

Microsoft Excel 2007

Chris Menard – Microsoft Certified Application Specialist
Instructor for Office 2007

5/8/2008


Triality Business Solutions

Contents

Creating a file and saving for the first time.....	1
Home Tab	2
Clipboard Group	4
Using the Office Clipboard	6
Editing Group	8
Sort by one column.....	8
Multiple Column Sort.....	8
Number Group	10
Cells Group.....	11
Inserting and Deleting Rows	11
Format Cells.....	12
Styles Group	14
Conditional Formatting – more features	14
Conditional Formatting – Managing Rules.....	15
Formulas	16
Date / Time Functions.....	17
Text Functions	17

Creating a file and saving for the first time.

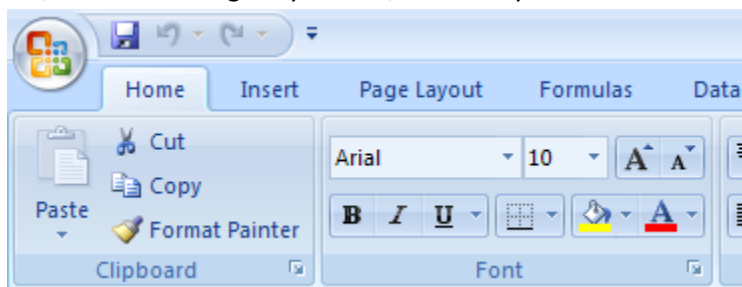
1. Click on Start | point to All Programs | Point to MS Office and left click Microsoft Office Excel

2007.  Microsoft Office Excel 2007

2. When Excel starts notice the Ribbon.



3. By default there are seven tabs at the top: Home, Insert, Page Layout, etc...Click on the Insert tab, click on the Page Layout tab, and finally click on the Home tab.




4. Click in cell A1 and type in Customer and press **[ENTER]**. You will be in cell A2. Type in ABC Company and press **[Enter]**, in A3 type in XYZ Company.

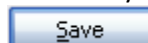
If you press Enter and do not move down, fix that by clicking on the Office button in the top left | Excel Options | Advanced | check the box under Editing.

5. Select B1 and Type in Revenue and press **[ENTER]**. In cell B2 type in 5000 press **[ENTER]**, and in B3 type in 12000 and press **[ENTER]**.

NOTE: Part of the words to ABC Company in A2 and XYZ Company in A3 may not show. That is ok

6. Click the Office button  and click on save. You can also do ALT F on the keyboard to get to the Office icon.


7. First time you save a file is a "Save As". Name the file **My Customers Test** and click on **save**

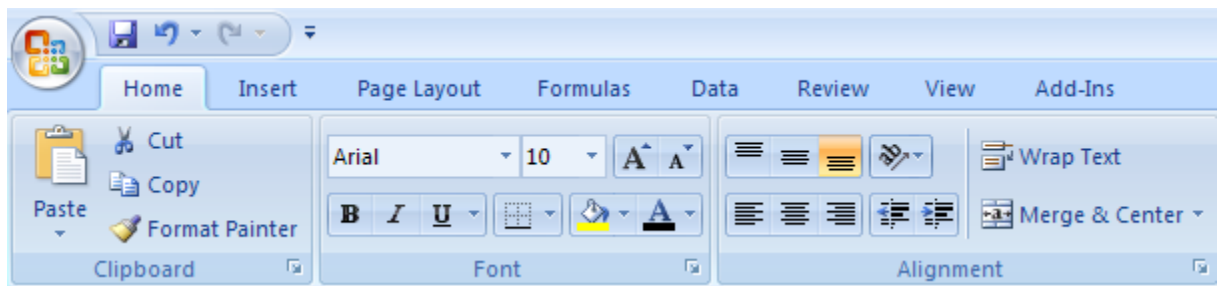





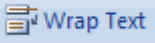



Home Tab

The home tab contains the most frequently used commands in Microsoft Excel. For previous Excel users, commands such as sort, which use to be under the Data menu, and conditional formatting (one of my favorites) is on the home tab. The home tab, like all the other tabs in Excel is broken up into groups. Each group has its own icons. Shown is the home tab and the groups are clipboard, font, and alignment. The font group has icons for bold, italics, font size, etc...

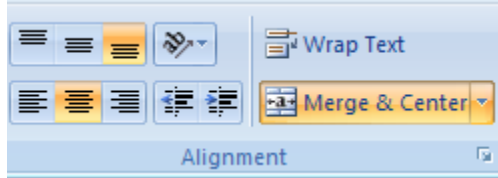
So the hard part on Excel 2007 is 1) knowing what tab to select, 2) after finding the right tab, looking in the right group for the icon you want.


1. **Open**  **Open** the Excel file called **ABC Company** by clicking on the Office Button, and clicking on Open. Keyboard users can still do CTRL O to open a file.
2. Make a copy of ABC Company by selecting the **Office Button | Save As | Excel Workbook**
3. Make the new file name: ABC Company Salaries and click on Save.
4. Click on cell **A1** that says ABC Company
5. Using the **Home** tab icon make A1 bold by clicking on **B** in the Font Group.



6. Now make the font color red by clicking on . Also make the font size, which is currently 10, the font size of 12. Click on the drop down arrow  and selecting 12. You can also use the font increase and decrease icons  to change the font. Feel free to click the increase button and decrease button. When done, make cell A1 a font size of 12.
7. Select A3 and B3 and make bold **B**.
8. Select B3. Notice how 2007 Annual Salary is extended into cell C3? One easy way to fix that is by clicking on Wrap Text icon . Now you want it right aligned so it lines up better with the numbers below it. Click on the  which is located under the Alignment Group. Feel free to click on the left and **[Enter]** icons also . When done, go back to Align right.
9. Select A1 and B1. Click on Merge & Center 

Pictured below is the *Alignment Group* which is on the Home Tab. For cell B3, you used wrap text align right from that group. For A1, you used Merge & Center. Set as the default is bottom align which is a default. We will change bottom align in another exercise.

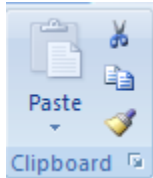


10. We are now going to use the Number Group. Notice the hourly salaries in cells B4 to B10 are not lined up. Select B4 to B10 and click on the Accounting Number Format . Notice you get a \$ with two decimal places by default. The dollar symbol is the far left of the numbers.

	A	B
1	ABC Company	
2		
3	Name	2007 Hourly Salary
4	Bill	\$ 10.00
5	Sue	\$ 12.50
6	Mary	\$ 18.25
7	David	\$ 20.00
8	Tom	\$ 22.00
9	Karen	\$ 14.00
10	Crystal	\$ 26.00

Clipboard Group

Clipboard group contains some of the most frequently used commands in Excel and other programs. Copy, Cut, and Paste are in the clipboard group.



1. **Open** the Excel file ABC Company if it is not already open. Select the worksheet **clipboard**.
2. Notice that five employees have not had their respective location typed in yet. They all work at a location that has been typed in already. Click **C2** and click **copy**. Keyboard is CTRL C. Click on **C5** and click **Paste** (Ctrl V with the keyboard). You can also right click in the cell to get copy.
3. Click **C3** and click **copy**. Click in **C7** and click on **Paste**. *If the office clipboard task panes opens, close it.*
4. Click on **C4** and press **[CTRL C]**. Select **C15:C19** and press **[CTRL V]**, then press **[ESC]**. ESC is located on the top left hand corner of the keyboard.
5. Click **E1** and click **cut** (scissors). Click on **A22** and click **Paste**. Cut moves what is in one cell and places it in another. A22 is blue, bold, and the font size is 11.
6. Click on the **format painter**, and then drag over **A1:C1**. Last Name, First Name and Department should now look like A22. The format painter copies formatting.

7. Click on the worksheet **Format Painter**

	A	B	C	D
1	Wilson Corporation			
2	Salary Report			
3				
4				
5	Company Name	Annual Salary	Bonus dollars	Total compensation
6	Art Jones	\$25,000	1,250.00	\$26,250
7	Karen Menard	\$25,755	1,287.75	\$27,043
8	Terri Smith	\$72,500	3,625.00	\$76,125
9	Taylor Brennan	\$73,255	3,662.75	\$76,918
10	CJ Martin	\$74,010	3,700.50	\$77,711
11	Cecil Robinson	\$74,765	3,738.25	\$78,503
12	Hattie Smith	\$75,520	3,776.00	\$79,296
13	Dan Owens	\$55,000	2,750.00	\$57,750
14	Mary Matthews	\$55,755	2,787.75	\$58,543
15	Martin Albright	\$83,500	4,175.00	\$87,675
16	David Abbott	\$39,500	1,975.00	\$41,475
17				
18				
19				
20				
21				
22				
23	As of June 30, 2007			

8. **[Ctrl] [Home]** to go to **A1**.
9. Click the **format painter**, and then click on **A2**.
10. Select A5, click the format painter, drag over B5:D5.
11. Click on **B6**. Notice the numbers in column C are not formatted with a dollar sign and have two decimal places. Click the **format painter**. Drag from **C6:C16**.

12. Click **A23**, click **cut**, click on **A19**, and click **Paste**.

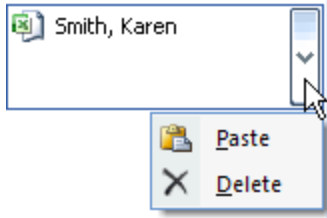
	A	B	C	D
1	Wilson Corporation			
2	Salary Report			
3				
4				
5	Company Name	Annual Salary	Bonus dollars	Total compensation
6	Art Jones	\$25,000	\$1,250	\$26,250
7	Karen Menard	\$25,755	\$1,288	\$27,043
8	Terri Smith	\$72,500	\$3,625	\$76,125
9	Taylor Brennan	\$73,255	\$3,663	\$76,918
10	CJ Martin	\$74,010	\$3,701	\$77,711
11	Cecil Robinson	\$74,765	\$3,738	\$78,503
12	Hattie Smith	\$75,520	\$3,776	\$79,296
13	Dan Owens	\$55,000	\$2,750	\$57,750
14	Mary Matthews	\$55,755	\$2,788	\$58,543
15	Martin Albright	\$83,500	\$4,175	\$87,675
16	David Abbott	\$39,500	\$1,975	\$41,475
17				
18				
19	As of June 30, 2007			

Using the Office Clipboard

1. Click the worksheet clipboard exercise
2. Open the office clipboard task pane by clicking the clipboard dialog box launcher.



3. Click cell **C2**, and then click copy. 1 of 24 items is now in the clipboard.
4. Select cell **C3**, and then click copy. 2 of 24 items are not in the clipboard.
5. Click on **C4**, and then do **[Ctrl] [C]**. Three items are now in the clipboard.
6. Select **C5** in the clipboard task pane, click on **Smith, Carol**.
7. Select **C6** click on **Smith, Karen**. Select **C7**, click on **Martin, Matt**.
8. Select **C8** and click **Paste All**. Paste all will paste in order from the bottom or last item in the clipboard to the first item. C8 to C10 should all have names filled in.
9. Click the drop down arrow next to **Smith, Karen** and click **Delete**. That will remove one item from the clipboard.



10. To remove all items from the clipboard, click on **Clear All**.



Editing Group

The editing group contains features that were previously in the Standard toolbar, the edit menu

Sort by one column

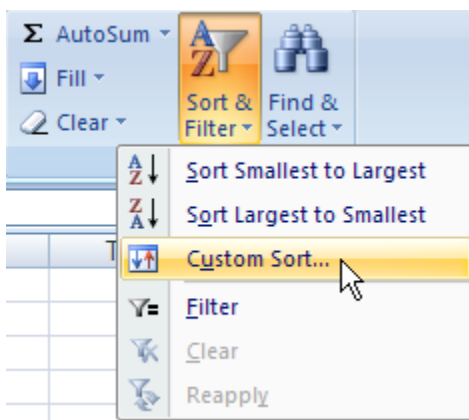
1. Open the excel file Sort-Filter and save as Editing Group Sort - Filter
2. Click C2. Click on the **Home** tab, in the **Editing** group, and then click **Sort & Filter**



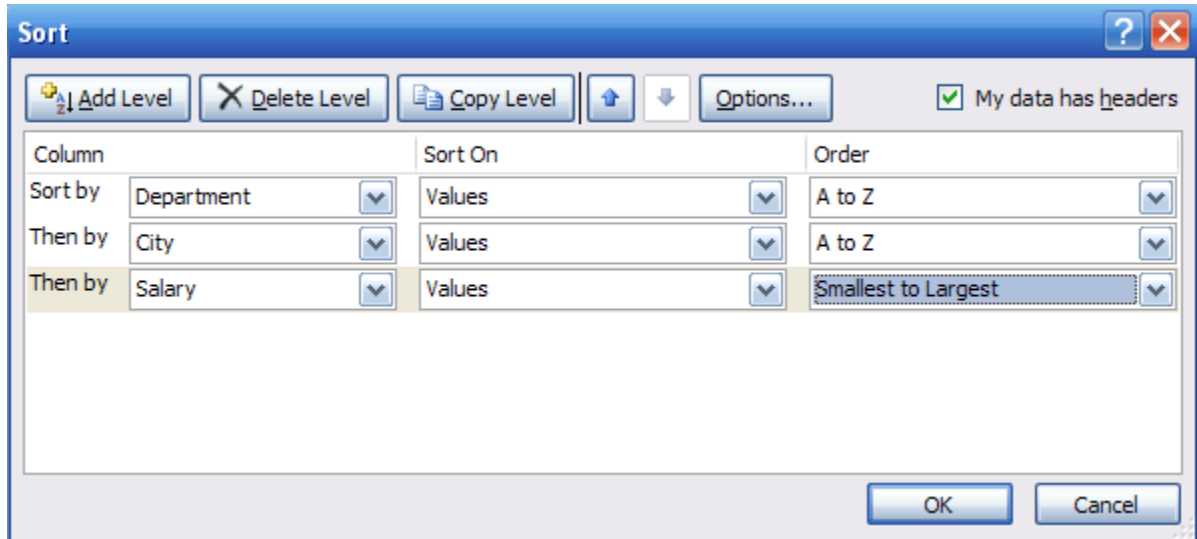
3. Click **Sort & Filter** drop down arrow, click Sort **A to Z**. Department will be shown with Accounting first, then Marketing, then Sales. Notice you clicked on C2 in step 2, you could have clicked on any single cell from C1:C19 to perform this sort.
4. Click **F7**. Click **Sort & Filter** drop down arrow, click **Sort A to Z**.
5. Click **Sort & Filter** drop down arrow, click **Sort Z to A**.
6. Right click on **F12**, select Sort, Sort Smallest to Largest. This is a new feature in Excel. The salaries should now be sorting in ascending order.

Multiple Column Sort

1. Click anywhere in your data A1:F19
2. Click **Sort & Filter** drop down arrow, click Custom Sort. A2 to F19 should get selected automatically and the Sort dialog box open.



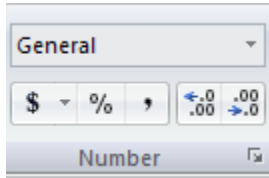
- In the Sort By box, select **Department**, Sort On should say **Values**, and Order will be **A to Z**. Click on Add Level and make sure your dialog box appears as:



- Notice you could keep Adding Levels! You can add up to 64 levels. Previous versions of excel allowed three levels. Click on **OK**. Your data will be sorted by Department, then City, then Salary. Accounting will come before Marketing, and within the Accounting rows, Atlanta came before Denver.

Number Group

1. Make sure the file Data_Analysis is open. Select the worksheet Sales_Reps.
2. Select D2 to D16. You want the revenue numbers formatted with a dollar sign and comma. Click on the dollar symbol. It will format the numbers with two decimal places by default.



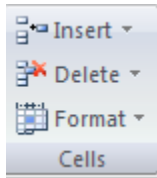
3. Click Decrease decimal twice to lose the two decimal places.

Menard Favorite: with E2 to E23 selected, on the keyboard hold down CTRL and SHIFT and press the \$ key (number 4 key). Release CTRL and SHIFT.

4. Select E2 to E14 and click the comma icon once, and then click on decrease decimal twice.
5. Select F2 to F16 and make percentages by clicking on the % symbol once. Next click on increase decimal twice to give the percentages two decimal places.
6. Click anywhere on your worksheet once. You've decided that you do not want the Accounting format for cells D2 to D16. The Accounting format puts the dollar sign to the far left of your numbers. Select D2 to D16 and click the number format drop down arrow and select Currency. Currency and Accounting look very similar but with currency the dollar sign is beside the number and accounting the dollar sign in to the far left. If you can't see the difference, widen column D.
7. Next select B2 to B14. Notice the dates are a single digit month and a day and a four digit year. You want a two digit month, two digit day, and a two digit year. Click the drop down that says date and select More Number Format...For previous excel users this pulls up format cells. Select the type, 03/14/01 and click OK.

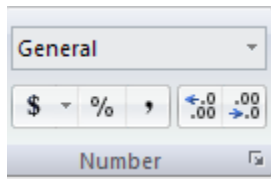
Menard Tip: **CTRL 1** will pull up Format Cells.

Cells Group



Inserting and Deleting Rows

1. Make sure the file Data_Analysis is open. Select the worksheet Cells_Group.
2. Select row 8, by clicking right on the 8. Click on Insert command from the Cell Group from the Home Tab. You can also right click on row 8 and left click on insert. Type in A8, Martin Company, press Tab, type in B8 04/15/2007, press Tab, type in C8 Chicago, press Tab and type in D8 450000 and press **[Enter]**.
3. To insert multiple rows, select rows 2 through 6. The tooltip will let you know you have 5R (rows) selected as you drag down. Click on Insert. Five rows get inserted at one time. Click on Delete and the five rows will be deleted.
4. Select column C and click on insert. Again you can right click column C and left click insert on the shortcut menu. Columns C and D will shift to the right. Now they are in D and E and column C is empty.
5. A paint bush pops up in C1. You can format Column C to look like the dates in column B or the text in column D. The default is always the column to the left. In this exercise, we are not going to use the paint brush.
6. In C1, type in Contact. Press **[Enter]**. In C2 type in Sue Smith.
7. You have decided not to use Contact. Left click on Column C and click on Delete from the Cells Group. All the other columns will move back to the left.
8. Select D2 to D16. You want the revenue numbers formatted with a dollar sign and comma. Click on the dollar symbol. It will format the numbers with two decimal places by default.

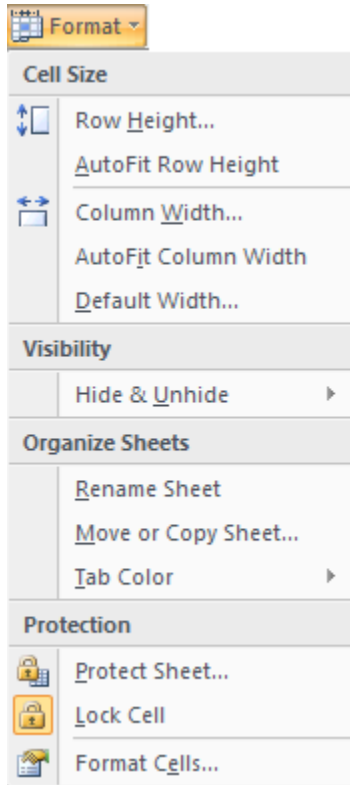


9. Click Decrease decimal twice to lose the two decimal places.

Menard Favorite: with E2 to E23 selected, on the keyboard hold down CTRL and SHIFT and press the \$ key (number 4 key). Release CTRL and SHIFT.

10. Select E2 to E14 and click the comma icon once, and then click on decrease decimal twice.
11. Select G2 to G16 and make percentages by clicking on the % symbol once. Next click on increase decimal twice to give the percentages two decimal places.
12. Click anywhere on your worksheet once. You've decided that you do not want the Accounting format for cells D2 to D16. The Accounting format puts the dollar sign to the far left of your numbers. Select D2 to D16 and click the number format drop down arrow and select Currency. Currency and Accounting look very similar but with currency the dollar sign is beside the number and accounting the dollar sign in to the far left. If you can't see the difference, widen column D.

Format Cells



1. With Excel running, open the file **Formatting**.
2. Select the worksheet Adjusting Column Widths. Notice that columns are labeled A, B, C, etc...There are now 16,384 columns. Previous Excel versions only had 256 columns.
3. Put your mouse pointer between columns A and B and double click. You just performed an AutoFit. You could have also clicked on Column A, click on format under the Cells Group and clicked AutoFit Column Width.
4. Select Columns B to D all at once by left clicking on column B and dragging over to column D and releasing the mouse. Click on Format | AutoFit Column Width from the Cells Group on the Home tab.
5. You've decided you don't care for columns B to D to be Autofit. While they are still selected, click on Format | Column Width to open the column width dialog box. Type 14 and click OK. Columns B to D are now all the same width.
6. Select rows 1 to 9.
7. Click Format | Row Height. In the dialog box type 18 and press **[ENTER]**. Rows 1 to 9 are all a height on 18.

If you have either a lot of rows or columns and you want to AutoFit or make the same height (for rows) or width (for columns), you the Select All button. It is the rectangle located to the left of column A and above row 1.

	A	B	C	D
1	Student	Test 1	Test 2	Test 3
2	Mark Smith	98	93	77
3	Arnold Jones	50	60	55
4	Karen Menard	95	92	98
5	David Wilson	75	77	80
6	Carol Jones	90	100	98
7	Al Barnes	100	100	98
8	Hugh Lincoln	98	95	91
9	Miranda Hamilton	65	97	55

Styles Group

1. Select cell **A1**, and click the **Home** tab if necessary.
2. From the Home Tab, notice the Styles Group. Depending on what is selected, the Styles Group will change. Select **B4 to B10** and the style group looks different than when A1 was selected. It looks different because you are on a different row in the group. You can either scroll up and down on the styles group or you can use More to see “more” at one time. Live preview is making cells B4 to B10 change.
3. Click on **More** and the Styles Group will show everything. Move your mouse over the different icons. Watch B4 to B10 change. When done, click on **Currency** in the Style Group.
4. You want to quickly show anyone with an hourly salary greater than \$18. Click on **Conditional Formatting** in the Styles Group.
5. Select **Highlight Cell Rules | Greater Than**.
6. In the dialog box that appears type in **18**. You do not have to type in the dollar symbol.
7. Click on the **with** drop down arrow and select Red Text. Notice that live preview does not work when using this drop down arrow. Click once anywhere else on your screen.

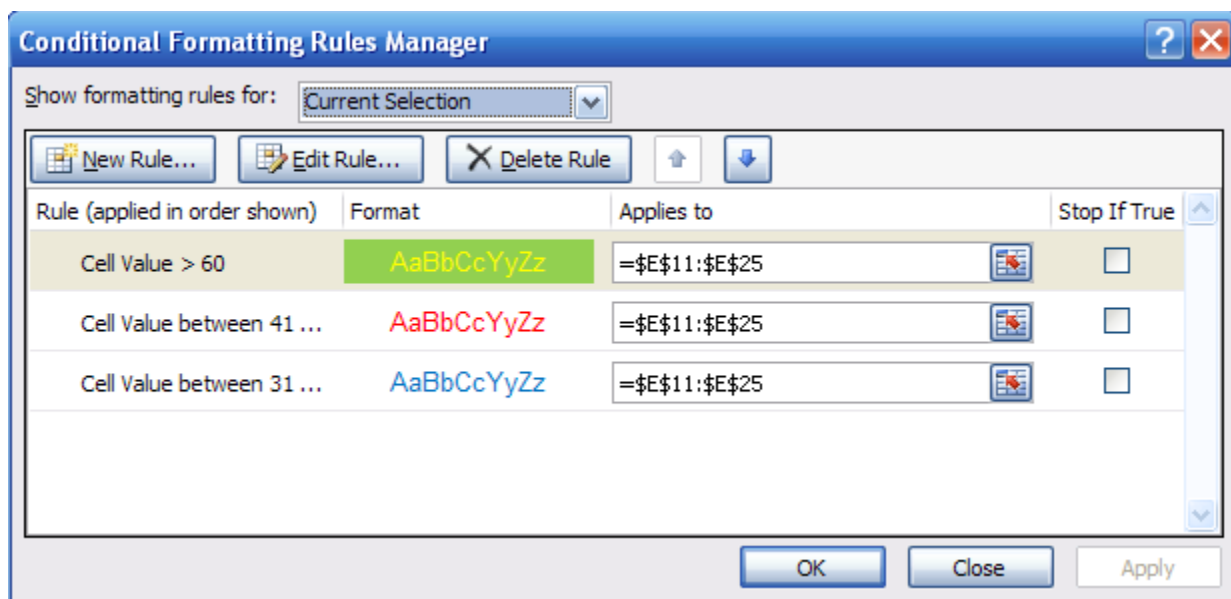
Conditional Formatting – more features

1. Make sure the file ABC Company is open and the worksheet **AccountsReceivable** is selected.
2. ABC Company wants to figure out when its invoices are due and how many days old. Most companies use net 30 as their terms. Meaning once an invoice is mailed out, it is due 30 days from that invoice date. Click cell **B8** and type in the date **10/15/2007** and press **[Enter]**.
3. Click cell **D11**. Since your terms are net 30, to figure out your due date for invoice A401, type in **=B11+30** and click the **[Enter]** check mark in the formula bar. Autofill D11 down to D25.
4. Select **E11**. To calculate the number of days old, you will take today’s date and subtract the invoice date. You will use absolute reference since all the invoice dates are being subtracted from today’s date. The formula in E11 is **=B8** press **[F4]** function key - **B11** and click the **[Enter]** check mark. Formula in the formula bar should show **=B\$8-B11**
5. Autofill **E11** down to **E25**. Notice that some number of days old in column E are less than 30 days. Those invoices are not due yet. You have decided that any invoice between 31 and 40 days to show in a blue font color, any between 41 and 60 in a red font color, and any over 60 in a yellow font with a green background.
6. With E11 to E25 still selected, click on **Conditional Formatting | Highlight Cell Rules | Between**.
7. Type **31** in the first box, click in the second box and type **40**, select the drop down for the with box and select **Custom Format**. On the font tab, make the font color blue and click on **OK** twice. If you picked another font color, or a different blue, that is ok.
8. To apply the second condition for the dates between 41 and 60, make sure E11 to E25 is selected, Click on **Conditional Formatting | Highlight Cell Rules | Between**.

9. Type **41** in the first box, click in the second box and type **60**, select the drop down for the with box and select **Custom Format**. On the font tab, make the font color red and click on **OK** twice.
10. For the final condition, with E11 to E25 selected, Click on **Conditional Formatting | Highlight Cell Rules | Greater Than**.
11. Type **60** in the first box, select the drop down for the with box and select **Custom Format**. On the font tab, make the font color yellow and select the fill tab and make the background color green. Click on **OK** twice

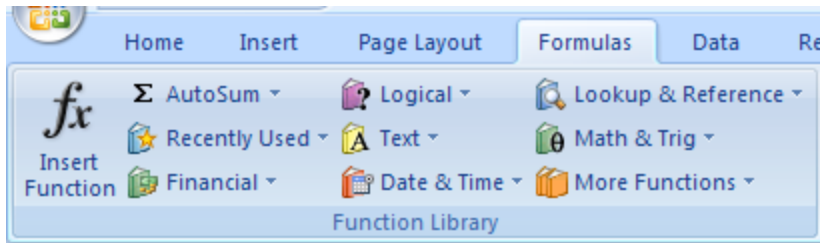
Conditional Formatting – Managing Rules

After applying the three rules from above, you have decided that you are not satisfied with your date range. For instance, you want the blue font that was originally 31 to 40 days, to be 31 to 45 days. You also want a dark blue font, and the Red font will now be 46 to 60 days.

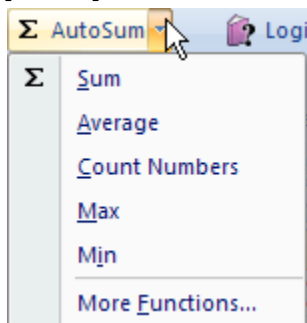


1. Make sure **E11:E25** are selected. From the **Home Tab | Styles Group | Conditional Formatting** click the drop down arrow.
2. Select **Manage Rules**. There will be three rules showing. The priority of the rules is from top to bottom if there is a conflict. For example, if the first rule showing, cell value > 60 is the highest priority rule. If the second rule, cell value between 41 and 60 were changed to between 41 and 100, and numbers over 60 would still be in a yellow font and green background.
3. You want to change two rules, click on the second rule, **cell value between 41 and 60** and click **Edit Rule**.
4. Change the 41 to **46** and click on **OK**.
5. Click the third rule, cell value is between 31 and 40. Click **Edit Rule** (you can also double click the rule to get to edit) and change the 40 to **45** and click on **Format**, click on the **Font Tab**, and change the color to **Dark Blue**.
6. Click on **OK** three times to see your changes.

Formulas



1. Open the Excel file Functions
2. Select **B12** and click on **AutoSum** in the Function Library Group. The formula =Sum(B4:B11) will display. Press **[ENTER]**
3. In **B13**, click the drop down arrow for AutoSum and select **Average**. Highlight **B4:B11** and press **[ENTER]**.

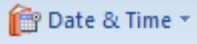


4. In **B14**, click the drop down arrow for AutoSum and select **Max**. Type **B4:B11** and press **[ENTER]**
5. In **B15**, type =min(b4.b11 and press **[ENTER]**. Excel will close the parenthesis and change the period to a colon.

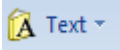
	A	B
1	Martin Supply - Phone Orders	
2		
3	Employee Name	Orders Taken in March
4	Bill	200
5	Sue	150
6	Mary	300
7	David	275
8	Tom	250
9	Karen	100
10	Crystal	160
11		
12	Total	1435
13	Average	205
14	Highest	300
15	Lowest	100

6. Click **A16**, type 2nd Highest, press **[Tab]**.
7. In **B16**, type **=LA** press **Tab**, type in **B4.B11,2** and press **Enter**. Click on B16. Look in the formula bar. The entire function in B16 is **=LARGE(B4:B11,2)**. You found the 2nd highest or largest number of orders taken. This is new in Excel, when you start typing a function, example =L the functions that start with L appear. Also notice that the large function explains what it will do.

Date / Time Functions

1. Select the worksheet **Date-Time**. Notice that your customers are listed in column A, and their customerID contains the state they live in, a dash, and four digit number. Here is the problem with this worksheet. If you wanted to sort by Year, or Month, you can't since the column C's dates were not inputted that way. Also, if you want to break out the states from the rest of the customer ID you can't right now.
2. Select D4. Click on the Formula Tab. Select the Date & Time  command under the Function Library. Select Year, which extract the year from a date. A dialog box appears asking what cell has the year you want to extract.
3. Click on C4.
4. Click on OK.
5. Autofill D4 down to D28. You just pulled the year out of each date.
6. Select E4. Click on the Formula Tab. Select the Date & Time command under the Function Library. Select Month, which extract the month from a date. A dialog box appears asking what cell has the year you want to extract.
7. Click on C4.
8. Click on OK.
9. Autofill E4 down to E28. You just pulled the month out of each date.

Text Functions

10. Select F4. Click on the Formula Tab. Select the Text  command under the Function Library. Select **Left**, which extracts characters from a text string. A dialog box appears asking what cell has the text you want to extract.

	B	C	D	E	F
	Martin Supply Company				
		Date they became a			
	Customer ID	customer	Year	Month	State
	FL-2999	4/17/2002	2002	4	=LEFT(B4,2)
	SC-1437	7/21/2002	2002	7	
	GA-2053	10/24/2002	2002	10	

Function Arguments

LEFT

Text: B4 = "FL-2999"

Num_chars: 2 = 2

Returns the specified number of characters from the start of a text string.

Num_chars specifies how many characters you want LEFT to extract; 1 if omitted.

Formula result = FL

[Help on this function](#)

OK Cancel

11. For the Text click on B4.

12. For the Num_chars type in 2.
13. Click on OK.
14. Autofill F4 down to f28. You just pulled two characters out of cell B4, starting on the left.
15. Go select A32. Type in Today's date and press Tab. You will be in B32. If you always want today's date to appear when you open the Excel file, use the Today function.
16. Click on Date and Time, select Today, click on OK. This function has no arguments. It will put in today's date. Tomorrow when you open the file, it will have the correct current date. It reads the clock in your computer.
17. Click on B33. Click on Date and Time, select Now and click on OK. Now will give you the date and time.