Excel Lesson 6
Enhancing a Worksheet

Microsoft Office 2010
Introductory

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Objectives

- Sort and filter data in a worksheet.
- Apply conditional formatting to highlight data.
- Hide worksheet columns and rows.
- Insert a shape, SmartArt graphic, picture, and screenshot in a worksheet.
- Use a template to create a new workbook.

Objectives (continued)

- Insert a hyperlink in a worksheet.
- Save a workbook in a different file format.
- Insert, edit, and delete comments in a worksheet.
- Use the Research task pane.

Vocabulary

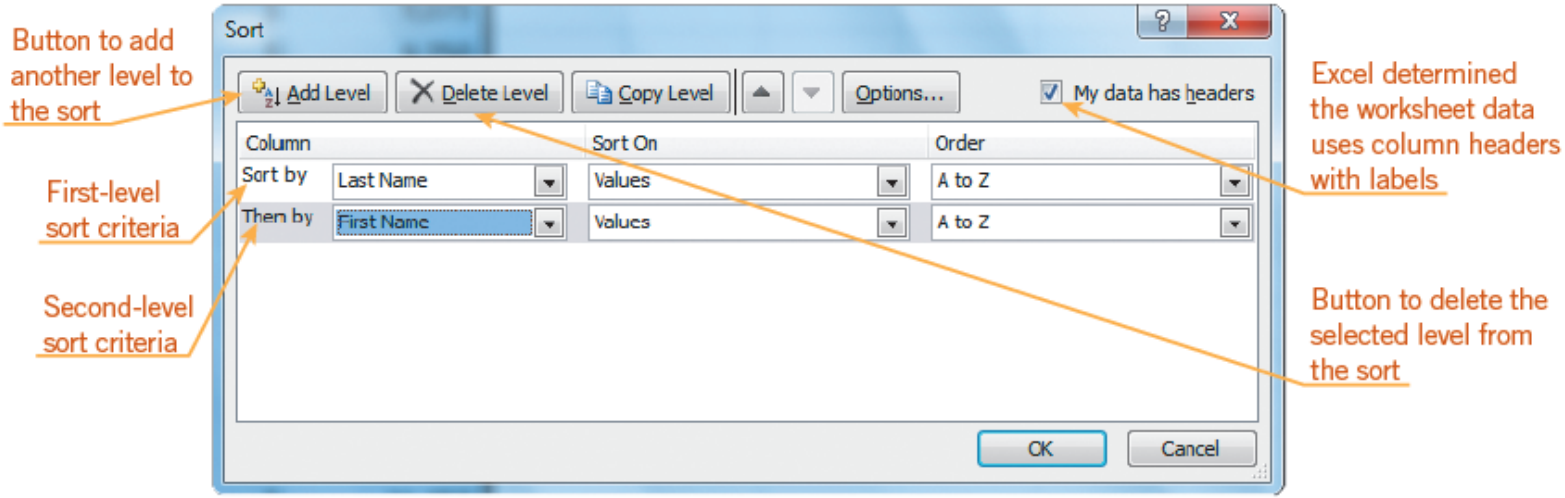
- ascending sort
- comment
- conditional formatting
- descending sort
- filter
- filter arrow
- hyperlink
- object
- picture
- Research task pane
- screen clipping
- screenshot
- shape
- SmartArt graphic
- sort
- template

Sorting Data

- **Sorting** rearranges data in a more meaningful order.
- In an **ascending sort,** data with letters is arranged in alphabetical order (A to Z), numbers are arranged from smallest to largest. The reverse order occurs in a **descending sort.**
- You can sort by more than one column of data.

Sorting Data (continued)

- Sort dialog box

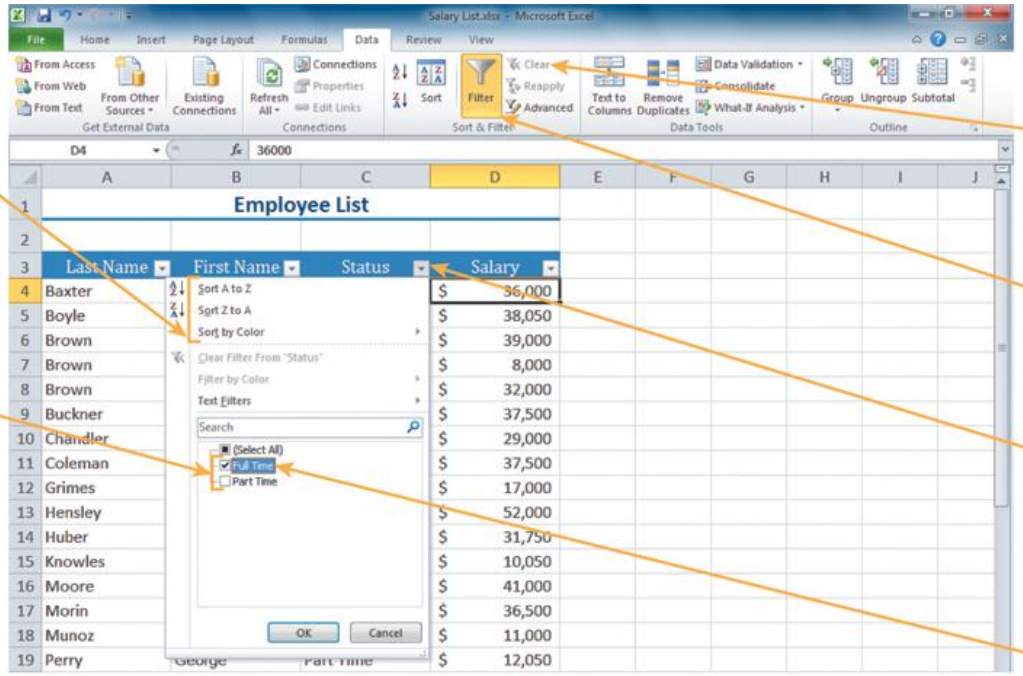


Filtering Data

- **Filtering** displays a subset of data that meets certain criteria. You can filter by value, by criteria, or by color.
- On the Data tab of the Ribbon, click the Filter button. **Filter arrows** appear in the lower-right corners of the cells with column labels. When you click a filter arrow, the AutoFilter menu for that column appears.

Filtering Data (continued)

- AutoFilter menu



Clear button removes the current filter from the selected column

Sort commands are also available

Filter button turns the filter arrows on and off

Values in the Status column

Filter arrows appear in each column header

Checked item will be displayed in the filtered worksheet; unchecked item will be hidden

Applying Conditional Formatting

- **Conditional formatting** changes the appearance of cells that meet a specified condition.
- The Highlight Cells Rules format cells based on comparison operators such as greater than, less than, between, and equal to.
- The Top/Bottom Rules format cells based on their rank, such as the top 10 items.

Hiding Columns and Rows

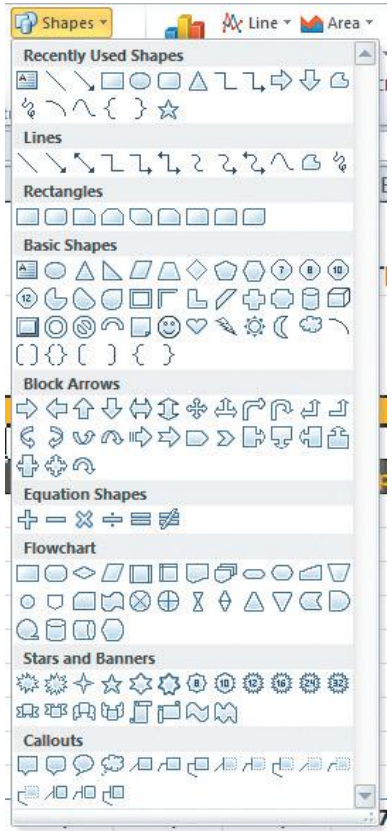
- Hiding a row or column temporarily removes it from view.
- Hiding rows and columns enables you to use the same worksheet to view different data.
- To hide data, select the rows or columns you want to hide, and then right-click the selection. On the shortcut menu that appears, click Hide.

Adding a Shape to a Worksheet

- **Shapes**, such as rectangles, circles, and arrows can help make a worksheet more informative.
- To open the Shapes gallery, click the Insert tab on the Ribbon, and then click the Shapes button.
- Shapes are inserted in the worksheet as objects. An **object** is anything that appears on the screen that you can select and work with as a whole.

Adding a Shape to a Worksheet (continued)

- Shapes gallery

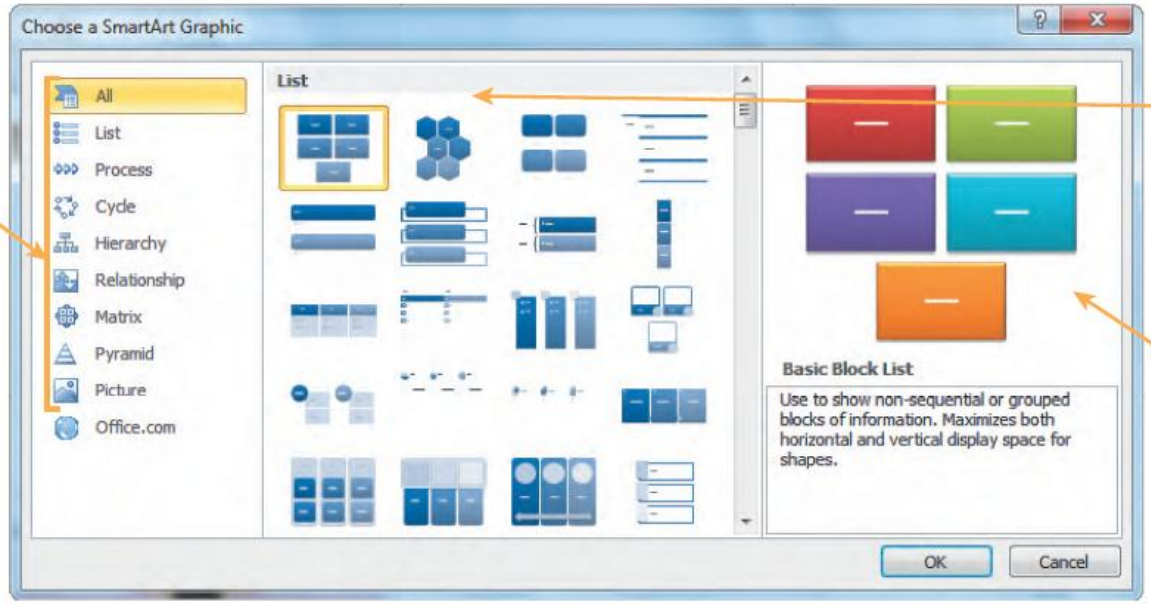


Adding a SmartArt Graphic to a Worksheet

- **SmartArt graphics** enhance worksheets by providing a visual representation of information and ideas.
- To insert a SmartArt graphic, click the SmartArt button in the Illustrations group on the Insert tab.
- When the SmartArt graphic is selected, SmartArt Tools appear on the Ribbon.

Adding a SmartArt Graphic to a Worksheet (continued)

- Choose a SmartArt Graphic dialog box



Adding a Picture to a Worksheet

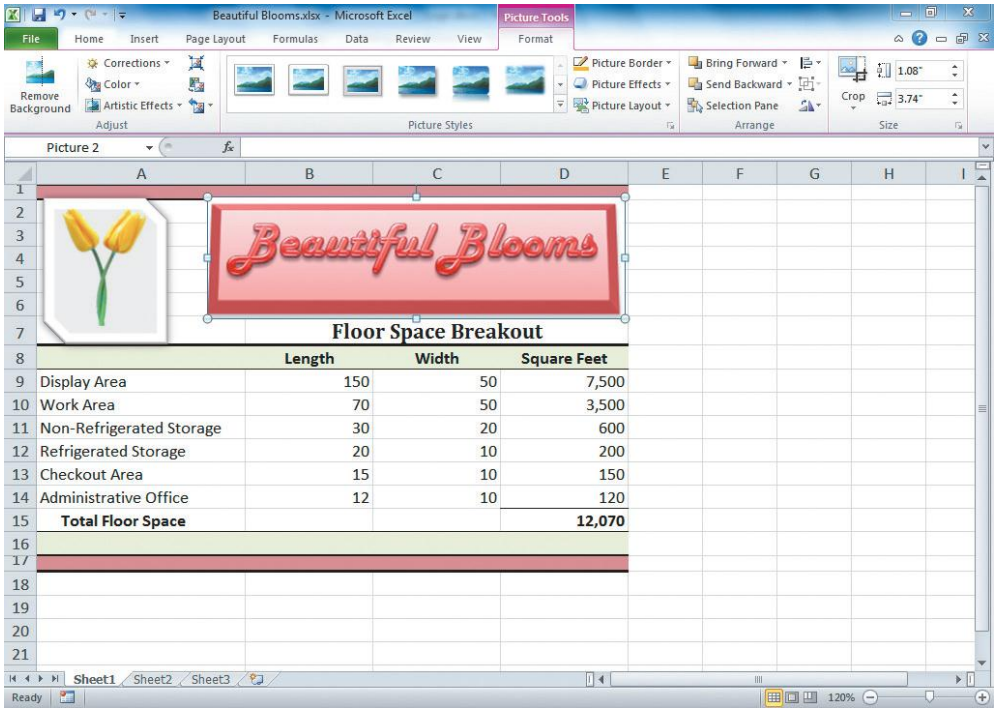
- A **picture** is a digital photograph or other image file.
- You can insert a picture in a worksheet by using a picture file, by using the Clip Art task pane, or from Office.com.
- A picture is inserted in the workbook as an object. As with shapes, you can move, resize, or format the picture to fit your needs.

Adding a Screenshot or Screen Clipping to a Worksheet

- A **screenshot** is a picture of all or part of something you see on your monitor.
- When you take a screenshot, you can include everything visible on your monitor or a **screen clipping**, which is the area you choose to include.

Adding a Screenshot or Screen Clipping to a Worksheet (continued)

- Screen clipping inserted in the worksheet

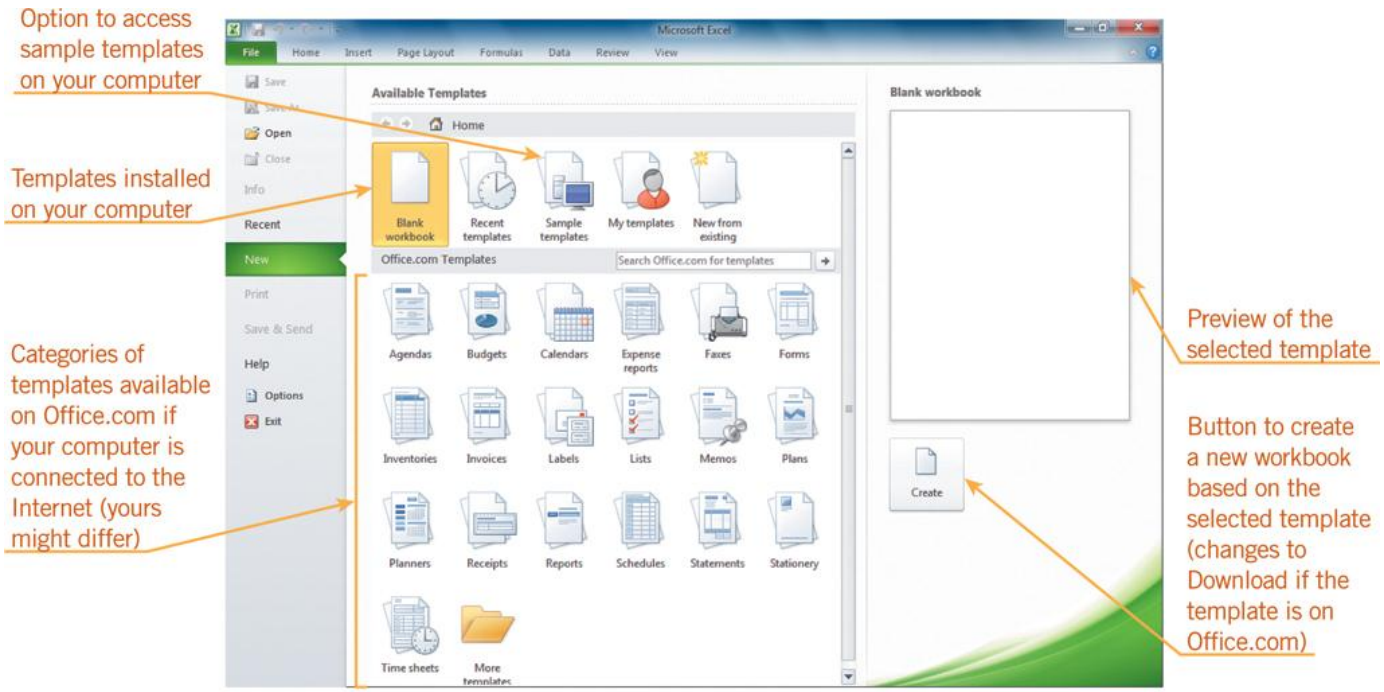


Using a Template

- **Templates** are predesigned workbook files that you can use as the basis or model for new workbooks.
- The template includes all the parts of a workbook that will not change, such as text labels, formulas, and formatting.
- Excel includes a variety of templates, which you access from the New tab in Backstage view.

Using a Template (continued)

- New tab in Backstage view



Inserting a Hyperlink

- A **hyperlink** is a reference that opens a Web page, a file, a specific location in the current workbook, a new document, or an e-mail address when you click it.
- To create or edit a hyperlink, you use the Hyperlink button on the Insert tab of the Ribbon.
- To use the hyperlink, click the cell or object.

Saving a Workbook in a Different Format

- Excel workbooks can be saved in different file formats so that they can be opened in other programs.

FILE TYPE	DESCRIPTION	FILE EXTENSION
CSV (Comma delimited)	Data separated by commas	.csv
Excel Template	File used to create other similar files	.xltx
Formatted Text (Space delimited)	Data separated by spaces	.prn
Microsoft Excel 97-2003	Data created in an earlier version of Excel	.xls
Text (Tab delimited)	Data separated by tabs	.txt
Single File Web Page	File to be displayed on the Internet	.mht, .mhtml
Web Page	File to be displayed on the Internet	.htm, .html
XML Data	Data in Extensible Markup Language	.xml

Working with Comments

- A **comment** is a note attached to a cell that you can use to explain or identify information contained in the cell.
- All of the comments tools are located on the Review tab of the Ribbon.
- To edit a comment, click the cell that contains the comment. Then click the Edit Comment button on the Review tab.

Using the Research Task Pane

- The **Research task pane** provides access to information typically found in references such as dictionaries and encyclopedias.
- In Excel, the Research task pane also provides numerical data typically used in a worksheet, such as statistics or corporate financial data.
- To open the Research task pane, click the Review tab on the Ribbon, and then, in the Proofing group, click the Research button.

Summary

In this lesson, you learned:

- Sorting rearranges worksheet data in ascending or descending alphabetical, numerical, or chronological order. Filtering displays a subset of data in a worksheet that meets specific criteria.
- Conditional formatting formats worksheet data by changing the appearance of cells that meet a specified condition, such as a comparison or rank.

Summary (continued)

- Hiding rows and/or columns lets you use the same worksheet to view different data. You can unhide the hidden rows and columns at any time.
- Shapes, such as rectangles, circles, arrows, lines, flowchart symbols, and callouts, can help make a worksheet more informative. Excel has a gallery of shapes you can insert.

Summary (continued)

- SmartArt graphics enhance worksheets by providing visual representations of information and ideas. Excel has a variety of SmartArt graphics you can use and customize.