

Unit 2

Entering and editing data

Unit time: 45 Minutes

Complete this unit, and you'll know how to:

- A Create an Excel workbook, and enter and edit text and values in a worksheet.
- B Enter and edit formulas in a worksheet.
- C Insert, move, and resize pictures in a worksheet.
- D Save and update a workbook, and use the Compatibility Checker.

Topic A: Entering and editing text and values

Explanation

After you create a workbook, you can begin entering data in cells. Cell entries can include many types of data, including text and values. When you type, data is entered in the active cell.

Text and values

Text entered in cells can be any length required, and it can be formatted just as in a word processing program; size, font, and style can all be changed. By default, text in a cell is left-aligned, as shown in Exhibit 2-1.

Values can include numbers, formulas, and functions. (Formulas and functions are explained in detail later.) Excel recognizes cell data as a value when it's a number or when it begins with +, -, =, @, #, or \$. By default, a value in a cell is right-aligned.



| | A | B | C | D | E | F |
|----|--------------------------------------------|--------------|-------------|-------------|-------------|-------------|
| 1 | Outlander Spices | | | | | |
| 2 | Bonus sales for the northern region | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | Name | Emp # | Qtr1 | Qtr2 | Qtr3 | Qtr4 |
| 7 | Kendra James | 16 | \$6,354 | \$4,846 | \$3,958 | \$8,284 |
| 8 | Alan Monder | 22 | \$7,546 | \$6,574 | \$5,767 | \$6,234 |
| 9 | Audrey Kress | 27 | \$7,635 | \$4,765 | \$5,256 | \$7,865 |
| 10 | Julie George | 29 | \$9,595 | \$5,859 | \$4,879 | \$3,432 |

Exhibit 2-1: A sample worksheet with text and values

Overflowing text and values

If a long text string doesn't fit in a cell, it will appear to go into the next cell if that cell is empty. The text isn't really in that next cell, though. If there is data in that next cell, the long string of text is truncated to fit the cell it's in.

If a long value doesn't fit in a cell, Excel displays a row of # characters. This indicates that the cell is too narrow to display the value, as shown in Exhibit 2-2.

The formula bar shows that D1, the active cell, is actually empty

The text in A1 appears to go into adjacent cells

That same text entered in A4 is truncated by the presence of text in B4

Values that are too long for a cell are replaced with a row of #s

| | A | B | C | D | E |
|---|--------------------------------------------------------------------|---|---|---|---|
| 1 | Text that is too long for a cell appears to go into adjacent cells | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | Text that is too long Unless there is data in the other cells | | | | |
| 5 | | | | | |
| 6 | | | | | |
| 7 | ##### | | | | |

Exhibit 2-2: Text and values that are too long for their cells

The Num Lock key

The numeric keypad, on the right side of most computer keyboards, is controlled by a Num Lock key in the upper-left corner of the keypad. Press Num Lock once to switch the keypad from functioning as numeric keys to functioning as navigation keys. Press Num Lock again to return to numbers. When numbers are active, a Num Lock light typically lights on the keyboard, as shown in Exhibit 2-3.

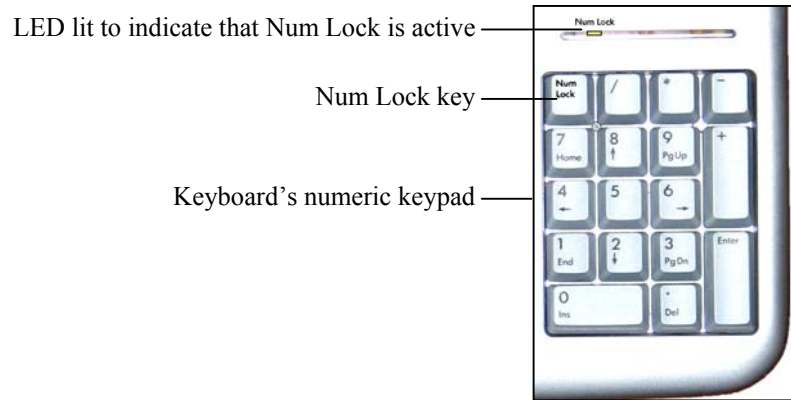


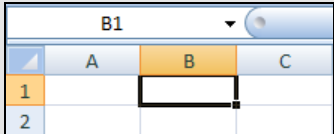


Exhibit 2-3: The Num Lock key on a keyboard's numeric keypad

Do it!

A-1: Entering text and values

TIPS ✓ Tell students they can also press **Ctrl+N**, but they'll bypass the New Workbook dialog box.

| Here's how | Here's why |
|-------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 Start Excel | (Click Start and choose All Programs, Microsoft Office, Microsoft Office Excel 2007.) The title bar displays "Book1," which is the name of the default workbook. |
| Click  and choose Close | To close the workbook. You'll create a new one. |
| 2 Click  and choose New | To open the New Workbook dialog box. |
| 3 Double-click Blank Workbook | To create a new workbook. The name of the new workbook, "Book2," appears in the title bar. |
| 4 Select B1 |  <p>(Click it.) To make B1 the active cell. The cell address B1 appears in the Name box.</p> |

5 Type **Outlander Spices**

To specify a heading for the worksheet. The text (or any other data) overlaps other blank cells if it takes up more room than the cell size allows. However, Excel considers the data to be the content of only the cell where you entered it—in this case, B1.

Press 

To complete the entry and move to B2. By default, text entries are left-aligned.

6 Select A4

To make A4 active.

Type **Month**

To create text that labels this column.

Press 

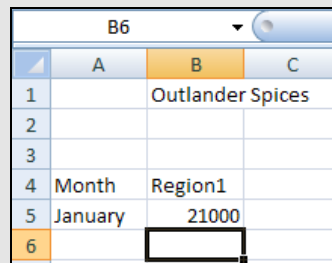
To complete the entry and move to A5.

7 Type **January**

To create text that labels this row.

8 In B4, enter **Region1**

The active cell now is B5.

9 In B5, enter **21000**

| | A | B | C |
|---|---------|------------------|---|
| 1 | | Outlander Spices | |
| 2 | | | |
| 3 | | | |
| 4 | Month | Region1 | |
| 5 | January | 21000 | |
| 6 | | | |

To enter the Region 1 sales for January. The workbook should look like the picture shown here.

Editing text and values

Explanation



If you make an error while entering data in a cell, you can correct it at any point. To make corrections, you can do any of the following:

Double-click the cell, make the corrections, and press Enter.

Click the formula bar, make the corrections (as shown in Exhibit 2-4), and press Enter.

Select the cell and type the correct data.

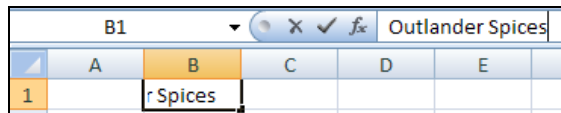


Exhibit 2-4: The formula bar showing B1 being modified

The Clear command

You can use the *Clear* command to remove a cell's contents, formats, comments, or all three. When a cell is cleared, its value is zero. To clear a cell:

- 1 Activate the Home tab (if necessary).
- 2 In the Editing group, click the Clear button, shown in Exhibit 2-5.
- 3 Choose one of the following four options:

Clear All removes the cell contents, as well as any formats and comments.

Clear Formats removes the cell's formats but not the contents.

Clear Contents removes the cell's text or value but not the formats.

Clear Comments removes any comments but not the contents or formats.

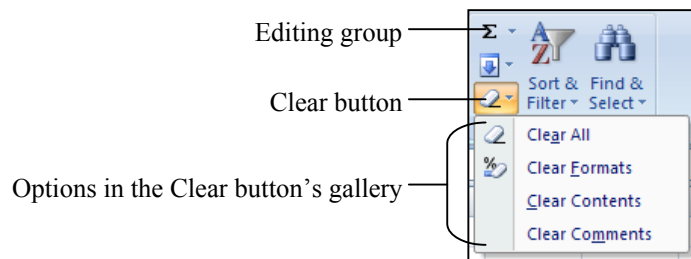
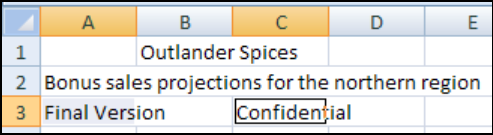
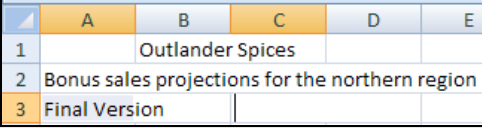


Exhibit 2-5: The options in the Clear button's drop-down menu

It's easy to delete the contents of a cell without using the Clear command. Just select the cell and press Delete (located just above the arrow keys on most keyboards). If multiple cells are selected, pressing Delete will clear the contents of all of them.

Do it!

A-2: Editing text

| Here's how | Here's why |
|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1 In A2, enter Extra sales projections</p> | <p>To add text to the worksheet.</p> |
| <p>2 Select A2</p> <p>Select Extra in the formula bar, as shown</p> | <p>You'll modify the contents of this cell.</p> |
| <p>Type Bonus</p> | <p>To edit the text.</p> |
| <p>3 Press END</p> | <p>To change the text to "Bonus sales projections."</p> |
| <p>Press SPACEBAR</p> | <p>To move the insertion point to the end of the text, where you'll add more text.</p> |
| <p>Type for the northern region</p> | <p>To add a space before the new text.</p> |
| <p>Press ENTER</p> | <p>To add this text.</p> |
| <p>4 Enter Final Version in A3</p> | <p>The text now reads "Bonus sales projections for the northern region."</p> |
| <p>5 Enter Confidential in C3</p> | <p>Type "Final Version" and press Enter.</p> |
| <p>6 Select A3</p> | <p>You'll remove the text from A3 and C3.</p> |
| <p>Press CTRL and select C3</p> |  |
| <p>7 Press BACKSPACE</p> | <p>Holding the Ctrl key while you click the mouse causes both cells to be selected. The outline box surrounds the current cell. Any other cells that have been selected are shaded.</p> |
| <p>Press ESC</p> |  <p>Only the contents of the current cell are cleared. The text in the other selected cell remains.</p> <p>To undo the Backspace action and restore the contents of C3.</p> |

Tell students that they can also press Delete.

8 Click 

(The Clear button is in the Editing group.) To display the Clear menu.

Choose **Clear All**

To clear both contents and formats from the selected cells.

AutoFill

Explanation

When you need to enter a list of numbers, dates, days of the week, or other sequential data, you can use the AutoFill feature to complete the list, as shown in Exhibit 2-6.

The *fill handle* is a small square in the lower-right corner of a selected cell or range. When you point to the fill handle, the pointer changes to a plus sign (+). The fill handle can autofill a range to complete a list or series.

To use AutoFill:

- 1 Select the cell containing the value that starts the list or series.
- 2 Point to the fill handle until the pointer changes to a + symbol.
- 3 Drag the fill handle over the adjacent cells that you want to fill.

For numbers or dates, you can select two cells with a desired range, and AutoFill will continue with the same increments. For example, you could use this technique to fill a range by 10s or to fill a range with dates a week apart.

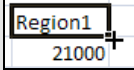
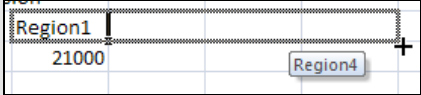



| | A | B | C | D | E |
|----|-------------------------------------------------|------------------|---------|---------|---------|
| 1 | | Outlander Spices | | | |
| 2 | Bonus sales projections for the northern region | | | | |
| 3 | Final Version | | | | |
| 4 | Month | Region1 | Region2 | Region3 | Region4 |
| 5 | January | 21000 | | | |
| 6 | February | | | | |
| 7 | March | | | | |
| 8 | April | | | | |
| 9 | May | | | | |
| 10 | June | | | | |
| 11 | July | | | | |
| 12 | August | | | | |
| 13 | September | | | | |
| 14 | October | | | | |
| 15 | November | | | | |
| 16 | December | | | | |
| 17 | | | | | |

Exhibit 2-6: Using AutoFill to insert a list of months

Do it!

A-3: Using AutoFill to fill a series

| Here's how | Here's why |
|---------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 Select B4 | It contains the text "Region1." You'll use AutoFill to add more headings. |
| 2 Point to the fill handle, as shown |  <p>The pointer takes the shape of a plus sign (+).</p> |
| 3 Press and hold the mouse button Drag the fill handle to the right to E4, as shown |  <p>As you drag, a shaded outline appears around the range you're filling. As you drag past each cell, a screen tip displays what will be entered in each cell.</p> |
| Release the mouse button | To finish autofilling the cells for the remaining regions. |
| 4 Select A5 Autofill to cell A16 | You'll autofill the remaining months in the year. (Drag the fill handle to A16.) The cells are populated with the months of the year, as shown in Exhibit 2-6. |
| 5 Click  and choose Close | To close the workbook. A message box appears, prompting you to save the workbook. |
| 6 Click No | To close the workbook without saving it. |

Topic B: Entering and editing formulas

Explanation



Formulas perform numeric calculations, such as adding, multiplying, and averaging. All formulas in Excel begin with the equal sign (=). A formula can refer to a value, a cell address, or another formula. *Functions* are predefined formulas that perform string operations or calculations, which can be simple or complex. Many formulas contain *operators*—characters that indicate the type of arithmetic operation the formula will perform.

The following table shows the types of arithmetic operators you can use:



| Operator | Used for... | Example |
|----------|----------------|--------------------------------------------------------------------|
| + | Addition | =A7+A9 |
| - | Subtraction | =A7-A9 |
| * | Multiplication | =A7*A9 |
| / | Division | =A7/A9 |
| % | Percentages | =50% |
| ^ | Exponents | =5^3 means 5 raised to the third power (5 ³), or 5*5*5 |

Entering formulas



To enter a formula, select the cell where you want the result to appear. Then type the formula and press Enter. For example, if there are numbers in A2 and A3, and you want to add them and show the result in A4, you select A4, type =A2+A3, and press Enter. The result appears in A4. If A4 is the active cell, the formula appears in the formula bar (as shown in Exhibit 2-7).

Formulas are based on the values contained in the cells in your worksheet. If you change the cells that a formula refers to, the result of the formula will change.

The screenshot shows an Excel worksheet with the following data:


| | A | B | C | D |
|---|-----|---|---|---|
| 1 | | | | |
| 2 | 44 | | | |
| 3 | 66 | | | |
| 4 | 110 | | | |
| 5 | | | | |

The formula bar at the top shows the formula =A2+A3, and the active cell A4 displays the result 110.


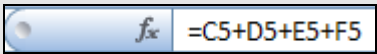

Exhibit 2-7: A sample formula, showing the result in the active cell and the formula in the formula bar

Do it!

B-1: Entering a formula by typing

 *Tell students not to press Enter after typing the equal sign.*

Tell students that the decimal will automatically be placed correctly.

| Here's how | Here's why |
|--------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 Open Sales | Click the Office Button and choose Open. Navigate to the current unit folder, and double-click Sales in the Open dialog box. |
| 2 Select G5 Type = | To activate the cell where you'll enter a formula. To indicate that you're about to enter a formula rather than text or a value. |
| 3 Type C5+D5+E5+F5 Press  | This formula adds the values of the quarterly bonus sales for Kendra James; these values are in cells C5 through F5. The result of the formula is \$23,442.00. |
| 4 Select G5 |  The formula bar shows the formula, not the result. |
| 5 Select F5 Type 1000 Press  | You'll change one of the cells in the formula. The result of the formula in G5 automatically changes to \$16,158.00. |

Using the mouse to enter cell references in formulas

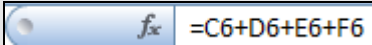

Explanation

You can use the mouse to enter cell references for a formula. To do so:

- 1 Select the cell where you want to enter the formula.
- 2 Type = (to begin a formula).
- 3 Click the cell for which you want to enter a reference.
- 4 Type the operator you want.
- 5 Repeat Steps 3 and 4 until you've created the formula you want.
- 6 Press Enter.

Do it!

B-2: Entering cell references with the mouse

| Here's how | Here's why |
|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 Select G6 | You'll enter a formula to calculate the total quarterly bonus sales for Pamela Carter. |
| Type = | To begin the formula. |
| 2 Select C6 | To enter this cell's address in the formula you're creating. |
| Type + | To continue to build the formula. |
| 3 Select D6 | To enter D6 in the formula. |
| 4 Complete the formula as shown, using the mouse to enter the cells |  |
| Press  | To enter the formula. G6 now contains the total quarterly bonus sales for Pamela Carter. G9 contains \$40,913.00, which is the total of the values in G5 and G6. |
| 5 In G7, enter a formula to calculate the total bonus sales for Julie George | Use any method you like. When you are finished, G7 should contain \$23,765. |

Editing formulas



Explanation

Formulas can be edited to adapt to changes in the worksheet or to correct a mistake. Edit a formula as you would edit any other cell. Simply double-click the cell and enter the correct formula. You can also edit a formula by using the formula bar:

- 1 Select the cell containing the formula.
- 2 Edit the formula in the formula bar.
- 3 Press Enter.

Do it!

B-3: Editing a formula

| Here's how | Here's why |
|------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| 1 Observe G9 | The total displayed in this cell is incorrect. |
| 2 Select G9 | You'll edit the formula in this cell. |
| Observe the formula bar | The formula bar shows =G5+G6. This formula doesn't include the total for Julie George. |
| 3 Place the insertion point at the end of the formula |  |
| 4 Type +G7 | To add the G7 cell value to the formula. |
| Press  | |
| 5 Observe G9 | G9 now shows the correct value, \$64,678.00. |

Topic C: Working with pictures

This topic covers the following Microsoft Certified Applications Specialist exam objective for Excel 2007.

| # | Objective |
|--------------|----------------------------------------------|
| 4.4.1 | Insert and modify pictures from files |
| | Insert pictures |
| | Modify pictures |

Using pictures in worksheets

Explanation

You can insert pictures and other graphics files to illustrate and enhance worksheets and printed reports, as shown in Exhibit 2-8. Excel supports dozens of industry-standard picture file formats, including .bmp, .jpg, .eps, and .tif.




| | A | B | C | D | E | F | G |
|---|---------------|-----------------------------------------------------------------------------------|-------------|-------------|-------------|-------------|--------------|
| 1 | |  | | | | | |
| 2 | | Bonus sales in the northern region | | | | | |
| 3 | | | | | | | |
| 4 | Name | Emp # | Qtr1 | Qtr2 | Qtr3 | Qtr4 | Total |
| 5 | Kendra James | 16 | \$6,354.00 | \$4,846.00 | \$3,958.00 | \$8,284.00 | \$23,442.00 |
| 6 | Pamela Carter | 25 | \$8,484.00 | \$5,858.00 | \$5,858.00 | \$4,555.00 | \$24,755.00 |
| 7 | Julie George | 29 | \$9,595.00 | \$5,859.00 | \$4,879.00 | \$3,432.00 | \$23,765.00 |

Exhibit 2-8: A worksheet with a picture

Adding pictures

To place a picture in a worksheet:

- 1 Activate the Insert tab.
- 2 In the Illustrations group, click the Insert Picture From File button. The Insert Picture dialog box appears.
- 3 Navigate to the picture's location, select the file, and click Insert. The picture appears in the worksheet, and the Picture Tools tab is activated.
- 4 Use the tools on the Picture Tools tab to modify the picture as necessary.



Objective 4.4.1

Moving pictures

When you insert a picture into a worksheet, Excel places it in the approximate middle of your screen. You can move a picture so that it appears and prints in a specific place in a worksheet. To move a picture:

- 1 Point anywhere within the picture. The pointer changes to a four-headed arrow.
- 2 Drag the picture. As you drag, the picture remains stationary, but a shadow of it moves with the pointer, as shown in Exhibit 2-9.
- 3 Position the outline box where you want the picture to be.
- 4 Release the mouse button. The picture moves to the location of the outline box.

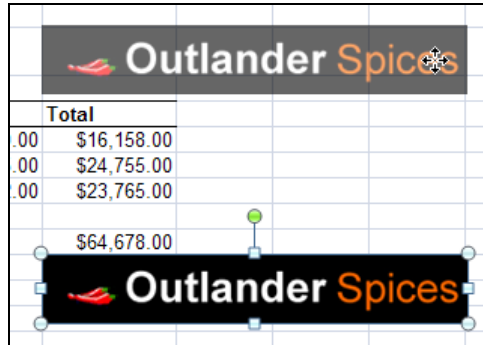


Exhibit 2-9: A gray outline box indicates where the picture will be moved to

Resizing pictures

There are several ways to resize a picture:

Objective 4.4.1

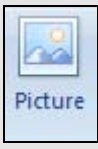
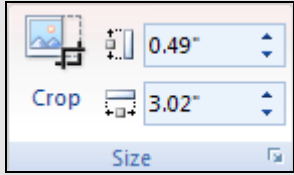

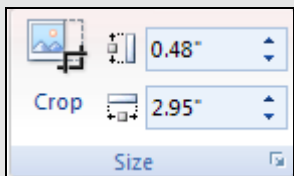
Select the picture; this activates the Picture Tools tab. In the Size group, enter new values in the Height and Width boxes.

In the Size group, click the Dialog Box Launcher button (in the lower-right corner of the group). The Size and Properties dialog box appears with the Size tab activated. Under Size and Rotate, or under Scale, resize the picture.

Point to one of the sizing handles at the corners of the picture frame. The pointer changes to a double-headed arrow. Drag a sizing handle to resize the picture.

To resize a picture proportionally, click and hold Shift before dragging the sizing handles. This forces the picture's height and width to resize at the same rate.

Do it! C-1: Inserting and modifying a picture

| Here's how | Here's why |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Objective 4.4.1</p> <p>1 Activate the Insert tab</p> <p>2 Click </p> | <p>You'll insert a logo picture in this worksheet.</p> <p>(The Insert Picture From File button is in the Illustrations group.) The Insert Picture dialog box appears.</p> |
| <p>Help students navigate to the correct folder.</p> <p>Navigate to the current unit folder</p> <p>Select logo</p> <p>Click Insert</p> | <p>From the current unit folder.</p> <p>To insert the picture. The logo appears in the middle of the worksheet, and the Picture Tools tab is activated.</p> |
| <p>Tell students they can also double-click the file to insert it.</p> <p>3 In the Size group, observe the picture dimensions</p> |  <p>The picture is 0.49 inches tall and 3.02 inches wide.</p> |
| <p>4 Point to the handle in the lower-right corner of the picture, as shown</p> <p>Press and hold SHIFT</p> <p>Drag up and to the left slightly</p> |  <p>The pointer changes to a double-headed arrow.</p> <p>To proportionally resize the picture.</p> |
| <p>5 Observe the picture dimensions</p> <p>Resize the picture proportionally until it is approximately the height of three rows</p> <p>Tell students that the picture size does not need to be exact.</p> | <p>In the Size group.</p>  <p>Press Shift and drag the picture handle in or out to get the desired size.</p> |

| | |
|------------------------------------------------------------------------------|---------------------------------------------------------------------|
| 6 Point anywhere inside the picture | The pointer changes to a four-headed arrow. |
| Drag up and to the left | A shadow of the picture moves with the pointer. |
| Move the upper-left corner of the outline box to the upper-left corner of B1 | Where the words “Outlander Spices” appear. |
| 7 Click anywhere in the worksheet | To deselect the picture. The worksheet should resemble Exhibit 2-8. |

Topic D: Saving and updating workbooks

This topic covers the following Microsoft Certified Applications Specialist exam objective for Excel 2007.

| # | Objective |
|--------------|------------------------------------------------------------------------------------------------------------|
| 5.4.1 | Save workbooks for use in a previous version of Excel |
| | Using Compatibility Checker, determine which feature of a workbook is incompatible with a previous version |
| | Save a specific feature to the Excel 97-2003 format |

Saving workbooks

Explanation

Saving a workbook stores your data for future use. Every time you change anything in a worksheet, you'll need to save the worksheet (update it) if you want to keep your changes.

Saving a file for the first time

The first time you save a workbook, you need to assign a file name and location for the file. You must also choose a file format. Some typical file formats include:

| Format | Extension | Description |
|--------------------------------|-----------|--------------------------------------------------------------------------------------|
| Microsoft Excel Workbook | .xlsx | This is the default workbook format for Excel 2007. |
| XML Data | .xml | The XML format is useful for data that must be transferred between applications. |
| Text | .txt | Files saved in plain text format can be opened by any word processor or text editor. |
| Comma Separated Values | .csv | Data fields in a CSV file are delimited by commas. |
| Excel 97 - Excel 2003 Workbook | .xls | This is the workbook format that can be opened by earlier versions of Excel. |
| Web Page | .html | This format enables the workbook to be published as a Web page. |



To save a workbook for the first time:

- 1 Click the Office Button and choose Save, or click the Save button on the Quick Access toolbar. The Save As dialog box opens (as shown in Exhibit 2-10) because this file does not yet have a file name.
- 2 From the Save in list, select the drive and folder where you want to save the workbook.
- 3 In the File name box, enter a name for the workbook.
- 4 From the Save as type list, select the file format in which you want to save the workbook.
- 5 Click Save.

Creating folders

If you don't want to save your workbook in an existing folder, use the Save As dialog box to create a new folder. Here's how:

- 1 From the Save in list, select the location where you want to create the folder.
- 2 In the Save As dialog box, click the Create New Folder button to open the New Folder dialog box.
- 3 In the Name box of the New Folder dialog box, type a name for the folder.
- 4 Click OK. The new folder appears in the Save in list.

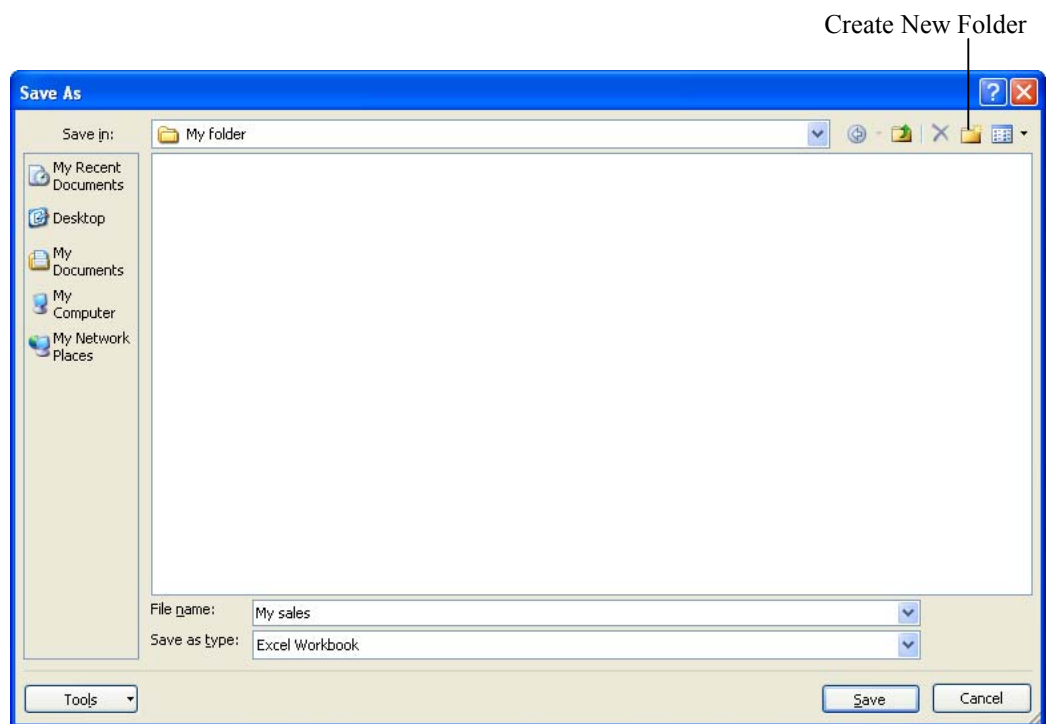




Exhibit 2-10: The Save As dialog box

Do it!






D-1: Saving a workbook

Explain that you can open one file "on top of" another file, without closing the previous file.

TIPS  Tell students they can also press Enter after typing the file name.

 Guide students to click the bottom X to close the file, not the top X.

Tell students they can also press Alt+4.

| Here's how | Here's why |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1 Open a new blank workbook</p> <p>2 Click </p> <p>Observe the Save in box</p> | <p>Click the Office Button and choose New, or press Ctrl+N.</p> <p>(The Save button is on the Quick Access toolbar, near the top-left corner of the workbook.) To save the workbook.</p> <p>The last folder you accessed is active and, unless changed, will be the location for your file. You can select various special folders from the left side of the dialog box.</p> |
| <p>In the File name box, enter My saved file</p> <p>Click Save</p> <p>3 Observe the title bar</p> | <p>To save the file with the name and location you specified.</p> <div data-bbox="857 844 1243 894" style="border: 1px solid black; padding: 2px;"> <p>My saved file - Microsoft Excel</p> </div> <p>The new file name is displayed.</p> |
| <p>Click </p> <p>4 Click  and choose Save As</p> | <p>(The Close button is in the upper-right corner of the file window.) To close the file.</p> <p>To open the Save As dialog box. You'll save the Sales file with a different name and in a different location.</p> |
| <p>5 Click </p> <p>In the Name box, type My folder</p> <p>Click OK</p> | <p>(The Create New Folder button is on the toolbar in the Save As dialog box.) To open the New Folder dialog box.</p> <p>To name the new folder.</p> <div data-bbox="857 1411 1185 1465" style="border: 1px solid black; padding: 2px;"> <p>Save in:  My folder</p> </div> |
| <p>6 In the File name box, type My Sales</p> <p>Click Save</p> | <p>The name of the folder you created appears in the Save in box.</p> <p>This is the new name for the file.</p> <p>To save the file.</p> |
| <p>7 Observe the title bar</p> | <p>It displays the workbook's name.</p> |


Updating workbooks

Explanation

Each time you save a workbook, Microsoft Excel updates the workbook file with the latest changes. You should update your workbooks frequently so that changes aren't lost. To save changes in a workbook, click the Save button on the Quick Access toolbar or press Ctrl+S.

Do it!

D-2: Changing and updating a workbook

| Here's how | Here's why |
|-------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| 1 In A10, enter Annual target | To add text to the worksheet. |
| 2 Click  | To update the workbook with the newly added text. |
| 3 Open the Save As dialog box | (Click the Office Button and choose Save As.) You'll save a copy of the workbook with a different name. |
| 4 In the File name box, type My annual target | To specify a different name for the workbook. |
| Click Save | To save the workbook. |
| 5 Observe the title bar | The name of the current workbook, "Annual target," now appears in the title bar. |
| 6 Close the workbook | Click the Office Button and choose Close. |

Previous versions of Excel

Explanation

Workbooks created in Excel 2007 are not compatible with previous versions of Excel. You can, however, save a workbook created in Excel 2007 as an Excel 97-2003 workbook to enable people with earlier versions to open and use it.

To save a workbook in the Excel 97-2003 Workbook format, click the Office Button and choose Save As, Excel 97-2003 Workbook. The Save As dialog box opens, with Excel 97-2003 Workbook selected in the “Save as file type” box. Enter a name for the workbook, if necessary, and click Save. In the Save as type list, select Excel 97-2003 Workbook.

The Compatibility Checker

Not all features present in Excel 2007 workbooks can be saved in the 97-2003 workbook format. You can check which features are incompatible with earlier versions of Excel by running the Compatibility Checker, shown in Exhibit 2-11.

Objective 5.4.1

There are two way to use the Compatibility Checker to determine which Excel 2007 features are incompatible with earlier versions of Excel:

Click the Office Button and choose Prepare, Run Compatibility Checker.

Click the Office Button and choose Save As, Excel 97-2003 Workbook to open the Save As dialog box. Click Save. If the workbook has any features that cannot be saved in the file format for the earlier version of Excel, the Compatibility Checker will launch, notifying you of any problems.

If it's possible to correct the feature, the Compatibility Checker will display the Fix option. You can choose whether to fix the issue or leave it as is. If you leave the feature as is, however, it will not be displayed properly when the workbook is opened in the earlier version of Excel.

You can configure the Compatibility Checker to run automatically whenever you update the workbook. Just check “Check compatibility when saving this workbook” in the Compatibility Checker dialog box.

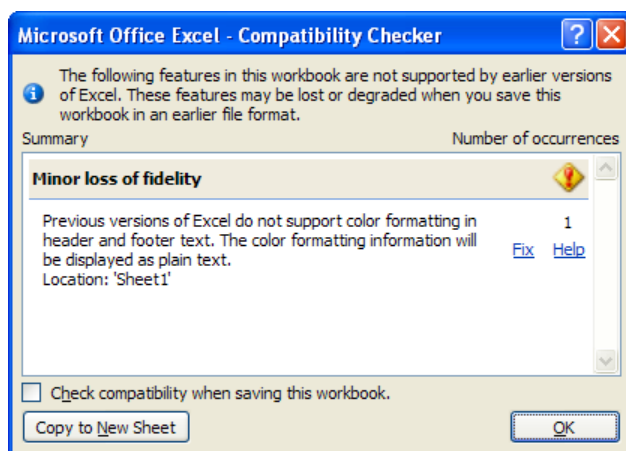


Exhibit 2-11: The Compatibility Checker



Do it!

D-3: Using the Compatibility Checker

Help students navigate to the current unit folder.

Objective 5.4.1

Objective 5.4.1

| Here's how | Here's why |
|-------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 Open 97 Sales | In the current unit folder. You'll save this workbook in the Excel 97-2003 Workbook format. |
| 2 Observe the worksheet | The header contains the current date and the word "Confidential" formatted in blue. |
| 3 Click  | |
| Choose Prepare, Run Compatibility Checker | To open the Microsoft Office Excel - Compatibility Checker dialog box. A message appears, stating that color formatting in header and footer text is not supported in previous versions of Excel. |
| 4 Click Fix | To change the header text to black and correct the incompatibility. |
| 5 Click OK | To close the dialog box and apply the change. The text is reformatted. |
| Click  | |
| Choose Save As, Excel 97-2003 Workbook | To open the Save As dialog box. Excel 97-2003 Workbook is selected in the Save as type list. |
| 6 Edit the file name to read My 97 Sales | |
| Click Save | To save the file in the new format with a new name. |
| Close the workbook | |

Unit summary: Entering and editing data

- Topic A** In this topic, you created a workbook and learned how to enter and edit **text and values** in a worksheet. You learned that, by default, text is left-aligned and values are right-aligned. You also learned how to edit a cell by clicking the **formula bar** and by double-clicking a cell. Then, you learned how to **autofill** a series.
- Topic B** In this topic, you learned how to use **formulas** to perform calculations on values in a worksheet. You learned how to enter formulas and how to use an **operator** to combine values. You also learned how to use the mouse to enter **cell references** and how to edit formulas.
- Topic C** In this topic, you learned how to insert a picture into a worksheet. You also learned how to **resize** a picture proportionally and how to move a picture in the worksheet.
- Topic D** In this topic, you learned how to **save** and **update** a workbook to prevent data loss. In addition, you learned how to save a file with a different name and in a different location. Finally, you learned how to save workbooks in an earlier version of Excel, and how to run the **Compatibility Checker** to find features that might not be compatible with earlier versions.

Independent practice activity

In this activity, you'll create a workbook, enter data, create formulas, and save the workbook in both 2007 and 97-2003 formats.

- 1 Create a new workbook.
- 2 Enter data beginning in row 4, as shown in Exhibit 2-12.
- 3 In column E, enter formulas to calculate the total costs for each item. (*Hint:* The multiplication operator is *.) Compare your results to Exhibit 2-13.
- 4 Insert the picture file Outlander into the worksheet.
- 5 Resize the picture and position it as shown in Exhibit 2-13. (*Hint:* Resize the picture proportionally until it is approximately 1.65 inches wide.)
- 6 Save the workbook as **My total costs** in the current unit folder.
- 7 Save the workbook as an Excel 97-2003 Workbook, with the name **My total costs 97**.
- 8 Close the workbook.

| | A | B | C | D | E |
|---|-------|---------|----------|-----------|------------|
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | Code | Desc | Quantity | Cost/Item | Total cost |
| 5 | | | | | |
| 6 | 10001 | Garlic | 16 | 2.5 | |
| 7 | 12001 | Cayenne | 7 | 4 | |
| 8 | 13003 | Dill | 5 | 6 | |
| 9 | | | | | |

Exhibit 2-12: The data to be entered in Step 2

| | A | B | C | D | E |
|---|------------------|---------|----------|-----------|------------|
| 1 | Outlander | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | Code | Desc | Quantity | Cost/Item | Total cost |
| 5 | | | | | |
| 6 | 10001 | Garlic | 16 | 2.5 | 40 |
| 7 | 12001 | Cayenne | 7 | 4 | 28 |
| 8 | 13003 | Dill | 5 | 6 | 30 |

Exhibit 2-13: The formula results after Step 4

Review questions

- 1 Name two basic types of data that can be entered in a worksheet.
You can enter text or values. Values can be numbers, formulas, or functions.
- 2 How can you clear a cell's text or value but not its formatting?
On the Home tab, in the Editing group, click the Clear button and choose Clear Contents.
- 3 All formulas must begin with what symbol?
All formulas begin with the equal sign (=).
- 4 How do you resize a picture so that its dimensions remain proportional?
Press Shift and drag one of the resizing handles on the picture.
- 5 What is the default file-name extension for workbooks saved in Excel 2007?
The default workbook file-name extension is .xlsx.

