

Section 3

Creating and Saving Workbooks

By the end of this Section you should be able to:

Start a New Workbook

Enter Text and Numbers

Save a New and Named Workbook

Save Workbooks in Different Formats

Save a Workbook as a Template

To gain an understanding of the above features, work through the **Driving Lessons** in this **Section**.

For each **Driving Lesson**, read the **Park and Read** instructions, without touching the keyboard, then work through the numbered steps of the **Manoeuvres** on the computer. Complete the **Revision Exercise(s)** at the end of the section to test your knowledge.

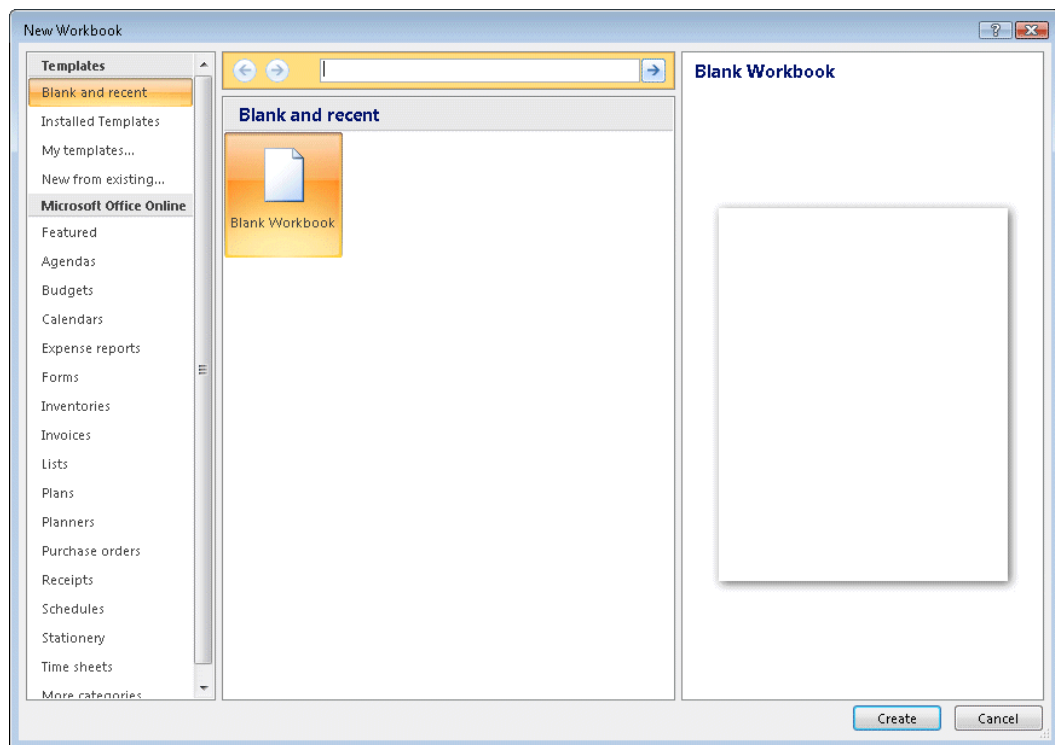
Driving Lesson 17 - Starting a New Workbook

P Park and Read

A blank workbook based on the default template must be started to begin creating a new spreadsheet.

Manoeuvres

1. Start a new workbook by clicking the **Office Button** and selecting **New**.



2. This displays the **New Workbook** dialog box. Examine the top of the list at the left. There are options to: start a new blank workbook, create one from an existing workbook and create a new workbook from an existing template.
3. The **Blank and recent** section is displayed with a **Blank Workbook** the default option, click the **Create** button to start a new workbook.
4. Leave this blank workbook open for the next Driving Lesson.

Driving Lesson 18 - Entering Labels

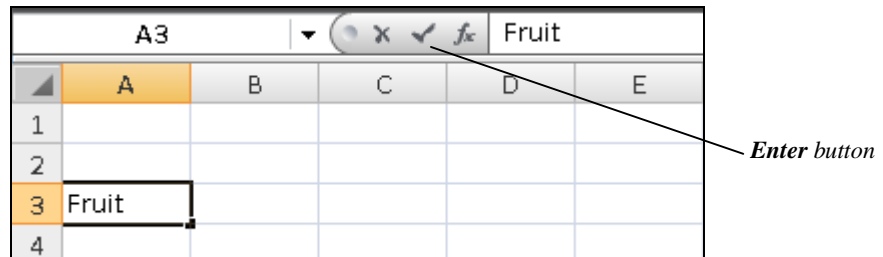
P Park and Read

Labels are normally used for describing the contents of the worksheet, as columns or row titles. When entering information into a cell, notice that the text appears in the **Formula Bar** as well as in the cell. A cell should really only ever contain one data item, e.g. a first name in one cell and a surname in an adjacent cell. This makes the data much easier to manipulate and sort. It's also good practice when creating a list of data to make sure it's easy to read. You can use a variety of layouts to do this: leave cells surrounding the list blank, leave a blank row before a row showing totals. Make sure you don't leave blank rows or columns in the main part of the list though.



Manoeuvres

1. With a blank workbook on screen, click on cell **A3** to select it.
2. Type the label **Fruit**. Notice **Enter** appears on the **Status Bar**, and that the **Enter** button appears in the **Formula Bar**. Press the <Enter> key to place the label into cell **A3**.



The entry can also be completed by clicking on the **Enter** button.

3. Move to cell **B3** and type **Apples**. Place **Apples** in **B3** by pressing the right cursor key →. This automatically enters the data into **B3** and moves the active cell to the right, ready for the next entry.

4. Pressing <Enter> moves the selection down, by default. Click the **Office Button** and then click **Excel Options**. Display the **Advanced** options and check that the **Direction** is **Down** under **After pressing Enter, move selection**. Click **OK**.

	A	B	C	D	E
1					
2					
3	Fruit	Apples	Pears	Oranges	Total
4	Jan				
5	Feb				
6	Mar				
7	Total				
8					

Complete the entries into the cells as opposite. If any mistakes are made, leave the errors.

5. Leave the workbook open for the next Driving Lesson.

Driving Lesson 19 - Entering Numbers

Park and Read

Numbers must begin with one of the following characters: **0 1 2 3 4 5 6 7 8 9 . + -** or a currency symbol.



Manoeuvres

1. Use the workbook open from the previous Driving Lesson.
2. Click on cell **B4** and type **36**, followed by **<Enter>**. The active cell is placed in cell **B5** ready for the next entry.
3. Enter the rest of the information into the correct cells, using the cursor movement keys to complete each entry.

	A	B	C	D	E	F
1						
2						
3	Fruit	Apples	Pears	Oranges	Total	
4	Jan	36	38	26		
5	Feb	40	26	37		
6	Mar	53	20	41		
7	Total					
8						



*Any instruction to enter or type information into a cell will assume that the entry is completed with a movement key, **<Enter>** key, clicking on another cell, etc.*

4. Do **NOT** close the workbook as it is saved in a later Driving Lesson.




By default, all numeric values are right aligned (placed to the right edge of the column) and the labels (text) are left aligned. Alignment is dealt with in a later Driving Lesson.

Driving Lesson 20 - Saving a New Workbook

P Park and Read

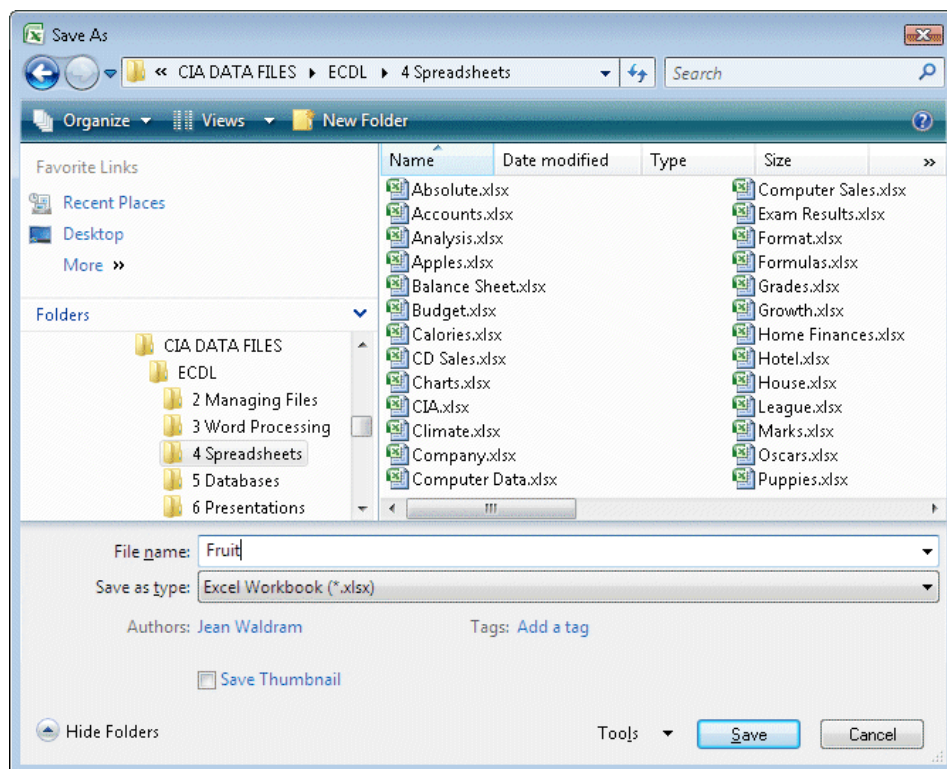
After creating a worksheet, it needs to be saved as a workbook so it can be used again. The **Save** process includes selecting the location to save to, giving the workbook a name and selecting the type of format to save it in.

Manoeuvres

1. With the worksheet open from the previous Driving Lesson, click the **Save** button,  on the **Quick Access Toolbar**, or click the **Office Button** and select **Save As** or use the key press <Ctrl S> to display the **Save As** dialog box.
2. In the **File name** box overtype to change the default workbook name to **Fruit**. The files for this guide are stored in the **4 Spreadsheets** folder (see Page 4 **Downloading the Data Files** for the exact location).



After moving to the **4 Spreadsheets** folder earlier, Excel remains there until it is closed down or another location is selected. Excel, when restarted, will revert to the default folder, **Documents**.



3. Click the **Save** button to save the file.
4. Check the **Title Bar** for the file name.
5. Leave the workbook **Fruit** open.

Driving Lesson 21 - Saving a Named Workbook

P Park and Read

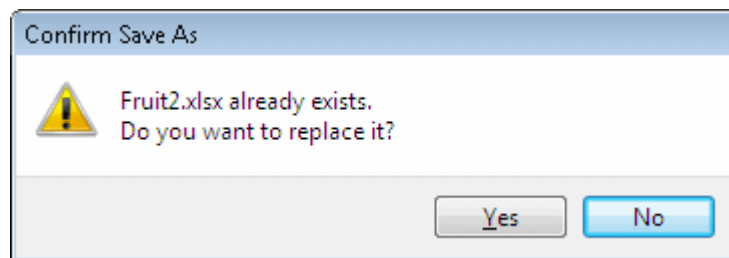
There are two commands used when saving a workbook.

- Save** saves the file under the same name as previously used and overwrites an earlier version.
- Save As** allows changes to be made to the initial save options creating a different version of the original, or to overwrite the original by confirming the replacement. This option can be used to create a backup of a file to a diskette (a floppy disk) or a memory stick.



Manoeuvres

1. The workbook **Fruit** should still be on screen from the last Driving Lesson. Select cell **A1** and enter your name, then complete the entry.
2. This workbook will now be saved as **Fruit2**. Click the **Office Button** and then **Save As** to display the dialog box.
3. Type or edit the name in the **File name** box to **Fruit2** to save the file with the new name. Check that the current folder (in which to save the file) is correct in the folder box.
4. Click **Save**.
5. This workbook has not changed but it can still be saved to overwrite the first copy. Click the **Office Button** and then **Save As**, leave the filename as **Fruit2**, click the **Save** button to begin saving.



6. Click **Yes** to replace the existing file. The workbook is saved.
7. Close the workbook **Fruit2**.
8. *Excel* displays the most recently opened workbooks to the right of the **Office** menu. Open the workbook **Fruit** by clicking the **Office Button** and then clicking on **Fruit**. It should be exactly as saved earlier, i.e. without your name.
9. Close the workbook **Fruit**.

Driving Lesson 22 - Saving in Different Formats

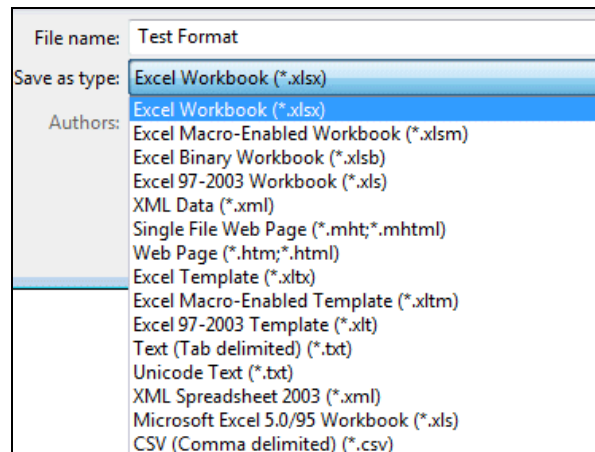
P Park and Read

Workbooks can be saved in a variety of formats: Text, template, older versions of *Excel* and associated products.



Manoeuvres

1. Open the workbook **Grades**. This workbook cannot be opened in older versions of *Excel* or other spreadsheet programs without being saved in the correct format. To save the workbook in a different format. Click the **Office Button** and **Save As**.
2. In the **File name** box enter **Test Format**, then click the drop down arrow of **Save as type** box.



3. Scan the list to display all the available formats that *Excel* can use. Choose the **Excel 97-2003 Workbook (*.xls)**, a set of previous *Excel* versions. Click **Save**.
4. To save the file so that it can be opened in another application's format display **Save As** and from the **Save as type** box, select **CSV (Comma delimited) (*.csv)**. Change the file name to **Test2**. Click **Save**.
5. If a workbook contains features that are not supported in the chosen format, an error message is displayed about losing formatting. Click **Yes** to lose some formatting. The workbook is saved as **Test2.csv**. This file can be opened by other spreadsheet applications.
6. To save the workbook as a text file, display **Save As** and from the **Save as type** box, select **Text (Tab delimited) (*.txt)** and change the file name to **Test3**. Click **Save**. Select **Yes** at the prompt. The workbook is saved as **Test3.txt**. This text file can be opened in *Notepad*, *WordPad* or *Word*.
7. Close the text file. Click **No** to save the changes message.

Driving Lesson 23 - Saving as a Template

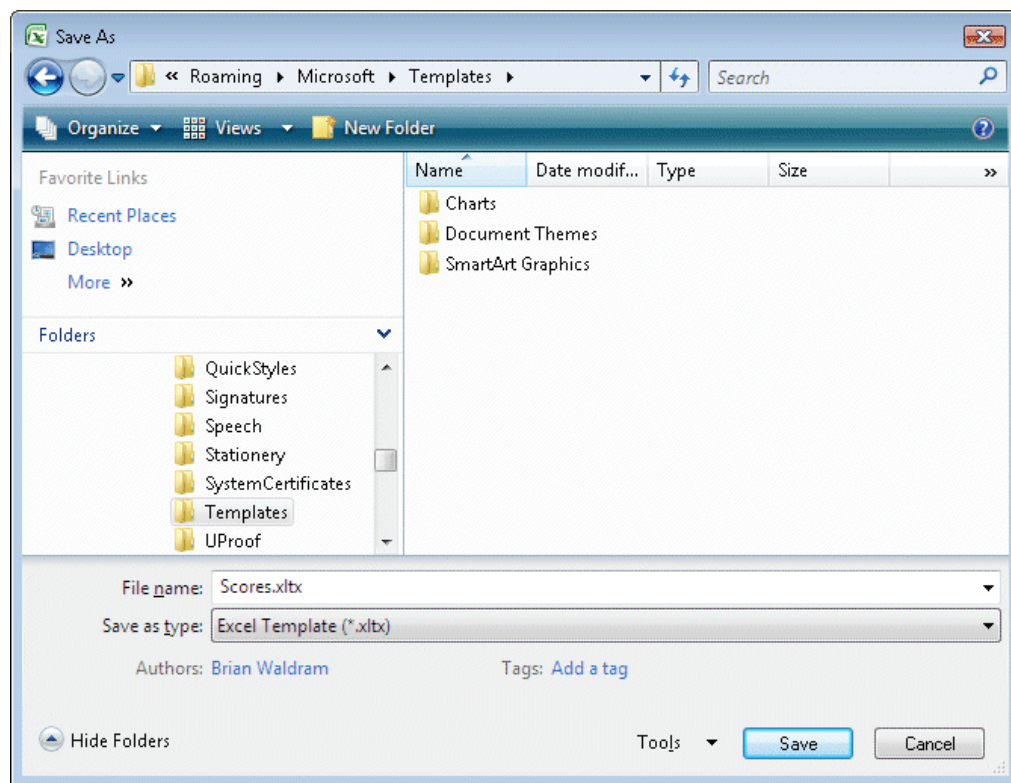
P Park and Read

An *Excel* worksheet can be saved as a **Template**, so that it can be viewed as a starting point from which to create new worksheets.




Manoeuvres

1. Open the workbook **Grades**.
2. To save the workbook as a template, click the **Office Button** and then **Save As**. In the **Save As** dialog box, change the **File name** to **Scores** and from **Save as type** select **Excel Template (*.xltx)**.



3. Click **Save**.



A **Template** is a base workbook that is stored with other templates. They have an **.xltx** extension and are shown with a  icon. To use a template select the **Office Button** then **New** and then select **My templates**. Available templates will be displayed in the **New** dialog box in the **My Templates** tab.

4. Close the workbook.
5. Select to open a file. Note that the **Templates** folder is still displayed. After saving a template you will need to navigate back to the data files folder. Navigate to the **4 Spreadsheets** folder, then click **Cancel**.

Driving Lesson 24 - Revision

This Driving Lesson covers the features introduced in this section. Try not to refer to the preceding Driving Lessons while completing it.

1. Start with a new workbook.
2. Create the following worksheet in the columns and rows indicated.

	A	B	C	D	E	F
1	Fred Bloggs					
2						
3	Number	Add	Subtract	Multiply	Divide	
4	First	6	7	5	12	
5	Second	3	4	3	4	
6	Result					
7						

3. Save the workbook as **Maths** and close it.
4. Start a new workbook.
5. Create the following worksheet:

	A	B	C	D
1	Formatting Section			
2				
3	Exercise	Title		
4	39	General Formatting		
5	40	Format Cells		
6	41	Format Number		
7	42	Date and Time		
8	43	Alignment		
9	44	Wrap Text		
10	45	Merge Cells		
11	46	Text Orientation		
12	47	Borders		
13	48	Revision		
14				

6. Save the workbook as **Formatting Section** and close it.

If you experienced any difficulty completing this Revision refer back to the Driving Lessons in this section. Then redo the Revision.

Driving Lesson 25 - Revision

This Driving Lesson covers the features introduced in this section. Try not to refer to the preceding Driving Lessons while completing it.

1. Start with a new workbook.
2. Create the following worksheet in the columns and rows indicated.

	A	B	C	D	E	F	G	H	I
1	Satellite Sales Figures								
2									
3		Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
4	Zara	0	3	5	3	2	4	5	
5	Geoge	4	5	3	0	7	6	2	
6	Ishmael	3	2	0	6	4	5	3	
7	Liz	3	6	2	4	5	10	0	
8	Total								
9									

3. Save the workbook as **Satellite**.
4. Save the workbook as **Satellite97** in a worksheet format that can be opened in **Excel 97**.
5. Close the workbook **Satellite97**.
6. Open the workbook **Quickloan**.
7. Save the worksheet as a **template**, as **Loan**.
8. Close the workbook.
9. Open the workbook **Calories**.
10. Enter your name in cell **A3**.
11. Test the calories counter, using your own details.
12. Save the workbook as a **template**, named **Calorie Intake**.
13. Close the workbook.

If you experienced any difficulty completing this Revision refer back to the Driving Lessons in this section. Then redo the Revision.

Once you are confident with the features, complete the Record of Achievement Matrix referring to the section at the end of the guide. Only when competent move on to the next Section.