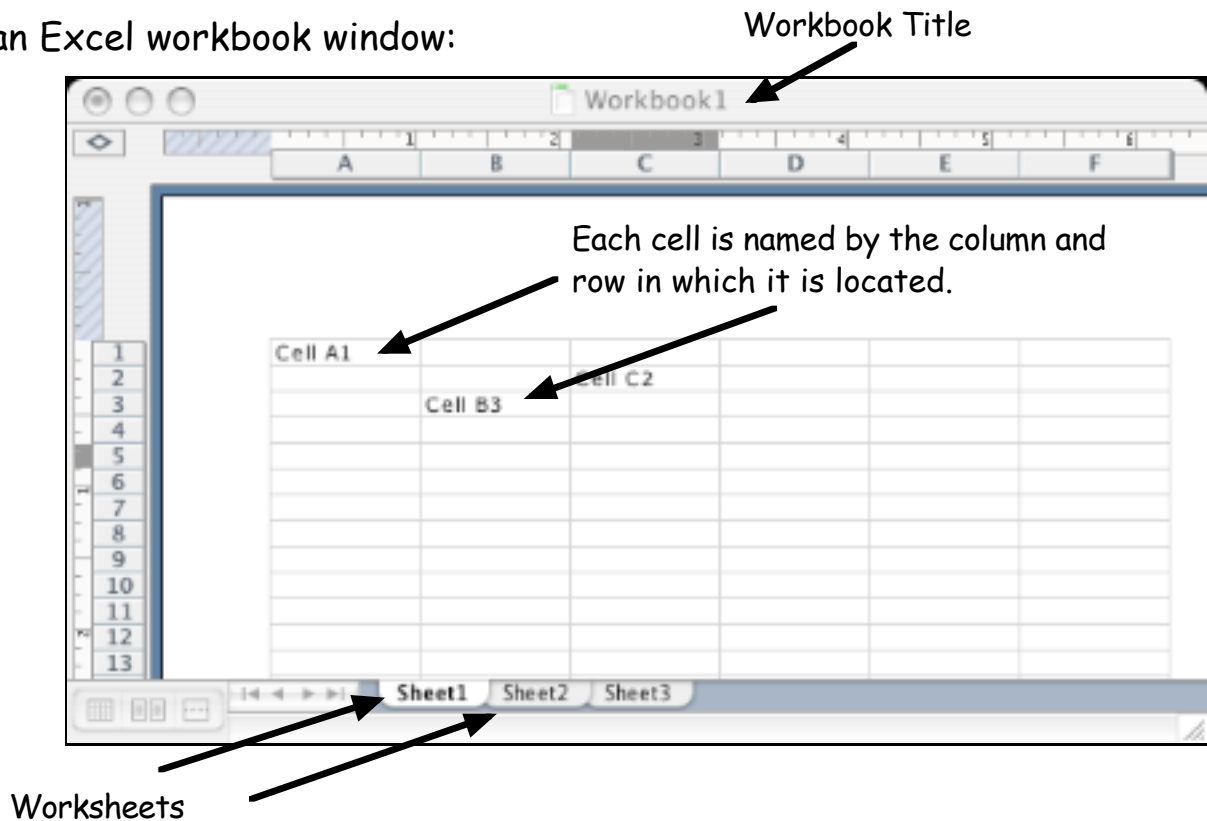


# Using Excel: Basics

## *Workbook/Worksheet*

When you open Excel, you are opening a Workbook that initially contains 3 worksheets. Worksheets can be added or deleted to your workbook. Worksheets contain a number of cells arranged in rows and columns. You can click to move between cells, or press **Return** to move down a column, press **Tab** to move across a row or use the arrow keys to move around.

Here's an Excel workbook window:



In terms of recordkeeping by the benchmarks, this gives you the option to create workbooks by subject area, individual student, particular project, etc. The workbook is really just like having a binder containing several individual sheets.

## *Saving Excel files*

When saving Excel files the default name is Workbook1.xls (Mac) or Book1 (PC). Replace the name "Workbook1" with a file name that you can easily identify but keep the .xls extension on the name. When moving files from one computer to another, this helps to identify the software used to create the document.

## ***Moving around the Excel window***

**Tab** - moves you *across a row* one cell at a time

**Return** - moves you *down a column* one cell at a time

**Arrow keys** - move you one cell at a time in the direction chosen

## ***Choosing Multiple Cells, Rows or Columns***

- Choose multiple cells in a spreadsheet by clicking then dragging across the cells you wish to select.
- Choose an entire row by placing your mouse on the row number and clicking one time. Select more than one row by clicking and dragging across more than one row number.
- Choose an entire column by placing your mouse on the column letter and clicking one time. Select more than one column by clicking and dragging across more than one column letter.



- Click on the diamond in the upper left corner of the document to select the entire document. If you don't see this diamond, click on the blank box to the left of Column A above Row 1.

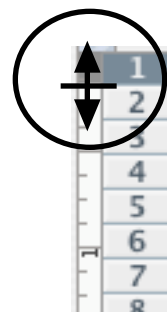
## ***Adjusting Column width***

Column width can be adjusted by placing your mouse on the border between two columns. When you do, you'll see a line with opposite facing arrows similar to the one in this picture. Hold your mouse down and drag to the left to decrease the width or to the right to increase the width.



## ***Adjusting Row Height***

Row height can be adjusted by placing your mouse on the border between two rows. When you do, you'll see a line with opposite facing arrows similar to the one in this picture. Hold your mouse down and drag up to decrease the height or down to increase the height.



## Page Setup

Go to **File** and select **Page Setup**. This allows you to do several things with the worksheet currently active.

**Page Setup**

Page Margins Header/Footer Sheet

Orientation **Set the page orientation**

Portrait  Landscape

Options...

**Page Setup**

Page Margins Header/Footer Sheet

Top:  Header:

Left:  Right:

Bottom:  Footer:

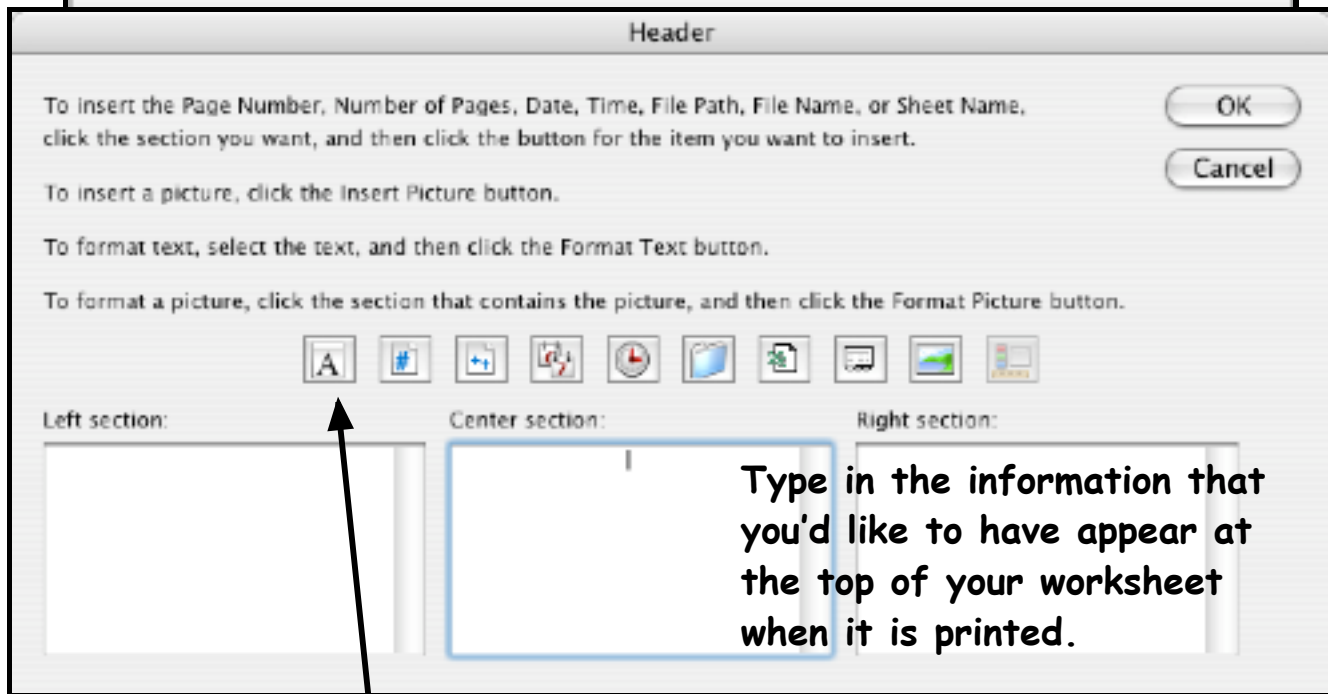
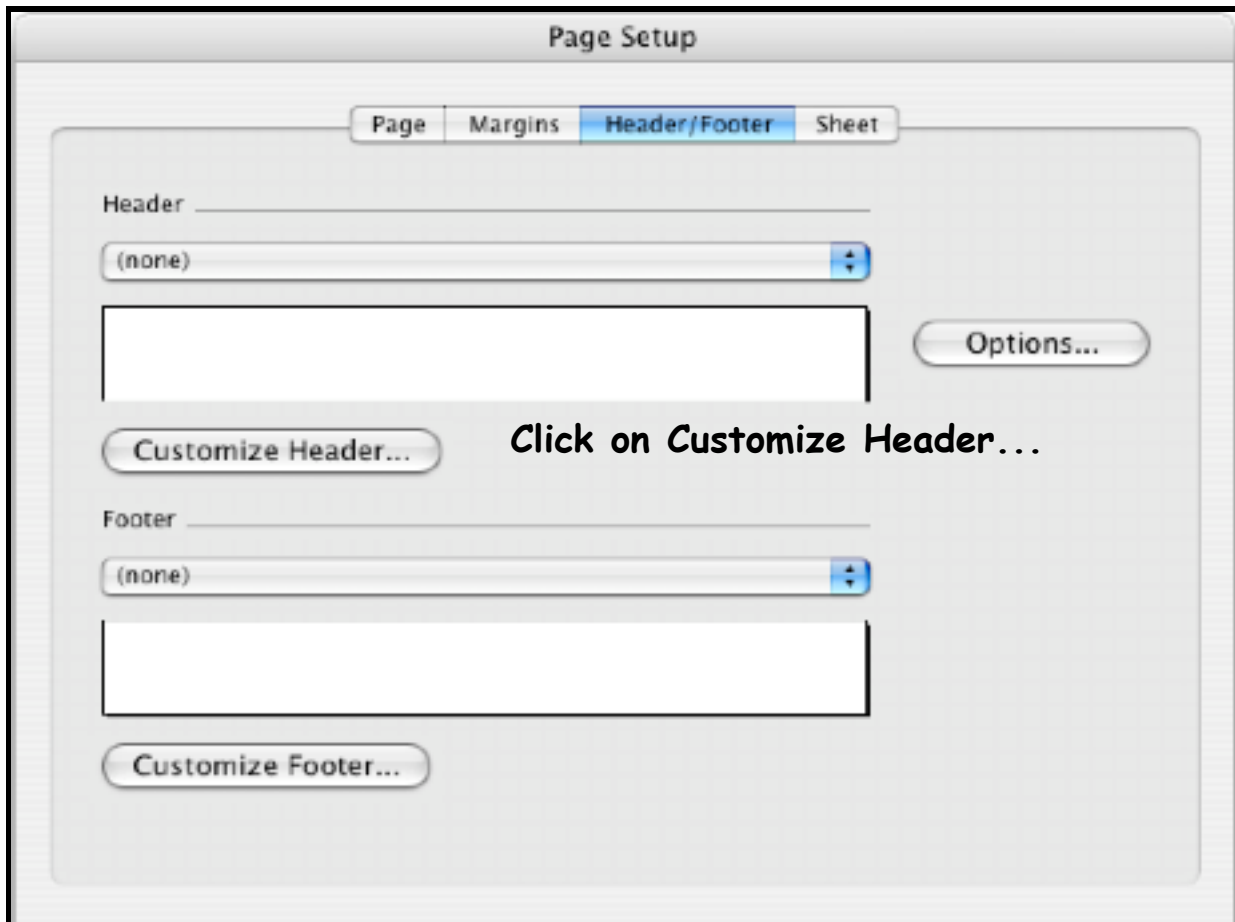
**Set the margins on all sides of the worksheet.**

**Recommendation: Leave the top margin at 1" and set all other margins for 0.5".**

Options...

Center on page  Horizontally  Vertically

Cancel OK

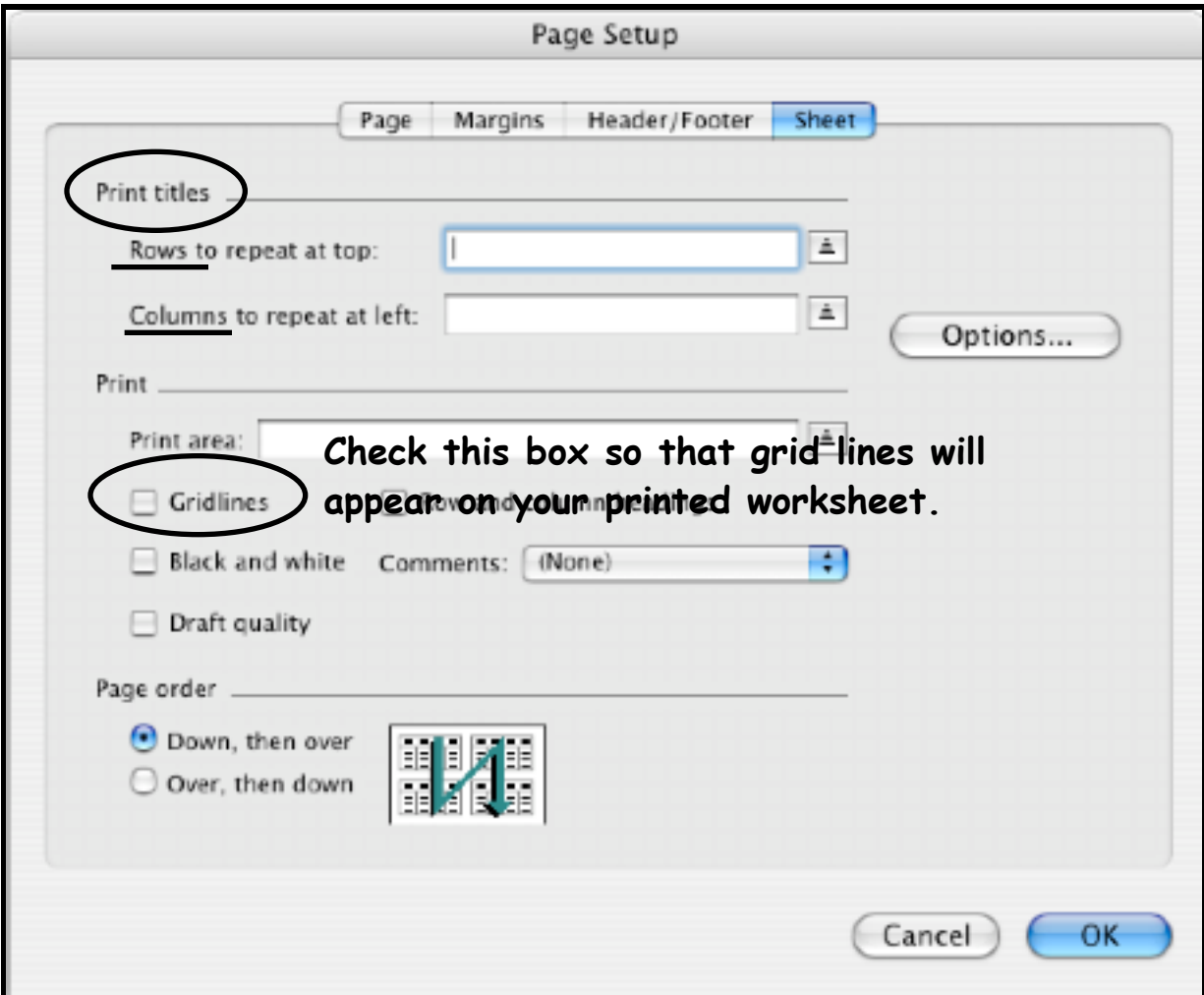


Click on **OK** to return to the page setup.

## ***Print titles***

If your worksheet is large enough so that it will need to be printed on more than one sheet of paper, you can choose the rows that should appear at the top of each page and columns that should appear on the left side of each page.

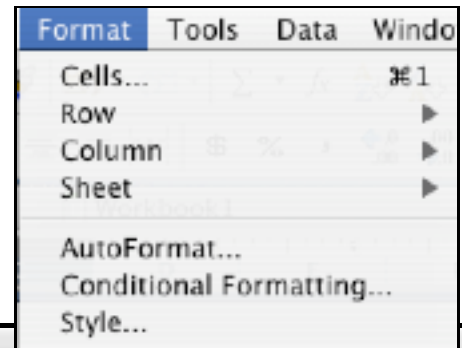
Click to place a cursor in the appropriate field ( Rows or Columns) then select the rows or columns on your worksheet that should repeat on each page and click on **OK**.



If at any time you want to check what your document will look like when printed, go to the menu bar to **File** and select **Print Preview**.

## Formatting Cells

First, select all the cells for which you'll apply formatting. On the menu bar, go to **Format** and choose **Cells...** Notice the tabs across the top of this window.



A screenshot of the 'Format Cells' dialog box. The 'Alignment' tab is selected. The dialog has tabs for 'Number', 'Alignment', 'Font', 'Border', 'Patterns', and 'Protection'. The 'Text alignment' section includes 'Horizontal' (set to 'General') and 'Vertical' (set to 'Bottom'). The 'Orientation' section shows a preview of text rotated 45 degrees and a 'Degrees' input field set to 0. The 'Text control' section has three unchecked checkboxes: 'Wrap text', 'Shrink to fit', and 'Merge cells'. 'Cancel' and 'OK' buttons are at the bottom right. Two arrows point from the text above to the 'Format Cells' title bar and the 'Alignment' tab.

**Text alignment** - adjustments can be made to the horizontal and vertical alignment

**Wrap text** - sets the cell(s) text to wrap

**Merge cells** - create one cell by merging two or more together

**Orientation** - set the way text is oriented within a cell. This is useful for setting text to be vertical in a cell instead of horizontal.

\*\*\*On a Mac, you may also have the choice of viewing the Formatting Palette (View > Formatting Palette) which is essentially a set of shortcuts for many of the formatting options as well as other functions of the software.

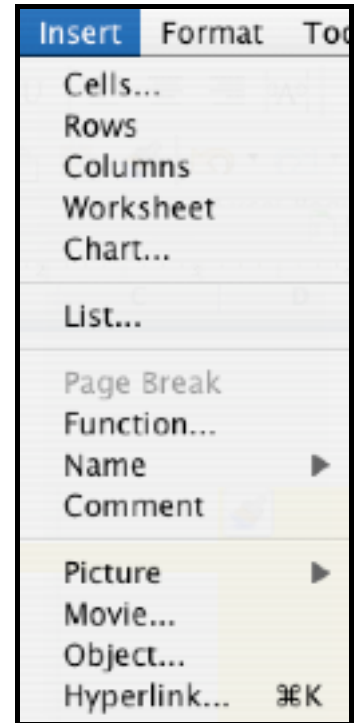
## ***Insert Row or Column***

To insert a Row:

Click on the row number **below** where you'd like a new row to appear. This highlights the entire row. Go to the menu bar to ***Insert*** and select ***Rows***. Your new row will appear.

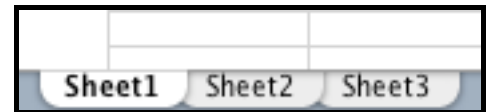
To insert a Column:

Click on the column letter **to the right** of where you'd like a new column to appear. Go to the menu bar to ***Insert*** and select ***Columns***.

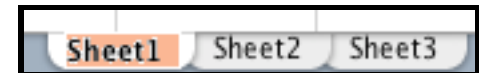


## ***Naming Worksheets***

When you first open an Excel workbook, you'll notice that the worksheet tabs contain just a generic name: Sheet1, Sheet2, Sheet3.



To rename a sheet, ***double click on the name tab***. This highlights the name. Now you can type a new name for the sheet. When you're done, press ***Return*** or click away from the tab to set the name.



## ***Inserting New Worksheets***

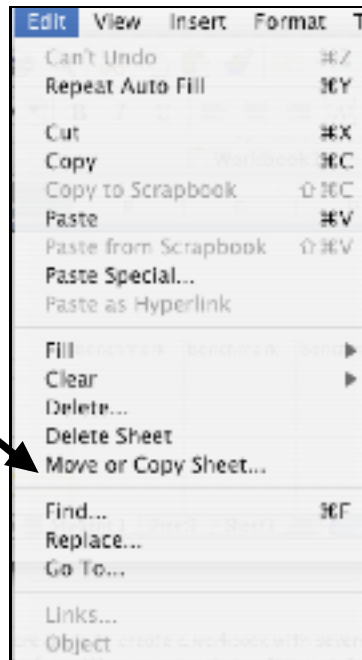
Although a new Excel workbook can begin with any number of worksheets, you can as many as needed to suit your needs. With any worksheet active, go to the menu bar to ***Insert*** and select ***Worksheet***. A new sheet tab will appear at the bottom of the window. To move this sheet, click on the tab, hold down your mouse and drag it to the desired position. You'll see a small triangle as you do this. That tells you where you're positioning the sheet. Name this new sheet accordingly.

## Copy or Move Sheet

In some cases, creating one sheet as a template will allow you to make additional copies of that sheet so that the setup/format can be easily repeated.

Make sure that the sheet to be copied is active by clicking on the tab for that sheet.

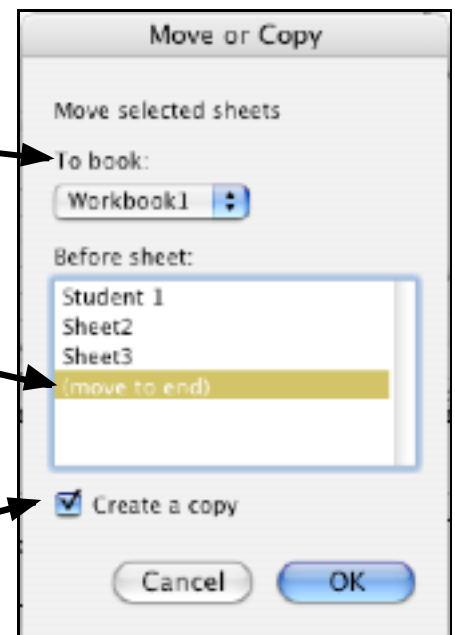
Go to **Edit** on the menu bar and select **Move or Copy Sheet...**



This example is showing you that the sheet is going to a particular workbook.

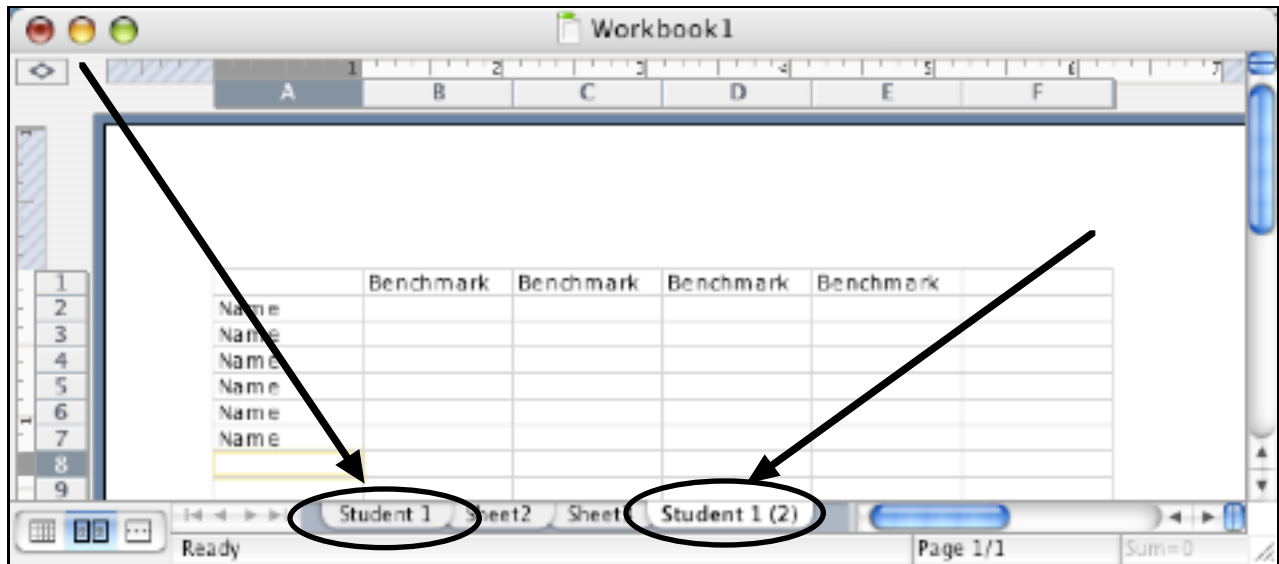
The sheet will be copied to a position *before* the sheet you select in the list. It can also be placed at the end of any other sheets in your workbook.

(Keep in mind that, once the sheet has been copied you can still move it to any position in your workbook.)



Click on **Create a copy**. Then click on **OK**.

The copy that is created will have the same label as the template worksheet with (2) after it to indicate that it is a second copy of that sheet.



Now you can rename that sheet accordingly.

### ***Miscellaneous***

Above the Excel workbook window you can have several toolbars available as additional shortcuts to a number of functions. To select toolbars, go to **View** and select **Toolbars** to see a listing. Toolbars shown on the screen are currently checked. Minimally, you may find it most useful to have at least the **Standard** and **Formatting** toolbars available. The **Formula Bar** should also be checked under the View menu.

### ***Other Information***

Attached are additional information sheets describing other ways to use Excel in your recordkeeping. These include: Adding Comments to Records, Conditional Formatting and Creating a Drop Down Menu in a Cell.

### ***Before you print...***

- Check the Print Preview - this will show you what the document will look like and how many pages will be printed.
- Check your spelling - go to **Tools** and select **Spelling**