



## **Excel II**

*An Intermediate Guide to Spreadsheets*

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## **Objectives**

- Set up the user preferences.
- Learn how to group and ungroup worksheets.
- Use the available general templates.
- Learn how to create or modify a template.
- Insert, view, show, hide, edit, or delete comments.
- Modify the view of the worksheet.

## **Preferences**

### ***Change the Default Number of Worksheets***

The default number of worksheets in a new workbook is three. If you find yourself using only one worksheet in a workbook and deleting the remaining two, or continuously adding more worksheets, you may want to reset the default to the desired number of worksheets you use most of the time.

- Select **Tools** on the **Menu Bar** for a PC, or select **Excel** on a Mac
- Select **Options** on a PC, select **Preferences** on a MAC
- Select the **General tab**
- In the **Sheets in new workbook** box, enter the desired number of sheets you want created for new workbooks
- Select **OK**

### ***Specify A User Name***

Specifying your name in the user name settings will allow your name to appear as the author in the file properties and inserted comments.

- Select **Tools** on the **Menu Bar** for a PC, or select **Excel** on a Mac
- Select **Options** on a PC, select **Preferences** on a MAC
- Select the **General tab**
- In the **User name:** box, enter your first and last name
- Select **OK**

### ***Access Recently Used Files***

At the bottom of the File Menu on the Menu Bar and in the New Workbook Task Pane, the four most recently used Excel workbooks will be displayed. Selecting one of these shortcuts will open the file. The default number of recently used workbooks is four. You can change the number to display more files for quicker access or zero for more security. If a workbook has been deleted, the recently used files shortcut to that workbook will no longer work.

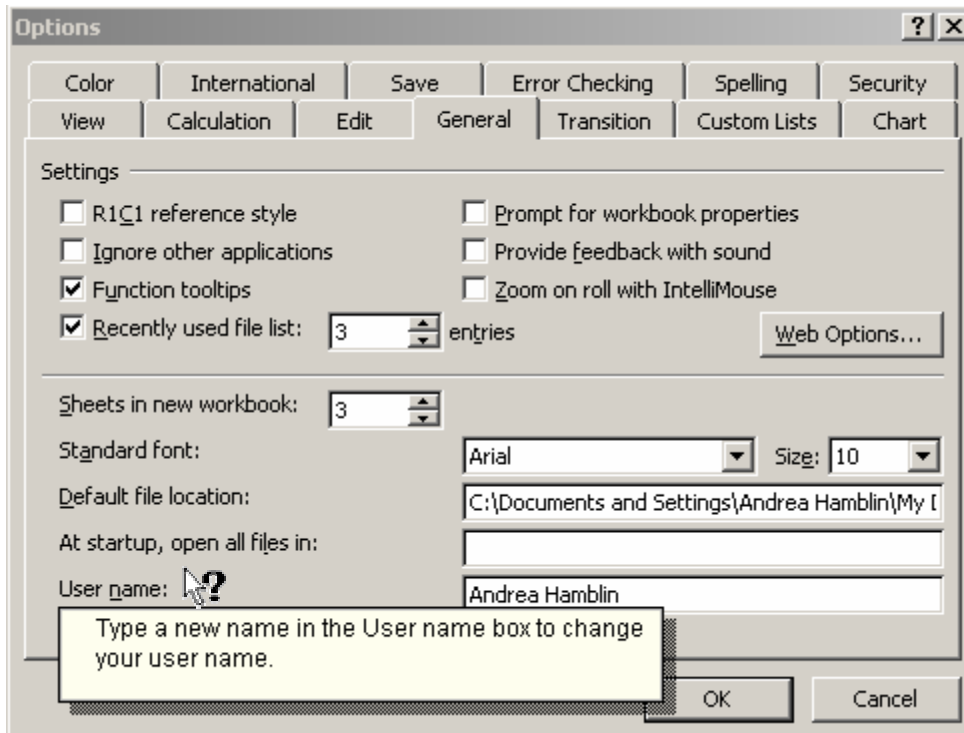
- Select **Tools** on the **Menu Bar**
- Select **Options** on a PC, select **Preferences** on a MAC
- Select the **General tab**
- Make sure **Recently used file list:** is checked and enter the desired number of files to be displayed
- Select **OK**

### ***Get Help in Dialog Boxes***

Learn about more features in dialog boxes without making changes to your work.

- Select the question mark button **?** on the dialog box title bar on a PC, or on a Mac hover over the dialog box and information appears at the bottom of the window
- Select the dialog box feature that you would like to know more about

- Select the yellow tip box to close the feature's definition

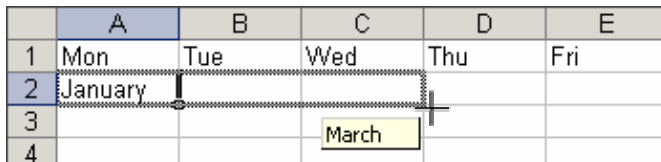


## Use Lists

Several default lists already exist to save time typing.

- Select a cell where the list series should begin
- Type the first name in the series
- Drag the fill handle in the desired direction to complete the series

Excel's Default Lists
1, 2, 3...
QTR1, QTR2, QTR3, QTR4
Quarter 1, Quarter 2, Quarter 3, Quarter 4...
Sun, Mon, Tue...
Sunday, Monday, Tuesday...
Jan, Feb, Mar...
January, February March...
Jan-02, Feb-02, Mar-02...

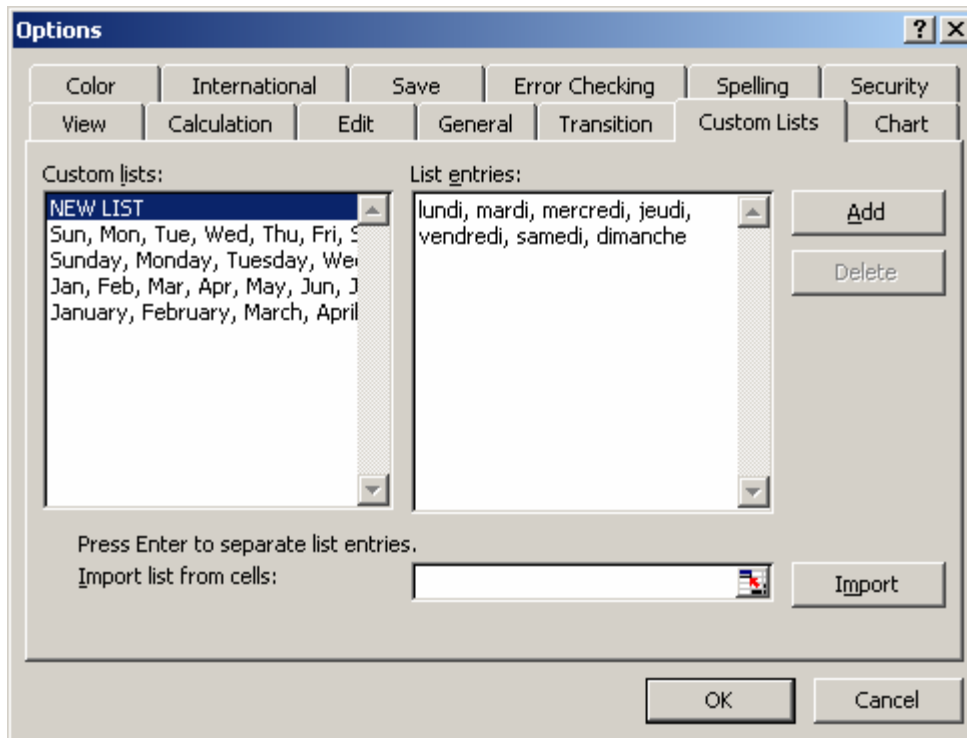


## Create Custom Lists

Create custom lists for series that you use frequently to save time typing.

- Select **Tools** on the **Menu Bar** on a PC, or select **Excel** on a Mac

- Select **Options** on a PC, select **Preferences** on a MAC
- Select the **Custom Lists** tab
- Make sure **NEW LIST** is selected in the **Custom Lists:** area
- In the **List entries:** type a custom series divided by commas
- Select **Add** to add the custom list to Excel
- Select **OK**

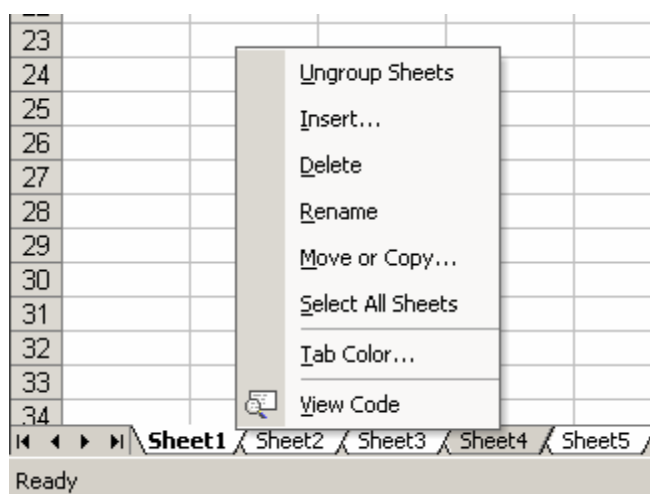


## Group Worksheets

### Select a Range

Grouping worksheets allows you to save time. When you enter, change or format data on a grouped sheet, the changes affect all selected sheets. Changes may replace data on the active sheet and other selected sheets.

- Select the first sheet tab in the range you would like to group
- Press the [**SHIFT**] key on the keyboard and select on the last sheet tab in the range you would like to group
- Press the [**CTRL**] key on a PC, [**COMMAND**] key



on a Mac and select on sheet tabs that you would like to add or deselect from a group

### ***Ungroup Worksheets***

Ungroup worksheets to add data to one worksheet without the changes affecting all selected sheets.

- **Right-click** on a PC/[**CTRL**] click on a Mac any grouped sheet tab
- Select **Ungroup Sheets**

## **Templates**

A template is workbook that can include formatting, styles, standardized text such as page headers and row and column labels, formulas, macros, and custom toolbars that will be used as the basis for other similar workbooks.

### ***Use Default Templates***

Excel XP or Excel X on a Mac includes several templates by default such as the Balance Sheet, Expense Statement, Loan Amortization, Sales Invoice, and Time Card.

For a PC:

- Select **View** on the **Menu Bar** and select **Task Pane**
- In the **New from template** section, select **General Templates**
- Select a template and select **OK**

For a Mac:

- Select **File** from the menu bar and select **Project Gallery**
- Then choose from **Templates** on the left side.

### ***Create A Custom Template***

- Create and format a workbook to be used as a template
- Select **File** on the **Menu Bar** and choose **Save As**
- Type the template name in the **File name:** box
- Choose **Template (\*.xlt)** from the **Save as type:** menu
- If necessary, create a folder and/or select the destination folder from the **Save in:** menu. The default is the **Templates** folder.
- Select the **Save** button

### ***Modify An Existing Template***

- Select **File** on the **Menu Bar** and choose **Open**
- Choose **Templates (\*.xlt)** from the **Files of type:** menu
- If necessary open a subfolder and select the template to be modified
- Choose **Open**
- Edit the template as needed
- Select **File** on the **Menu Bar** and choose **Save As**
- Choose **Template (\*.xlt)** from the **Save as type:** menu
- If necessary open a subfolder and reselect the template name in the file list

- Select the **Save** button

## Comments

A comment is a note that you attach to a cell, separate from other cell content. Comments are useful as reminders to yourself, such as noting how a complex formula works, or to provide feedback to other users.

	A	B	C	D
1				
2	Rent	1200		
3	Utilities	156		
4	Phone	63		
5				
6	Total	\$1,419.00		

**Andrea Hamblin:**  
Try to cut expenses by limiting long distance calls.

## Insert Comments

- Select the cell where the comment is to be displayed
- Click **Insert** on the **Menu Bar**
- Select **Comment**

## View Comments

A red triangle or comment indicator appears in the upper-right corner of a cell with a comment. To view the comment, hover the mouse pointer over the cell.

## Show All Comments Continuously

To display all comments in a workbook without hovering the mouse pointer over a specific comment, follow these steps.

- Select **View** on the **Menu Bar**
- Select **Comments**

## Show Individual Comments Continuously

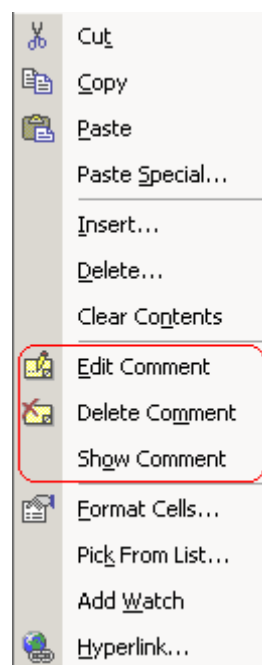
- Select the cell where the comment is located
- **Right-click** on a PC/[CTRL] + **click** on a Mac directly on the cell containing the comment
- Select **Show Comment**

## Hide Individual Comments

- Select the cell where the comment is located
- **Right-click** on a PC/[CTRL] + **click** on a Mac directly on the cell containing the comment
- Select **Hide Comment**

## Hide All Comments

- Select **View** on the **Menu Bar**
- Select **Comments**



### ***Edit Comments***

- Select the cell where the comment is located
- **Right-click** on a PC/[CTRL] + **click** on a Mac directly on the cell containing the comment
- Select **Edit Comment**

### ***Delete Individual Comments***

- Select the cell where the comment is located
- **Right-click** on a PC/[CTRL] + **click** on a Mac directly on the cell containing the comment
- Select **Edit Comment**

### ***Delete All Comments***

- Select **Edit** on the **Menu Bar**
- Trace to **Clear**
- Select **Comments**

### ***Print Comments***

- Select **File** on the **Menu Bar** and click **Page Setup**
- Select the **Sheet** tab
- In the Print section, select the **Comments:** drop-down arrow to choose:
  - **At end of sheet:** to print comments beginning on a separate page at the end of the document.
  - **As displayed on sheet:** to print comments where they are displayed when you view them on the worksheet. Only the comments that are displayed will be printed.
- Click **OK**
- Select **File** on the **Menu Bar** and click **Print**
- Click **OK** to print the spreadsheet and comments

## **Modify View**

### ***Split Windows***

The Split option splits the active window into panes so that remote areas of a worksheet can be seen at the same time.

- Select the cell just below and to the right of where the split is to occur
- Select **Window** on the **Menu Bar**
- Select **Split**

### ***Remove Split***

- Select **Window** on the **Menu Bar**
- Select **Remove Split**

### ***Splitting a Worksheet into Panes***

Large worksheets or workbooks often cannot be displayed on one screen. Splitting a window into panes will allow views of the remote areas simultaneously.

- Select the worksheet that will be split. The split will occur in the upper left-hand corner of the selected cell.
- Click Window from the toolbar and select Split.
- This creates both a vertical and horizontal pane.

### ***Creating a Vertical or Horizontal Pane***

- Select the desired worksheet.
- Place the mouse over the split box, the mouse will change to a double-sided arrow.
- Dragging the Vertical Split Pane to the right or left will create two vertical panes.
- Dragging the Horizontal Split Pane up or down will create two horizontal panes.

### ***Removing Panes***

- Select the split pane to be removed.
- Double-click on the bar or
- Drag the split bar to its original position, or
- Choose Window from the toolbar and select Remove Split.

### ***Freezing Panes***

Scrolling down or across on a large sheet filled with data, causes headings and titles to disappear making data identification awkward. By freezing a worksheet you can keep row and column labels visible as you scroll.

- To freeze the top horizontal pane, select the row below where you want the split to appear.  
OR
- To freeze the left vertical pane, select the column to the right of where you want the split to appear.  
OR
- To freeze both the upper and left panes, click the cell below and to the right of where you want the split to appear.
- On the Window menu, click Freeze Panes.

## **Getting Help**

### ***Help Desk***

#### **Help Desk Contact Information**

Moody Hall 309  
448-8443  
helpline@acad.stedwards.edu  
[http://www.stedwards.edu/it\\_dept/computer/](http://www.stedwards.edu/it_dept/computer/)

#### **Help Desk Hours of Operation**

Monday – Thursday  
8:00 AM – 10:00 PM

Friday  
8:00 AM – 6:00 PM

Saturday  
9:00 AM – 6:00 PM

### ***Training***

#### **Joana Trimble, Computer Competencies and Training Manager**

Moody Hall 319  
448-8816  
joanat@admin.stedwards.edu

#### **Cousett Ruelas, Training Coordinator**

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#### **Cesar Diaz, Part-Time Training Coordinator**

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