

Microsoft Excel for Libraries: An Introduction

Welcome and introductions

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Report 1: Board Report

Lesson 1: Open Microsoft Excel

1. Double-click on the Microsoft Excel icon on the desktop, or, Click on the Microsoft Excel shortcut on the Start Menu.
2. Review the Excel screen layout.

Lesson 2: Set Workbook Properties

1. Click on File, Properties.
2. Click on the Summary tab.
3. Type in information, such as your name and the name of your library.
4. Click on OK.

Lesson 3: Enter Data

1. Click in the cell where you want to enter data.
2. Type the data and press <enter> or an arrow to move to another cell.
3. You can replace the cell data by clicking in the cell, typing new data, and pressing <enter> or <arrow>.
4. If you want to modify the data, double-click in the cell. Use your left and right arrows to locate the area you want to modify. Type new data, using <backspace> or <delete> to remove data.
5. You can also single-click in the cell, and make your corrections in the formula bar area, if you prefer.

Lesson 4: Adjust Column Width

1. Click in the upper-left corner to select the entire worksheet.
2. Position the cursor between two column heads until the pointer shape becomes a line with arrows pointing left and right.
3. Double-click to widen all columns automatically to the longest data in the column.
4. Do not select the entire worksheet if you only want to widen one column at a time.
5. You can also drag a column head to widen a column to the width you prefer.
6. To select a numeric value for your column width, click on the column head to select the column.
7. Right click.
8. Click on Column Width.
9. Type a numeric value (displayed as character pixels).

10. Click on OK.

Lesson 5: Fill Cells

1. Click and type the data in the first cell and press <enter> or <arrow>.
2. If this data is a series, such as numbers of calendar months, Excel will continue the series for you. Type the data in the second cell, but **don't** press <enter> or <arrow>.
3. To continue the series, grab the fill handle in the lower right corner of the cell. Drag to the right (or down), and watch Excel supply pop-ups indicating the data it intends to add to those cells. Let go when you've reached the last cell you wanted to fill in.
4. You can also use this technique to fill cells with the same data when the data is not part of a series. Type the same data into two cells and drag to fill this same data into the rest of the cells.

Lesson 6: Save a Workbook

1. Click on the Save button on the standard toolbar.
2. The default location will be the My Documents folder. If you don't want to save your document there, navigate to the appropriate location.
3. In the File Name box, type the name for your file.
4. Click on Save.
5. Remember to save your work early and often! Once you've assigned a name to your file, you can click on the Save button to save the changes.

Lesson 7: Name a Worksheet

1. In the lower left corner of the workbook window, right-click on the sheet tab.
2. Click on Rename.
3. Type a new name for the worksheet and press <enter>.
4. We'll use the worksheet name later, when we set up this worksheet for printing.

Lesson 8: Format Cells

1. Click in an individual cell or select a column or row. To select a row, click on the row head, just like you click on the column head to select a column.
2. Right-click and choose Format Cells.
3. On the number tab, choose the number format.
4. On the alignment tab, you can wrap text so that a column or row can be multiple lines long, you can merge cells, and you can center your column headings, for example.
5. When you've made the changes you want, click on OK.

Lesson 9: Freeze Panes

1. When you have more data than you can see on the screen, it can be helpful to see the row or column headings as you scroll down or left.
2. Click in the first cell below the row and column headings you want to see.
3. Click on Windows, Freeze Panes.
4. To cancel this, click on Windows, Unfreeze Panes.

Lesson 10: Add a Formula to Your Worksheet

1. Click in the cell in which you want a mathematical calculation to be performed.
2. Type an = sign, then type the formula and the cells to be used in the formula. Sum is probably the most common formula: =sum(A2:E2)
3. Press <enter> and Excel will perform the calculation.
4. Instead of typing the range of cells, you can select them by holding down the <ctrl> key. Type the first part of the formula, e.g., =sum(
5. Then, press <ctrl> and select the cells.
6. Type the closing) and press <enter>.

Lesson 11: Copy, Cut and Paste

1. To copy data, click in the cell containing the data.
2. Click on the Copy button on the standard toolbar.
3. Click in the cell where you want to paste the data.
4. Click on the Paste button on the standard toolbar.
5. If the data is a formula, Excel will automatically adjust the range of cells.
6. Perform this same process to move data to a different cell, substituting the Cut button for the Copy button.

Lesson 12: Page Setup for Printing

1. Click on File, Page Setup.
2. On the Page tab, choose portrait or landscape.
3. On the Margins tab, you can adjust the margins and/or choose Center on Page horizontally or vertically to keep a small spreadsheet from appearing in the upper-left corner of the printed page.
4. On the Header/Footer tab, you can choose Header for your report, such as the name you added to the worksheet tab. You can choose a Footer for your report, such as your name, today's date, and the page number.
5. On the Sheet tab, click on Gridlines to have the data appear in boxes. Click on the Select box to choose the rows to repeat at the top or on the left of your printout if it is more than one page long. Select the rows or columns and click on the Select icon. When finished, click on OK.

6. Click on the Print Preview icon on the standard toolbar to review your document before printing it. Click on Close when finished.
7. Click on the Print icon to print the worksheet to the default printer. If you want to choose the destination printer or which pages to print, click on File, Print instead to open the Printer dialog box.

Lesson 13: Hide Columns

1. To hide a column (especially useful when printing a document), select the column.
2. Right click and choose Hide.
3. To view the hidden column, highlight the column before and after it.
4. Right click and choose Unhide.
5. You can also Unhide by selecting the workbook and double-clicking between column heads A and B (just as though you were adjusting the column width).
6. These same techniques work for hiding and unhiding rows.

Lesson 14: Set Print Area

1. Select the cells you want to print.
2. Click on File, Print Area, Set Print Area.
3. Click on the Print Preview button on the standard toolbar to confirm your selection.
4. Click on the Print button on the standard toolbar.
5. To clear the print area, click on File, Print Area, Clear Print Area.

Lesson 15: Change Page Breaks

1. Click on View, Page Break Preview.
2. Drag the page break line to the desired location.
3. Click on View, Normal.

Exercise: Create a Board Report

1. Using the techniques discussed in the lessons, create the Board Report in the Sample Reports handout.

Report 2: Circulation Report

Lesson 1: New Workbook

1. Click on File, New.
2. In the right-hand task pane, click on Blank Workbook.

Lesson 2: To Save a Workbook with a Different Name

1. Click on File, Save As.
2. Navigate to the folder where you want to save the workbook.
3. In the File name box, delete the existing file name and type the new name for your file.
4. Click on Save.
5. This technique is very useful for using the same workbook structure for a new fiscal year's data.

Lesson 3: Add a Column or Row

1. Click on the Column Head to the left of where you want the new column to appear.
2. Right click and click on Insert.
3. A new column will appear. Excel will automatically adjust the formula of the existing columns.
4. Use this same technique to add a row.
5. You can add multiple columns or rows by highlighting the number of columns/rows you want to add. When you right click and click on Insert, that number of rows/columns will be added.

Lesson 4: Add Cells in a Worksheet

1. Click on the cell (or cells) below or to the right of where you want the new cell (or cells) to appear.
2. Indicate in the Insert Dialog box whether the cell should shift right or down.
3. Click on OK.
4. Be careful when shifting a single cell or a group of cells. Since the entire column/row isn't moving, your data will no longer line up and your formula will no longer be accurate.

Lesson 5: Delete a Column or Row

1. Click on the Column Head to select the column.
2. Right click and click on Delete.
3. Use this same technique to delete a row.
4. You can delete multiple columns or rows by selecting all of them at once, then right clicking and clicking on Delete.

Lesson 6: Delete Cells

1. Click on the cell (or cells) you want to delete.
2. Right click and click on Delete.
3. Indicate in the Delete Dialog box whether cells should shift up or left.
4. Click on OK.
5. Be careful when deleting a single cell or a group of cells. Since the entire column/row isn't being deleted, your data will no longer line up and your formula will no longer be accurate.

Lesson 7: Clear Cells

1. To remove the cell contents without deleting the cell, click in the cell.
2. Right click and click on Clear Contents.
3. To remove the cell contents from multiple cells, select the group of cells.
4. Right click and click on Clear Contents.
5. To select non-contiguous cells (that is, cells that aren't next to each other), hold down the <ctrl> key as you click in each cell.

Lesson 8: Undo and Redo

1. Click the Undo button on the standard toolbar to remove the last change.
2. Click the Redo button on the standard toolbar to reinstate the last change you removed.

Exercise: Create a Circulation Report

1. Using the techniques discussed in the lessons, create the Circulation Report in the Sample Reports handout.

Report 3: New Titles

Lesson 1: Open a Workbook

1. Click on the Open button on the standard toolbar.
2. Navigate to the folder where your document is located.
3. Highlight the file you want to open.
4. Click on Open.

Lesson 2: Sort

1. Click on Data, Sort.
2. Choose up to three columns to sort by and whether the sort should be A-Z (Ascending) or (Z-A) Descending.
3. Click on OK.
4. Do not Sort with a column or row selected. If you do, this will only sort that column or row which will cause your data no longer to be in alignment.

Lesson 3: Fonts

1. You can use Format Cells to set the font size and style. You can also access this information from the formatting toolbar.
2. You can apply changes to the entire worksheet by clicking in the upper-left corner to select the worksheet.

Lesson 4: Find/Replace

1. Click on Edit, Replace.
2. In the Find What: text box, type the text you want to find.
3. In the Replace With: text box, type the text you want to substitute. If you don't want to substitute anything, leave Replace With blank.
4. Click on Options to see more options.
5. Click on Match case if the text you find must match exactly in terms of upper- and lower-case characters.
6. Click on Match Entire Cell Contents if you want to find this word or phrase alone in the cell.
7. If you want to find whole words, include the space. For example, The <space> won't find Therapy.
8. Click on Find to see if you've been specific enough in your Find What: criteria.
9. Click on Replace to replace one instance.
10. Click on Replace All to replace all instances.
11. Use Undo if you replace too much.

Exercise: Create a New Titles Report

1. Using the techniques discussed in the lessons, create the New Titles Report in the Sample Reports handout.
2. Begin by opening New Titles Data in Excel. Remember, to open Excel first and then open New Titles Data from within Excel so that you will be able to use the Import Wizard. If you double-click on the New Titles Data file to open it, you will bypass the Import Wizard.

Report 4: Friends Membership List

Lesson 1: COUNTIF Function

1. Use COUNTIF to count the number of cells which meet the given conditions. For example: COUNTIF(I2:I9,2006) or COUNTIF(I2:I9,"Mulholland Falls").

Lesson 2: Go To

1. Click on Edit, Go To.
2. Type a cell reference.
3. Click on OK and your cursor will move to this cell.

Lesson 3: Customize Options

1. Click on Tools, Options.
2. Click on the View tab.
3. Click to uncheck Startup Task Pane if you don't want the task pane to display each time you open Excel.
4. Click on the General tab. Consider making the following changes.
5. Change the Recently Used File List to 9 entries
6. Change the Sheets in New Workbook option to 1.
7. Change the standard font and size.
8. Change the default file location.
9. Supply or change the user name.
10. When finished, click on OK.

Lesson 4: Wrap Text

1. Click in an individual cell or select a column or row.
2. Right-click and choose Format Cells.
3. On the alignment tab, click to place a checkmark in the Wrap Text box.
4. Click on OK.

Exercise 4: Create a Friends Membership List

1. Using the techniques discussed in the lessons, create the Friends Membership List in the Sample Reports handout.

Report 5: Collection Statistics

Lesson 5: Insert Chart

1. Select the cells to provide data for the chart.
2. Click on Insert, Chart.
3. Click on Chart Type (such as pie chart).
4. Click on Chart Sub-Type.
5. Click on Next.
6. Look at the chart sample and click on Rows or Columns, as appropriate.
7. Click on Next.
8. Type a title for your chart.
9. Make any adjustments to the Legend and Data Labels tabs. You might, for example, want to include percentages on the Data Labels tab.
10. Click on Next.
11. Click on As New Sheet.
12. Type a Name for the Sheet, such as MFPL Collection Size.
13. Click on Finish.
14. Save and close your document.

Exercise 5: Insert a Chart into the Collection Statistics Report

1. Using the techniques discussed in the lessons, create the Collection Statistics Report in the Sample Reports handout.
2. Create a pie chart on a separate worksheet like the one in the Sample Reports handout.