

# **Excel 2010**

## **Level 2C – Class Notes**

*Excel 2010 Online Training*

*Presented by*



\*There is a pre-requisite for this course, please read it on the next page and be sure you meet the criteria.

## Pre-requisite for this course

The time requirements for this class mean that the instructor will be unable to review material covered in previous classes. Learners may wish to take an earlier level class before participating in this one if they do not meet the following criteria:

Learners should:

- **Know how to use the fill handle/auto-fill**
- Know how to navigate an excel spreadsheet & use basic selection techniques
- Know how to copy, cut, and paste
- Understand basic excel/spreadsheet terminology

## Course Objectives

- Working with styles and themes
- Naming ranges/managing names
- Cell comments
- Auditing/troubleshooting formulas
- Workbook/worksheet protection
- Working with templates

## Working with Styles and Themes

Open TotalSales.xlsx

- Styles – simplify formatting, make it consistent across documents
  - Built-in styles (in the gallery)
  - Create your own styles
    - Cell styles/New style
- Themes

## Naming Ranges-Cells/Managing Names

Open TeamSales.xlsx

- Creating & Using Names
  - Select the cell or range you want to name
  - Enter the name in the name box (left of the formula bar)
  - Can use the cell/range name in formulas rather than the range notation (ex. A2:F15)
- Create from Selection
  - Select a range of cells that have a label name (like a row or column in a table.) Be sure to include the label (in the top row or left column!)
  - On the Formulas tab, in the Defined Names group, click on 'Create from Selection'
- Managing Names
  - Formulas tab, Defined Names, click on the name manager to see the names defined in the current workbook.
  - You can edit and/or delete names from within the name manager

## Comments

Switch back to TotalSales.xlsx

- Comments can be inserted into a cell by right-clicking it and choosing 'Insert Comment'
- Comments are generally denoted by a red triangle in the corner of the cell, and the whole comment shows on hover.
- Comments can be shown, hidden, printed as well as edited or deleted as needed.

## Auditing (Troubleshooting) Formulas

Still working with TotalSales.xlsx

- Cells with formula errors will display a green triangle in the corner of the cell.
  - Hover over the cell and click on the pop up menu to get options on handling the error. If you don't know what the error message means, you can click on help for that error.
- Display the formulas
  - Press ctrl + ` to toggle the formula display on or off
  - Or go to the Formulas tab and click on 'show formulas'
- Other troubleshooting methods
  - Trace precedents or Trace dependents
  - Evaluate the formula
  - Error Checking/Trace Error

## Protection

Leave TotalSales.xlsx open

- Protecting the workbook
  - The entire workbook may be protected by placing a password on it so that it cannot even be opened without knowing the password
    - File-Save As-Click on Tools near the bottom of that window, choose General Options.
      - Enter a password to open and/or enter a password to modify
        - If you enter a password to open, the file cannot be opened unless the password is entered.
        - If you enter a password to modify, the file will be opened in Read-Only mode and changes can be made, but the file will have to be saved under another name for the changes to take effect.
      - Click Save (You may be asked to overwrite the file, say Yes)
  - The entire workbook can be protected without using passwords to open them
    - Review Tab – Protect Workbook
      - Protect the Windows
        - Users can open the file, change/edit things, but cannot resize the windows or close it using the 'x' in the right upper corner.
        - Ensures that the windows are the same size and position each time the workbook is opened.
      - Protect the Structure
        - Protects the worksheet structure. Worksheets cannot be deleted, moved, copied, renamed, hidden, un-hidden, inserted, or tab colors changed.

- Protecting the Worksheets
  - Review Tab-Protect worksheet
    - Protecting the worksheet (with or without a password) means that none of the content can be changed on the worksheet.
    - Users may click into cells (and see formulas in the formula bar) but they may not edit anything.
    - Printing is allowed, as is deleting, hiding, un-hiding, renaming, etc. worksheets
    - To unprotect the sheet, go to the Review Tab and choose 'Unprotect sheet' (If a password is needed, this is where it will be asked for)
- Protecting Cells
  - If only certain cells need to be protected, and others need to be open so people can enter data or edit them, you have to start by unprotecting the worksheet (or make sure it's unprotected).
  - Select the cells that you want to be Open, or unlocked
  - Right-click the cell range and choose 'Format Cells'
  - Go to the Protection tab and clear the checkmark from in front of 'Locked'
  - When you're back to the worksheet, go to protect the worksheet.
  - When the worksheet is protected, the only cells that can be edited are the ones you unlocked.

## Templates

- Using built-in templates
  - Click on the File Tab, choose New.
    - Recent Templates – templates used recently
    - Sample Templates – templates that are installed with Excel
    - My Templates – templates that the user has downloaded or created
    - New from Existing – Users can create templates from existing workbooks or templates.
    - Templates from Office. Com – Templates created by users-free to download and use (not Microsoft created!)
- Creating a template
  - Create the workbook
  - Save As Type Excel template
    - File will be stored in the template folder and can be accessed in the My Templates section.



## Follow-up Classes

- Excel 2010 – Level 3A
  - Advanced functions (logical, math, statistical, financial)
  - Lookup functions
  - Displaying formulas
- Excel 2010 – Level 3B
  - Creating data tables
  - Validating cell entries
  - Exploring database functions
  - Exporting & importing txt files
  - Querying external databases
  - Using Goal Seek, Solver, and Scenarios