

Basic Computing Skills for Excel

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Introduction

Using Excel requires understanding the elements of Excel windows as well as common mouse operations and dialog box interactions. This guide reviews all three topics and uses the vocabulary that you will find in the book to which this serves as a supplemental companion.

1 Elements in an Excel Window

When you open Excel, you see a *window* similar to Figure 1, the Microsoft Windows Excel for Microsoft 365 window. This window contains many subparts or elements, about which you need to be familiar in order to effectively use Excel. Table 1 on the next page identifies the numbered elements of Figure 1.

Figure 1

Microsoft Windows Excel for Microsoft 365 window with a new, blank worksheet

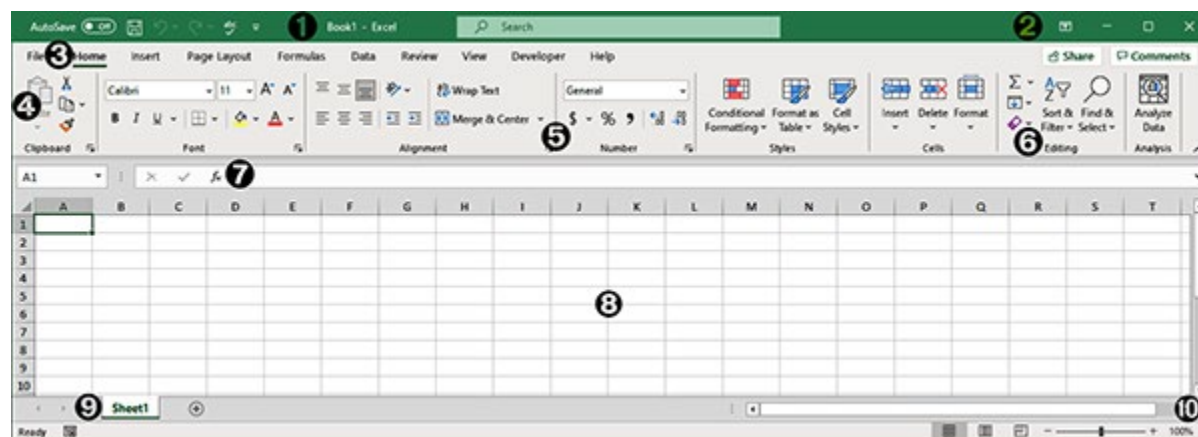


Table 1 Labeled Excel Window Elements in Figure 1

Number and Element	Function
1 Title bar	Displays the name of the program and contains the Minimize , Resize , and Close buttons for the program window. You drag and drop the title bar to reposition a program window onscreen.
2 Ribbon Display Options, Minimize, Resize, and Close buttons	Ribbon Display Options controls the displays of the Office Ribbon, the set of icons that appear below the menu bar (label #3). Minimize hides the window without closing the program. Resize permits you to change the size of the window. Close removes the window from the screen and closes the program.
3 Menu bar	The horizontal list of menu choices or “tabs” that begins with File. Selecting a menu choice opens either a “tab,” a selection of choices presented in the Office Ribbon, or a special display of information and choices (the File choice). In Figure 1, Home has been selected and the Office Ribbon displays the Home tab choices.
4 Office Ribbon	The main area for selecting Excel commands. Commands are grouped into tabs , and tabs can be further subdivided into groups . Some groups, such as the Font group in Figure 1, include launcher buttons that display dialog boxes or galleries , a set of pictorial choices.
5 Alignment and Number groups	The choices in the Alignment and Number groups of the Home tab are among the most frequently used to format worksheet (label #7) entries.
6 Sort and Filter	Sort and Filter in the Editing group of the Home tab enables you to sort worksheet entries or select a subset of rows based on a filter criteria.
7 Formula bar	Displays and enables editing of the contents of the currently selected worksheet cell (Cell A1, in Figure 1).
8 Workbook area	Displays the currently open worksheets or workbooks. In typical use, this area displays the currently active worksheet in the workbook and shows the other worksheets as sheet tabs near the bottom of the workbook area.
9 Sheet tab	A clickable tab that selects an individual worksheet or chart sheet, labeled with the name of the sheet.
10 Scroll bar	Allows you to move through a worksheet vertically or horizontally to reveal rows and columns that cannot otherwise be seen.

2 Basic Mouse Operations

To interact with objects onscreen, you typically use a mouse or other pointing device such as a trackpad. Mouse operations can be divided into four types and assume a mouse with two buttons, one designated as the primary button (typically the left button) and the other button designated as the secondary button (typically the right button).

Click, **select**, **check**, and **clear** are operations in which you move the mouse pointer over an object and press the primary button. **Click** is used when pressing the primary button completes an action, as in “click (the) **OK** (button).” **Select** is used when choosing a choice from a gallery or list of choices. **Check** is used when pressing the primary button places a checkmark in the dialog box’s check box. (**Clear** reverses this action, removing the checkmark.)

Double-click is an operation in which two clicks are made in rapid succession. Most double-click operations enable an object for following use, such as double-clicking a chart in order to make changes to the chart. **Right-click** is an operation in which you move the mouse pointer over an object and press the *secondary* button. Often when you right-click an object, a **shortcut menu** of context-sensitive commands appears.

Drag is an operation in which you hold down the primary button over an object and then move the mouse. Dragging selects multiple objects, such as selecting a group of worksheet cells and can also be used to physically move an object to another location on the screen. (The drag operation ends when you release the mouse button.)

The related **drag-and-drop** operation permits you to move one object over another to trigger an action. You drag the first object across the screen, and when the first object is over the second object, you release the primary mouse button. In most cases, releasing the primary button causes the first object to reappear in its original position onscreen.

If you use a touchscreen, these mouse operations are done with finger gestures and taps, the details of which can vary from one system to another.

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3 Dialog Box Interactions

When you interact with Microsoft Excel, you will see **dialog boxes**, pop-up separate windows that contain messages or ask you to make entries or selections, and **panes**, areas that are displayed inside the Excel application window. Table 2 identifies and defines the user interface elements found in dialog boxes and panes that Figure 2 on page 5 labels.

Table 2 Dialog Box Elements

Element	Function
Command button	A clickable area that tells a program to take some action. For example, a dialog box OK button causes a program to take an action using the current entries and selections of the dialog box. A dialog box Cancel button closes a dialog box and cancels the pending operation associated with the entries and selections in the dialog box.
List box	A box that displays a list of clickable choices. If a list exceeds the dimensions of a list box, list boxes display scroll buttons or sliders (not shown in Figure 2) that can be clicked to reveal choices not currently displayed.
Drop-down list	A button that, when clicked, displays a list of choices from which you select.
Edit box	An area into which entries are typed. Some edit boxes also contain drop-down lists or <i>spinner buttons</i> that can be used to make entries. In Excel, a cell range edit box typically contains a clickable button that allows you to select a cell range by dragging the mouse in lieu of typing the cell range.
Set of option buttons	A set of buttons that represent a set of mutually exclusive choices. Clicking one option button clears all the other option buttons in the set.
Check box	A clickable area that represents an optional action. A check box displays either a checkmark or nothing, depending on whether the optional action has been selected. Unlike with option buttons, more than one check box can be checked at a time. Clicking a check box that already contains a checkmark <i>clears</i> the check box.

Figure 2

Microsoft Windows Excel Open dialog box, Print pane (partial), and Excel Options dialog box

