the book you'll be really comfortable and productive with the Ribbon.

1 Start Excel and open a new workbook.

1. Click Office→New.

The New Workbook dialog appears.



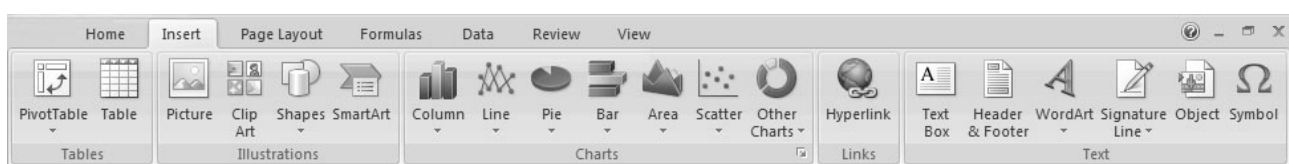
2. Double-click the *Blank Workbook* icon to create a new blank workbook.

2 Use Ribbon tabs.

Each Ribbon tab has its own toolkit available to you. By far the most important tab is the *Home* tab which has buttons for all of the most common and useful features.

Click each tab in turn and view the buttons. The screen grab below has the *Insert Tab* selected. Don't worry if the buttons seem cryptic at the moment. Most of them will make complete sense by the end of this book.

If you later go on to complete the Expert course too, Excel will have no mysteries left at all!



note

contextual tabs

If you are doing something special, such as previewing a worksheet, Excel doesn't want to bother you with a lot of commands that are irrelevant.

For this reason you'll often see a cut-down version of the Ribbon, listing only the commands that are available at that time. For example, when you change to print preview view (we cover that later in *Lesson 1-10: Customize the Quick Access Toolbar and preview the printout*), you'll see a cut-down Ribbon with only one tab containing all of the things you are able to do when previewing a printout.

Sometimes Excel will show you even more tabs. For example, when you select a picture, a *Picture Tools* tab group will magically appear containing a *Format* tab. This enables you to enhance the picture.

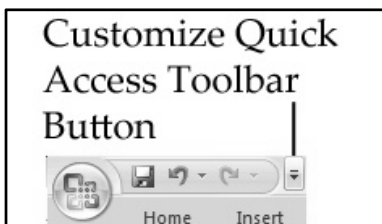
note

Other ways to show and hide the Ribbon

1. Press <Ctrl>+<F1>.
2. Right-click anywhere on the Ribbon and choose *minimize the Ribbon* from the shortcut menu.

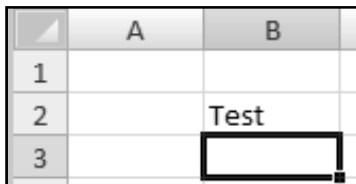
You can do any of the above a second time to bring the Ribbon back.

If you close Excel with the Ribbon hidden it will still be hidden when you re-open it.



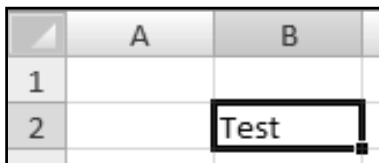
- 3 Type the word **Test** into any blank cell and then press the <Enter> key on the keyboard once.

Notice how the Active Cell moves to the cell beneath.



- 4 Make the cell with the word *Test* into the active cell.

Click once on the word *Test* or use the arrow keys on the keyboard to navigate back to the cell. Be very careful not to double-click otherwise Excel will think that you want to edit the cell.



- 5 Click the *Home* tab on the Ribbon and focus upon the Font panel (it's the second panel from the left). Try clicking each of the buttons and you will see the word *Test* change to reflect your choices.

This drop-down allows you to change the font to something different to the default Calibri.

This drop-down allows you to change the size of the font (measured in points).

These buttons allow you to change the cell's background and text colour.

Click here once to make the text Bold, Italic or Underlined (or all three). Click again to restore it to Normal.

Clicking here puts a single underline along the entire length of the bottom of the cell. Try the drop-down arrow too for more border options.

This drop-down arrow allows you to add a double underline.

- 6 Minimize the Ribbon.

To minimize the Ribbon in order to save screen space, click the *Customize the Quick Access Toolbar* button (see sidebar) and choose *Minimize the Ribbon* from the drop-down menu. Notice how the Ribbon now takes up far less screen space.

An even quicker way of doing the same thing is to double-click any of the tabs.

Double-click once more to bring the Ribbon back to full size.

- 7 Save your work with the name *Ribbon Test* and close Excel.

Click Office→Save As→Excel Workbook, type in the file name (Ribbon) and then click the Save button.

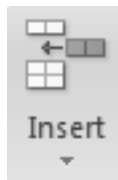
Lesson 1-9: Understand Ribbon components

The whole is more than the sum of its parts.
Aristotle, Greek critic, philosopher, physicist & zoologist
 (384 BC – 322 BC)

The Ribbon is made up of several different artifacts.

B Normal button

Simply executes a command when clicked. The Bold button on the Home tab is a good example.



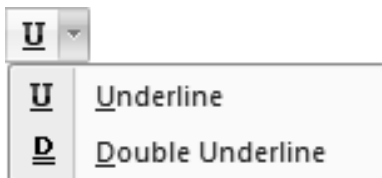
Menu or gallery button

This type of button has a little down-arrow on it. It will display a Menu or Gallery when clicked.



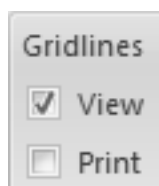
This is the hardest button to understand because these buttons look almost the same as the *menu or gallery* button. When you hover the mouse cursor over a split button, the icon and drop-down arrow highlight separately as different "buttons within a button".

A good example is the *underline* button on the Home toolbar.



Clicking the icon part of a split button (the U) will perform the default action of the button (in this case a single underline). Clicking the arrow part of the button will display a menu of further choices (in this case the choice between a single and double underline).

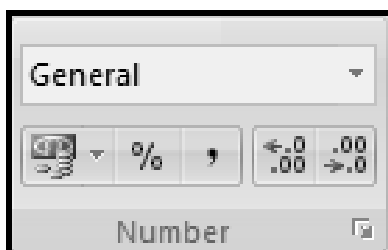
Check box



A little square box that you can click to switch an option on or off.

In this example (from the *Page Layout* Ribbon) you are able to switch the gridlines on and off for the screen display and/or the printout.

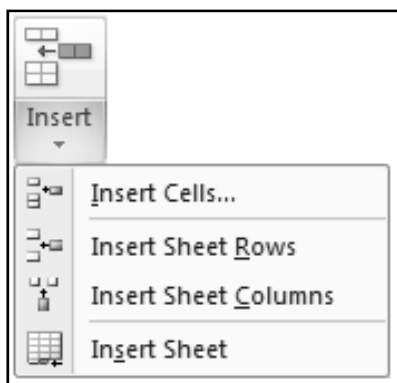
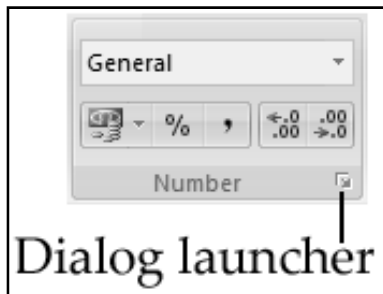
Command group



Similar actions are grouped into a cluster. For example, every component relating to numbers is clustered into the Number group.

Dialog launcher

Dialog launchers appear on the bottom right-hand corner of command groups. Dialogs offer more choice than it is possible for the Ribbon to express graphically. Many of the dialog launchers will present a dialog that is identical to the old dialogs from Excel 2003.



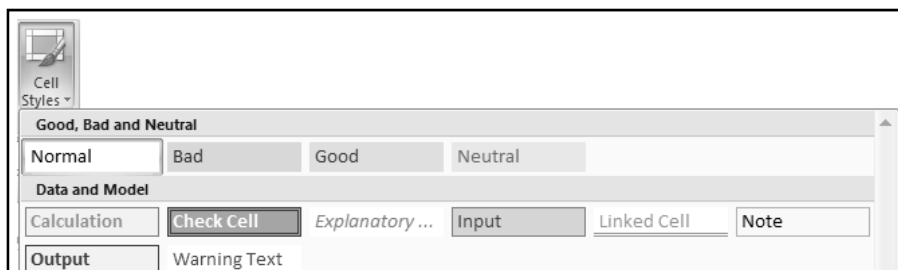
Drop down list

I often shorten this to simply “Drop Down” in this book. A drop down is a simple menu listing several choices.

If you see an ellipsis (...) after a drop down list item this means that a dialog will be displayed after you click, offering further choices.

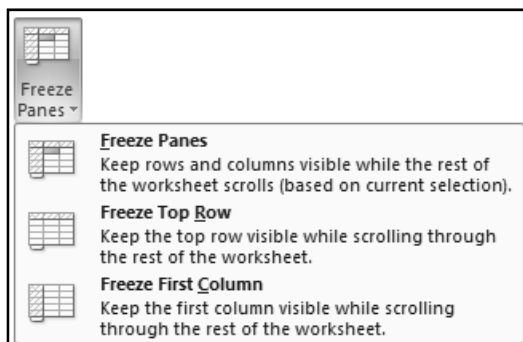
Drop down gallery

This is a little like a drop down list but has graphics to visually demonstrate the effect of each choice.



Rich menu

The rich menu is Microsoft’s way of trying to coerce you into being brave enough to use a feature that you might not have understood in previous Excel versions. A sort of an “in your face” help system.



note

If you are used to an earlier version of Excel you might wonder where all of the toolbars have gone?

In earlier versions of Excel it was possible to create as many of your own custom toolbars as you wanted.

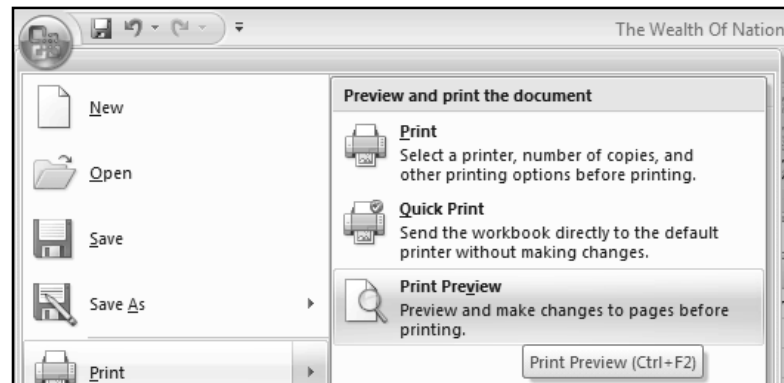
The new Ribbon based user interface (Microsoft calls this the *Fluent Interface*) means that you don't need to create toolbars to the same extent in Excel 2007, because every panel on the Ribbon is, essentially, a toolbar.

Lesson 1-10: Customize the Quick Access Toolbar and preview the printout

In Excel 2007 you may have just one custom toolbar: the *Quick Access Toolbar*. In this lesson we'll add some useful buttons to the Quick Access Toolbar to save a few clicks.

The Quick Access Toolbar is one of the keys to being really productive with Excel 2007. This lesson will introduce you to the main features.

- 1 Open *The Wealth of Nations* from your sample folder, (if it isn't already open).
- 2 Preview how the *Life Expectancy* worksheet will look when printed.
 1. Click the *Life Expectancy* tab at the bottom of the worksheet.
 2. Click Office→Print→Print Preview:



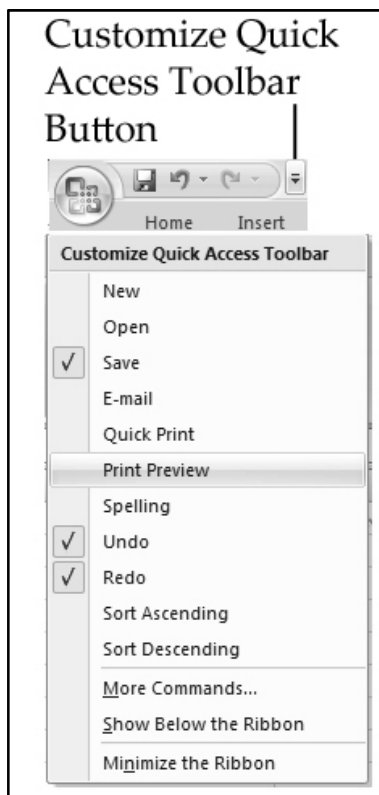
A preview of the how the page will print is displayed.

Notice that the Ribbon now displays a contextual menu because there are only a few options open to you when previewing.

3. Click the *Next Page* and *Previous Page* buttons to move through the print preview.
 4. Use the *Zoom* button to magnify the page for a clearer view.
 5. Click the *Close Print Preview* button to return to the workbook.
- 3 Add a Print Preview button to the Quick Access Toolbar.

Print Preview is a very useful feature and you'll probably use it a lot. Every time you use it, however, it is going to take three clicks of the mouse. Wouldn't it be better if you could show a print preview with just one click?

1. Click the *Customize Quick Access Toolbar* button (see sidebar).
2. Click the *Print Preview* item in the drop-down list.



The Wealth of Nations

note

Some amazing Excel features cannot be used at all without customizing the Quick Access Toolbar!

One of my favourite features in Excel 2007 is its ability to read the workbook to me via its *Text to Voice* facility.

When I have input lots of numbers from a sheet of paper and want to check them I get Excel to read them to me as I tick each off my list. This is much faster and nicer than continuously looking first at the screen, then at the paper, for each entry.

This feature is covered in depth in the Expert Skills book in this series.

You can't use this feature at all unless you add some custom buttons to the Quick Access Toolbar!

tip

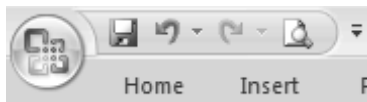
The Quick Access Toolbar is one of the keys to being really productive with Excel 2007.

Always try to minimize the number of mouse clicks needed to do common tasks.

If you find yourself forever changing tabs to use a button, change two clicks into one by adding the button to the Quick Access Toolbar.


All of those extra clicks add up to a lot of time over the weeks and years.

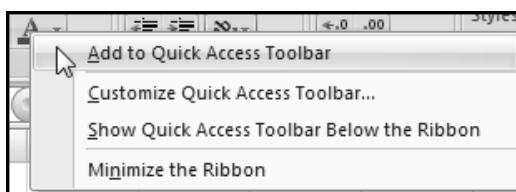
A new button now appears on the Quick Access Toolbar. You are now able to Print Preview your work with a single click of the mouse.



4 Add a Font Color button to the Quick Access Toolbar.

The *More Commands...* option is available when you click the *Customize Quick Access Toolbar* button. This enables you to add any command in Excel to the toolbar. But there's an easier way!

1. Click the *Home tab* on the Ribbon (if it isn't already selected)
2. Right-click on the *Font Color* button  in the *Font Group*.



3. Click *Add to Quick Access Toolbar*.


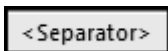



A *Font Color* button is added to the Quick Access Toolbar.



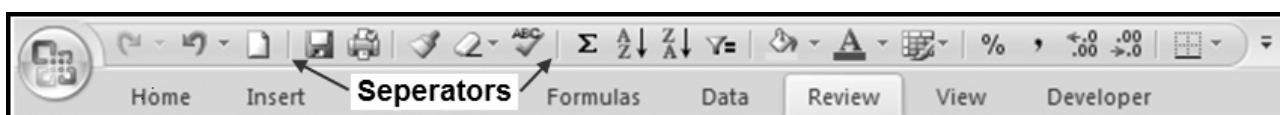
5 Remove a button from the Quick Access Toolbar.

1. Right-click on the *Font Color* button you've just added to the Quick Access Toolbar. 
2. Click *Remove from Quick Access Toolbar* on the shortcut menu.

6 Add separators to make heavily customized Quick Access toolbars more readable.

1. When you add many items to the Quick Access toolbar it is a good idea to use separators to split icons into logical groups.
2. Click the *Customize Quick Access Toolbar* button. 
3. Click *More Commands...* on the shortcut menu.
4. Click the  item at the top of the Commands list.
5. Click the *Add >>* button. 
6. Use the up  and down  buttons to move the separator to the required location.

Here's a screen grab of my own Quick Access Toolbar:



important

Keyboard shortcuts don't work with the numeric keypad

It's a strange quirk of Excel that you must use the number keys along the top of your keyboard when using keyboard shortcuts that involve a number.

If you use the numeric keypad on the right of your keyboard they won't work.

note

Keyboard shortcuts are one of the secrets of maximizing productivity with Excel

Many years ago I took my mouse and stuck it to the back of my monitor with sticky tape.

For a whole day I struggled to work without it.

The first few hours weren't much fun but after that my work became faster and faster. It became a challenge to figure out how to do things without the mouse.

You will be far more productive if you can get into the same habit.

These days, there are some things that you simply need the mouse for, and some things that are genuinely faster (or easier) with the mouse. For most common tasks, however, there are keyboard shortcuts and Excel 2007 has just made things a lot easier with the new Key Tips feature.

Lesson 1-11: Use the Mini Toolbar, Key Tips and keyboard shortcuts

- 1 Open the *Wealth of Nations* sample worksheet (if it isn't already open).
- 2 Select cell B2 (Qatar) on the GDP worksheet.
 1. Click on the *GDP* tab.
 2. Click on cell B2 (Qatar).

Make sure that you only click once otherwise Excel will think that you are trying to edit the cell.

	A	B	C
1	button	Country	GDP - per capita (PPP)
2	1	Qatar	\$ 80,900

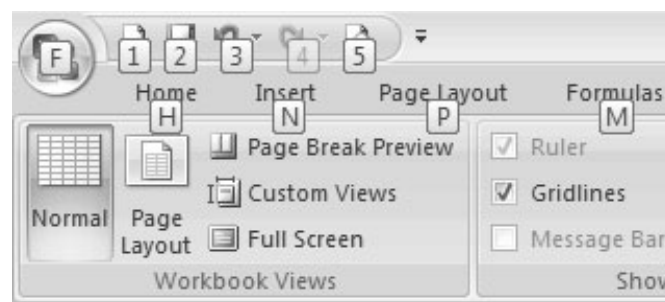
- 3 Make cell B2 (Qatar) bold, italicized and underlined.
 1. Click Home→Font→Bold
 2. Click Home→Font→Italic
 3. Click Home→Font→Underline

	A	B	C
1	button	Country	GDP - per capita (PPP)
2	1	<i><u>Qatar</u></i>	\$ 80,900

- 4 Display Key Tips.

Hold down the <Alt> key on the keyboard.

Notice how Key Tips are now displayed on the Ribbon and the Quick Access Toolbar:



- 5 Use the Key Tips to show a print preview using only the keyboard.

The key tips reveal the key you need to press to simulate clicking any of the Ribbon and Quick Access Toolbar icons.

Hold down the <Alt> key and press the relevant number to show a print preview.

NB: Your toolbar, and the number you need to press, may look different to the screen grab above. For example, the print preview

note

If you don't like the Mini Toolbar you can switch it off

Personally I really like the mini toolbar and wouldn't dream of switching it off but if you are used to an early version of Excel and find that it annoys you, here is how it's done:

1. Click the Office button.
2. Click the *Excel Options* button at the bottom right of the dialog.
3. Click the *Popular* item in the left-hand list.
4. Uncheck the *Show Mini Toolbar* item.
5. Click the *OK* button.

note

The shortcut menu

If you right-click on a cell, a shortcut menu is displayed.

The shortcut menu doesn't display *everything* that you can do to a cell but Excel's best guesses at the *most likely things* you might want to do.

Because Excel is guessing at the actions you might want to take in the context of what you are doing, the *shortcut menu* is also sometimes referred to as the *contextual menu*.

button will not be on the Quick Access Toolbar unless you added it during: *Lesson 1-10: Customize the Quick Access Toolbar and preview the printout.*

6 Click the Close Print Preview button  to return to normal

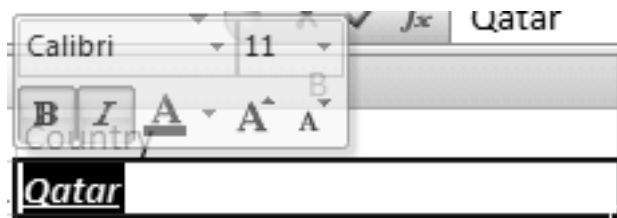
7 Use the mouse to select the text *Qatar* in cell B2.

1. Double-click the cell containing the text.
You'll see the cursor flashing in the cell.
2. Position the mouse just after the word *Qatar* and hold down the left mouse button.
3. Drag the mouse across the complete word until it is highlighted like this:





8 Observe the *Mini Toolbar*.

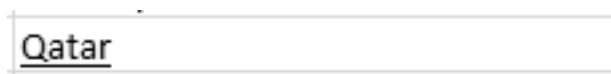
Hover the mouse cursor over the selected text and you should see a "ghost" image of the Mini Toolbar just above the cell:



When you move the mouse cursor up and over the Mini Toolbar it will light up.

9 Use the Mini Toolbar to restore the text to non-bold and non-italic.

Click on the Bold  and Italic  buttons to remove the bold and italic attributes from the text.




10 Show a bigger Mini Toolbar with a right-click.

Right-click on *Bermuda* (Cell B4). Notice that, as well as the shortcut menu (see sidebar) you now get an even better Mini Toolbar with a few extra buttons.

11 Remove the underline from *Qatar*.




1. Click on *Qatar* again (cell B2).
2. Press the <Ctrl>+<U> keys on the keyboard to remove the underline.

But how can you remember cryptic keyboard shortcuts like <Ctrl>+<U>? Fortunately you don't have to. Hover the mouse over the underline button  and you'll see the keyboard shortcut listed in the tooltip.

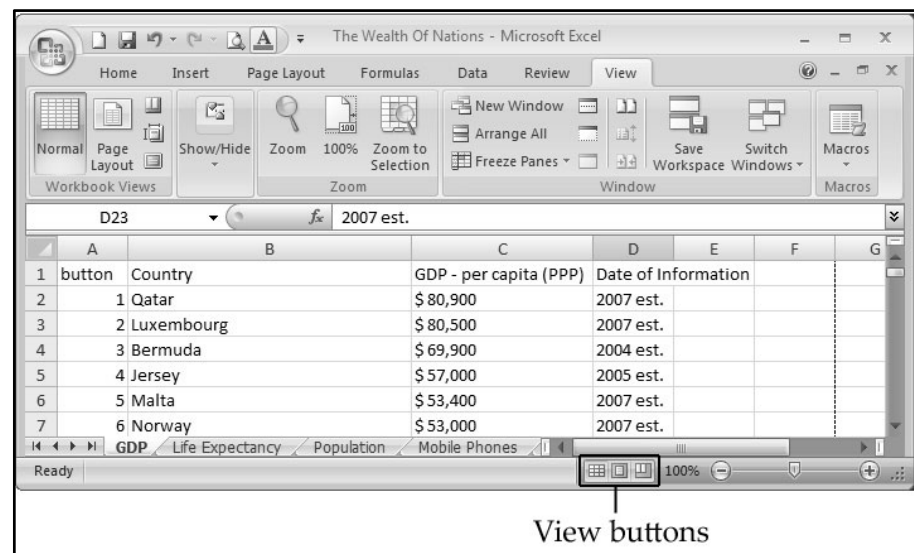
Lesson 1-12: Understand views


Views are different ways to look at your worksheet.

Excel 2007 has three views. They are:-

View	Icon	What it is used for
Normal		This is the view you've been using until now. It's the view most users use all of the time when they are working with Excel.
Page break preview		A page break is when the printer advances onto a new sheet of paper. We'll use this view in : <i>Lesson 7-5: Insert, delete and preview page breaks</i> to make sure that the page breaks in the right place.
Page layout		This is a fantastic new view for Excel 2007. It allows you to see (almost) exactly what the printout will look like. Unlike running a Print Preview you are able to edit cells just as you can in Normal view.

- 1 Open the *Wealth of Nations* sample worksheet (if it isn't already open).

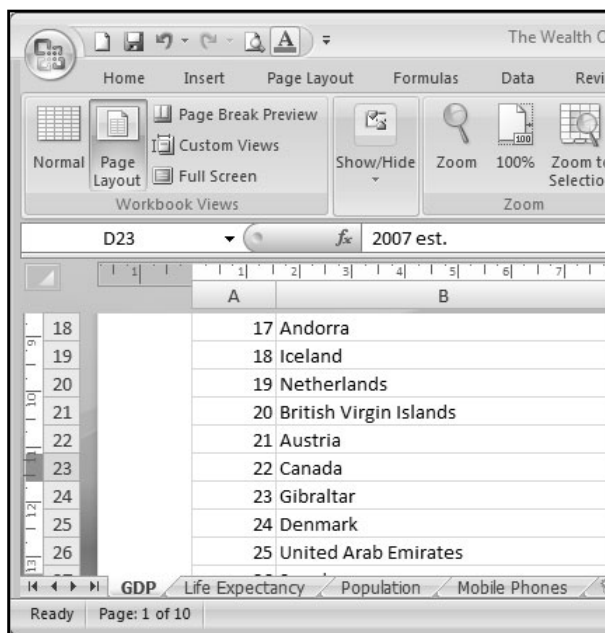



- 2 Click on the GDP tab and then click on the *page layout view* button  at the bottom of the screen.

The worksheet is displayed in *page layout view*. It is a little like *Print Preview view* as you are able to see (almost) exactly what will be printed. Headers, footers and margins are all shown.

Unlike *Print Preview* view you are able to edit the worksheet.

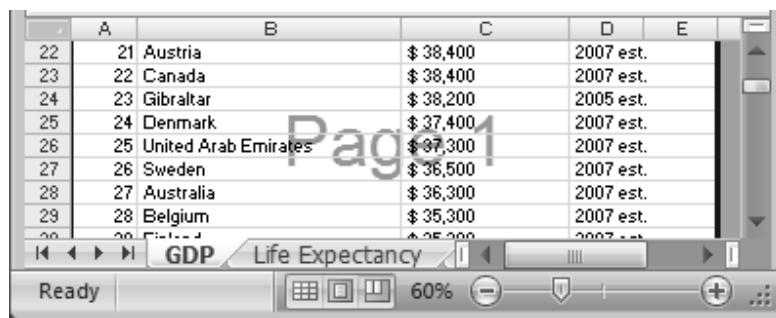
You may wonder why we don't use page layout view as the default when editing worksheets. While some users may prefer to do this, most will want to see the maximum amount of data possible on screen and so will prefer the Normal view.



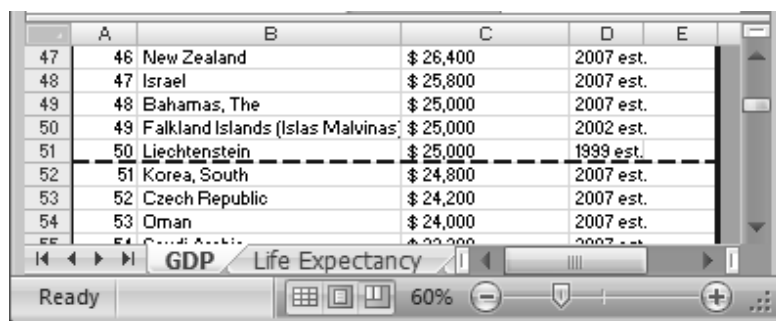
3 Click the *page break preview* button. 

The worksheet is displayed in page break preview view (you may also see a help dialog first).

This view shows each page with a watermark to indicate which sheet of paper it will be printed on:



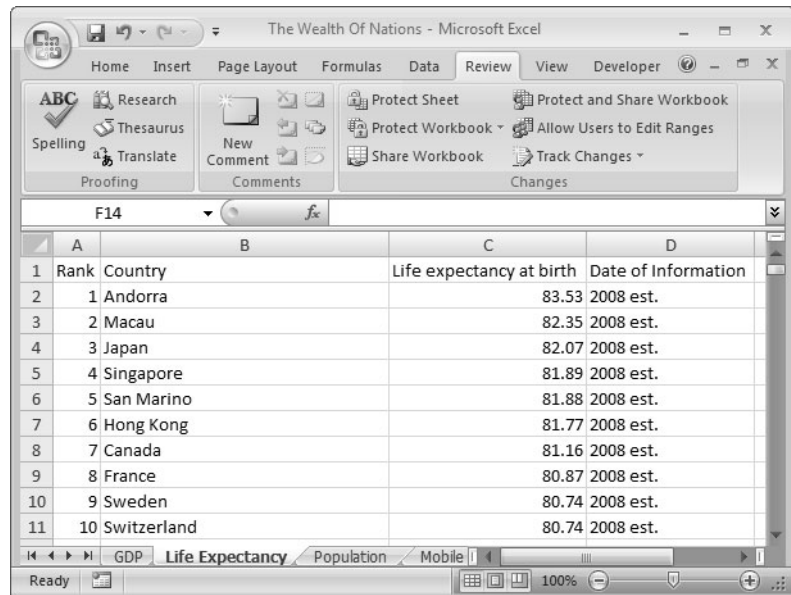
It also shows the break between each page as a dotted line:



It is possible to click and drag the dotted line to change the place where the page breaks. This will be covered in depth in: *Lesson 7-6: Adjust page breaks using Page Break Preview.*

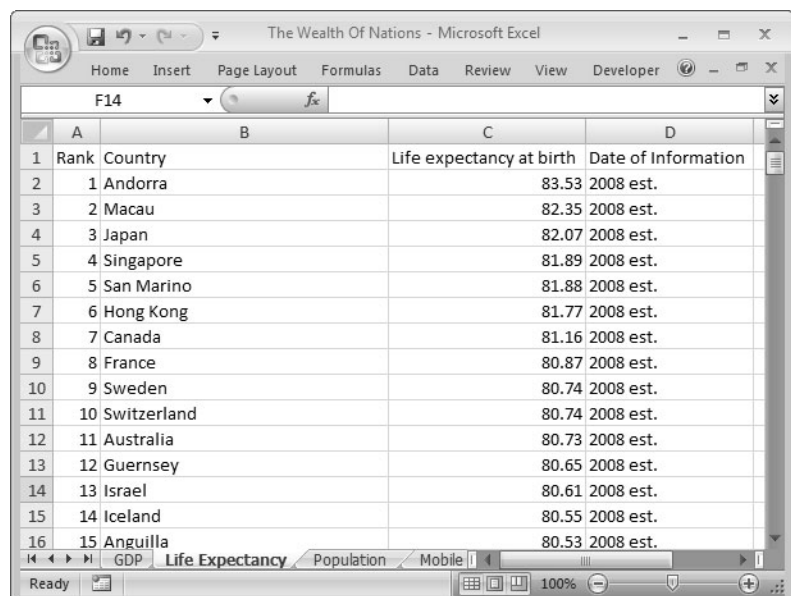
Lesson 1-13: Use full screen view

- 1 Open the *Wealth of Nations* from your sample files folder (if it isn't already open) and click the *Life Expectancy* tab.



Notice that the Ribbon, formula bar and status bar are all taking up space that could be used to display information. In the example above only the first ten rows are visible.

- 1 Double-click on any of the Ribbon tabs to hide the Ribbon.



With the Ribbon hidden things are a little better. Fifteen rows are now visible. Perhaps you want to view even more. This is what *Full Screen View* is for.

- 2 Click View→Workbook Views→Full Screen.

The Wealth of Nations

Rank	Country	Life expectancy at birth	Date of Information
1	Andorra	83.53	2008 est.
2	Macau	82.35	2008 est.
3	Japan	82.07	2008 est.
4	Singapore	81.89	2008 est.
5	San Marino	81.88	2008 est.
6	Hong Kong	81.77	2008 est.
7	Canada	81.16	2008 est.
8	France	80.87	2008 est.
9	Sweden	80.74	2008 est.
10	Switzerland	80.74	2008 est.
11	Australia	80.73	2008 est.
12	Guernsey	80.65	2008 est.
13	Israel	80.61	2008 est.
14	Iceland	80.55	2008 est.
15	Anguilla	80.53	2008 est.
16	Cayman Islands	80.32	2008 est.
17	New Zealand	80.24	2008 est.
18	Italy	80.07	2008 est.
19	Gibraltar	80.06	2008 est.
20	Monaco	79.96	2008 est.
21	Liechtenstein	79.95	2008 est.
22	Spain	79.92	2008 est.
23	Norway	79.81	2008 est.
24	Jersey	79.65	2008 est.
25	Greece	79.52	2008 est.
26	Austria	79.36	2008 est.
27	Virgin Islands	79.34	2008 est.
28	Malta	79.3	2008 est.
29	Faroe Islands	79.29	2008 est.
30	Netherlands	79.25	2008 est.
31	Luxembourg	79.18	2008 est.
32	Montserrat	79.15	2008 est.
33	Germany	79.1	2008 est.

Note that the Quick Access Toolbar, the Ribbon, the formula bar and the status bar have all vanished. On the above example shown at 1,024*768 screen resolution 34 rows are visible.

On my own 22 inch monitor running at 1,680*1,050 pixels in portrait mode I can view 81 rows of information on one screen.

3 Switch back to normal view.

To return to normal view either:

Press the <Esc> key on the keyboard.

OR

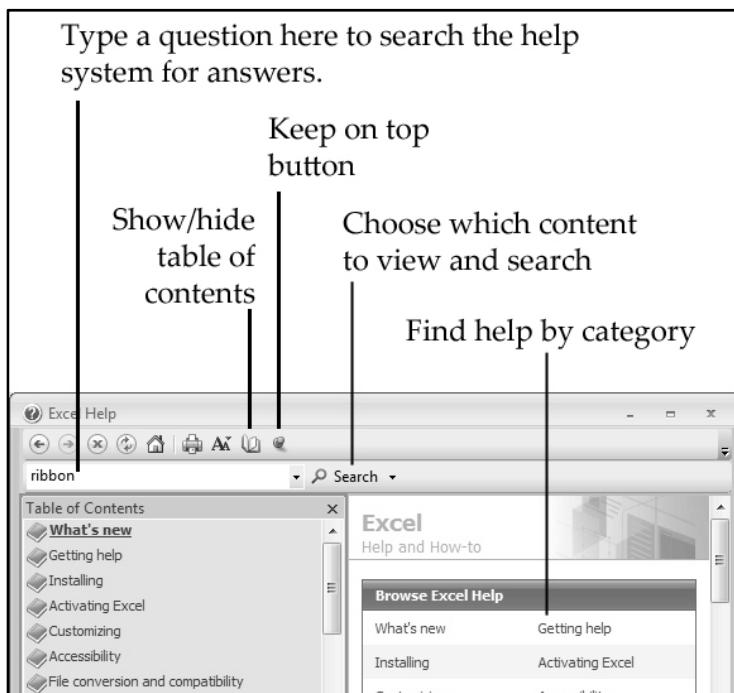
Right click in any cell and then click *Close Full Screen*.

Lesson 1-14: Use the help system

- 1 Click the Help button  at the top right of your screen.


The help dialog is displayed:


If your screen doesn't look like this, click the *show/hide table of contents* button.



Tip

The *Keep On Top* button

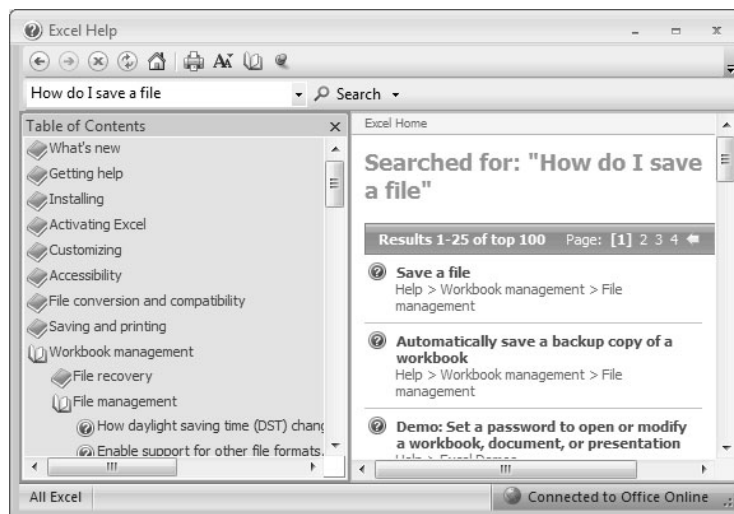
When this button is pinned in like this:  the help window will stay on top of all open Office windows.

When the button is unpinned like this:  the window will be hidden if you move other Office windows on top of the help window.

Note that this is only the case with Microsoft Office windows and not with windows from other applications.

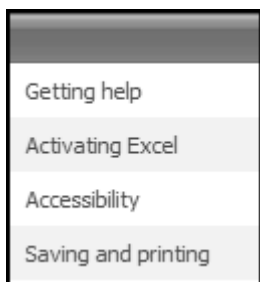
- 2 Type **how do I save a file** into the search box followed by the **<Enter>** key.

The help system provides many potential answers to the question:



- 3 Click on the most likely answer to read the help topic.
Step by step instructions are displayed showing how to save a file.

4 Find help by category.



Let's do the same thing now using the category pane. The category pane is a little like a web page. You find the answer to your question by navigating a series of hyperlinks.

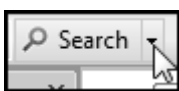
Close down the help system and re-start it. Look at all of the categories and decide which is most relevant. See if you can find a help topic for saving a file by navigating the hyperlinks. On my system I got there by clicking Workbook Management → Saving and Printing → Save a File but your links may differ.

The same help topic found earlier is displayed.

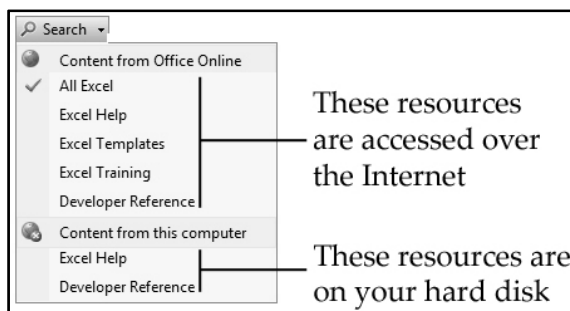
5 Choosing which content to search.

Excel is a huge application and just one help reference wouldn't be enough. As well as the help files stored on your hard disk you can also search a perpetually updating help resource on-line at Microsoft via the Internet.

Click the drop-down arrow next to the *Search* button at the top of the Help dialog.

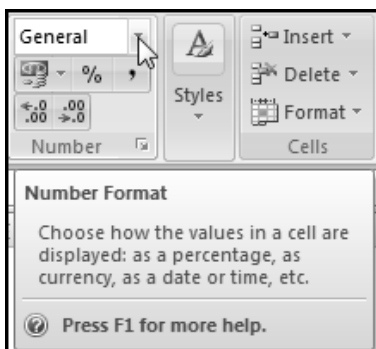


The Search drop-down menu appears:



The Developer Reference contains topics only of interest to programmers who understand VBA macro code. This is a very advanced subject and is covered in the *Excel Expert Skills* book in this series.

6 Get help directly from the Ribbon.

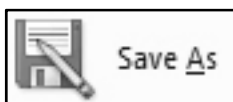
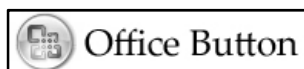


1. Click the *Home* tab on the Ribbon and hover the mouse cursor over the drop down arrow to the right of the word *General* in the *Number* group.

If you keep the mouse still, after a short delay a screen tip pops up providing a short description of what the drop-down list is for and also advising that you can obtain more help by pressing the <F1> key on your keyboard.

2. Press the <F1> button (at the top left of your keyboard) to obtain help about topics relevant to this control.

7 Obtain help directly from a dialog.



Click Office → Save As.

At the top right corner of the *Save As* dialog there is a help button



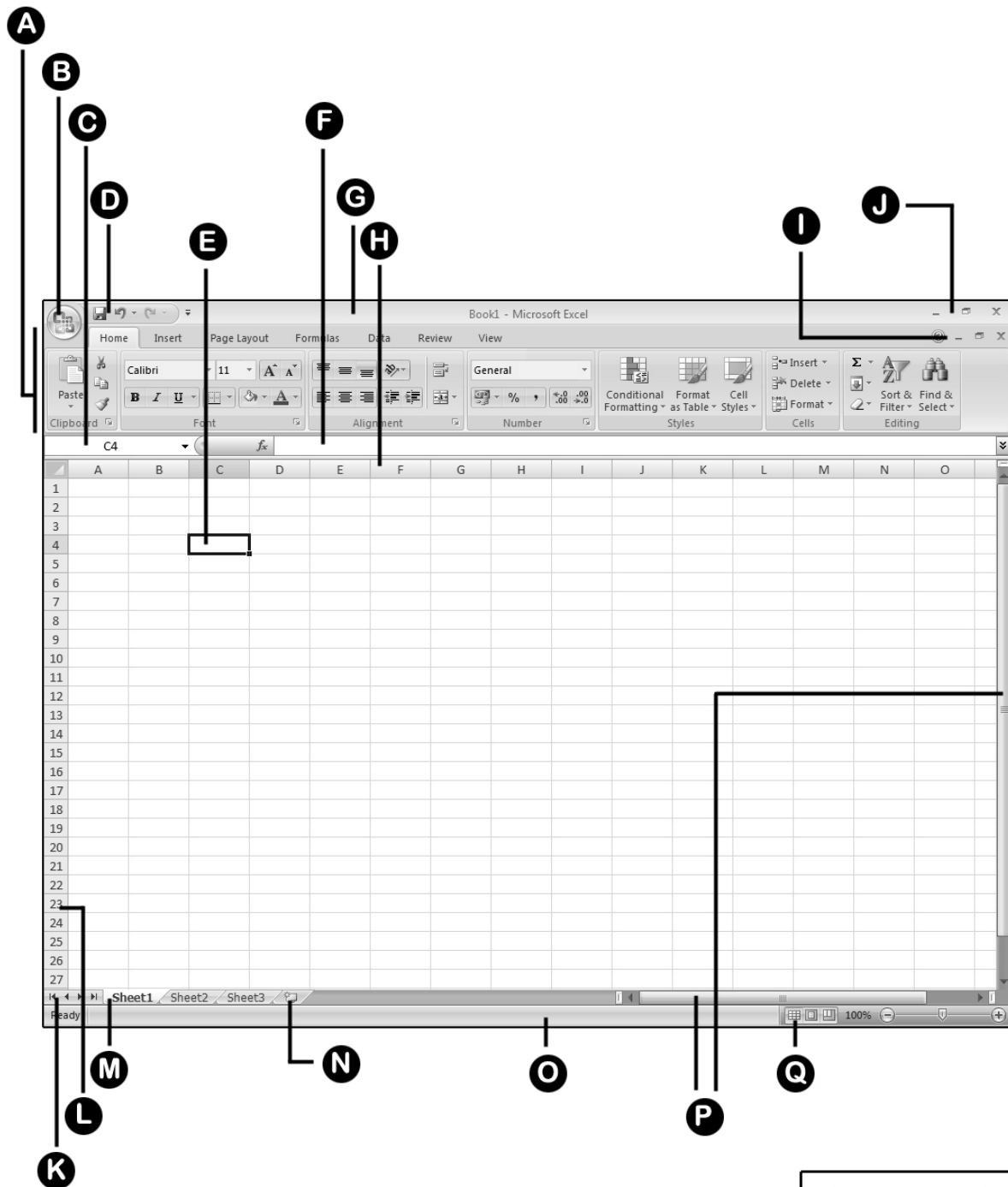
(if you are using Windows Vista).

Click it for detailed help about the Save As dialog.


Session 1: Exercise

In this exercise you'll try to remember the name of each of the Excel screen elements. The answers are on the next page so you might want to recap by turning the page for a little revision before you start.

Keep trying until you are able to name each of the screen elements from memory. We'll be using this terminology during the remainder of the book so it's important that you can correctly identify each element.



If you need help
slide the page to
the left



Session 1: Exercise answers

