



Excel (spreadsheets) for Practical Uses

ICL Fall 2024 Class 5

Read Gilgen

# Excel #5

- Questions
- Course website: [gilgens.org/icl/excel/](http://gilgens.org/icl/excel/)

# Today's Topics

- Excel Templates
- Formatting Review and More
- Quick Charts
- Import/Export Data
- Mail Merge w/Word
- Functions

# Excel Templates

New



Home



New



Open

Blank workbook

Family tree generator

Basic mileage and expens...

Christmas card list

Address and phone list

Home inventory

Inventory list

Home construction budget

Simple invoice

Any year custom calendar

Search for online templates



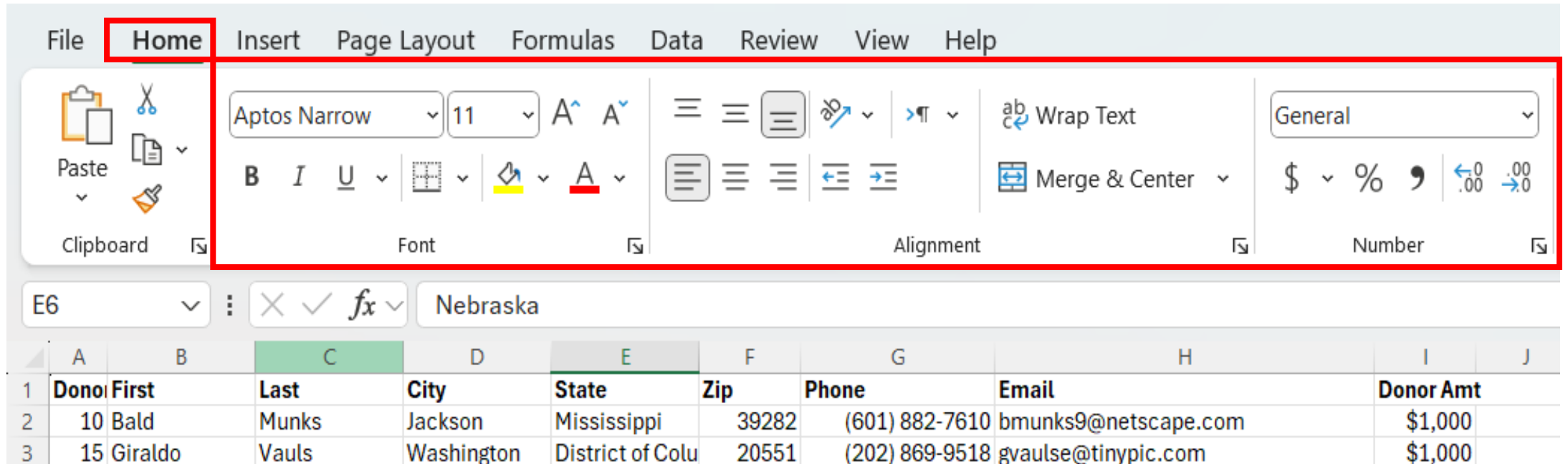
Suggested searches: Business Personal Planners and Trackers Lists Budgets Charts Calendars

# Let's Do This!

- Open **XL5-Format** to practice the following
- Feel free to experiment with various options

# More Formatting

- Select Cells/Columns/Rows to be formatted
- Many options are on the “Home” menu



The screenshot displays the Microsoft Excel interface with the Home ribbon selected. The ribbon is divided into several groups: Clipboard, Font, Alignment, and Number. The Font group includes options for font face (Aptos Narrow), size (11), bold (B), italic (I), underline (U), text color (A), and background color. The Alignment group includes options for text alignment (left, center, right, justified), orientation (vertical), and wrap text. The Number group includes options for number format (General, currency, percentage, etc.), decimal places, and thousands separator. The spreadsheet below shows a table with columns for Donor information and Donor Amt.

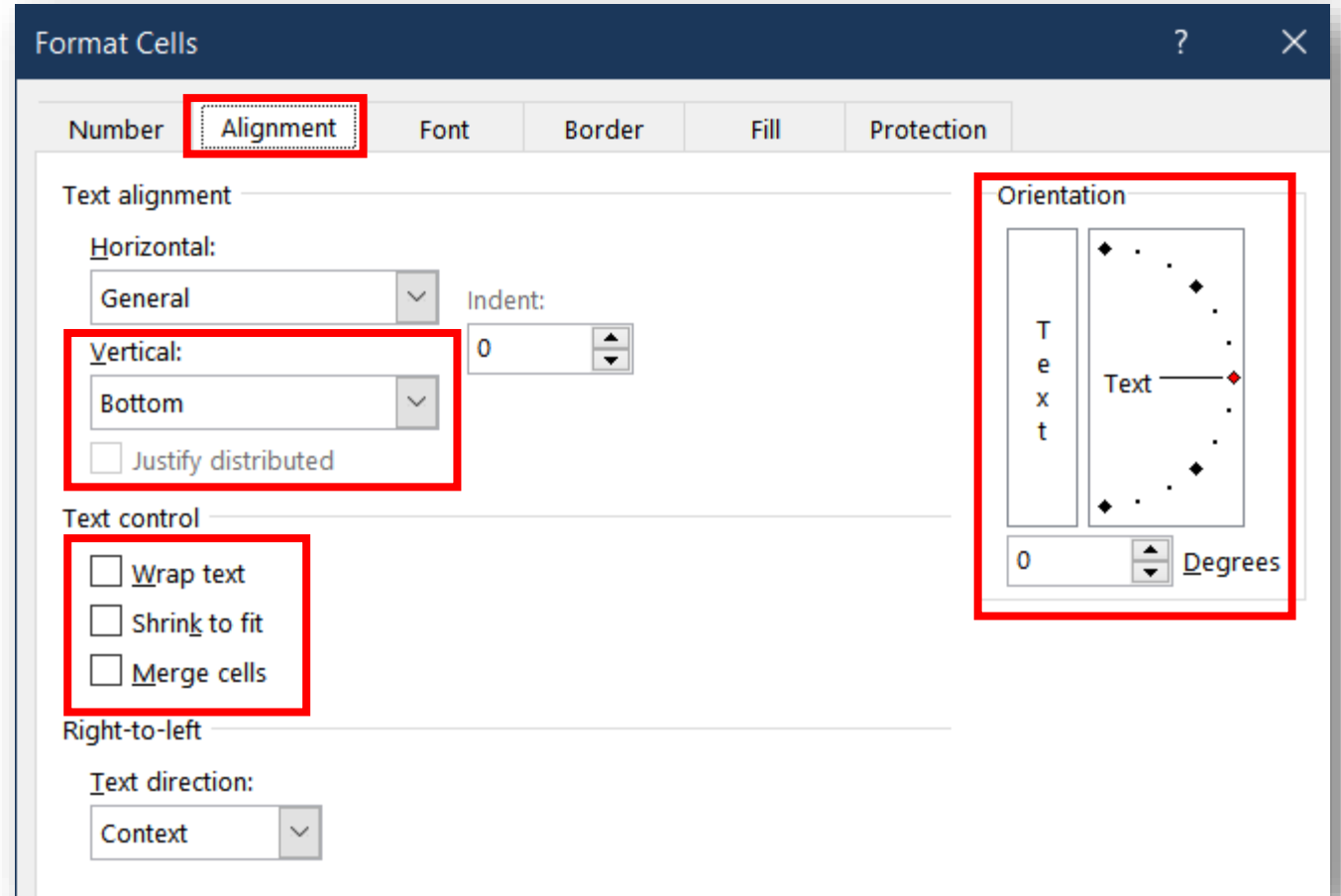
	A	B	C	D	E	F	G	H	I	J
1	Donor	First	Last	City	State	Zip	Phone	Email	Donor Amt	
2	10	Bald	Munks	Jackson	Mississippi	39282	(601) 882-7610	bmunks9@netscape.com	\$1,000	
3	15	Giraldo	Vauls	Washington	District of Colu	20551	(202) 869-9518	gvaulse@tinypic.com	\$1,000	

# More Formatting

- Right-click/Format Cells for detailed dialog boxes
  - We've already reviewed Number
  - Alignment
  - Protect

# More Formatting - Alignment

- Vertical alignment
- Text Orientation
- Wrap text
- Merge selected cells





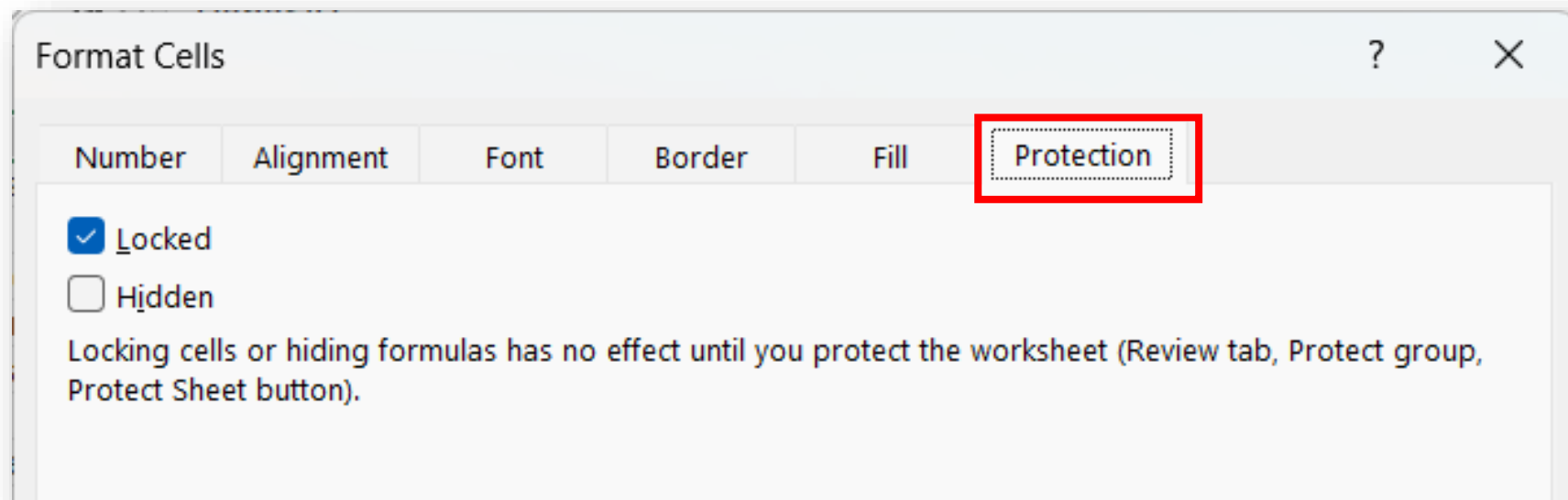
# More Formatting - Borders

- Default: no borders
- More borders:
  - Fine tune where they appear
  - Find tune what style/color
- Use buttons to preview

The selected border style can be applied by clicking the presets, preview diagram or the buttons above.

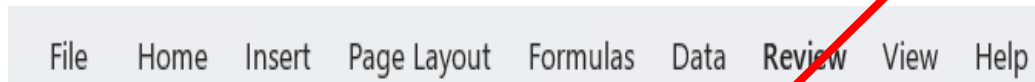
# Protecting Cells

- Locked
  - Protects against accidental changes to complicated formulas or static values
- Hidden
  - Hides content completely (cell and formula bar)



# Protecting Worksheet

- Review Menu

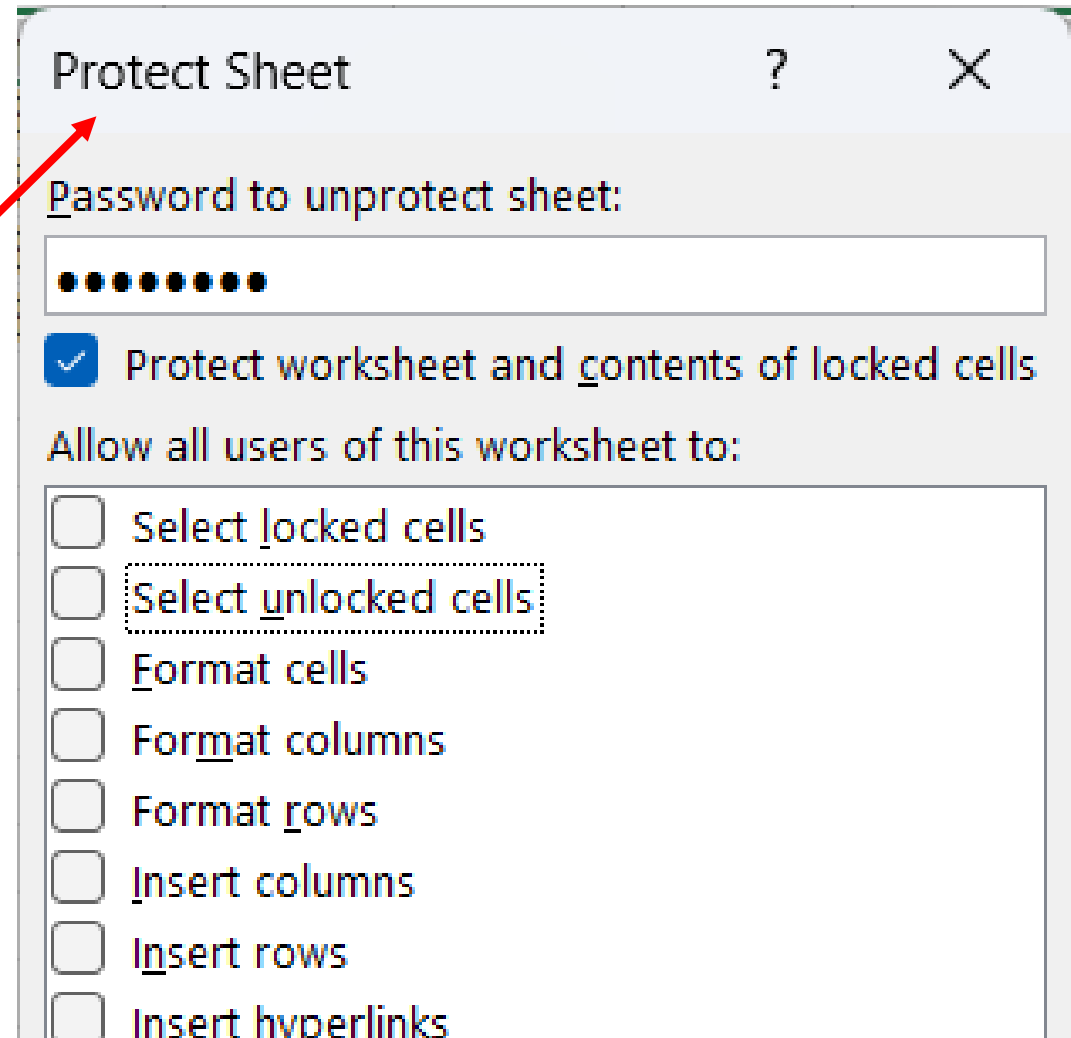


- Protect contents of locked or hidden cells



- Password protect entire worksheet

- *Note: if you lock and then want to make changes, you'll have to unlock the sheet first.*



# More Formatting

- Resize multiple columns/rows (easiest to select/drag)
- Equal width/height for all selected columns/rows

Note text orientation

	A	B	C
1	Donor ID	First	Last
2	10	Bald	Munks
3	15	Giraldo	Vauls
4	17	Currey	Sisland
5	24	Dolley	Gauler
6	6	Geoffrey	Grasha
7	19	Carmine	Tuffin
8	23	Danielle	Cleaveland

# Resize Example

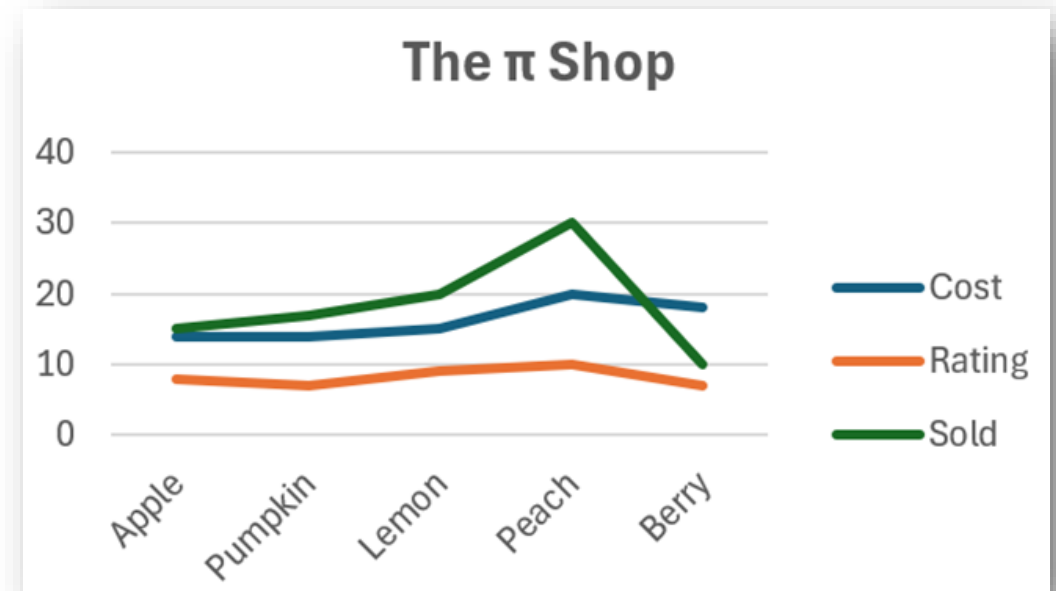
- Formulas to populate dates
- Align top and left

	A	B	C
1	Monthly Calendar		
2	1	=A2+1	=B2+1
3	=A2+7	=A3+1	=B3+1

	A	B	C	D	E	F	G
1	Monthly Calendar						
2	1	2	3	4	5	6	7
3	8	9	10	11	12	13	14
4	15	16	17	18	19	20	21
5	22	23	24	25	26	27	28
6	29	30	31				

# Quick Charts

- Visually show data
- Chart based on/linked to spreadsheet data
- Chart changes as data changes
- Chart can be copied/pasted
  - With links (spreadsheet must be available)
  - Without links (as image)



# Charts

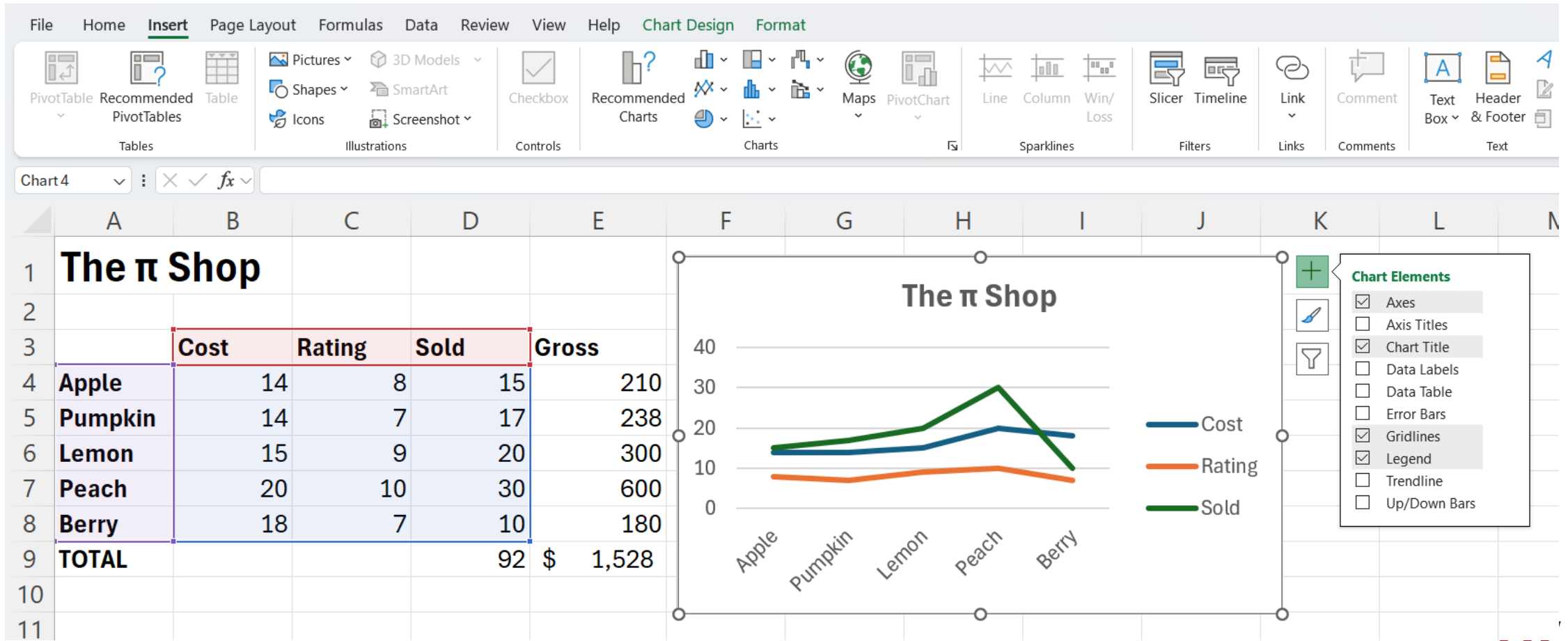
- Select Data
  - Include data labels
- Select Chart type
  - Insert Menu
  - Choose an appropriate type to illustrate the interpretation of the data

The screenshot shows the Microsoft Excel interface. The 'Insert' tab is selected in the ribbon, and the 'Charts' group is highlighted with a red box. Below the ribbon, a data table is visible, with the 'Cost', 'Rating', and 'Sold' columns highlighted by a red box. The table is titled 'The π Shop' and contains the following data:

	Cost	Rating	Sold	Gross	
1	<b>The π Shop</b>				
2					
3					
4	Apple	14	8	15	210
5	Pumpkin	14	7	17	238
6	Lemon	15	9	20	300
7	Peach	20	10	30	600
8	Berry	18	7	10	180
9	TOTAL			92	\$ 1,528
10					

# Charts

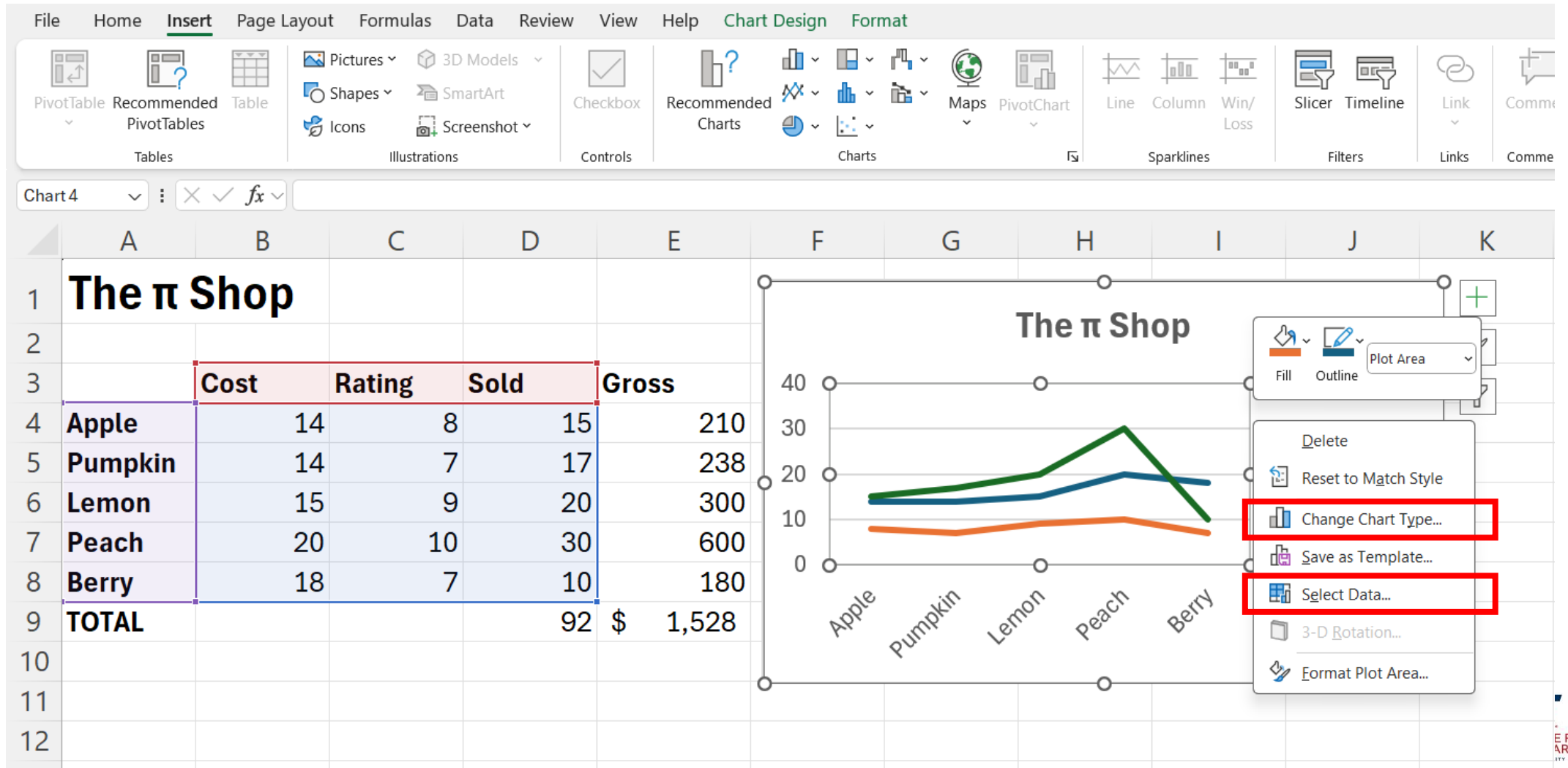
- Modify Chart Elements





# Charts

- Modify Chart Type/Data



# Let's Do This!

- Open **XL5-Chart** to practice
- Create a quick chart  
(see completed chart under the “Chart” Sheet Tab)
- Experiment with changing chart options
- Ask questions if you have them

# Import/Export Data

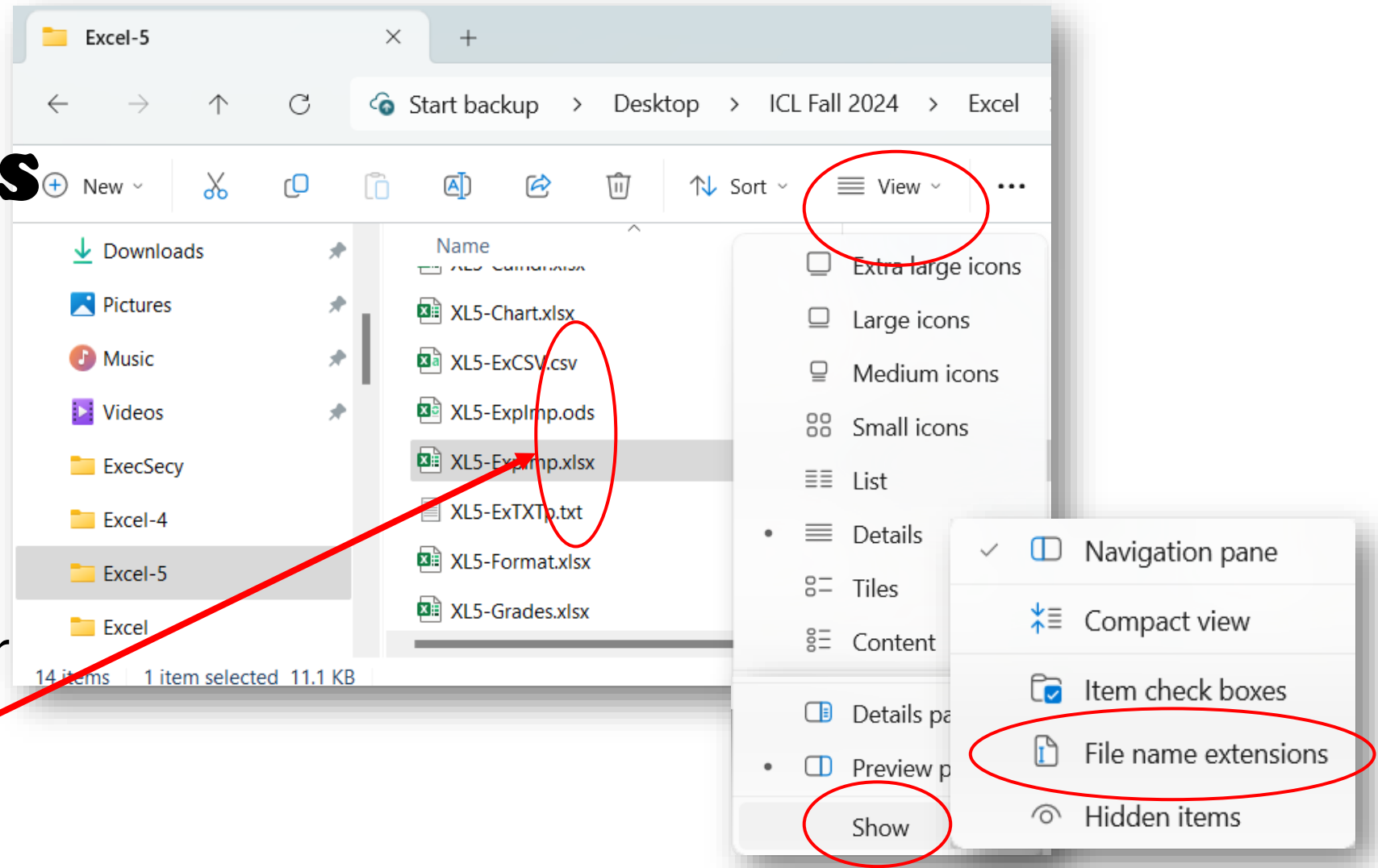
- Reuse data from elsewhere without retyping
- Provide data for other users/programs
- Examples:
  - From Word tables
  - From other programs (e.g., Open Office, Google Sheets)
  - To Word tables
  - To Email messages
  - To other programs (e.g., Open Office, Google Sheets)

# Import/Export Data Types

- File data formats generally indicated by filename extension
  - .xlsx (Excel)
  - .xls (older, less secure Excel format)
  - .ods (Open Office, Libre Office, etc.)
  - .csv (text, comma separated values)
  - .txt (text, tab delimited values)
  - .prn (text, formatted for printing only, not really usable as a data source)
- Those most useful as files for Excel users: .xlsx, .csv, and .ods

# Filename Extensions

- Some versions of Windows don't automatically show filename extensions.
- Open File Explorer and enable file name extensions!

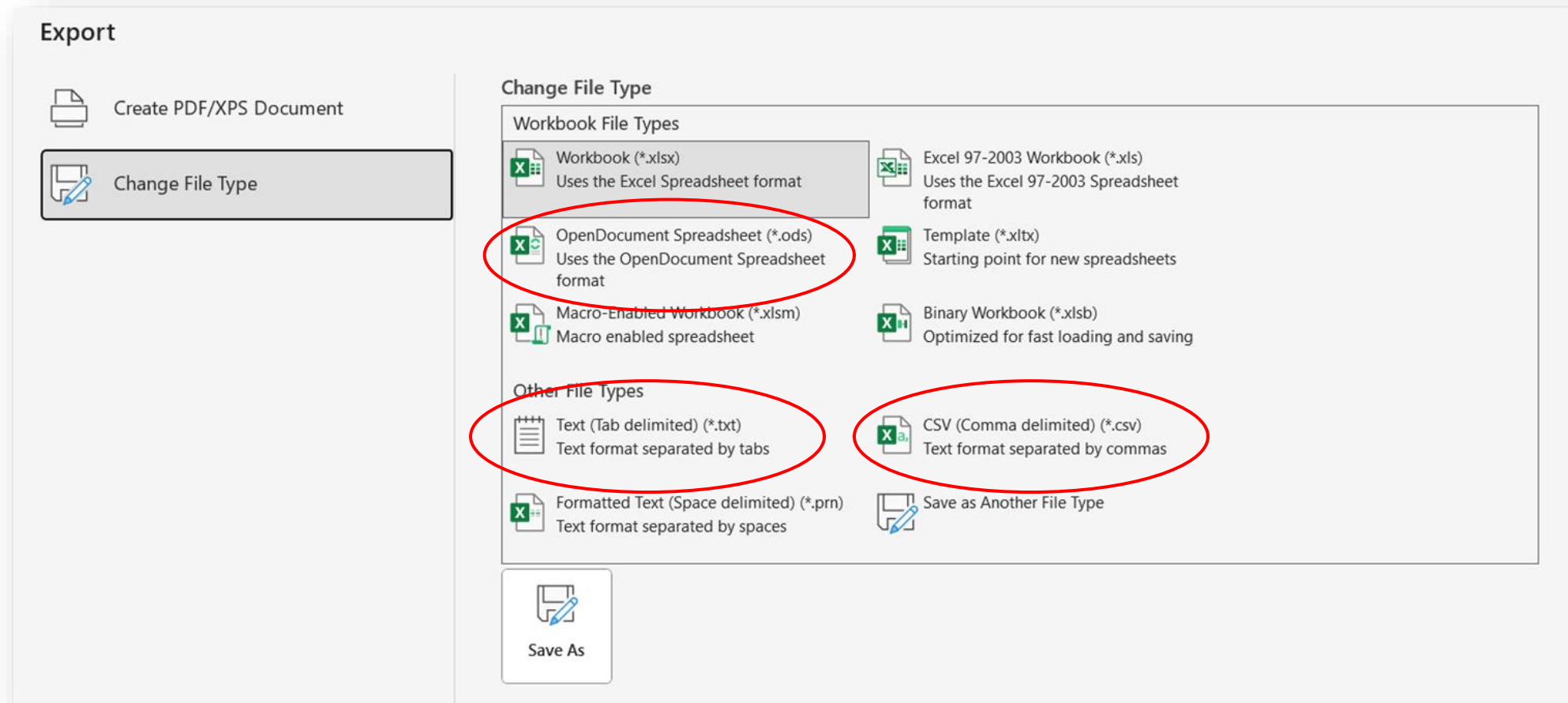


# Let's Do This!

- Open **XL5-Format** to practice the following
- Feel free to experiment with various options

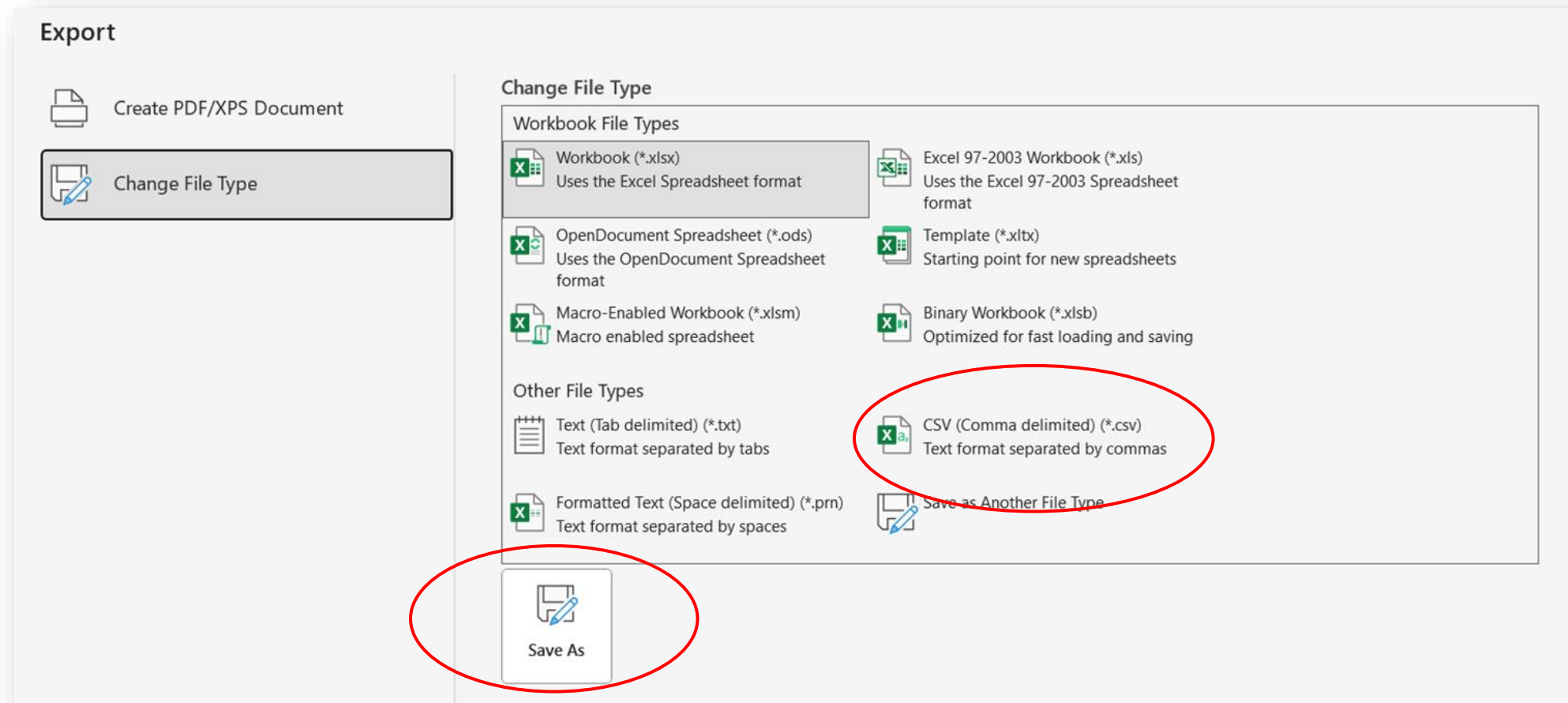
# Export Data

- File/Export...



# Export Data

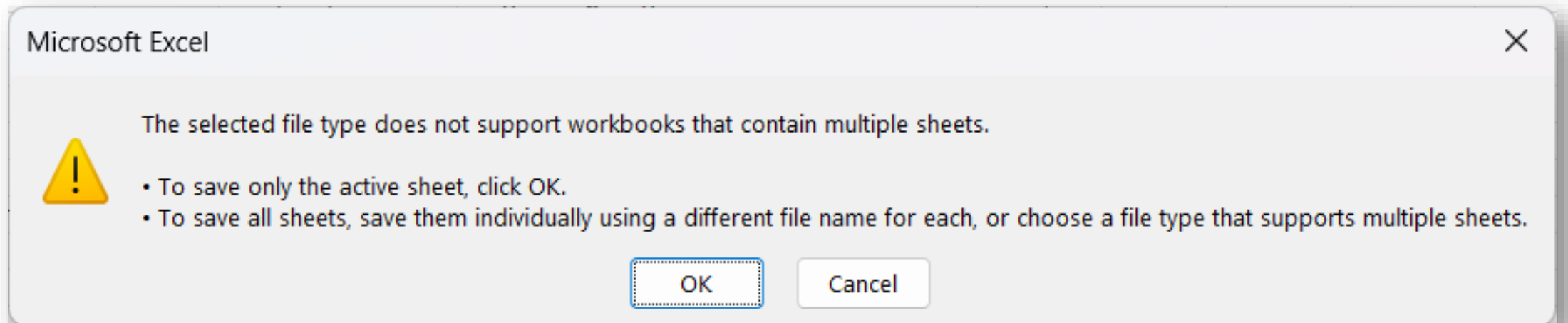
- File/Export...





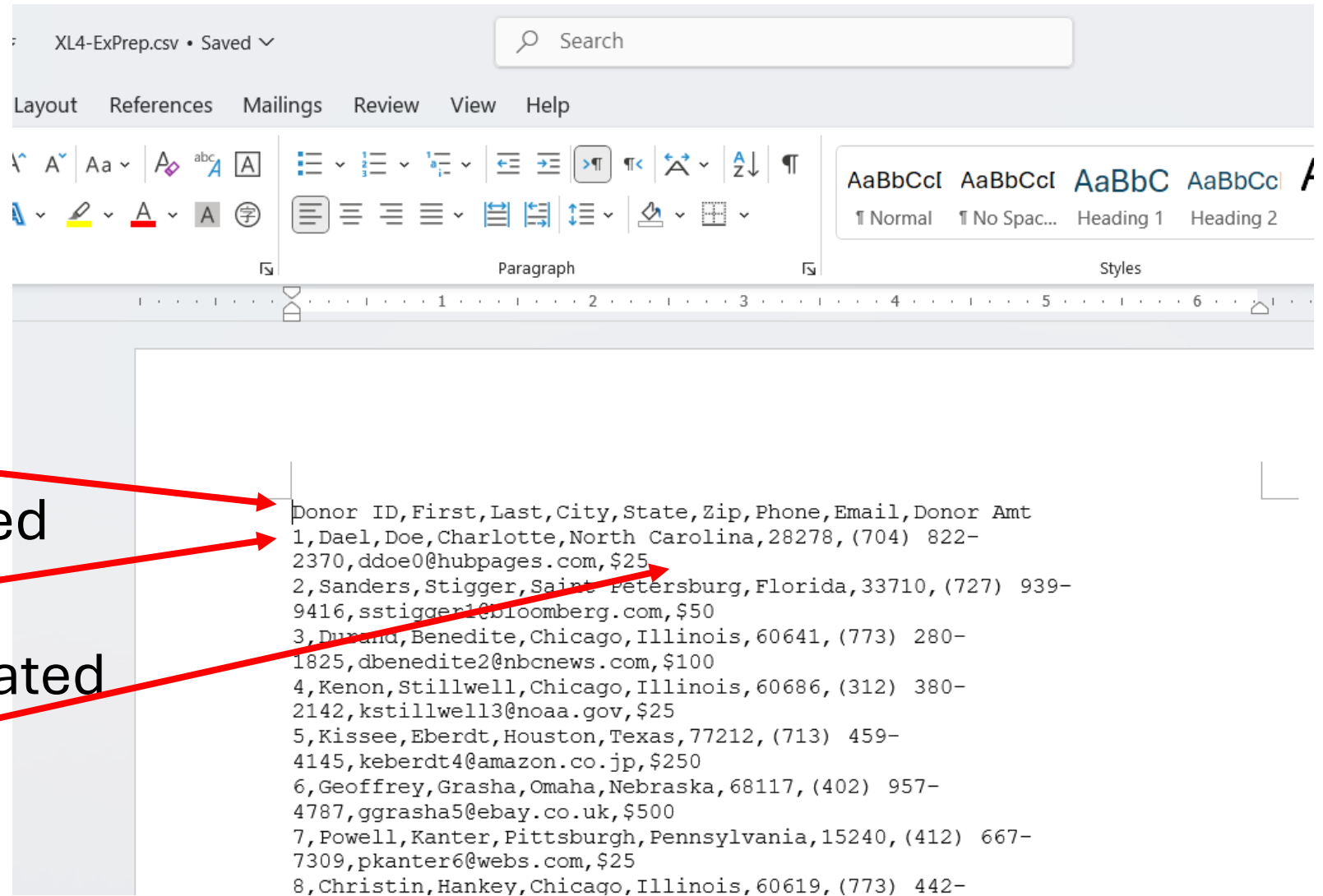
# Export Data

- You might get error messages when saving to another file format
- Some Excel features might be lost but proceed anyway
- Some formats only allow one sheet at a time



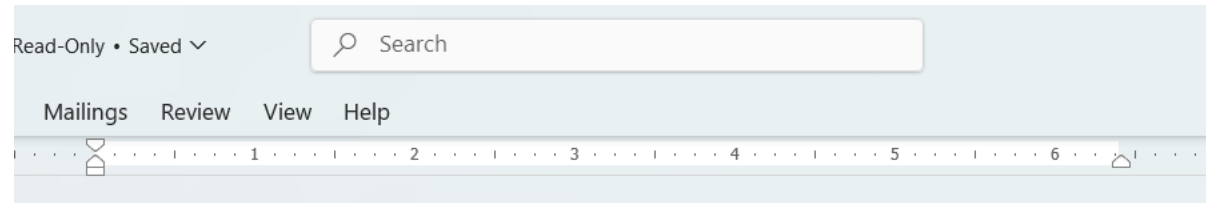
# CSV File

- Headers
- Each field separated by a Comma
- Each record separated by a Return



```
XL4-ExPrep.csv • Saved
Search
Layout References Mailings Review View Help
AaBbCcI AaBbCcI AaBbC AaBbCcI
Normal No Spac... Heading 1 Heading 2
Paragraph Styles
1 2 3 4 5 6
Donor ID,First,Last,City,State,Zip,Phone,Email,Donor Amt
1,Dael,Doe,Charlotte,North Carolina,28278,(704) 822-
2370,ddoe0@hubpages.com,$25
2,Sanders,Stigger,Saint Petersburg,Florida,33710,(727) 939-
9416,sstigger1@bloomberg.com,$50
3,Duand,Benedite,Chicago,Illinois,60641,(773) 280-
1825,dbenedite2@abcnews.com,$100
4,Kenon,Stillwell,Chicago,Illinois,60686,(312) 380-
2142,kstillwell13@noaa.gov,$25
5,Kissee,Eberdt,Houston,Texas,77212,(713) 459-
4145,keberdt4@amazon.co.jp,$250
6,Geoffrey,Grasha,Omaha,Nebraska,68117,(402) 957-
4787,ggrasha5@ebay.co.uk,$500
7,Powell,Kanter,Pittsburgh,Pennsylvania,15240,(412) 667-
7309,pkanter6@webs.com,$25
8,Christin,Hankey,Chicago,Illinois,60619,(773) 442-
```

# TXT File



- Headers
- Each field separated by a Tab
- Each record separated by a Return

Donor ID	First	Last	City	State	Zip	Phone	Email	Donor Amt
1	Dael	Doe	Charlotte	North Carolina	28278	(704) 822-2370	ddoe0@hubbpages.com	\$25
2	Sanders	Stigger	Saint Petersburg	Florida	33710	(727) 939-9416	sstigger1@bloomberg.com	\$50
3	Durand	Benedite	Chicago	Illinois	60641	(773) 280-1825	dbenedite2@nbcnews.com	\$100
4	Kenon	Stillwell	Chicago	Illinois	60686	(312) 380-2142	kstillwell13@noaa.gov	\$25
5	Kissee	Eberdt	Houston	Texas	77212	(713) 459-4145	keberdt4@amazon.co.jp	\$250
6	Geoffrey	Grasha	Omaha	Nebraska	68117	(402) 957-4787	ggrasha5@ebay.co.uk	\$500
7	Powell	Kanter	Pittsburgh	Pennsylvania	15240	(412) 667-7309	pkanter6@webs.com	\$25
8	Christin	Hankey	Chicago	Illinois	60619	(773) 442-6428	chankey7@howstuffworks.com	\$50
9	Weber	Vigours	Syracuse	New York	13224	(315) 431-8535	wvigours8@irs.gov	\$250
10	Bald	Munks	Jackson	Mississippi	39282	(601) 882-7610	bmunks9@netscape.com	"\$1,000"
11	Silvana	Bitchener	Glendale	California	91205	(323) 648-8169		

# Copy/Paste Export

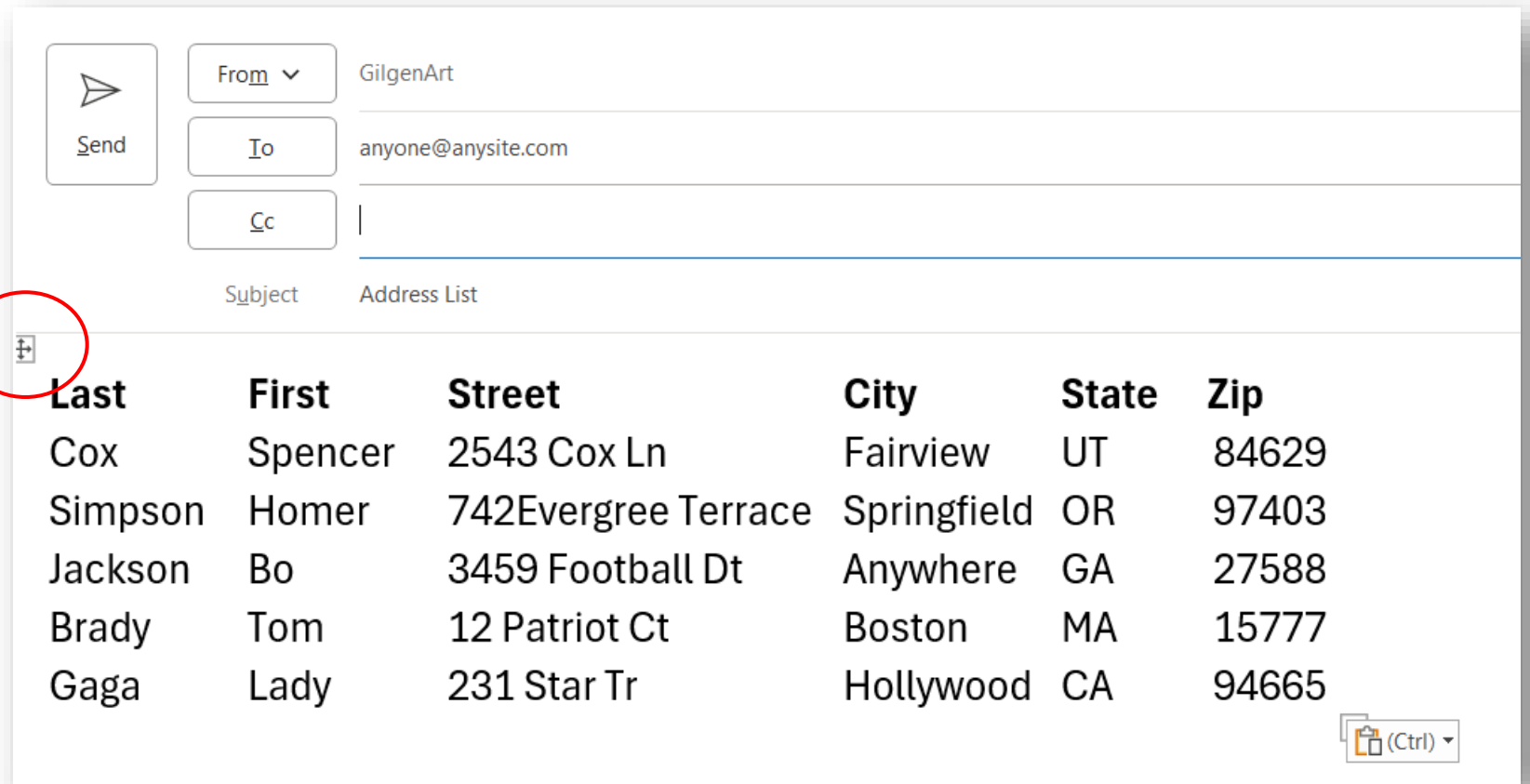
- Copy to **Word**, Email, etc.
- Choose paste format that works best (not links)

The screenshot shows a document editor interface. At the top, there is a toolbar with various formatting options like font face (Aptos (Body)), size (12), bold (B), italic (I), underline (U), text color (A), background color, bulleted list, numbered list, styles, and a 'New Comment' button. Below the toolbar is a table with three columns: Last, First, and Street. The table contains five rows of data. A 'Paste Options' menu is open over the second row, showing several icons for different paste formats. A red arrow points from the text 'Choose paste format that works best (not links)' to the 'Keep Source Formatting (K)' option in the menu.

Last	First	Street
Cox	Spencer	2543 Cox Ln
Simpson	Homer	742 Evergree Terra
Jackson	Bo	3459 Football Dt
Brad		2 Patriot Ct
Gaga	Lucy	231 Star Tr

# Copy/Paste Export

- Copy to Word, **Email**, etc.
- Choose paste format that works best (**table** or image)



Send

From ▾ GilgenArt

To anyone@anysite.com

Cc |

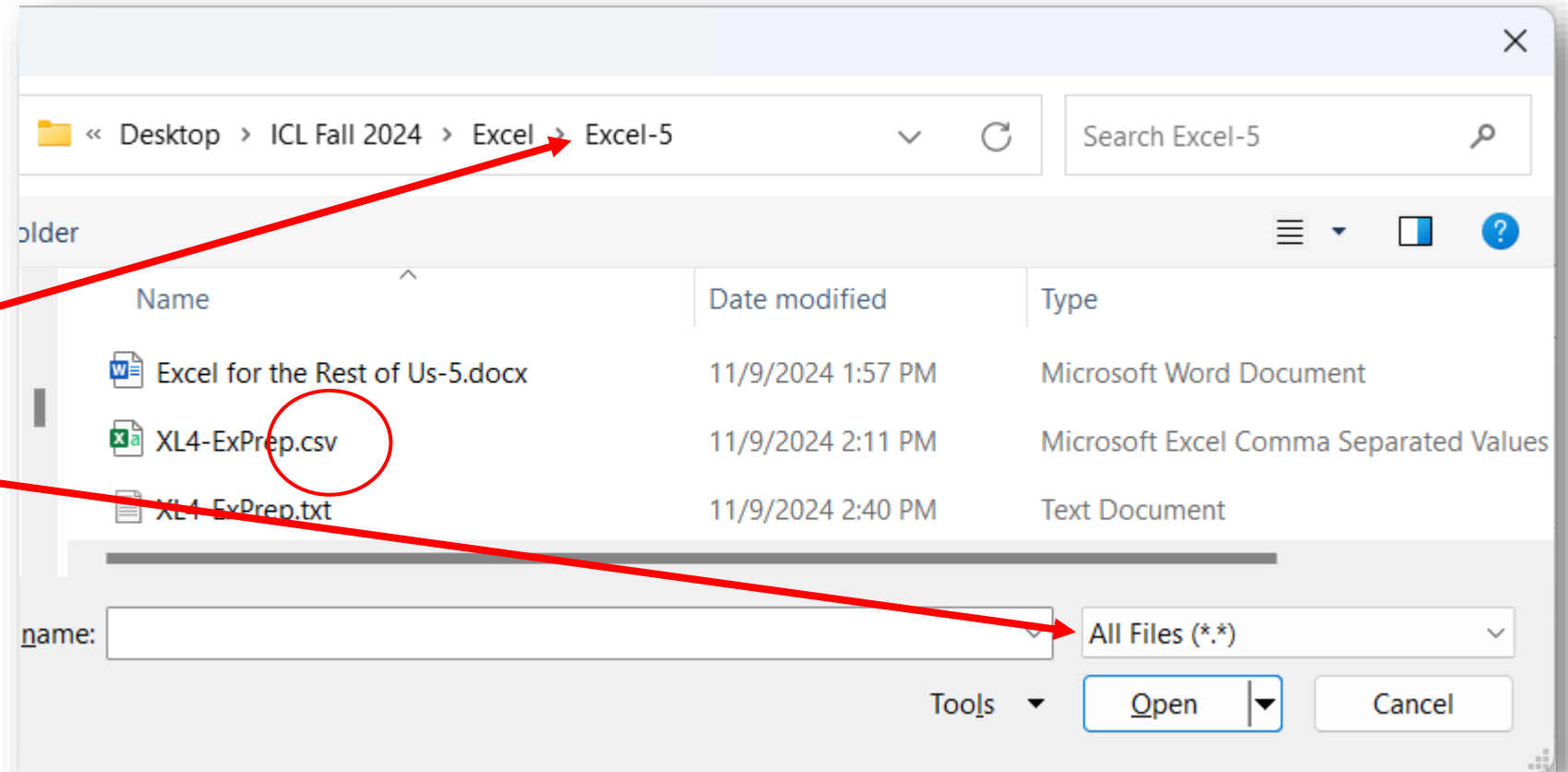
Subject Address List

Last	First	Street	City	State	Zip
Cox	Spencer	2543 Cox Ln	Fairview	UT	84629
Simpson	Homer	742Evergree Terrace	Springfield	OR	97403
Jackson	Bo	3459 Football Dt	Anywhere	GA	27588
Brady	Tom	12 Patriot Ct	Boston	MA	15777
Gaga	Lady	231 Star Tr	Hollywood	CA	94665

(Ctrl) ▾

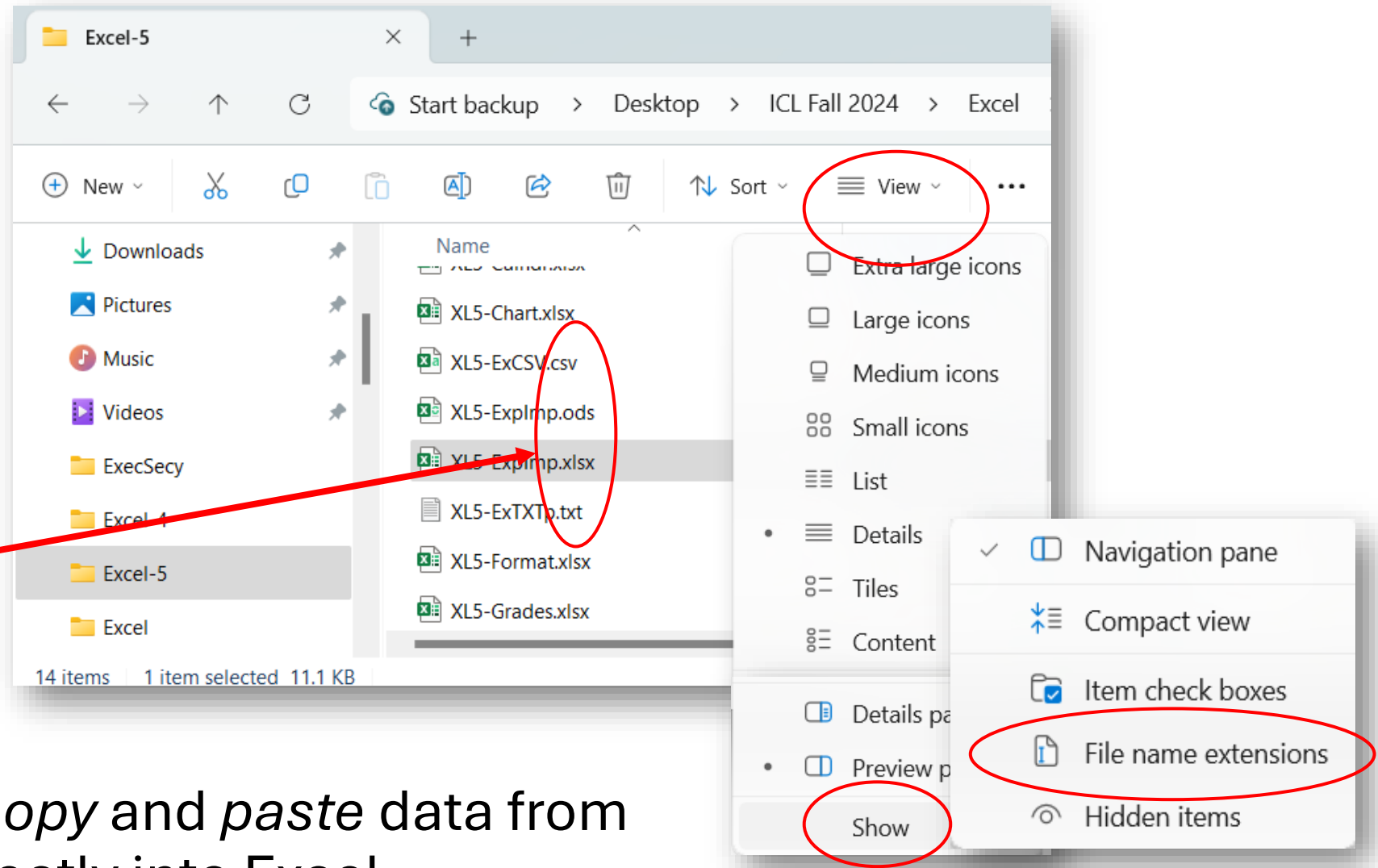
# Import Data

- File/Open
- Browse
- Go to folder
- Indicate All Files (\*.\*)
- Choose .csv (.ods, .txt file)



# Import Data

- Excel opens most all files automatically
- Have file name extensions enabled in File Explorer!
- You can usually *copy* and *paste* data from other sources directly into Excel, depending on the other source's formats.



# Integrating Data

- Excel can be an external data source to (some) other programs
- Example:
  - Word can use data from Excel spreadsheet
  - Integrates with Mail Merge functions
  - Can generate customized memos & letters
  - Can create mailing lists, directories, name tags

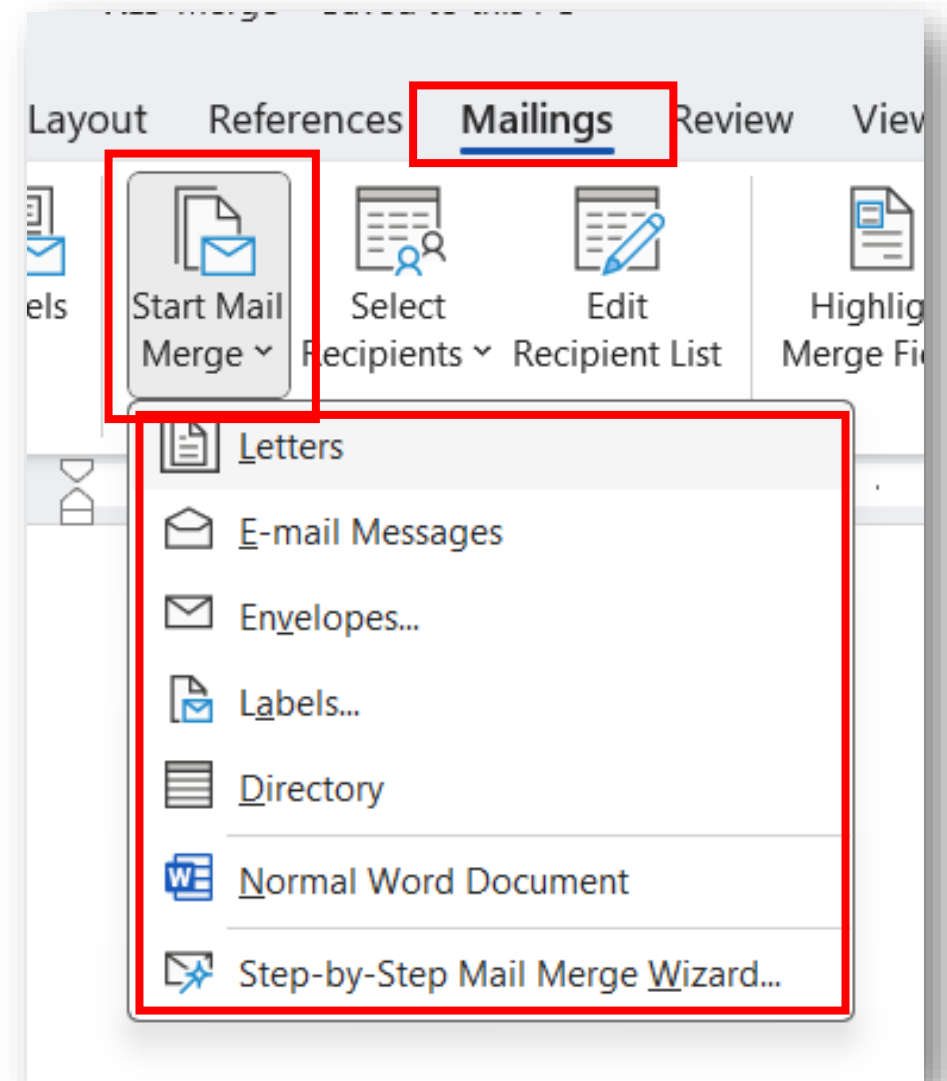


# Excel to Word Steps

- Create Excel data in good database format and save file
- Open Word

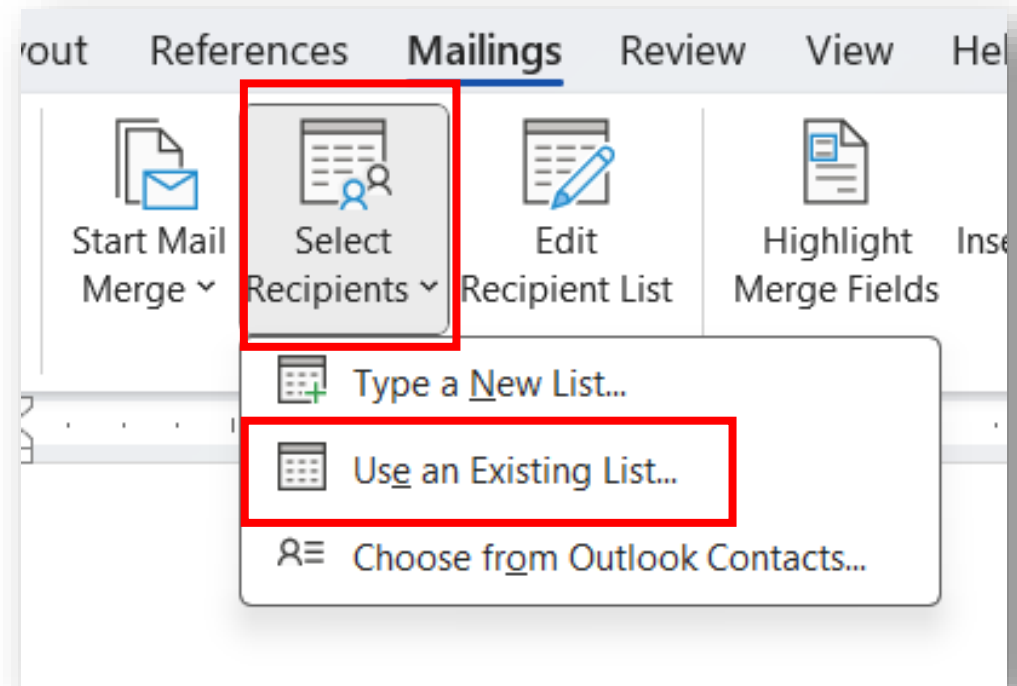
# Excel to Word Steps

- Choose the Mailings menu
- Click Start Mail Merge
- Select the type of merge document you want



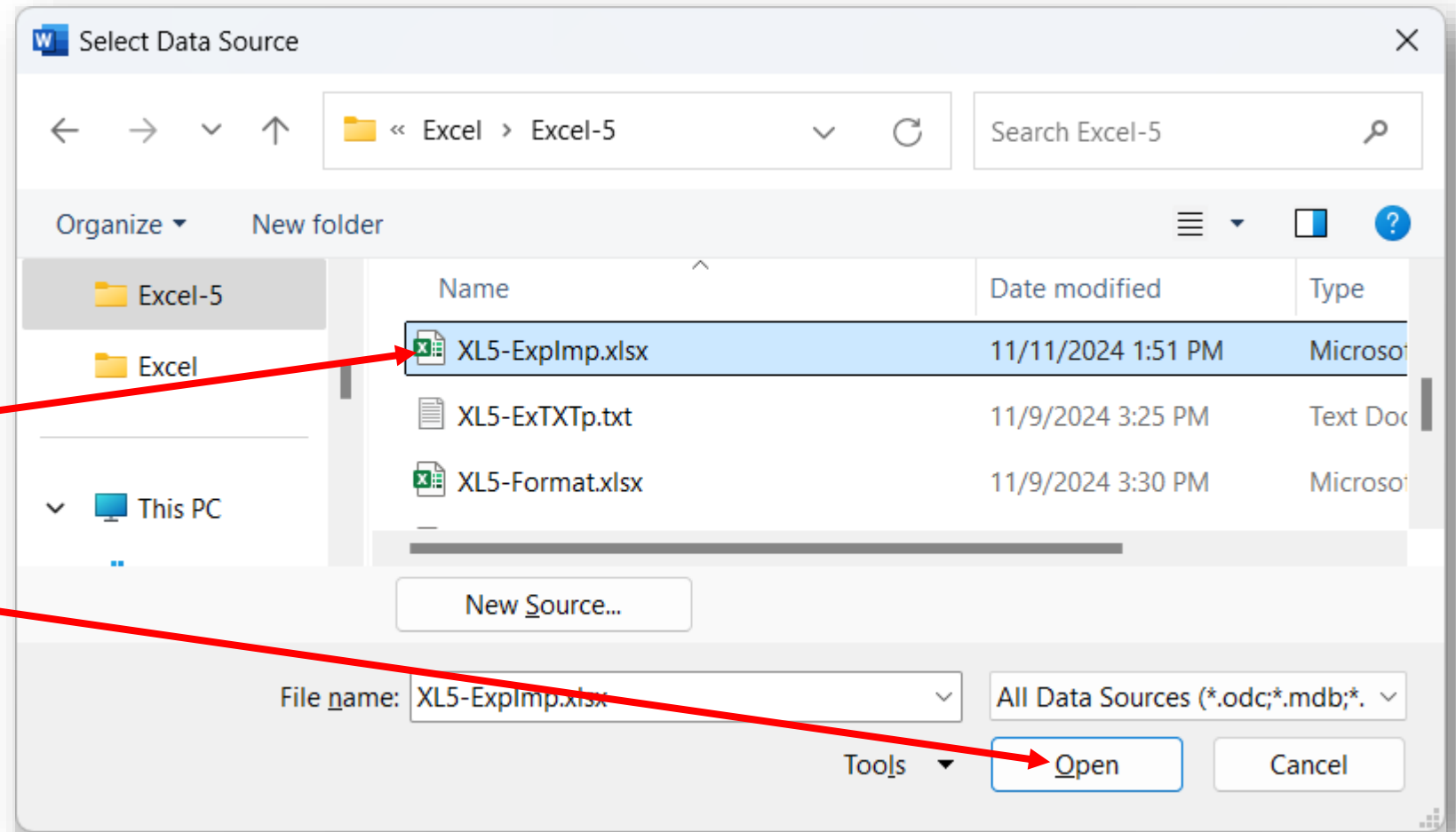
# Excel to Word Steps

- Click Select Recipients
- Select Use an Existing List
- On the screen that opens, *ignore* requests for SQL databases.
- *Instead...*



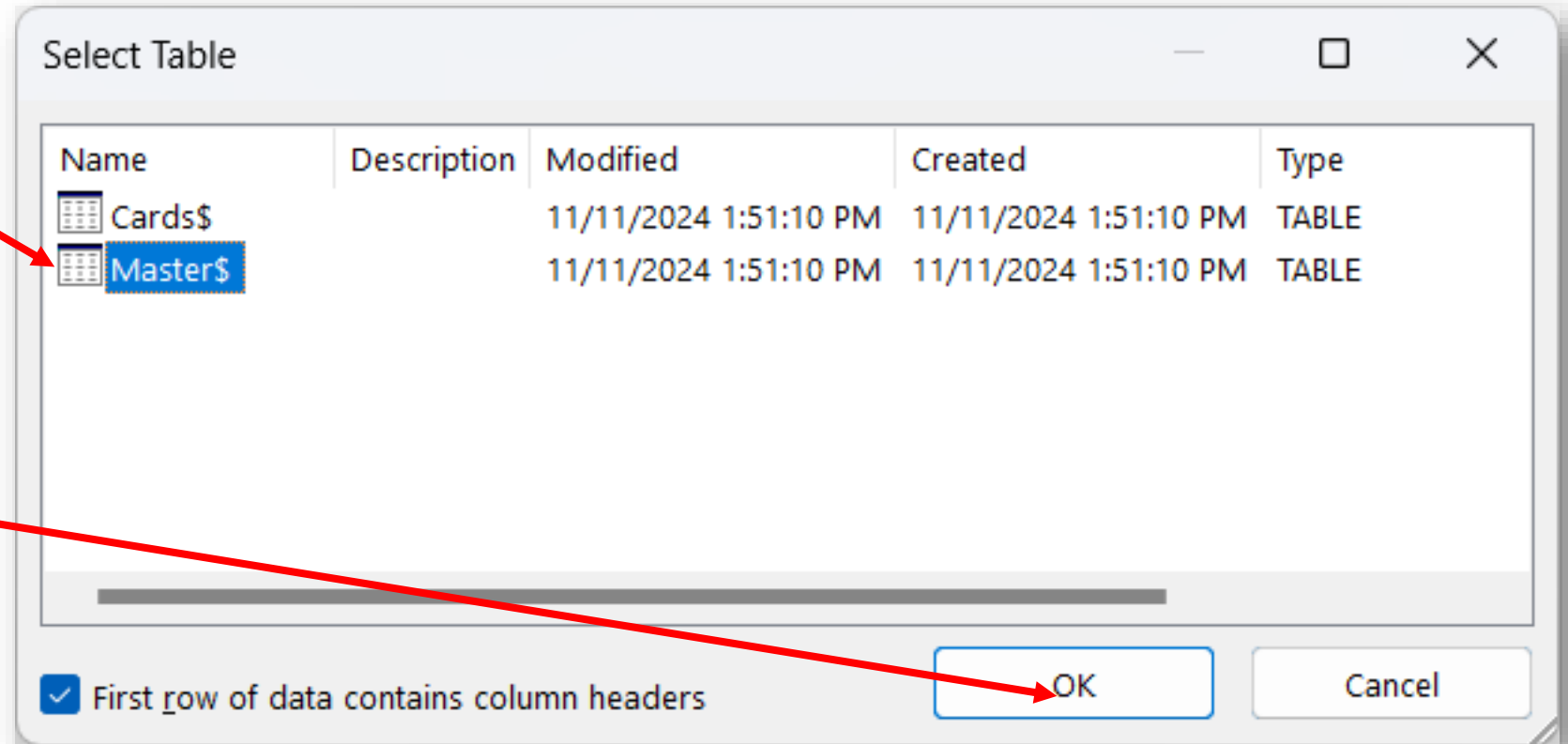
# Excel to Word Steps

- Browse to find the Excel spreadsheet that contains your data.
- Click it, then click Open



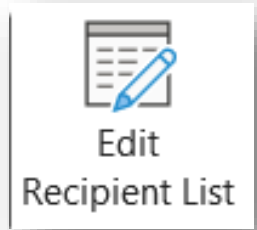
# Excel to Word Steps

- Click the table (sheet) that contains your data (e.g., Master\$)
- Click OK

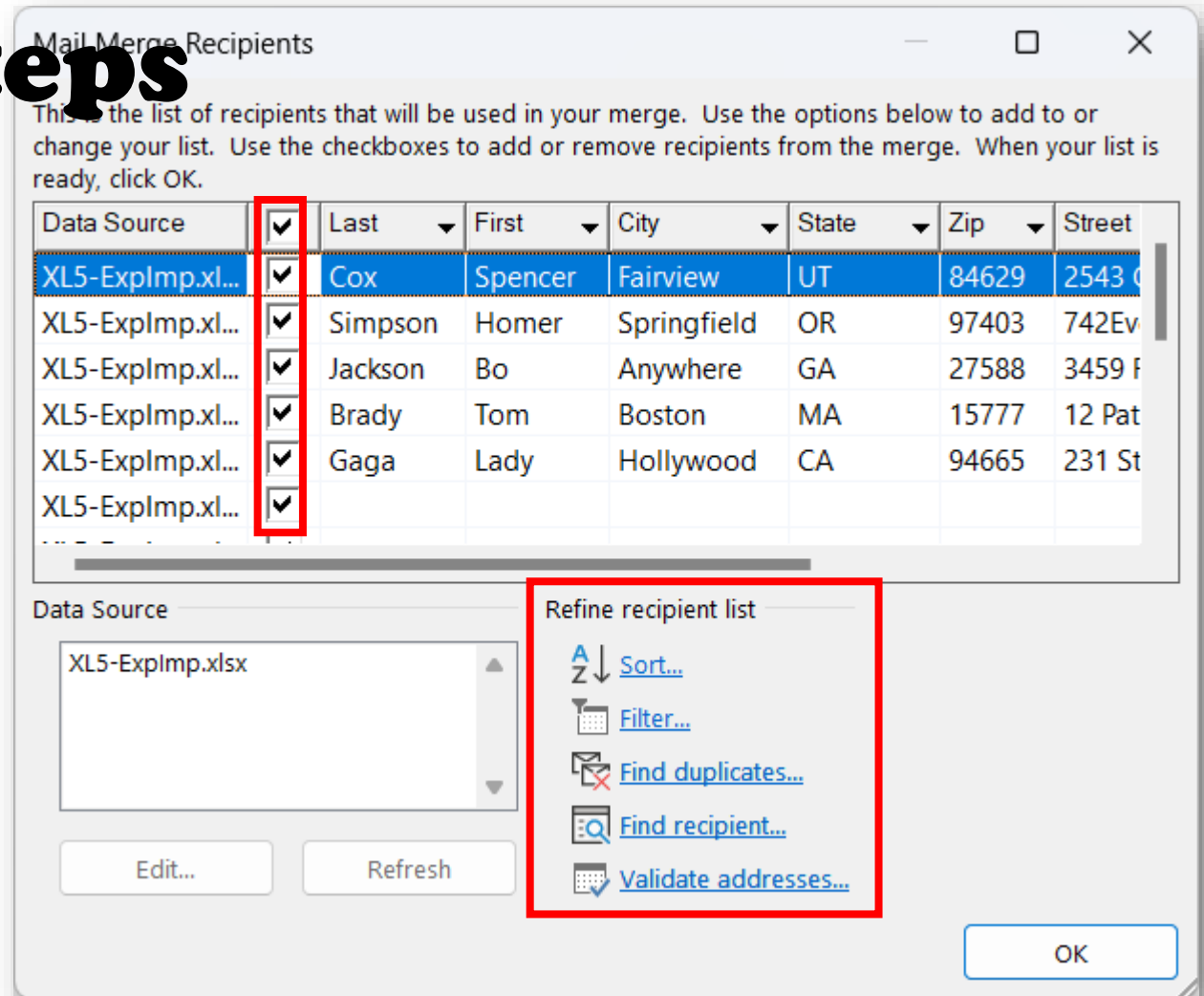


# Excel to Word Steps

- Click the Edit Recipient List button

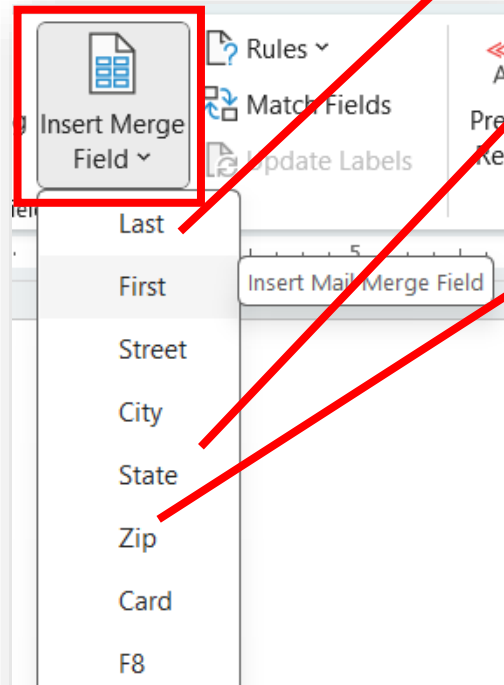


- In this dialog box, you can
  - Select/deselect entries
  - Sort
  - Filter
  - Etc.



# Excel to Word Steps

- Now create the text for your document.
- Insert Merge Fields at appropriate places.



«First» «Last»  
«Street»  
«City», «State» «Zip»

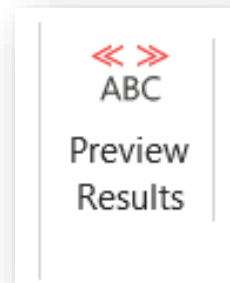
You have been selected to receive a new television, based on your Zip code «Zip». If you send us a prepaid gift card for handling fees of \$100, we will ship it immediately to your address in «City», «State».

Congratulations. We hope to hear from you soon.

Fake Prize Company  
123 Scammer Ave  
Anywhere, BogusCountry

# Excel to Word Steps

- Now create the text for your document.
- Insert Merge Fields at appropriate places.
- Click the Preview Results button to verify the data is being inserted correctly.



«First» «Last»  
«Street»  
«City», «State» «Zip»

You have been selected to receive a new television, based on your Zip code «Zip». If you send us a prepaid gift card for handling fees of \$100, we will ship it immediately to your address in «City», «State».

Congratulations. We hope to hear from you soon.

Fake Prize Company  
123 Scammer Ave  
Anywhere, BogusCountry



# Excel to Word Steps

- Now create the text for your document.
- Insert Merge Fields at appropriate places.
- Click the Preview Results button to verify the data is being inserted correctly.
- Make corrections as needed.



Spencer Cox  
2543 Cox Ln  
Fairview, UT 84629

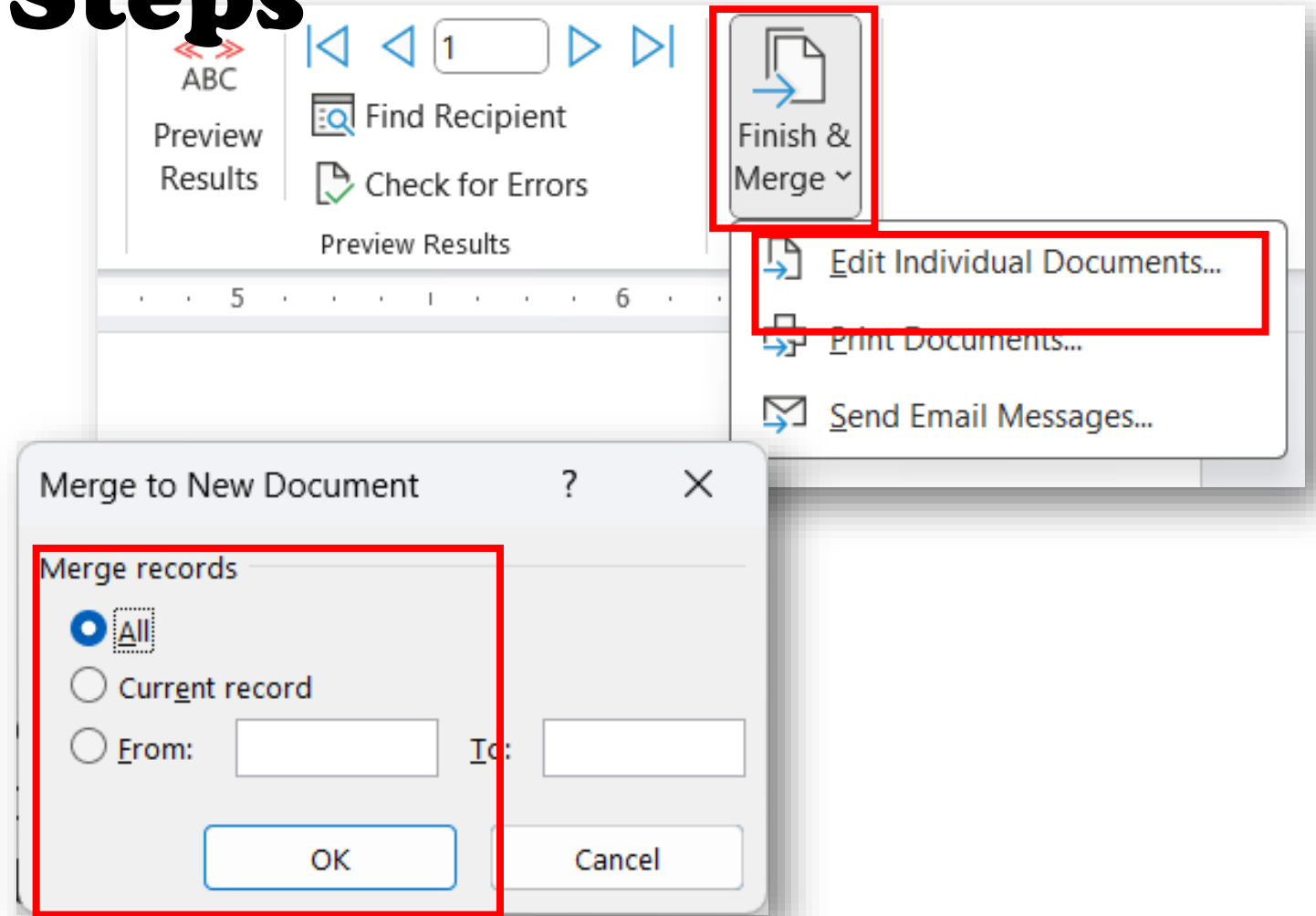
You have been selected to receive a new television, based on your Zip code 84629. If you send us a prepaid gift card for handling fees of \$100, we will ship it immediately to your address in Fairview, UT.

Congratulations. We hope to hear from you soon.

Fake Prize Company  
123 Scammer Ave  
Anywhere, BogusCountry

# Excel to Word Steps

- Save the merge file
- Click Finish & Merge
- Select Edit Individual Documents
- In the next dialog box, click OK to merge all the records into a new/separate Word document



# Let's Do This!

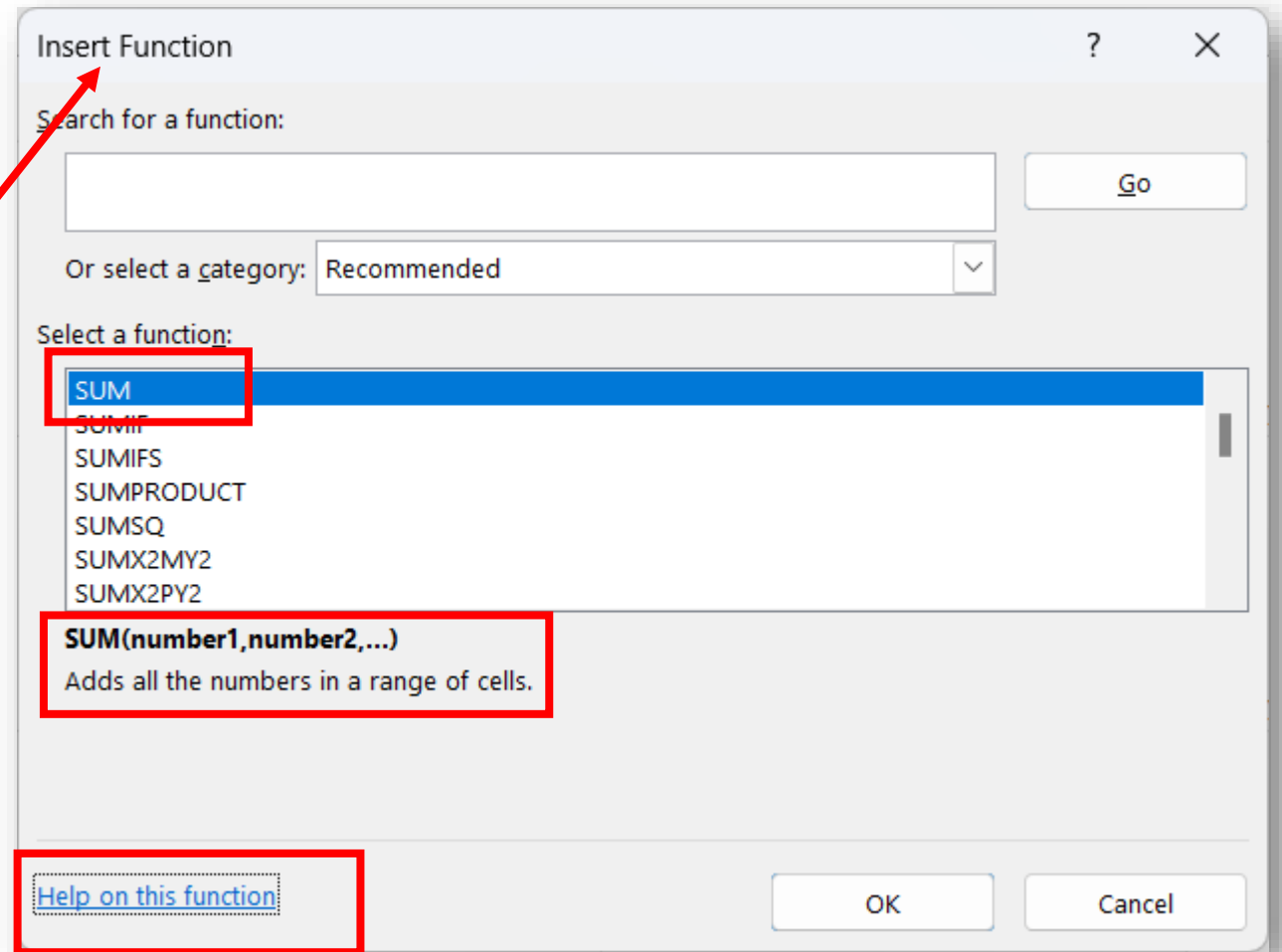
- Open **XL5-Merge** (in Word) to practice
  - This is intended to be used with the **XL5-EpxImp** Spreadsheet which provides the data to be merged into the document
  - Both files need to be in the same folder
- Practice the last steps in Word
  - Edit the Recipient List (if desired)
  - Use the merge letter (if desire, add a field or custom text)
  - Finish and Merge All

# Functions

- Excel “functions” can do much more than add and subtract



- If you explore a bit, you may find “functions” you can use in your formulas
- Microsoft provides web pages to help with using each function



# Summary

- What have you learned that will be useful?
- What could we have done without?
- Please send me an email with suggestions/comments about this course:

[read@gilgenart.com](mailto:read@gilgenart.com)

HAPPY THANKSGIVING

MERRY CHRISTMAS

**Next Time... That's All!**

