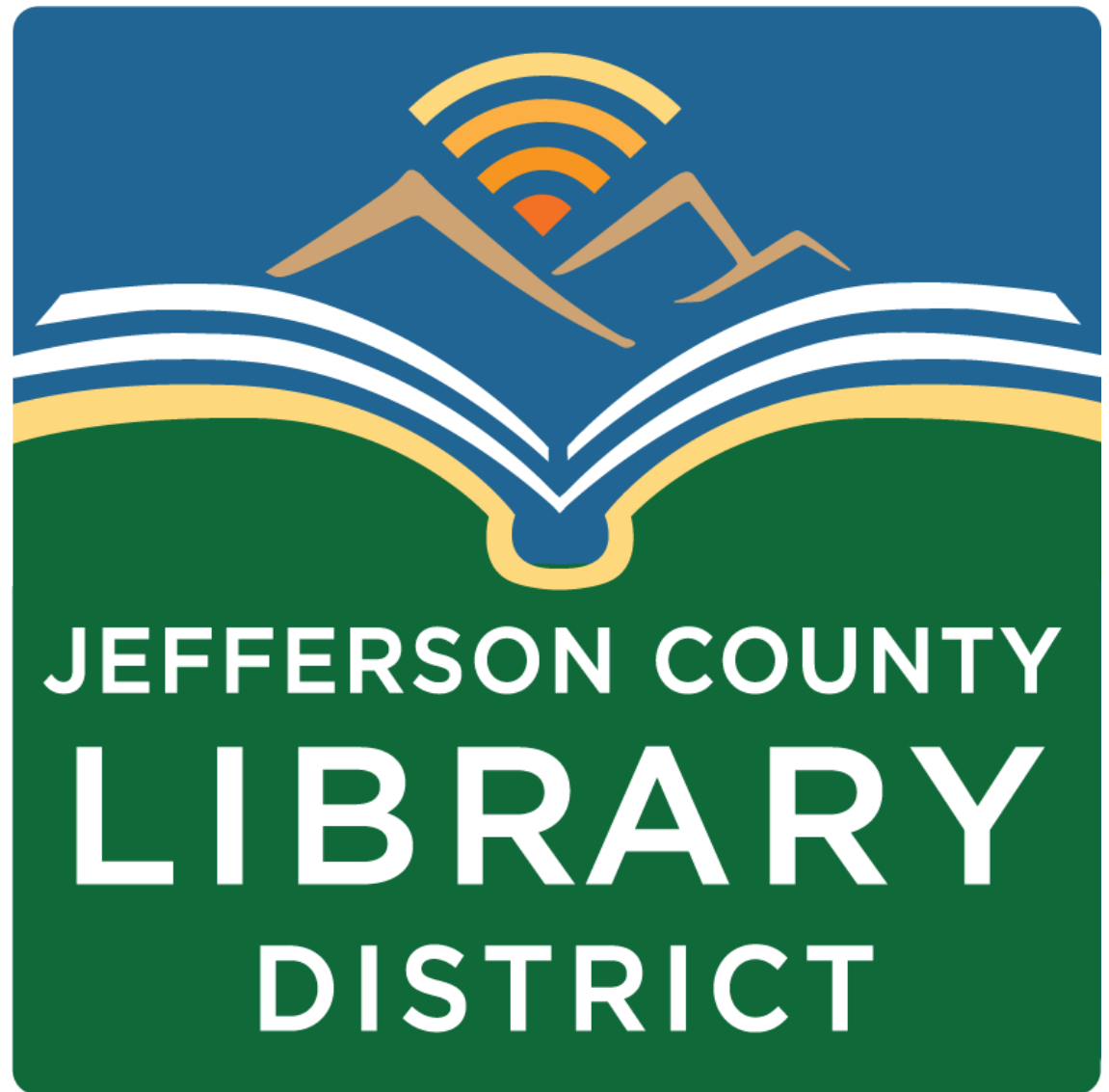


Introduction to Microsoft Excel: Getting Started

Presenter: Jamie Pena
Digital Equity Navigator



Contents

Definitions	4
Creating a Workbook	5
Creating a new workbook (MacOS)	7
Layout.....	8
Identifying Cells.....	10
Entering Data	11
Adjusting Columns and Rows.....	12
Selecting Cells	14
Saving a Workbook	15
Activity	17
Next Class	20

Learning Objectives

- Create a workbook
- Basic layout and navigation (ribbons, cells, rows/columns/formula bar)
- Identifying cells
- Selecting cells
- Entering/editing text and numbers
- Adjusting row/column sizes
- Saving/opening files

Definitions

Cells – where data is entered and displayed.

Ribbon – provides options for your data such as formatting and layout.

Tabs – changes what options appear on the ribbon.

Formula Bar - where formulas are entered. Data can also be entered and edited from here.

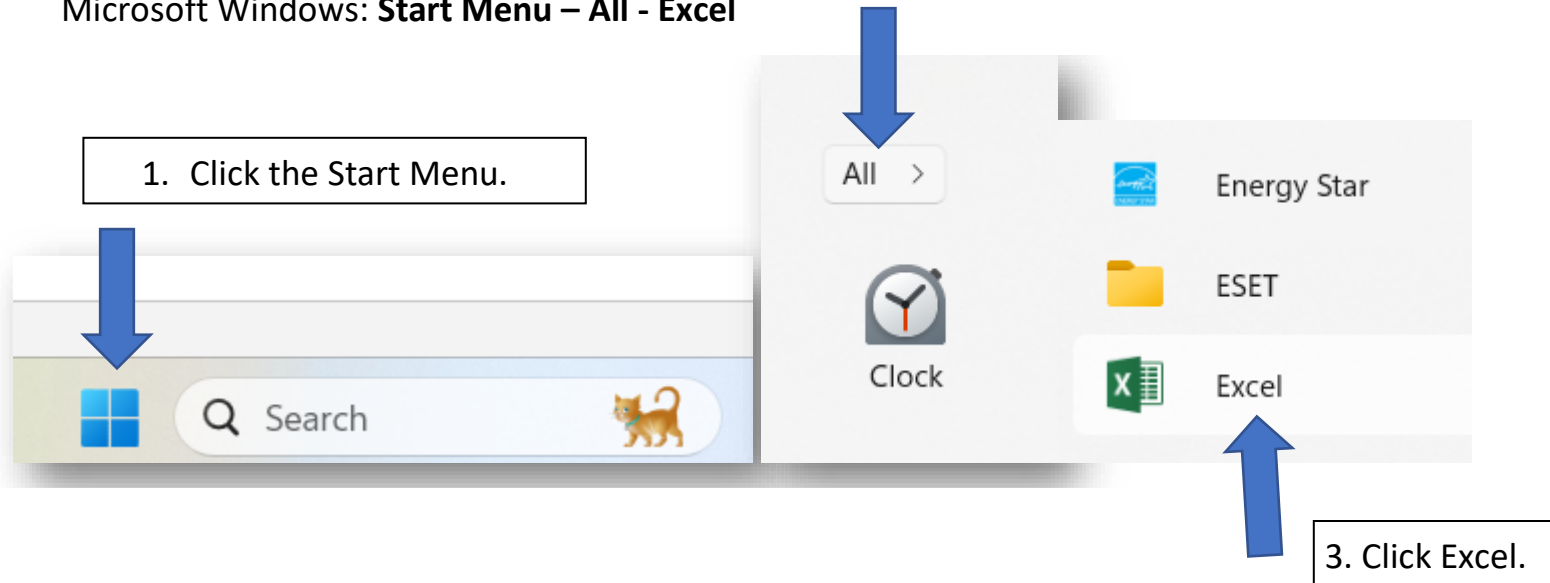
Quick Access Menu – For common functions such as Save and Undo.

Creating a Workbook

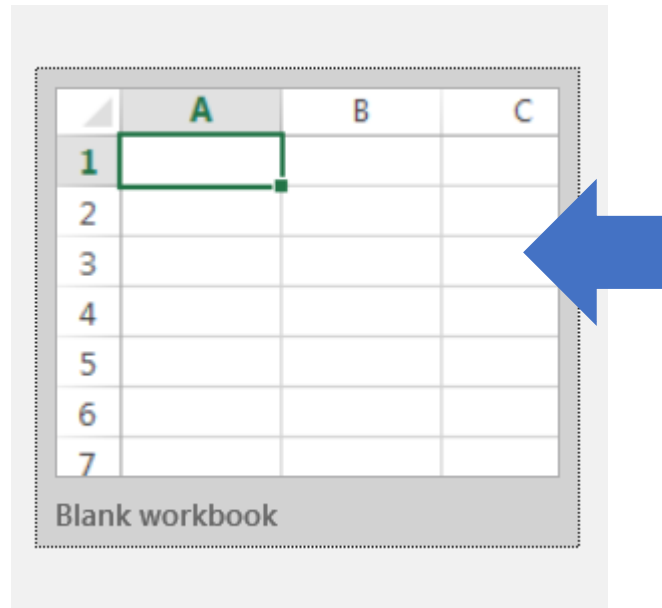
When you create a new file in Excel, this is referred to as a **Workbook**. A workbook may contain one, or many spreadsheets.

1. Open Microsoft Excel to create a new workbook.
2. Click All.

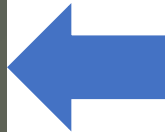
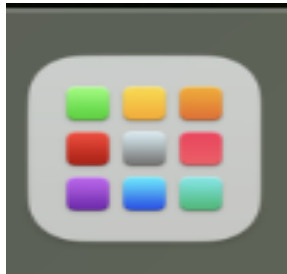
Microsoft Windows: **Start Menu – All - Excel**



2. Click **Blank Workbook**



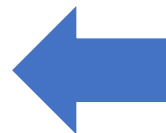
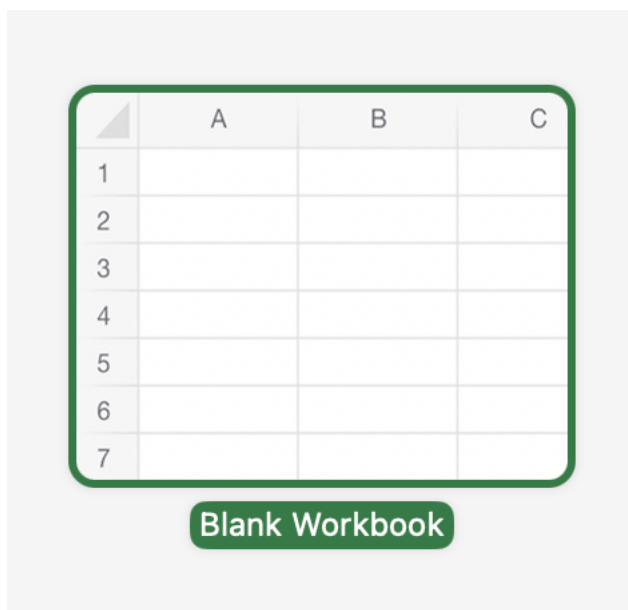
Creating a new workbook (MacOS)



On the Dock, click **Launchpad**.



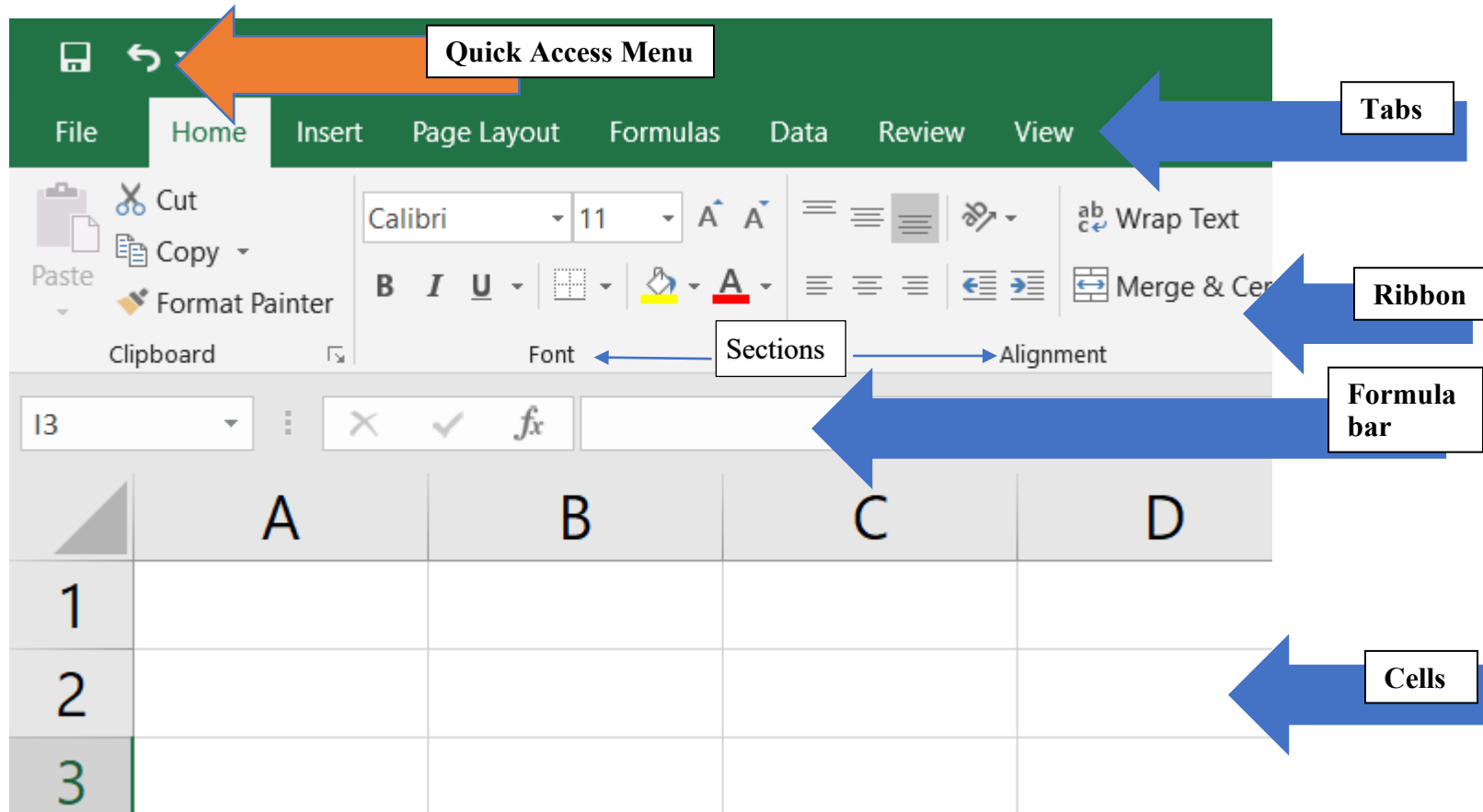
Click **Microsoft Excel**.



Click **Blank Workbook**.

Layout

Microsoft Excel has several areas in its layout: Cells, the Ribbon, Tabs, Formula bar, and the Quick Access Menu.



Cells are where data is entered.

The **Ribbon** is where you will find options for your data and spreadsheet. The ribbon contains **Sections** describe and group similar functions together.

Tabs change the options available along the ribbon. For example, **Insert** will allow you to insert charts into a spreadsheet.

The **Quick Access Menu** provides shortcuts to common functions like Save and Undo.

The **Formula Bar** is used to edit data and write formulas.

Identifying Cells

Excel spreadsheets are arranged into columns and rows. Columns can be identified by the letter at the top of each one. Rows can be identified by the number at the beginning of each one.

To identify a specific cell, combine its column letter and row number.

	A	B	C
1	One		
2		Two	
3			Three
4			

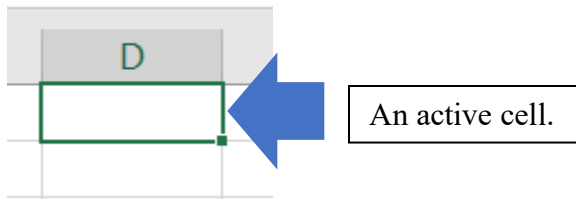
For example, the cell that has the word “One” in it is **A1**.

The cell that contains the word “Two” is **B2**.

What cell is the word “Three” in?

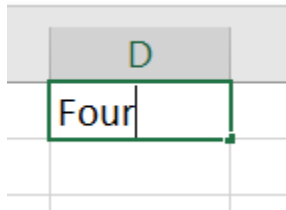
Entering Data

To enter data, first click on a cell. It becomes surrounded by a border. This means it is an **active cell**.



Once a cell is active you can enter data.

Click D1 to make it the active cell. Type the word “**Four**”.

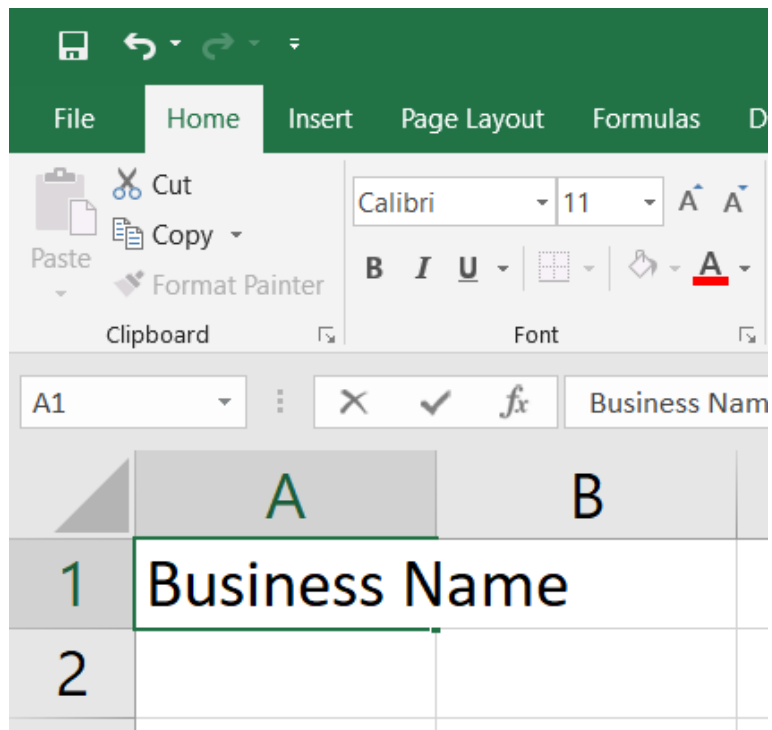


Adjusting Columns and Rows

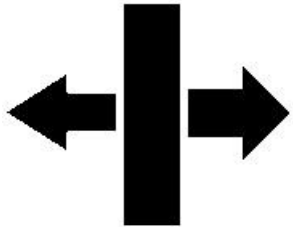
You will often find that data does not fit neatly into the default size of columns and rows. However, columns and rows can be adjusted.

To adjust columns and rows:

In cell A1, enter “Business Name”. Notice how the data extends past the border of column A.






Place your cursor between Column names A and B until your cursor appears like this:



When it does, click and drag to adjust the size of Column A. You can adjust rows the same way.

Your column should now look something like this:

Clipboard		Font	
A1		  	Business Name
	A	B	
1	Business Name		
2			

Selecting Cells

You will find you may need to change the appearance of the cells in your data. To do this, you must first select the cells you want to change.

To select a range of cells, click and drag across the cells. A border will appear.

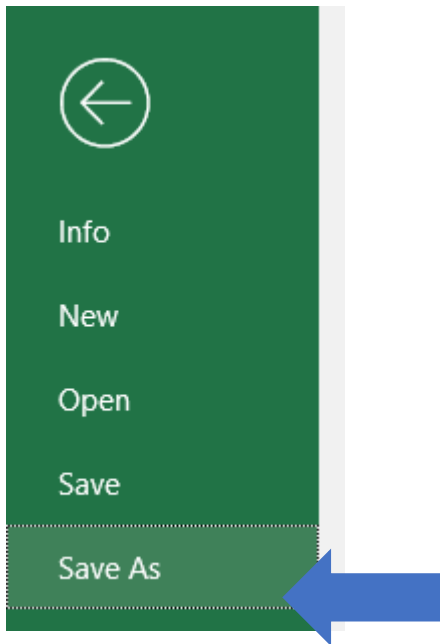
	A	B	C	D
1	One			Four
2		Two		
3			Three	
4				

Note: the first cell will be in white. It indicates the first cell in the selected range.

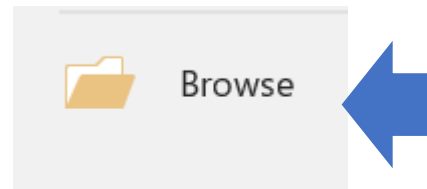
Saving a Workbook

To save a workbook in Excel:

Click **File** tab and choose **Save As**.

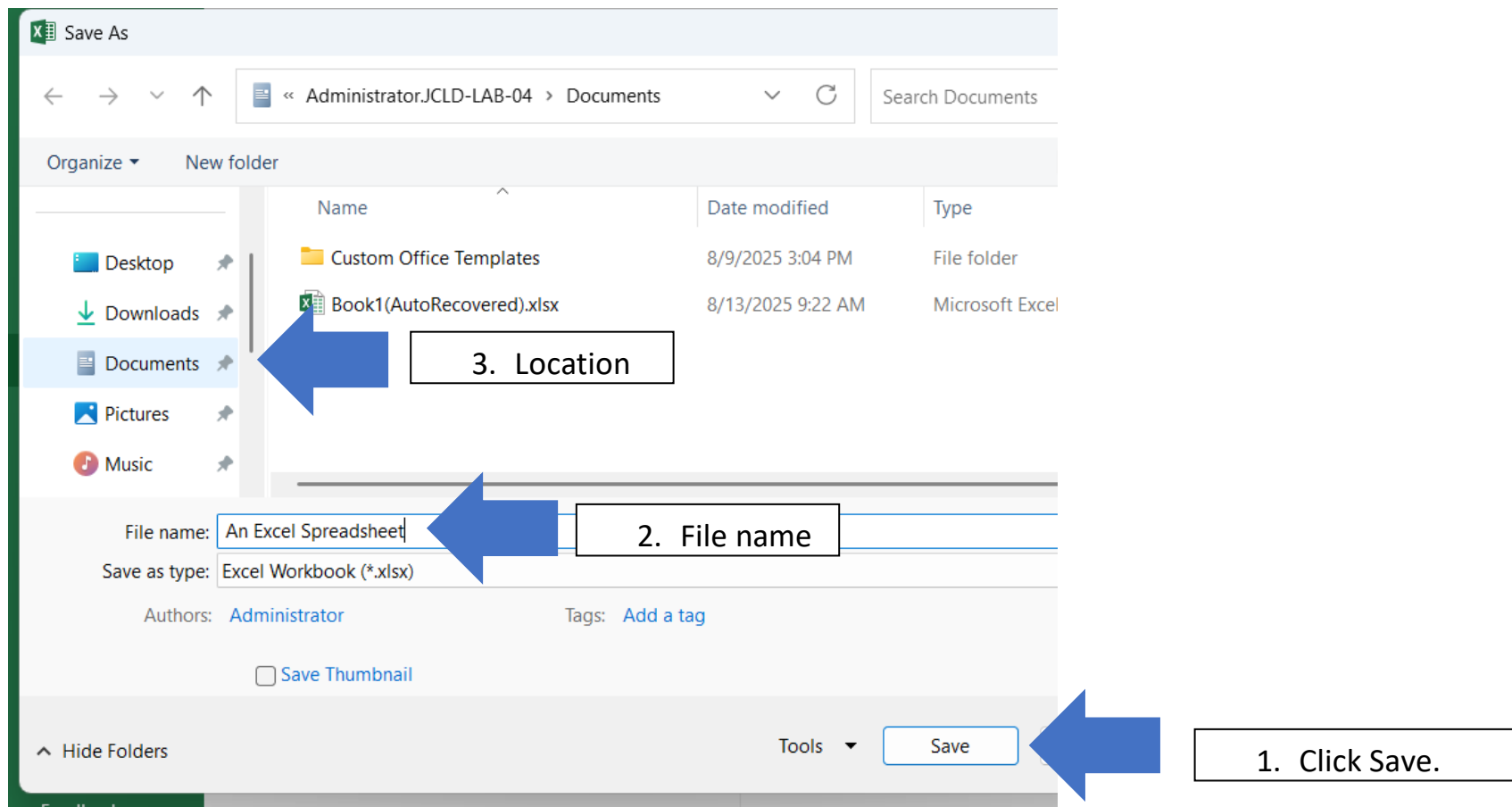


Click **Browse**.



Choose the following:

- 1) Location
- 2) File Name
- 3) Save



Activity

For this activity we are going to create a basic spreadsheet for a fictional business. Enter the following data or use your own to enter in your spreadsheet.

First, we will create the headings for our spreadsheet. Enter the following data or make up your own in the cells specified.

1. Business Name = A1
2. Owner = B1
3. Business Type = C1
4. Business Description = D1
5. Start Date = E1
6. Contact Name = F1
7. Contact email = G1
8. Contact phone number = H1
9. Tax Identification = I1
10. Number of Employees = J1

Notice how the headings do not fit in the columns. Adjust each of the columns to the appropriate heading size.

Next, we'll enter values for each of the headings in row 2. You can use the following examples or make up your own.

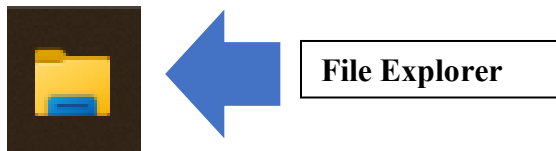
1. A2 = Daniel's 3D Printing Emporium
2. B2 = Daniel Heaton
3. C2 = Manufacturing
4. D2 = Designing and printing fine 3D objects since 2009!
5. E2 = October 31, 2009
6. F2 = Daniel Heaton
7. G2 = dheaton@jclibrary.info
8. H2 = 360-385-6544
9. I2 = 4583839009
10. J2 = 13

Your data may not fit neatly into the columns. Adjust the column widths until the data appears correctly. Adjust the row height as well to make it easier to read.

Lastly, we will save our workbook:

1. Click **File – Save As**
2. Click **Browse**.
3. Select Documents from the left-hand sidebar. You can also select a location of your choosing.
4. Name your file.
5. Click Save.

Note: To locate your file use File Explorer (Microsoft Windows) or Finder (MacOS).



Next Class

Managing Income and Expense

Learn about basic formatting, merge and center, wrap text, and how to use Autosum in Part 2.

