Excel Basics with the Health Sciences Library

This handout is to reinforce some of the basic skills taught during the workshop. For further information please refer to the Excel section of our Basic Computer Skills resource guide at
http://guides.hsict.library.utoronto.ca/content.php?pid=572391&sid=4801248

Terminology

Excel opens into a **workbook**. A workbook is a collection of **worksheets** that contain **rows** (labeled with numbers) and **columns** (labeled with letters). **Cells** are located at the intersection of every column and row, and each cell has its own distinct address defined by the column-row intersection, such as H6. Each cell holds a **single** value, label, or formula.
Cursors

Select mode: Looks like a thick white plus sign. This is the default cursor in Excel when moving the mouse over cells. When this cursor is active, it allows you to select individual cells. Clicking and dragging will select multiple cells.

Move mode: Has four small arrows pointing outward. This cursor appears when cells are selected and the mouse hovers over the cell border(s). This cursor allows you to move the contents of the selected cell(s) to another cell by clicking and dragging, just like copying and pasting.

Autofill mode: Looks like a thin black plus sign. This cursor appears when the mouse hovers over the bottom right corner of a selected cell. Clicking and dragging with this cursor repeats the information in a selected cell. It also completes series information including months, days, and years.

Resize mode: Looks like a black plus sign with arrows on the sides or top and bottom. This cursor appears when the mouse hovers over the borders of column letter headings and row number headings. Clicking and dragging with this cursor adjusts the width of columns and height of rows. Double-clicking with this cursor automatically adjusts the columns width or row size.

Row or Column selection mode: Looks like a thick black arrow pointing horizontally or vertically. This cursor appears when the mouse hovers over column and row headings. Clicking with this cursor highlights an entire row or column.
Looking at the Screen

The **quick access toolbar** at the top of the screen allows you to quickly **save** your workbook, as well as **undo** (eliminate the last change to the workbook) and **redo** (repeat the last change to the workbook). You can also customize the toolbar to contain the commands that you use regularly by pressing the dropdown next to the redo button. The **ribbon** organizes all of the features of Excel into tabs, including options for formatting, viewing, editing, and inserting data and objects into a worksheet.

There are **2 scroll bars** on the right and bottom of the screen that allow you to maneuver the worksheet to the left and right as well as up and down. The **page view** options include **normal** view (seen above), **page layout** view (displays the workbook as it would appear when printed) and the **page break preview** option which allows you to set page parameters. The **zoom tool** allows you to zoom in on the cell section of the workbook **only**, effectively increasing the appearance of the cells without distorting the ribbon and other features of the workbook.
Formulas/Functions

Excel is extremely useful for calculating and processing complex formulas. Below the ribbon menu is the formula bar on the right side which allows you to input equations or text into the selected cell. On the left side is the name box, which indicates the selected cell ("C5"). Equations (for example, =SUM(A5,A9)) will automatically be hidden and can only be viewed using the formula bar; the cell will display the result, not the equation.

There are a few different ways to enter formulas into a cell. One way is by pressing the insert function key next to the formula bar. Another way is by clicking the formulas tab and selecting an option from the function library. The insert function pop-up window allows you to either browse from categories of functions or enter search terms to get suggestions for an appropriate function. Another way to insert a formula is to select a cell and simply type the equals sign and first letter of a formula (for example “=S”). Suggestions of formulas with a brief description will appear for you to consider.
Formatting

The formatting options that are most frequently used are located within the **home tab**. Options to change the font face, size and colour, apply bolding, italicization, underlining, cell borders and background colour are found in the **font** section of this tab. To align, indent, orient, merge cells, or wrap text (adjust cell size so that all text is seen) the **alignment** section is used. The **number** section gives you options to change from general cell content to formats such as currency, percentage, and date. Holding the cursor over any of the icons on the tab will show a brief description of what formatting the option will do. The **sort and filter** function in the editing section will sort the cells that you select either alphabetically or by parameters that you outline by selecting **custom sort** from the drop-down menu.

Another way to format is by selecting a **theme** from the **page layout tab**. These options will not only change the appearance of the selected cells or worksheet, but the entire workbook. You can select a **colour**, **font**, or **effects** scheme which will also format the entire workbook.
Printing

To print a worksheet or workbook, click the **File** tab in the ribbon. On the left side, select **Print**.

Under settings, you have a number of options.

Of note, the **print active sheets** option lets you select which area of a sheet, which sheet, or the entire workbook to print.

The **portrait orientation** option is where you can choose to print in portrait or landscape format. For spreadsheets with many columns, it is best to print in landscape format.

Adding Page Numbers

To add page numbers to a worksheet, navigate to the **insert** tab on the ribbon. In the **text options**, select **Header & Footer**.

Select where on the page the number should appear. On the ribbon, in the **Header & Footer Elements**, select **Page Number**. Click in the margin of the document to exit the Header & Footer options. Then see the page number in whatever location you choose.
Additional Resources

Microsoft Office Support

List of Excel functions by category: goo.gl/0uW1CJ

This is an excellent resource from Microsoft that lists the names, formats, and capabilities of all functions within Excel. Use this page to discover new functions or to get help if a function is not working.

Microsoft Excel Help Guide

Access the Help Guide by pressing the F1 key on the keyboard or clicking the question mark button in the upper right corner of the ribbon. Then search for your topic.

Thank You!

For further help, please contact the Health Sciences Library at:

(416) 864-5059 OR hslibrary@smh.ca