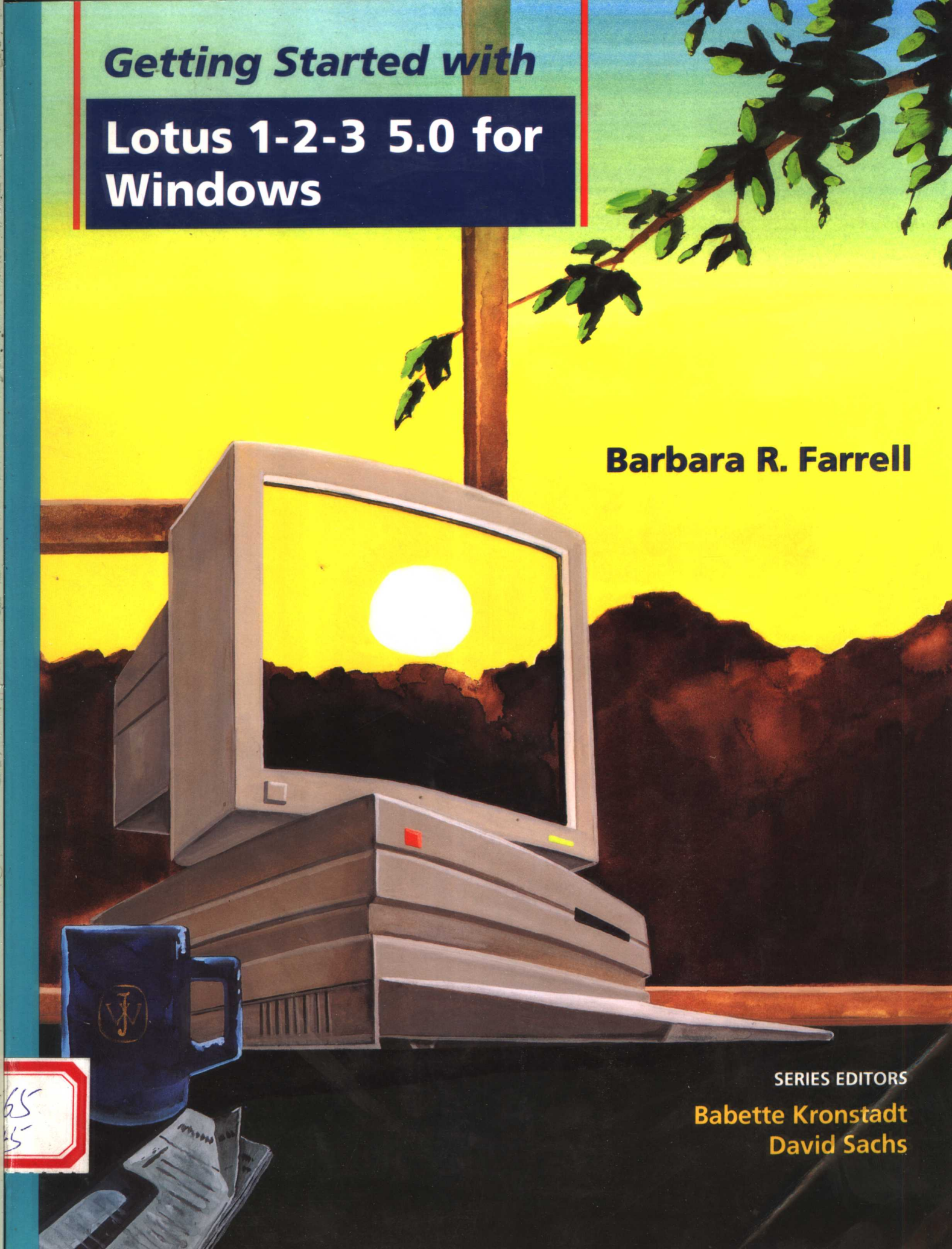


*Getting Started with*

# Lotus 1-2-3 5.0 for Windows

**Barbara R. Farrell**



SERIES EDITORS

**Babette Kronstadt  
David Sachs**

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# **Getting Started With Lotus 1-2-3 5.0 For Windows**

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# Preface

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*Getting Started with Lotus 1-2-3 5.0 for Windows* provides a step-by-step, hands-on introduction to *Lotus*. It is designed for students with basic PC and Windows skills who have little or no experience with *Lotus 1-2-3 5.0 for Windows*. Basic skills are taught in short, focused activities which build to create actual applications.

## Key Elements

Each lesson in *Getting Started with Lotus 1-2-3 5.0 for Windows* uses eight key elements to help students master specific worksheet and *Lotus 1-2-3 5.0* concepts and skills and develop the ability to apply them in the future.

- **Learning objectives**, located at the beginning of each lesson, focus students on the skills to be learned.
- **Project orientation** allows the students to meet the objectives while creating a real-world application. Skills are developed as they are needed to complete projects, not to follow menus or other artificial organization.
- **Motivation** for each activity is supplied so that students learn *why* and *when* to perform an activity, rather than how to follow a series of instructions by rote.
- **Bulleted lists of step-by-step general procedures** introduce the tasks and provide a handy, quick reference.
- **Activities with step-by-step instructions** guide students as they apply the general procedures to solve the problems presented by the projects.
- **Screen displays** provide visual aids for learning and illustrate major steps.
- **Independent projects** provide opportunities to practice newly acquired skills with decreasing level of support.
- **Feature reference** at the end of the book allows students to have a single place to look for commands to carry out the activities learned in the book.

## Stop and Go

The steps for completing each *Lotus 1-2-3 5.0 for Windows* feature introduced in this book are covered in two ways. First they are described clearly in a bulleted list, which can also be used for reference. Then the steps are used in a hands-on Activity. Be sure to wait until the Activity to practice each feature on the computer.

## Taking Advantage of Windows

*Getting Started with Lotus 1-2-3 5.0 for Windows* provides a balanced approach to using a Windows application. The use of the mouse, buttons, and icons is emphasized. However, familiarity with the menus is developed so that students can take advantage of the greater options often available in menu commands. Shortcut menus and keys are introduced when appropriate. The convenient **Feature Reference** at the end of the book summarizes menu commands and mouse and keyboard shortcuts for each of the features covered in the lessons. Students can use this both to review procedures or learn alternate ways of carrying out commands.

## Flexible Use

*Getting Started with Lotus 1-2-3 5.0 for Windows* is designed for use in an introductory computer course. As a “getting started” book, it does not attempt to cover all of the features of the software. However, the topics included in later lessons allow instructors to provide opportunities for individualized or extra credit assignments or use the book in short courses focused specifically on *Lotus 1-2-3 5.0*. While designed to be used in conjunction with lectures or other instructor supervision, basic concepts are explained so that students can use the book in independent learning settings.

## Data Disk

Data disks are provided to the instructors for distribution to the students. Many of the projects use files from the data disk so that the focus of the lesson is on the new skills being learned in each project. Initial projects require that students develop applications from the beginning, while later projects mix developing new applications with editing existing applications. Enough explanation and data entry is always included so that students understand the full application that they are building.

## Acknowledgments

*Getting Started with Lotus 1-2-3 5.0 for Windows* was written by me, but it represents the work and effort of many individuals and organizations. Special thanks go to Elizabeth LoSacco for her careful editing, testing and expansion of the book. Nancy Treuer, Joe Knowlton, and Matthew Poli worked miracles with the layout and text formatting. Babette Kronstadt provided energetic leadership and orchestrated the production of not only this book but all of Pace’s books in the *Getting Started* Series.

We received enormous institutional support from Pace University and the School of Computer Science and Information Science (CSIS). In particular, much personal support and personal leadership for our work has come from the Dean, Dr. Susan Merritt.

From another perspective, this book is also a product of the Pace Computer Learning Center, under the direction of Dr. David Sachs, which is a loose affiliation of approximately 15 faculty and staff who have provided more than 7,000 days of instruction to over 60,000 individuals in corporate settings throughout the United States and around the world during the past nine years. Our shared experiences in the development and teaching of these non-credit workshops, as well as credit bearing courses through the Pace University School of Computer Science and Information Systems, was an ideal preparation for writing this book.

We have received many invaluable comments and suggestions from instructors at other schools who were kind enough to review earlier books in the *Getting Started* series and offer their suggestions for the current books. Our thanks go to Jack D. Cundiff, Horry-Georgetown Technical College; Pat Fenton, West Valley College; Sharon Ann Hill, University of Maryland; E. Gladys Norman, Linn-Benton Community College; and Barbara Jean Silvia, University of Rhode Island.

Our thanks also go to the many people at Wiley who provided us with the support and assistance we needed. Our editor, Beth Lang Golub, and editorial program assistant, David Kear, have been very responsive to our concerns, and supportive of all of the Pace Computer Learning Center’s writing projects. Andrea Bryant was invaluable in her management of all aspects of the production of this book.

Last but not least, I would like to thank my husband Jim and my son Brandon for their patience and support throughout the long writing process.

Barbara Farrell

March, 1995  
White Plains, New York

# Students and Instructors

## Before Getting Started Please Note:

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### WINDOWS INTRODUCTION

*Getting Started with Lotus 123 5.0 for Windows* assumes that students are familiar with basic Windows concepts and can use a mouse. If not, instructors may consider using the companion book, *Getting Started with Windows 3.1*, also published by Wiley. Windows has a tutorial which can also help students learn or review basic mouse and Windows skills. To use the Windows Tutorial: 1) turn on the computer; 2) type: **win** or select Windows from the menu or ask your instructor how to start Windows on your system; 3) press the **ALT** key; 4) press the **H** key; 5) when the **Help** menu opens, type a **W**; and 6) follow the tutorial instructions, beginning with the mouse lesson if you do not already know how to use the mouse, or going directly to the Windows Basic lesson if you are a skilled mouse user.

### STUDENT DATA DISKS

Most of the projects in this book require the use of a Data Disk. Instructors who have adopted this text are granted the right to distribute the files on the Data Disk to any student who has purchased a copy of the text. Instructors are free to post the files to standalone workstations or a network or provide individual copies of the disk to students. This book assumes that students who use their own disk know the name of the disk drive that they will be using it from. When using a network, students must know the name(s) of the drives and directories which will be used to open and save files.

### SETUP OF WINDOWS AND LOTUS 123 5.0 FOR WINDOWS

One of the strengths of Windows and *Lotus 123* is the ease with which the screens and even some of the program's responses to commands can be customized. This, however, can cause problems for students trying to learn how to use the programs. This book assumes that Windows and *Lotus 123 for Windows* have been installed using the default settings and that they have not been changed by those using the programs. Some hints are given about where to look if the computer responds differently from the way it would under standard settings. If your screen looks different from those in the book, ask your instructor or laboratory assistant to check that the defaults have not been changed.

### VERSION OF THE SOFTWARE

All of the screenshots in this book have been taken using Version 5.0 of *Lotus 123 for Windows*. If you are using a different 5.0 version, the appearance of your screen and the effect of some commands may vary slightly from those used in this book.

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# Introduction; Creating A Worksheet In 1-2-3 For Windows

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## Objectives

**In this lesson you will learn:**

- The Capabilities of 1-2-3 for Windows;
  - Starting 1-2-3 for Windows;
  - The 1-2-3 for Windows Screen;
  - How to Use HELP;
  - Moving Around the Window;
  - How to Create a New file;
  - How to Open Existing files;
  - How to Save your file.
  - How to Close Files.
- 

## THE CAPABILITIES OF 1-2-3- FOR WINDOWS

1-2-3 Release 5 for Windows is a spreadsheet package that will permit you to calculate and analyze data in the Windows environment. Release 5 offers spreadsheet, charting, drawing, scenario and database capabilities.

The spreadsheet organizes information in columns and rows. Once data is entered, formulas can be entered to perform calculations based upon the numbers entered. When numbers are changed, the new results are automatically calculated. 1-2-3 for Windows also provides over 220 built-in functions (preconstructed formulas) for calculations

Database functions can also be accomplished with 1-2-3 for Windows. You may sort by alphabetic or numeric orders using different columns of data. Finding data in the 1-2-3 database and querying data are two other database functions.

Once the information in the spreadsheet is created, it can be used to create charts. Charts are useful when creating presentations and reports.

Using 1-2-3 in the Windows environment allows the user to transfer information between 1-2-3 for Windows and other software applications easily. The information being shared between 1-2-3 for Windows and the software packages can be linked. Whenever the data in the Lotus 1-2-3 file changes, the file in the other software package is also updated automatically.

## STARTING 1-2-3 FOR WINDOWS

Before you can use 1-2-3, you must install it on the hard disk.

**To start 1-2-3:**

1. Start Windows.
2. Open the Windows Program Manager (if it is not already open).

3. Open the Lotus Applications Window by double clicking on it (your Lotus applications may be in a different group window).
4. Select the 1-2-3 Icon by double clicking on it.

1-2-3 displays the program title screen and then the 1-2-3 window with a worksheet window inside it. The Welcome to 1-2-3 dialog box will allow you to choose whether you want to create a new worksheet, work on an existing worksheet, or start the 1-2-3 tutorial.

If you do not want the Welcome display to appear again, select **Don't Show this Screen Again** by clicking on it.

## THE 1-2-3 FOR WINDOWS SCREEN

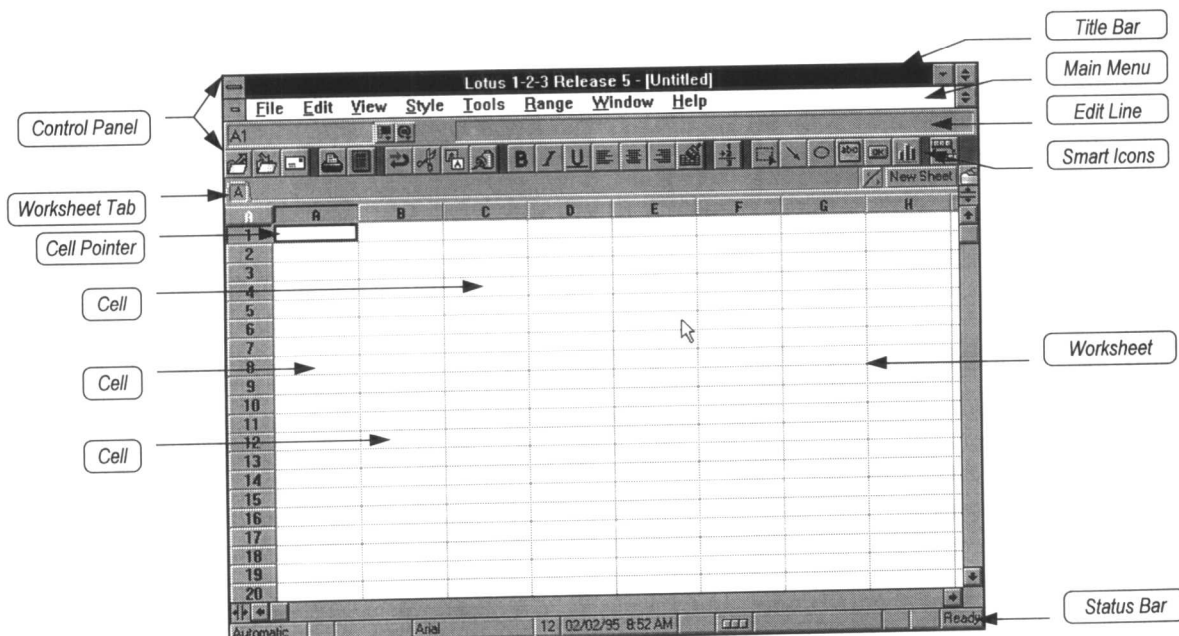


Figure I - 1

There are many parts of the 1-2-3 for Windows screen. Lets take a look at what appear on the screen before you.

### The Worksheet

A large portion of the screen contains the worksheet. The worksheet is a grid composed of **columns**, **rows**, and **sheets**. **Columns** are named by the letters of the alphabet: A, B, C, etc. **Rows** are named using numbers: 1, 2, 3, etc. Each worksheet contains 256 columns and 8,192 rows (2,097,152 cells per worksheet).

The intersection of a row and a column is a **cell**. Every cell has is addressed by using the column first, followed by the row (i.e.: A1, Q192, etc.) A cell is highlighted on you screen. This cell is A1. The highlighted box surrounding cell A1 is called the **cell pointer**. It identifies the **current cell**. When a cell is current, you may enter data, change the contents, or choose a command to affect the cell

Initially, the worksheet file has one worksheet open. You can add up to 255 more sheets to each worksheet file (536,870,912 cells per file). Each worksheet it identified by a letter , A, B, etc.. The worksheet letter is displayed at the top left corner of the worksheet.

## The Control Panel

The **Control Panel** displays information about 1-2-3 and the active window. It contains information about the **Title Bar**, the **Main Menu** and the **Edit Line**.

### Title Bar

The **Title Bar**, located at the very top of the screen, contains the Control menu box, the program name, the file name, the Minimize button and the Maximize or Restore button.

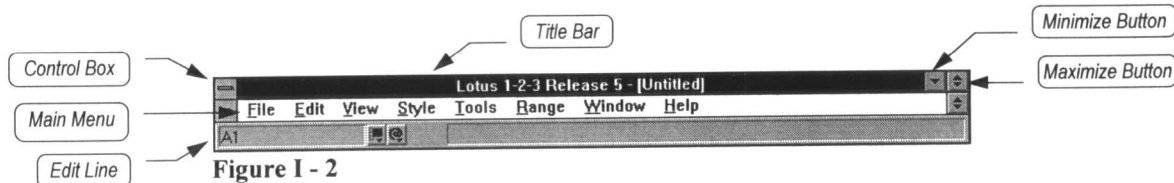


Figure I - 2

When a command from the menu is selected, the title bar displays a description of the command. Occasionally, if you choose a command, the title bar will display instructions to help you complete the command. For example, instructions appear when you are drawing a chart.

### The Main Menu

The **Main Menu** contains the commands that will be used with 1-2-3 for Windows. Commands on the main menu can change depending on the users selection.

### The Edit Line

The **Edit Line** contains the selection indicator, the navigator, the @function selector, the Cancel and Confirm buttons and the contents of the box

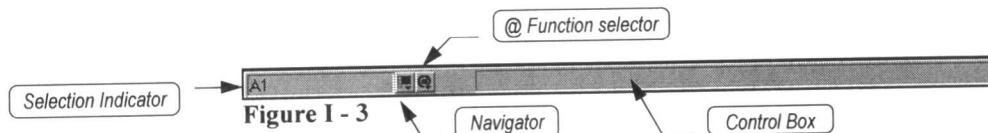


Figure I - 3

The **selection indicator** displays the current cell address or the name of the current selection (i.e.: range, chart,). If you click on the **Navigator**, a list of range names in the current file will be displayed. While in Ready mode, you can move to a range name by selecting it from the list. By clicking on the **@Function selector**, a list of @ functions available in 1-2-3 will be displayed. When data is entered such as values, labels,, etc., 1-2-3 will display the data in the **contents box**. Also, the Cancel and Confirm buttons appear. Select the Confirm button to enter the data or the cancel button to cancel the entry.

## SmartIcons



Figure I - 4

**SmartIcons** are shortcuts for the menu commands. The SmartIcons displayed will change depending on the menu item selected.

## The Status Bar

The **Status Bar** is located at the bottom of the window. This bar displays formats for the selected cell, time and date, SmartIcon selector, Status Indicator, and the Mode Indicator. You can use the Status bar to perform many tasks with the mouse.

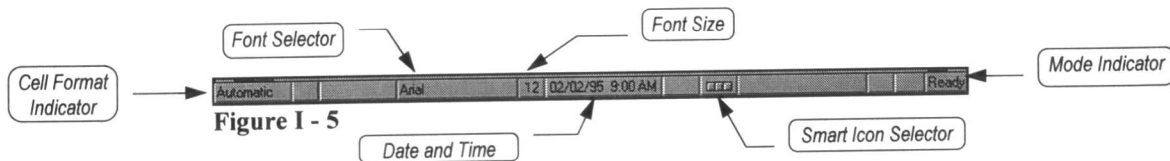


Figure I - 5

## USING HELP

1-2-3 for Windows makes use of an on-line **Help** feature that may be accessed many ways. You may select Help by:



The steps for completing each *Excel* feature introduced in this book are covered in two ways. First, they are described in a **bulleted** list, that can also be used for reference. The steps are used in a hands-on *Activity*. Be sure to wait until the **numbered** instructions in the *Activity* to practice each feature on the computer.

- From the menu commands;
- By pressing **F1**.
- By selecting the Question Mark in the top right corner of every dialog box.

Help is context sensitive. If you are in the middle of an operation and select Help, information about that operation appears. Help appears in a window that can be sized or moved. There are buttons and a menu in the Help window. Topics within the Help menu show as green and underlined. Help terms appear as green with dashed underlines.

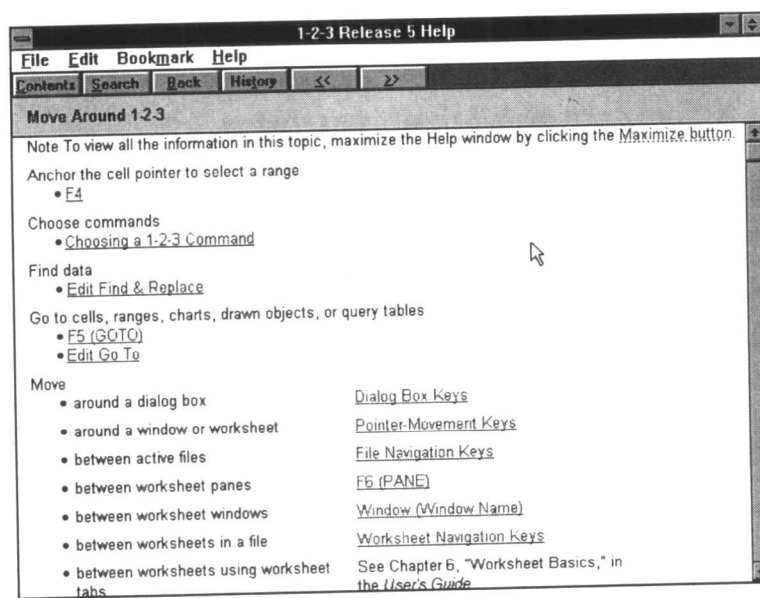


Figure I - 6



### Activity 1.1: Using Lotus 1-2-3 for Windows Help

The F1 HELP in 1-2-3 for Windows is context sensitive.

1. Click on **HELP** from the menu.
2. Click on **SEARCH**.
3. Type in **FORMULAS**.
4. Click on **SHOW/Topics**.
5. Select **@FUNCTION CATEGORIES** by clicking on it and pressing **ENTER** or selecting **GoTo**.
6. In the second row of the dialog box that appears there is a term, *edit line*. Click on *edit line* and read the definition.
7. Click a second time to make the definition of edit line disappear.
8. In the center of the dialog box is the term **financial**. Click on **Financial**. A list of financial **@ functions** will appear.
9. When you are ready to end **HELP**, click on **CLOSE**. Then select **FILE/Exit**.

## MOVING AROUND THE WINDOW

To enter data, the cell pointer must be placed in the correct location. There are many ways to move the cell pointer by using either the mouse or the cursor.

### To Change Cell Positions using the Mouse

All of the following methods can be used to change cell positions using the mouse:

- |                             |  |
|-----------------------------|--|
| • Click on the cell         | This makes the cell active   |
| • Click on scroll bar arrow | Moves the screen in the direction of the arrow: one row or column for each click |
| • Click on scroll bar       | Moves the entire screen up, down, left or right                                  |
| • Drag scroll bar           | Moves up, down, left or right quickly  |
| • Edit, Go To               | Go to a cell specified by the user ( <b>F5</b> )                                 |

### To Change Cell Positions using the Keyboard

All of the following methods can be used to change cell positions using the keyboard:

- |                               |   |
|-------------------------------|---|
| • Right Arrow                 | Right one column                                |
| • Left Arrow                  | Left one column                                 |
| • Up Arrow                    | Up one cell                                     |
| • Down Arrow                  | Down one cell                                   |
| • Home                        | To cell A1 of the current sheet                 |
| • Ctrl-Home                   | To cell A:A1 (beginning of the file)            |
| • <b>F5</b> and cell location | <b>GO TO</b> specific cell within the worksheet |
| • End-Home                    | End of the file                                 |
| • Page Up                     | One Screen Up                                   |
| • Page Down                   | One Screen Down                                 |

- Tab or Ctrl Right Arrow      Right one screen
- Shift-Tab or Ctrl-Left Arrow      Left one screen

### ***Activity I.2: Cursor Movement***

To get some practice moving around the worksheet, complete the following Activity:

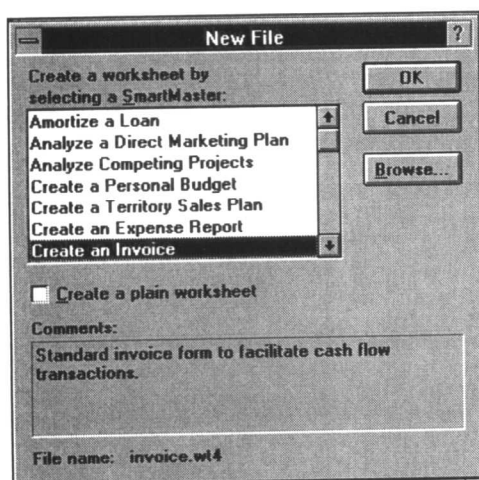
1. Select **FILE/New**.
2. Press **HOME** to place your cursor in cell **A1**.
3. Press the Right Arrow → to move to **B1**.
4. Press the Down Arrow ↓ to move to **B2**.
5. Press the Left Arrow ← to move to **A2**.
6. Press **PGDN** to move the cursor to cell **A22**. Notice the screen has scrolled down 20 rows.
7. Press **TAB** (or **CTRL-Right Arrow**) to move to cell **I22**. Notice that the screen has scrolled across 8 columns.
8. Press **F5** to bring up the **GoTo** prompt. The **F5** key is used to specify the cell location that you want to move your pointer to. A dialog box will appear.
9. Type **P200** and press **ENTER**. Now your cursor (or pointer) is in cell **P200**.
10. Press **HOME** to return to cell **A1**.

## **CREATING A NEW FILE**

When you start 1-2-3, you have a choice of creating a new file or opening an existing file. If you are working in 1-2-3, you would choose **FILE/New** to open a new file or **FILE/Open** to open an existing file.

### ***Activity I.3: Creating a New File***

1. Choose **FILE/New**.



**Figure I - 7**

2. A dialog box appears. You may select a SmartMaster template or you may select the “**Create a plain worksheet**” check box. We want to start a blank worksheet so make sure there is an X in the check box before “**Create a Plain Worksheet**”.