The
New York Society Library
Presents:

Microsoft Excel & Word

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Head of Systems

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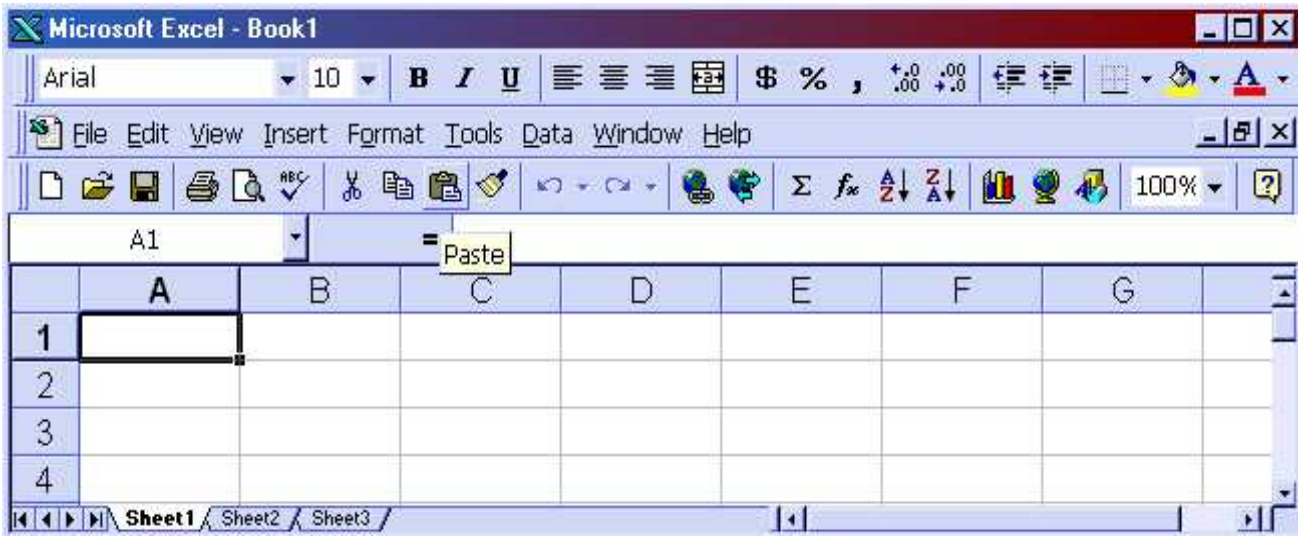
OVERVIEW



MICROSOFT EXCEL

Click *Start → Programs → Microsoft Excel*

Microsoft Excel is a spreadsheet application ideal for accounting (you can change interest rates, starting balances, etc. in one cell and each dependent cell will also change) and sorting uncomplicated data (such as a list of names). Additional spreadsheet programs include: Lotus 1-2-3 and Quattro Pro.

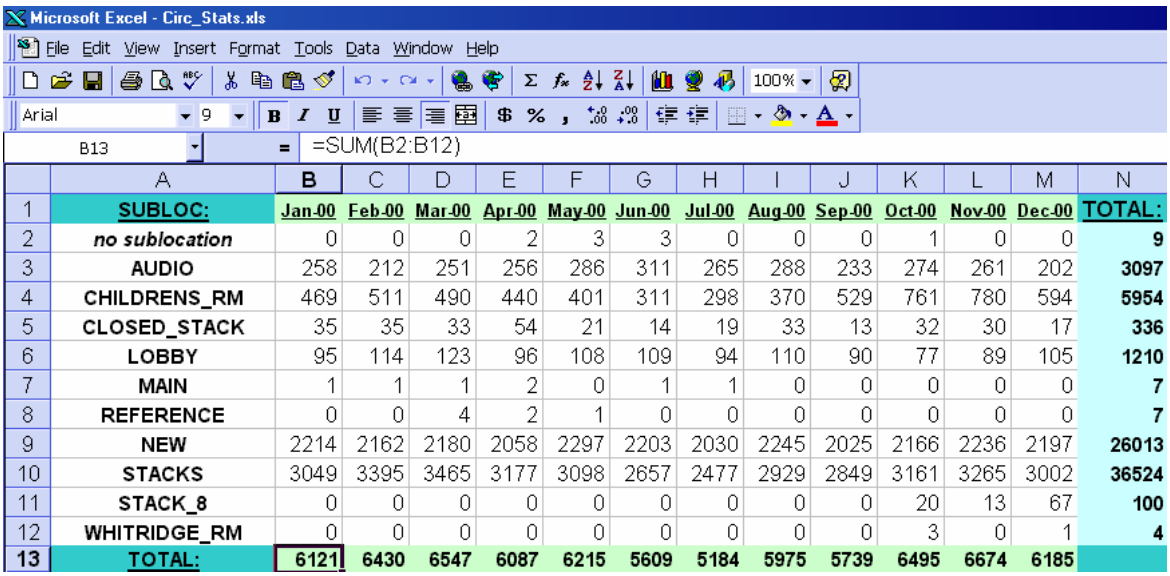
Microsoft Excel is comprised of a worksheet with a grid of rows and columns. Each cell in the worksheet is named by the intersection of a column and row (e.g. B4 is the intersection of Column B and Row 4). Columns are assigned letters; rows are assigned numbers.

Active cells appear highlighted on your screen by a heavy border (in the above picture, A1 is the selected cell). Only one cell is active at a time (to activate a different cell, either click the mouse on the appropriate cell or use the directional arrow keys). The active cell will also reflect the address in the FORMULA BAR at the top of the cells (if you do not see a formula bar, select *View → Formula Bar* from the top menu).

To enter information in an active cell, start typing in the active cell (the text will also be reflected after the = sign on the formula bar). You can either type straight data (words, numbers) or relational formulas (=sum (A1:A2)). It will also appear on the formula bar.

To modify existing information in a cell, activate the cell by clicking on it, move your mouse to the formula bar, and insert the cursor where you wish to start editing (you need to edit the information on the status bar instead of in the cell directly). When you're done, press "Enter" on the keyboard to change the cell.

BASIC FUNCTIONS



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	SUBLOC:	Jan-00	Feb-00	Mar-00	Apr-00	May-00	Jun-00	Jul-00	Aug-00	Sep-00	Oct-00	Nov-00	Dec-00	TOTAL:
2	*no sublocation*	0	0	0	2	3	3	0	0	0	1	0	0	9
3	AUDIO	258	212	251	256	286	311	265	288	233	274	261	202	3097
4	CHILDRENS_RM	469	511	490	440	401	311	298	370	529	761	780	594	5954
5	CLOSED_STACK	35	35	33	54	21	14	19	33	13	32	30	17	336
6	LOBBY	95	114	123	96	108	109	94	110	90	77	89	105	1210
7	MAIN	1	1	1	2	0	1	1	0	0	0	0	0	7
8	REFERENCE	0	0	4	2	1	0	0	0	0	0	0	0	7
9	NEW	2214	2162	2180	2058	2297	2203	2030	2245	2025	2166	2236	2197	26013
10	STACKS	3049	3395	3465	3177	3098	2657	2477	2929	2849	3161	3265	3002	36524
11	STACK_8	0	0	0	0	0	0	0	0	0	20	13	67	100
12	WHITRIDGE_RM	0	0	0	0	0	0	0	0	0	3	0	1	4
13	TOTAL:	6121	6430	6547	6087	6215	5609	5184	5975	5739	6495	6674	6185	

ADDING NUMBERS:

To add a column of numbers, click on the cell directly below the numbers and type =SUM (A1:A3), where A1 is the starting cell and A3 is the ending cell (the "=" is necessary for Excel to recognize this as a formula). You can also use the mouse to select the cells. Hit ENTER to view the results.

ARITHMETIC OPERATORS:

+	Addition	/	Division	%	Percent
-	Subtraction	*	Multiplication	^	Exponentiation

AVERAGING CELLS:

Take the average of a column by typing: =AVERAGE (A1:A4). Hit ENTER to view the results

DELETING ROWS OR COLUMNS:

Click on the row or column header (the letter for the column or the number for the row) to highlight everything in that section. On the menu, choose *Edit → Delete*

FILLING CELLS:

To fill a column with the same number, highlight the cells you want filled (including the starting number to fill) and hold down CTRL-D (for "Fill Down"). Use CTRL-R to Fill Right with rows.

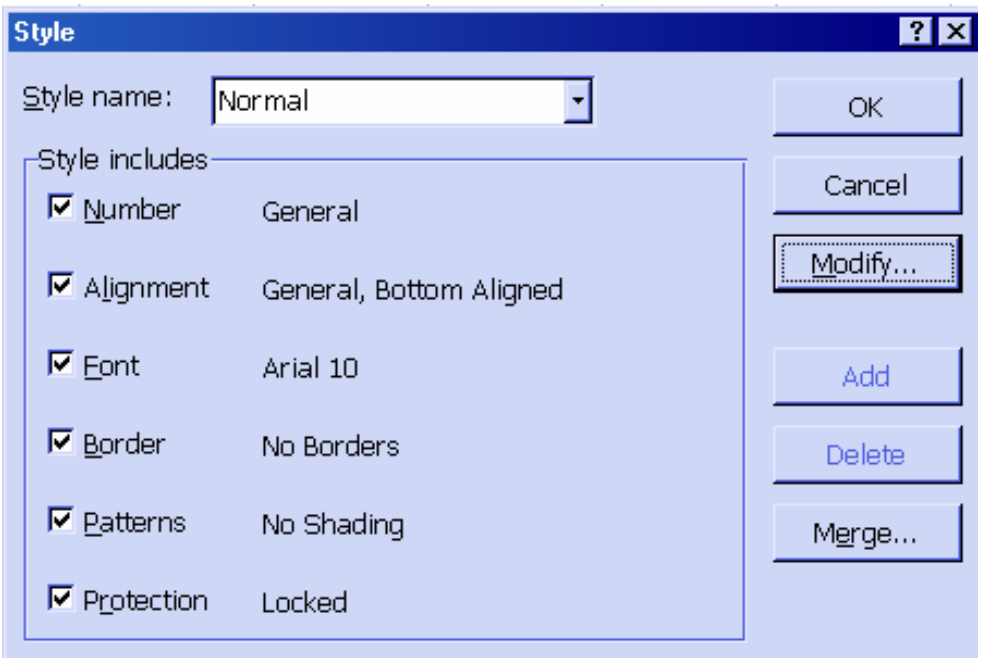
RESIZING ROWS OR COLUMNS:

To adjust the size of a row or column, move the mouse between the headers (e.g. between "A" and "B" for columns) until it forms a two-way arrow. Click and hold down the left mouse button and drag the line to the appropriate size. Release the mouse button.

SORTING ROWS:

To sort a list of names, type CTRL-A (for "Select All") and choose ***Data → Sort***. You can sort in increasing or decreasing order.

STYLE



FORMATTING:

Format → Style → Modify

You can format either individual cells or entire rows or columns (click on either the cell or the column or row heading). Highlight the information you want to format. Right-click the mouse and select "Format Cells" (or select *Format → Style → Modify* from the drop-down menu). Formatting options are:

- **General:** Default - no formatting
- **Number:** Treats number as operational number, no formatting
- **Currency:** $XX.XX
- **Accounting:** Lines up decimal points
- **Date:** Treats numbers as dates
- **Time:** Treats numbers as times
- **Percentage**: Converts to percent
- **Fraction:** Adds fractional extensions
- **Scientific:** 1.00E+00
- **Text:** Treats numbers as pure text
- **Special:** Zip code, phone numbers and social security numbers
- **Custom:** Choose your own code

GRAPHING

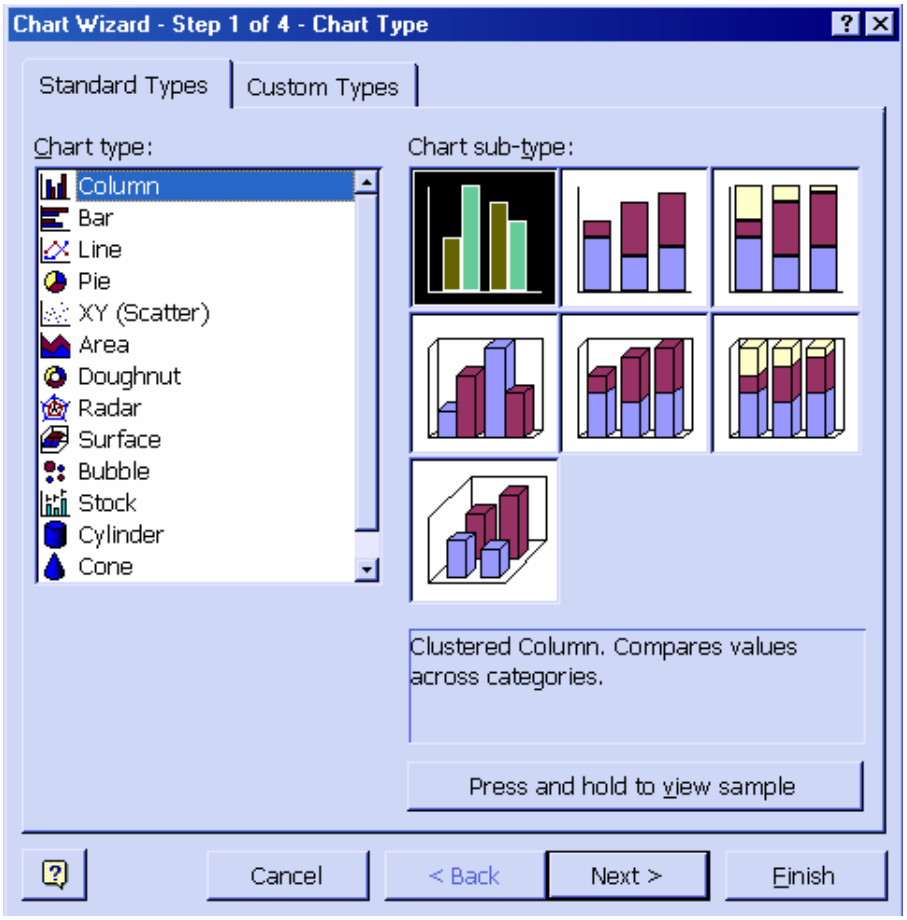


CHART
Insert →Chart

Highlight the cells you wish to graph. Choose *Insert →Chart* to start the Chart Wizard.

CHART WIZARD

I. Select type of chart: Column, Bar, Line, Pie, XY, Area, Doughnut, Radar, Surface, Bubble, Stock, Cylinder, Cone or Pyramid
II. Confirm the Range of Data.
III. Verify the Legend for the Data
IV. Chose new graph in original document or on own sheet.

TROUBLESHOOTING & SHORTCUTS:

	B	C	D	E
1	**CALL #**	**NAME**	**PUBLISHER**	**LOCATION**
2	**612 T**	3-D Body Adventure	*Knowledge Adventure*	\\NYSLPDC\CD_3DB
3	**916.7 W**	Wild Africa 1: Ngorongoro, Serengeti, Tar:	*Sumeria*	\\NYSLPDC\CD_AFR1
4	**916.8 W**	Wild Africa 2: Okavango, Chobe, Makgadi	*Sumeria*	\\NYSLPDC\CD_AFR2
5	**918.1 A**	Amazon Trail II	*MECC*	\\NYSLPDC\CD_AMAZO
6	**973.9 G**	American Journey: The Great Depressior	*Primary Source Media*	\\NYSLPDC\CD_AMER
7	**591.5 A**	Animal Planet	*Discovery Channel*	\\NYSLPDC\CD_ANIM
8	**912 P**	Picture Atlas of the World	*National Geographic Society*	\\NYSLPDC\CD_ATLA
9	**598.2 N**	North American Birds	*National Audubon Society*	\\NYSLPDC\CD_AUDO
10	**591.5 W**	A World Alive	*Voyager*	\\NYSLPDC\CD_AWA
11	**378 B 2001**	Barron's Profiles of American Colleges	*Barron's*	\\NYSLPDC\CD_BARRO

CIRCULAR REFERENCE:

The formula contains the end total in equation (i.e. A10's formula address cells A1 through A10 instead of A9). To correct, edit the equation so that it doesn't end on the calculation cell.

ERROR VALUES:

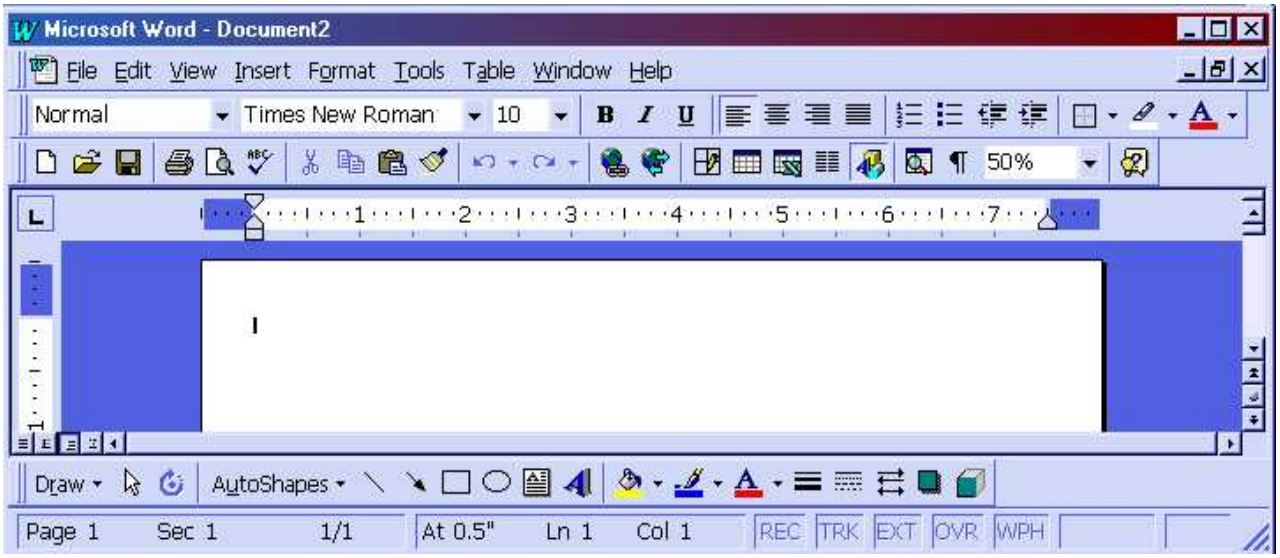
#DIV/0!	Formula is trying to divide by 0
#N/A	Value is not available
#NAME?	Uses a name that Excel doesn't recognize
#NULL!	Specifies an invalid intersection of two areas
#NUM!	Uses a number incorrectly
#REF!	Refers to a cell that is not valid
#VALUE!	Uses an incorrect argument or operating
#####	Produces a result that is too long to fit in the cell

KEYBOARD SHORTCUTS

- Undo last action: <CTRL><Z>
- Repeat last action: <F4>
- Select All: <CTRL><A>
- Select Current Region: <CTRL><SHIFT><*>
- Check Spelling: <F7>
- Move to Next Tab: <CTRL><PgDn>
- Move to Previous Tab: <CTRL><PgUp>
- Move to beginning: <CTRL><HOME>
- Calculate open workbooks: <F9>
- Calculate active sheets: <SHIFT><F9>
- Activate Cell & Formula: <F2>
- Covert Relative/Absolute: <F4>
- Display Value/Formula: <CTRL><'>
- Edit Cell Note: <SHIFT><F2>
- Find Cell contents: <CTRL><F>

ADDITIONAL EXCEL NOTES:

OVERVIEW



MICROSOFT WORD

Click *Start→Programs→Microsoft Word*

Microsoft Word is a sophisticated word-processing program that can be used for writing and editing, as well as desktop publishing, web publishing and bulk mailings.

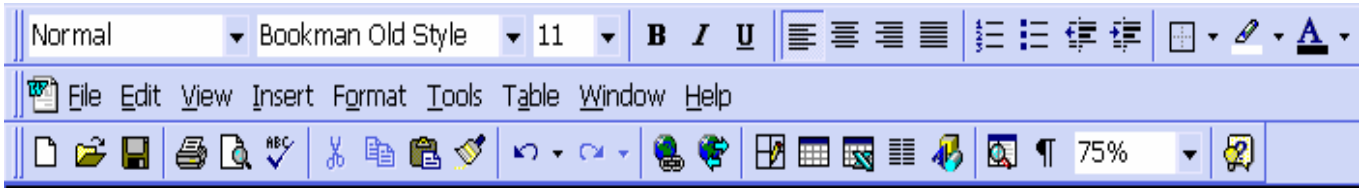
Other word-processing programs include: Ami Pro, Q&A Write, Word Perfect, WordStar, MultiMate, DisplayWrite, PC Write, XY Write, Professional Write, Peach Text, Easy Writer II, Volkswriter, Select, Scriptor, Scriptsit II, Perfect Writer, Spellbinder, Grammatik, Microlink II, and Writenow.

Microsoft Word uses the following word-processing terms: Word Wrap, Mail Merge (formerly File Insertion), Block Move, Copy Block, Find All (formerly Global Search), Replace (formerly Search and Replace), Spell Check (formerly Dictionary), Centering, Print Preview (formerly Page Display), Automatic Pagination and Alignment (formerly Justification). Microsoft Word has kept these text-formatting terms: underline, boldface, subscript, superscript and strikeout. These can be found in *Format →Font*.

To convert old word-processing documents into Microsoft Word, save the file in text (or ASCII) format and open it in Microsoft Word. ASCII (American Standard Code for Information Interchange) is a pure text format that is universally read in all programs (including DOS). Unfortunately, it also removes all customization (bold, underline, indent, page numbers, headers and footers).

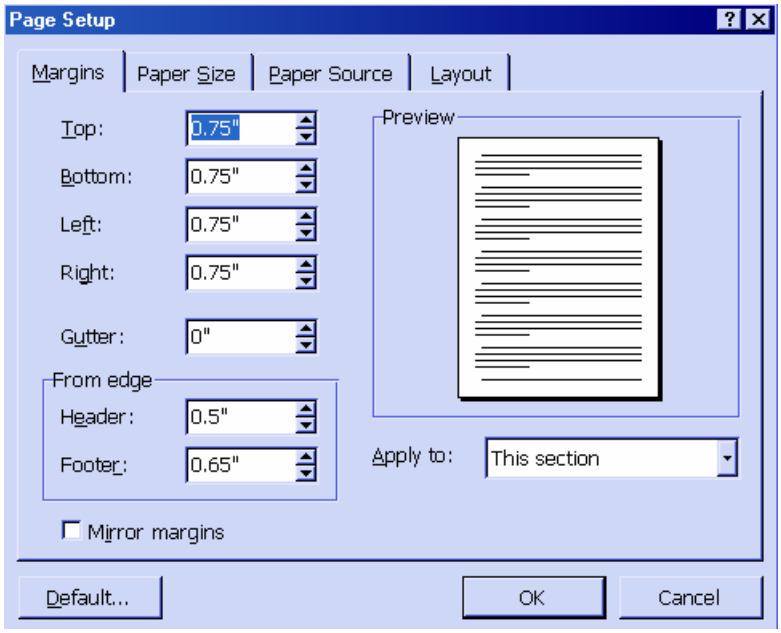
To convert Microsoft Word documents into ASCII files, select *File→Save as→ Save as Type: Text Only (*.txt)*. This will remove all of Microsoft Word's specialization

BEFORE YOU START:



TOOLBARS ***View → Toolbars***

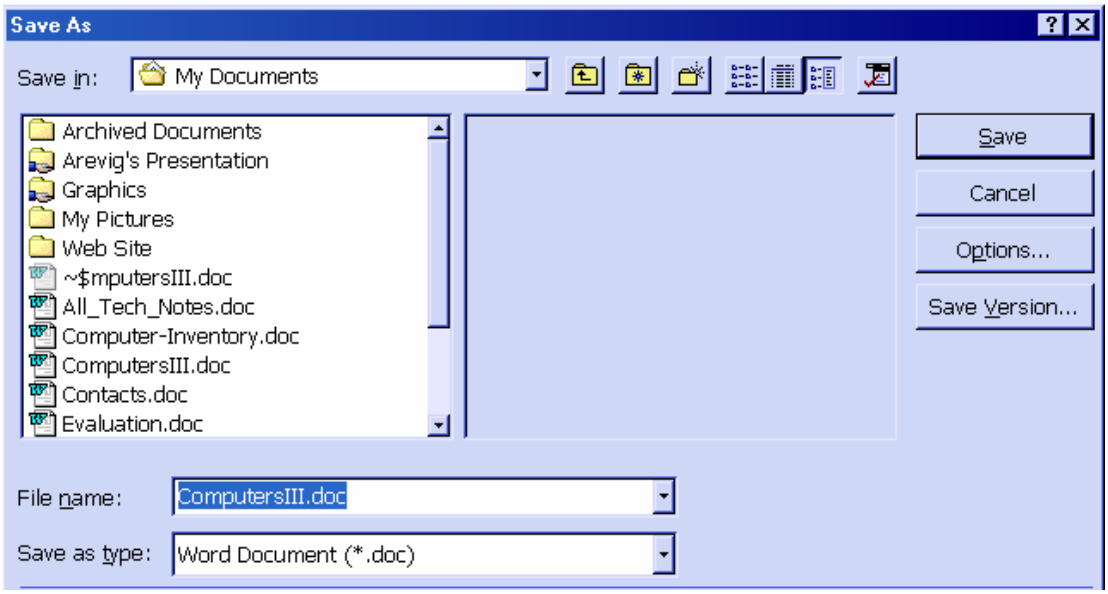
If they are not already active, add the following two toolbars: **Standard** and **Formatting** (***View→Toolbars***; both should have a checkmark next to them) to your Microsoft Word document. The Standard Toolbar includes the basic function such as saving, printing, cutting & pasting; the Formatting Toolbar contains the font size, type, layout, etc. Additional toolbars include: Auto Text, Control Toolbox, Database, Drawing, Forms, Pictures, Reviewing, Tables and Borders, Visual Basic, Web and Word Art. Add as many Toolbars as you want, but your workspace will decrease with each additional toolbar.



PAGE DEFAULT: ***File→Page Setup***

Set your preferred font and font size using the Formatting toolbar (or through the Format menu). Enter ***File→Page Setup*** to set the paper size, alignment and page margins for the document and press "***Default***". All new documents you create will now start with these default settings.

GETTING STARTED



CREATING A NEW DOCUMENT: ***File→ New***

To create a new document, click the New button, or select *File→ New.* Microsoft Word includes several templates (called "Wizards") if you do not wish to custom-format your document. These Wizards include (but are not limited to): Business Letter, Letterhead and Envelopes, Memos, Fax Sheets and Sending FAX via the modem, Newsletters, Resume and Cover Letters and Online Manuals.

COPYING/MOVING TEXT: ***CTRL-C, CTRL-V***

To select any amount of text, drag over it. To select a word, double-click it. To select a line, click to the left of it. To select multiple lines, click to the left of a line and drag up or down. The easiest way to move or copy text a short distance is to select the text, point to it, hold down the mouse button, drag the dotted pointer to the new location and then release the mouse button.

SAVING A DOCUMENT: ***File→Save*** *or* ***File→Save As***

Select *File→Save.* When you first create a Microsoft Word document, you will need to select a name for it (Microsoft will default to either doc1.doc or the first several letters in the document). If you save the document as a Word Document (*.doc), the default, all your formatting will also be saved. The file will also be quite a bit larger than a text document (sometimes 3-4 times larger). Subsequent saves will now be under this name. To save the file under a different name/type/location, select *File→Save As* instead

CHECKING SPELLING: ***Tools→Spelling and Grammar***

To run spellchecker once you are done typing the document, either click on the check-mark icon on the Standard toolbar or select *Tools→Spelling and Grammar.* You can add words to the custom dictionary (such as your name) so that it will automatically correct for them. Click Tools→*Spelling and Grammar→Options* to change your default options.

ADDING FOREIGN CHARACTERS

FRENCH:

- **Á** hold down <CTRL><'> then type <A>
- **Â** hold down <CTRL><SHIFT><^> then type <A>
- **Ä** hold down <CTRL><SHIFT><:> then type <A>
- **É** hold down <CTRL><'> then type <E>
- **È** hold down <CTRL><`> then type <E>
- **Ê** hold down <CTRL><SHIFT><^> then type <E>
- **Ë** hold down <CTRL><SHIFT><:> then type <E>
- **Ï** hold down <CTRL><SHIFT><:> then type <I>
- **Ô** hold down <CTRL><SHIFT><^> then type <O>
- **Ç** hold down <CTRL><,> then type <C>

SPANISH:

- **Á** hold down <CTRL><'> then type <A>
- **É** hold down <CTRL><'> then type <E>
- **Í** hold down <CTRL><'> then type <I>
- **Ó** hold down <CTRL><'> then type <O>
- **Ú** hold down <CTRL><'> then type <U>
- **Ñ** hold down <CTRL><SHIFT><~> then type <N>
- **¡** hold down <CTRL><SHIFT><ALT><!>
- **¿** hold down <CTRL><SHIFT><ALT><?>
- « hold down <CTRL><`> then type <
- » hold down <CTR><`> then type >

GERMAN:

- **Ä** hold down <CTRL><SHIFT><:> then type <A>
- **Ö** hold down <CTRL><SHIFT><:> then type <O>
- **Ü** hold down <CTRL><SHIFT><:> then type <U>
- **ß** hold down <CTRL><SHIFT><&> then type <s>

FORMATTING

BORDERS: ***Format→Borders and Shading***

Select the text and go to *Format→Borders and Shading*. Choose one of the preset border style icons under "Setting". You can also control the style by choosing a pattern from "Style" list and the color from "Color" list.

DROP CAP: ***Format→Drop***

To create a large first letter in a paragraph, highlight the letter and select *Format→Drop Cap* from the menu. Sample is shown on this paragraph.

FONT STYLE: ***Format→Font***

To change the font, style or color of the text, highlight the appropriate text (<CONTROL><A> selects all the text in the document) and either click on the appropriate icon on the Formatting Toolbar or select *Format→Font* from the main menu.

MULTIPLE COLUMNS: ***Format→Columns***

If you have long lists that take up far too much space on your document, you can divide that information into columns (up to four). Highlight the list and select the appropriate icon from the Standard Taskbar, or select *Format→Columns.* To force a break in a column after an item, select *Insert→Break→Column Break.*

SPACING: ***Format→Paragraph→Spacing→Line Spacing***

To change text spacing, select *Format→Paragraph→Spacing→Line Spacing.* To add Bullets and Numbered lists, highlight the information and click on the Formatting toolbar or select *Format→Bullets and Numbering.*

DESKTOP PUBLISHING

GRAPHICS: ***Insert→ Picture→Clip Art*** *or* ***Insert→Picture→From File***

To insert pictures in your document, click on the section where you want the picture and select *Insert→ Picture→Clip Art* (for Microsoft's own supplied set of pictures) or *Insert→Picture→From File* (for your own pictures). Alternately, you can use a symbol in a large size (*Insert→Symbol*, then highlight it and change the font size to 72 or larger). Note: Each Font style has it's own unique symbols; check Wingdings and Webdings for common icons.

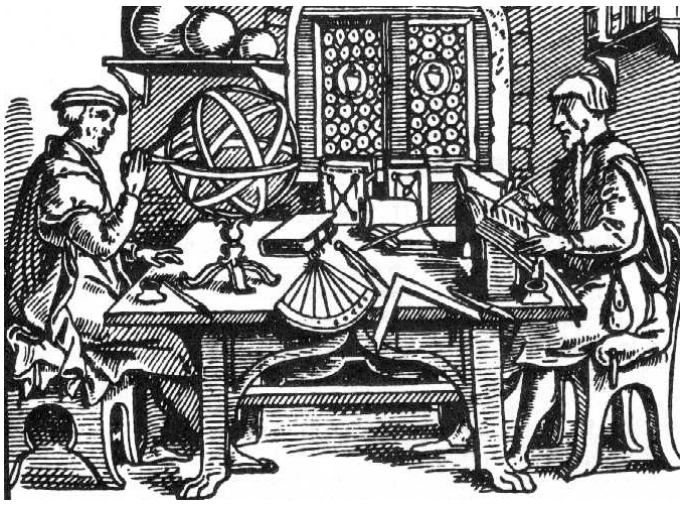
MARGINS: ***File→Page Setup → Margins → Mirror Margins***

To mirror margins for a page layout (instead of keeping them all the same), select *File→Page Setup → Margins → Mirror Margins.* This will keep the odd and even numbered pages separate. Select *View→Header and Footer→Page Setup→Layout → Different Odd and Even* to separate the Headers and Footers.

TEXT BOXES: ***Insert→ Text Box***

To insert a text box, select *Insert→ Text Box* and use your mouse to draw the upper-left and bottom-right corners (don't worry - you can always change the size later). Type the text inside the text box. To remove the border around the Text Box, right-click on the edge of the Text Box and select "*Format Text Box*". Under *Line → Color,* select "*No Line*" (black is the default). Alternately, you can change the format of the line around the text box. To change the size of the text box, click on the box and use one of the eight white squares surrounding it (one at each corner for increasing and decreasing size, and one in the middle of each line for skewing proportions). To delete the Text Box, right-click on the edge of it and select "Cut". To change the direction of the text in the Text Box, highlight the text (<CTRL><A> for all the text inside the box) and select *Format→Text Direction.*

ADVANCED FEATURES:



DICTIONARY: ***Tools → Options → Spelling and Grammar***

To correct an error in the Custom Dictionary, select *Tools → Options → Spelling and Grammar*. Under Custom Dictionary (CUSTOM.DIC), press "DICTIONARY" and select "Edit". Delete any incorrect entries in the Custom Dictionary and save.

LINKS: ***Create Text Box Link***

Your Microsoft Word document can incorporate information from another Microsoft document (Word or Excel). The information is only entered in one unique place; when you change it, it is automatically changed on all linked documents. To create a link, create a new, blank Text Box the information. Right-click on the border of the text box and select "Create Text Box Link". The Text Box will then ask you to point to the original text box (may be in a different document) for the information.

PASSWORD: ***File →Save As → Options→File sharing options***

Select *File →Save As → Options→File sharing options* and type in your document password (subsequent users will have to enter this password to open the document). This can be used to send encrypted e-mails (password protect and send the file as an attached document. Send the password to unlock the file in a separate e-mail).

SOUND: ***Insert→Object→Create New →Wave Sound***

You will need to have a sound card and a microphone and speakers installed on your computer for this function. Select an area where you wish to add sound. Choose *Insert→Object→Create New →Wave Sound*. Record your message into the microphone and hit "Stop" when you are done. Select *File→Exit→Return to Document*. Your document will now have a speaker icon in document. To play the sound, double-click the speaker icon.

WEB: ***Insert → Hyperlink***

Highlight the appropriate text. Select *Insert → Hyperlink* (or <CTRL><H>) and type the web address where you want the text to link to. Alternately, you can save any document you type into HTML (Hypertext Markup Language) form by selecting File *→Save As →Save As Type: HTML Document (*.htm, *.html, *.htx)*. To view this document as a web page, open it up in a web browser (either Internet Explorer or Netscape Navigator).

MAIL MERGE

STEP I: START A MAIL MERGE

- Start a new document
- Choose Tools → Mail Merge
- Click on the Create button in the Mail Merge Helper dialog box and choose Form Letters
- In the Dialog box that appears, click on the Active Windows button

STEP II: CREATE A DATA SOURCE

- Click on the Get Data button in the Mail Merge Helper Dialog box, and choose Create Data Source
- Add and remove field names as needed in the Create Data Source dialog box
- Click on OK
- Save your data source
- Click on the Edit Data Source button in the dialog box that appears.

STEP III: ENTER THE DATA IN A DATA SOURCE

- Type the contents of a field in the Data Form dialog box
- Press TAB to move to the next field
- Click on the Add New button to start a new record.
- Repeat until done, then click OK

STEP IV: ADD A MERGE FIELD TO THE MAIN DOCUMENT

- Click on the Insert Merge Field button on the Mail Merge toolbar, and choose the field you want to insert.
- Include normal spacing and punctuation around and between merge fields

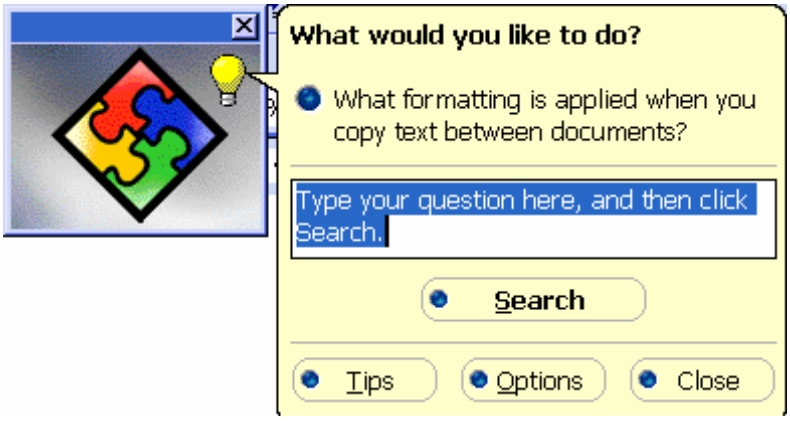
STEP V: MERGE THE DATA SOURCE INTO THE MAIN DOCUMENT

- Click on the Merge button in the Mail Merge Helper dialog box
- Click on the Merge button in the Merge dialog box.
- Click on the Check Errors button in the Merge Dialog box.

STEP VI: CREATE MAILING LABELS

- From within the main document, click on the Mail Merge Helper button on the Mail Merge toolbar
- In the Mail Merge Helper dialog box, click on the Create button and choose Mailing Labels
- In the dialog box that appears, click on the New Main Document button
- Back in the Mail Merge Helper dialog box, click on the Get Data button and open a data source
- In the dialog box that appears, click on Set Up Main Document
- In the Label Options dialog box, chose the labels' manufacturer in the Label Products drop-down list box
- Chose the labels' product number in the Product Number list box. Click OK
- In the Create Labels dialog box, click on the Insert Merge Field button and choose merge fields to construct an address.
- Include punctuation and spaces as needed.

MINOR ANNOYANCES



AUTO CORRECT: ***Tools → Auto Correct***

Does Microsoft Word keep trying to complete your sentences (i.e. you start typing "Febr" and a yellow note with the word "February" pops up)? You can either hit <ENTER> to accept the suggestion (and avoid typing the rest of the word), or select *Tools→Auto Correct* to turn these features off.

PAPERCLIP GUY: ***Tools → Options → View → ScreenTips***

To turn off the annoying paperclip guy (he's known as the "Office Assistant" and he'll offer you tons of "Screen Tips" when you start typing), select Tools→*Options*→*View* and uncheck "*ScreenTips*". You can also right-click on him when he pops up (usually when you start entering a date or a salutation) and select "Hide Assistant". You can also change him from the paperclip into something more soothing (a jigsaw puzzle piece, etc.).

SPELLING/GRAMMAR: ***Tools→ Options → View → Non-Printing Characters***

Is your document plastered in red and green squiggly lines? Enter *Tools→Options→ Spelling & Grammar* and uncheck "Check Spelling as you type" and "Check grammar as you type" to remove the squiggly lines while you type. Likewise, if you want to get rid of non-printing characters in your document (paragraph and tabs), deselect them in *Tools→Options→View→Non-Printing Characters*

MACRO VIRUSES: ***Tools → Options → General → Macro virus protection***

The macro feature in Microsoft Word is how hackers can infect your computer. Since it is a program that runs in Microsoft Word, a damaging program can be recorded, sent to you as an attached document, and run when you open Microsoft Word. To prevent such a virus from infecting your system:

(a) Do not open any Microsoft Word attachments that you are not expecting, even if they are from your friends or co-workers,

(b) Check *Tools →Options→General→Macro virus protection*. This will offer you a second level of security

(c) Keep a virus-protection program running on your computer if you use the Internet. McAfee VirusScan and Norton AntiVirus are the two most popular ones on the market (and usually come installed with a new P.C.)

ADDITIONAL WORD NOTES