

The

O'LEARY

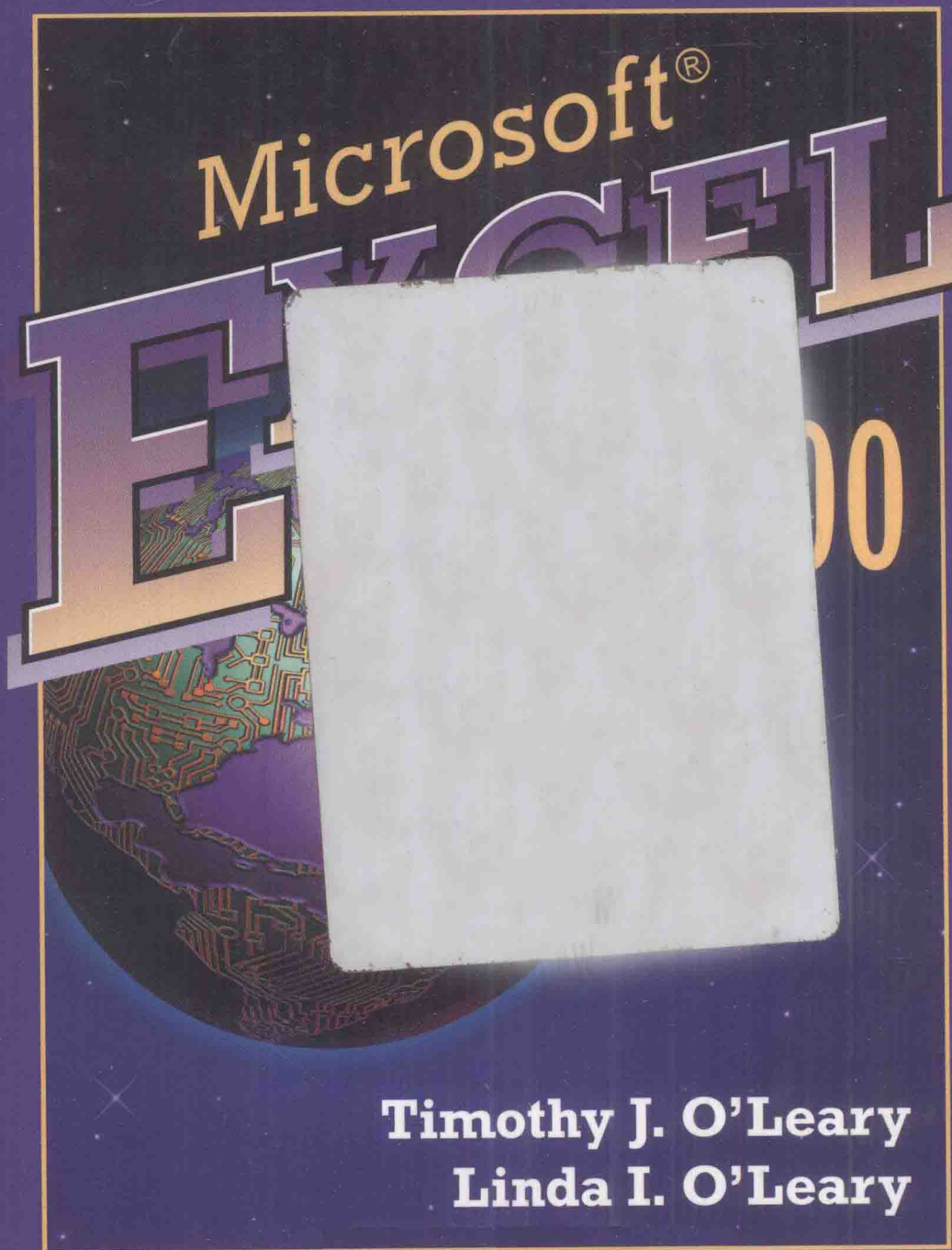
S E R I E S



APPROVED COURSEWARE

Level 1

Microsoft® Office User Specialist
Excel 2000 Exam



THE O'LEARY SERIES

Microsoft® Excel 2000

Introductory Edition

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MICROSOFT® EXCEL 2000, INTRODUCTORY EDITION

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Preface

Goals/Philosophy

The goal of *The O'Leary Series* is to give students a basic understanding of computing concepts and to build the skills necessary to ensure that information technology is an advantage in whatever path they choose in life. Because we believe that students learn better and retain more information when concepts are reinforced visually, we feature a unique visual orientation coupled with our trademark “learn by doing” approach.

Approach

The O'Leary Series is the true *step-by-step way to develop computer application skills*. The new Microsoft Office 2000 design emphasizes the step-by-step instructions with full screen captures that illustrate the results of each step performed. Each Tutorial (chapter) follows the “learn by doing” approach in combining conceptual coverage with detailed, software-specific instructions. A running case study that is featured in each tutorial highlights the real-world capabilities of each of the software applications and leads students step by step from problem to solution.



APPROVED MICROSOFT COURSEWARE

Use of the Microsoft Office User Specialist Approved Courseware Logo on this product signifies that it has been independently reviewed and approved in compliance with the following standards: Acceptable coverage of all content related to the Microsoft Office Exam entitled Microsoft Excel 2000 and sufficient performance-based exercises that closely apply to all required content, based on sampling of text. For further information on Microsoft's MOUS certification program, please visit Microsoft's Web site at http://www.microsoft.com/office/train_cert/.

About the Book

The O'Leary Series offers 2 levels of instruction: Brief and Introductory. Each level builds upon the previous level.

- **Brief**—This level covers the basics of an application and contains two to three chapters.
- **Introductory**—This level includes the material in the Brief textbook plus two to three additional chapters. The Introductory text prepares students for the *Microsoft Office User Specialist Exam (MOUS Certification)*.

Each text features:

- **Common Office 2000 Features**—This section provides a review of several basic procedures and Windows features. Students will also learn about many of the features that are common to all Microsoft Office 2000 applications.
- **Overview**—The Overview contains a “Before You Begin” section which presents both students and professors with all the information they need to know before starting the tutorials, including hardware and software settings. The Overview appears at the beginning of each lab manual and describes (1) what the program is, (2) what the program can do, (3) generic terms the program uses, and (4) the Case Study to be presented.
- **Working Together sections**—These sections provide the same hands-on visual approach found in the tutorials to the integration and new collaboration features of Office 2000.
- **Glossary**—The Glossary appears at the end of each text and defines all key terms that appear in boldface type throughout the tutorials and in the end-of-tutorial Key Terms lists.
- **Index**—The Index appears at the end of each text and provides a quick reference to find specific concepts or terms in the text.

Introductory Edition

The Introductory Edition is divided into six tutorials, followed by two Working Together sections.

Tutorial 1: Your first project is to develop a forecast for the café for the first quarter. You will learn to enter numbers, perform calculations, copy data, label rows and columns, and format entries in a spreadsheet using Excel 2000.

Tutorial 2: After creating the first quarter forecast for the Downtown Internet Café, you have decided to chart the sales data to make it easier to see the trends and growth patterns. You also want to see what effect a strong advertising promotion of the new café features will have on the forecast sales data.

Tutorial 3: You have been asked to revise the workbook to include forecasts for the second, third, and fourth quarters. Additionally, the owner wants you to create a composite worksheet that shows the entire year’s forecast and to change the data to achieve a 5 percent profit margin in the second quarter.

Working Together: Your analysis of sales data for the first quarter has shown a steady increase in total sales. Evan, the café owner, has asked you for a copy of the forecast that shows the growth in Internet sales if a strong sales promotion is mounted. You will include the worksheet and chart data in a memo to the owner.

Tutorial 4: As you continue to work on the financial forecast for the Downtown Internet Café, you will use the Solver tool to achieve a quarterly profit margin of 6½ %. Additionally, you will create three different scenarios that will show the best, worst, and most likely scenarios for the annual forecast. Once the annual forecast for 2001 is complete, Evan wants you to use the same procedure to create the forecast for 2002. You will use the 2001 annual forecast worksheet to create a template for the next year's forecast and then you will use the template to create the first quarter forecast for that year.

Tutorial 5: Evan is considering the purchase of a new espresso/cappuccino machine and would like you to evaluate several different loan options. You will create a loan analysis spreadsheet that incorporates Excel's PMT function, macros, and data table feature. Next, Evan would like you to develop a spreadsheet to calculate and record customer Bonus Dollars. You will create an electronic form that uses the IF and Index functions to calculate and record customer Bonus Dollars.

Tutorial 6: You will create a separate worksheet database that contains the Café customers' contact information. You will also generate several reports from the database that summarize the monthly connection times to keep track of the computer usage at the Café, analyze seasonal trends, and plan marketing campaigns. In addition, you will create a data map based on the information in the worksheet database that will illustrate the diversity of the Café clientele by highlighting their home states on a U.S. map.

Working Together 2: To make it easier for the Café employees to enter the customer connection time information in one worksheet and customer contact information into another, you will create a hyperlink between them. Also, Evan has requested a copy of the pivot chart sheet and five-year forecast. You will e-mail the pivot chart sheet to him and embed the five-year forecast with the scenarios in a memo. Additionally, Evan has asked you to convert the data map sheet to a Web page so he can see if it would be a good candidate to add to the Café Web site.

Each tutorial features:

- **Step-by-step instructions**—Each tutorial consists of step-by-step instructions along with accompanying screen captures. The screen captures represent how the student's screen should appear after completing a specific step.
- **Competencies**—Listed at the beginning of each tutorial, the Competencies describe what skills will be mastered upon completion of the tutorial.
- **Concept Overview**—Located at the start of each tutorial, the Concept Overviews provide a brief introduction to the concepts to be presented.
- **Concept boxes**—Tied into the Concept Overviews, the Concept boxes appear throughout the tutorial and provide clear, concise

explanations of the concepts under discussion, which makes them a valuable study aid.

- **Marginal notes**—Appearing throughout the tutorial, marginal notes provide helpful hints, suggestions, troubleshooting advice, and alternative methods of completing tasks.
- **Case study**—The running case study carried throughout each tutorial and is based on real use of software in a business setting.
- **End-of-tutorial material**—At the end of each tutorial the following is provided:

Concept Summary—This two-page spread presents a visual summary of the concepts presented in the tutorial and can be used as a study aid for students.

Key Terms—This page-referenced list is a useful study aid for students.

Matching/Multiple Choice/True False Questions

Command Summary—The Command Summary includes keyboard and toolbar shortcuts.

Screen Identifications—These exercises ask students to demonstrate their understanding of the applications by identifying screen features.

Discussion Questions—These questions are designed to stimulate in-class discussion.

Hands-On Practice Exercises—These detailed exercises of increasing difficulty ask students to create Office documents based on the skills learned in the tutorial.

On Your Own—These problems of increasing difficulty ask students to employ more creativity and independence in creating Office documents based on new case scenarios.

Acknowledgments

The new edition of the Microsoft Office 2000 has been made possible only through the enthusiasm and dedication of a great team of people. Because the team spans the country, literally from coast to coast, we have utilized every means of working together including conference calls, FAX, e-mail, and document collaboration . . . we have truly tested the team approach and it works!

Leading the team from Irwin/McGraw-Hill is Trisha O'Shea, Sponsoring Editor. Her renewed commitment, direction, and support has infused the team with the excitement of a new project.

The production staff is headed by Beth Cigler, Senior Project Manager whose planning and attention to detail has made it possible for us to successfully meet a very challenging schedule. Members of the production team include: Gino Cieslik and Francis Owens, art and design, Pat Rogondino, layout; Susan Defosset, Betsy Blumenthal, and Joan Paterson, copy editing. While all have contributed immensely, I would particularly like to thank Pat and Susan . . . team members for many past editions whom I can always depend on to do a great job. My thanks also go to the project Marketing Manager, Jodi McPherson, for her enthusiastic promotion of this edition.

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Reviewers

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Finally, I would like to thank Keri Howard, Manager for the Coffee Plantation, for her evaluation and input into the Downtown Internet Café case study.

Features of This Text

Concept Boxes identify the most important concepts in each Tutorial.

Concept 5 Automatic Grammar Check

The automatic grammar-checking feature advises you of incorrect grammar as you create and edit a document, and proposes possible corrections. If Word detects grammatical errors in subject-verb agreements, verb forms, capitalization, or commonly confused words, to name a few, they are identified with a wavy green line. You can correct the grammatical error by editing it or you can display a suggested correction. Not all grammatical errors identified by Word are actual errors. Use discretion when correcting the errors. Grammar checking does not occur until after you enter punctuation or end a line.

- 2 Right-click on Announcing four to display the Grammar shortcut menu.

Your screen should be similar to Figure 1-10.

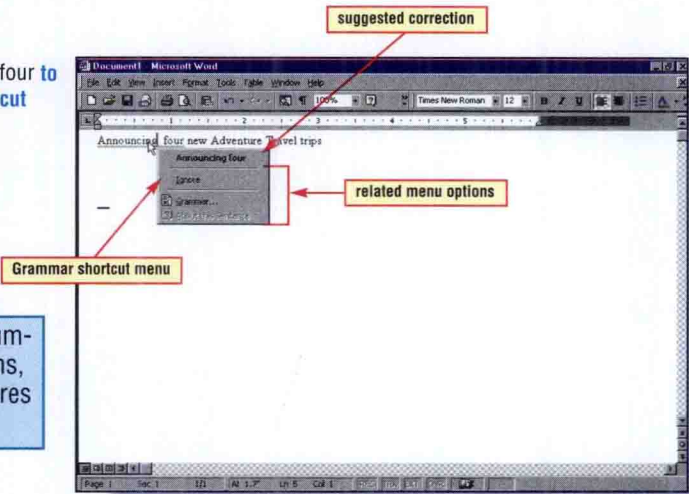


Figure 1-10

Tables provide quick summaries of toolbar buttons, key terms, and procedures for specific tasks.

Yellow **Additional Information** boxes appear throughout each tutorial and explain additional uses of the application or of a specific topic.

Additional Information

A dimmed option means it is currently unavailable.

A shortcut menu showing a suggested correction is displayed. The Grammar shortcut menu also includes several related menu options described below.

Option	Effect
Ignore	Instructs Word to ignore the grammatical error in this sentence.
Grammar	Opens the Grammar Checker and displays an explanation of the error.
About this Sentence	If the Office Assistant feature is on, this option is available. It also provides a detailed explanation of the error.

Because you cannot readily identify the reason for the error, you will open the Grammar Checker.



Other Features

Real World Case—Each O’Leary Lab Manual provides students with a fictitious running case study. This case study provides students with the real-world capabilities for each software application. Each tutorial builds upon the gained knowledge of the previous tutorial with a single case study running throughout each Lab Manual.

End-of-Chapter Material—Each tutorial ends with a visual **Concept Summary**. This two-page spread presents a concept summary of the concepts presented in the tutorial and can be used as a study aid for

Purple marginal boxes provide tips, shortcuts, and trouble-shooting advice.

1 Click  Show/Hide.

You may need to click  More Buttons on the Standard toolbar first to locate the Show/Hide  button.

The menu equivalent is **Tools/Options/View/All**.

Your screen should be similar to Figure 1-19.

Show/Hide button depressed indicating formatting marks are displayed

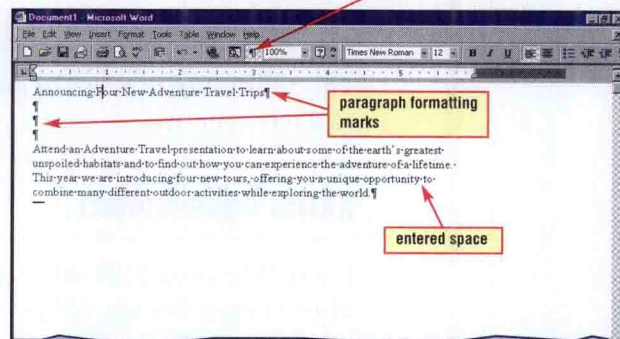


Figure 1-19

Clear **Step-by-Step Instructions** are provided in blue along with screen captures, detailing the steps of completing a task.

The document now displays the formatting marks. A paragraph formatting mark ¶ is displayed wherever the **Enter** key was pressed. Between each word, a dot shows where the **Spacebar** was pressed. Formatting marks do not appear when the document is printed. You can continue to edit your document while the formatting marks are displayed, just as you did when they were hidden.

As you continue to proof the letter, you decide that the paragraph is too long and should be divided into two separate paragraphs.

2 Move to T in This (beginning of second sentence).

Press **Enter** 2 times.

Your screen should be similar to Figure 1-20.

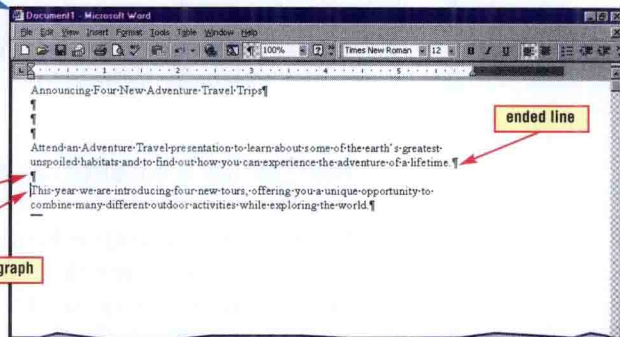


Figure 1-20

Text provides detailed explanation of the basic competencies in each chapter.

The ¶ character on the line above the insertion point represents the pressing of **Enter** that created the blank line between the paragraphs. The ¶ character at the end of the line above that represents the pressing of **Enter** that ended the paragraph and moved the insertion point and all text following it to the beginning of the next line.

As you continue to create a document, the formatting marks are automatically inserted and deleted. Now that you have separated the two sentences into separate paragraphs, you no longer want the space at the end

students. A **Key Terms** section and a **Command Summary** table follow the Concept Summary, providing a list of page-referenced terms and keyboard and toolbar shortcuts which can be a useful study aid for students. **Screen Identification**, **Matching**, **Multiple Choice**, and **True False Questions** provide additional reinforcement to the tutorial material. **Discussion Questions**, **Hands-on Practice Exercises**, and **On Your Own Exercises** develop critical thinking skills and offer step-by-step practice. These exercises have a rating system from Easy to Difficult and test the student's ability to apply the knowledge they have gained in each tutorial. Each O'Leary Lab Manual provides at least two **On the Web** exercises where students are asked to use the Web to solve a particular problem.

Teaching Resources

The following is a list of supplemental material that can be used to help teach this course.

Skills Assessment

Irwin/McGraw-Hill offers two innovative systems that can be used with The O'Leary Series, ATLAS and SimNet, which take skills assessment testing beyond the basics with pre- and post-assessment capability.

- **ATLAS (Active Testing and Learning Assessment Software)**—ATLAS is our *live* in-the-application skills assessment tool. ATLAS allows students to perform tasks while working *live* within the Microsoft applications environment. ATLAS is web-enabled and can be customized to meet the needs of your course. ATLAS is available for Office 2000.
- **SimNet (Simulated Network Assessment Product)**—SimNet permits you to test the actual software skills students learn about Microsoft Office applications in a simulated environment. SimNet is web-enabled and is available for Office 97 and Office 2000.

Instructor's Resource Kits

Instructor's Resource Kits provide professors with all of the ancillary material needed to teach a course. Irwin/McGraw-Hill is committed to providing instructors with the most effective instructional resources available. Many of these resources are available at our Information Technology Supersite, found at www.mhhe.com/it. Our Instructor's Resource Kits are available on CD-ROM and contain the following:

- **Diploma by Brownstone**—Diploma is the most flexible, powerful, and easy to use computerized testing system available in higher education. The Diploma system allows professors to create an exam as a printed version, as a LAN-based Online version, or as an Internet version. Diploma also includes grade book features, which automate the entire testing process.
- **Instructor's Manual**—The Instructor's Manual includes solutions to all lessons and end of the unit material, teaching tips and strategies, and additional exercises.

- **Student Data Files**—Students must have student data files in order to complete practice and test sessions. The instructor and students using this text in classes are granted the right to post student data files on any network or stand-alone computer, or to distribute the files on individual diskettes. The student data files may be downloaded from our IT Supersite at www.mhhe.com/it.
- **Series Web site**—Available at www.mhhe.com/cit/oleary.

Digital Solutions

- **Pageout Lite**—This software is designed for you if you're just beginning to explore Web site options. Pageout Lite will help you to easily post your own material online. You may choose one of three templates, type in your material, and Pageout Lite will instantly convert it to HTML.
- **Pageout**—Pageout is our Course Web Site Development Center. Pageout offers a syllabus page, Web site address, Online Learning Center content, online exercises and quizzes, gradebook, discussion board, an area for students to build their own Web pages, plus all features of Pageout Lite. For more information please visit the Pageout Web site at www.mhla.net/pageout.
- **OLC/Series Web Sites**—Online Learning Centers (OLCs)/series sites are accessible through our Supersite at www.mhhe.com/it. Our Online Learning Centers/series sites provide pedagogical features and supplements for our titles online. Students can point and click their way to key terms, learning objectives, chapter overviews, PowerPoint slides, exercises, and Web links.
- **The McGraw-Hill Learning Architecture (MHLA)**—MHLA is a complete course delivery system. MHLA gives professors ownership in the way digital content is presented to the class through online quizzing, student collaboration, course administration, and content management. For a walk-through of MHLA, visit the MHLA Web site at www.mhla.net.

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Introducing Common Office 2000 Features

This section will review several basic procedures and Windows features. In addition, you will learn about many of the features that are common to all Microsoft Office 2000 applications. Although Excel 2000 will be used to demonstrate how the features work, only common features will be addressed. The features that are specific to each application will be introduced individually in each tutorial.

Turning on the Computer

If necessary, follow the procedure below to turn on your computer.

Do not have any disks in the drives when you start the computer.

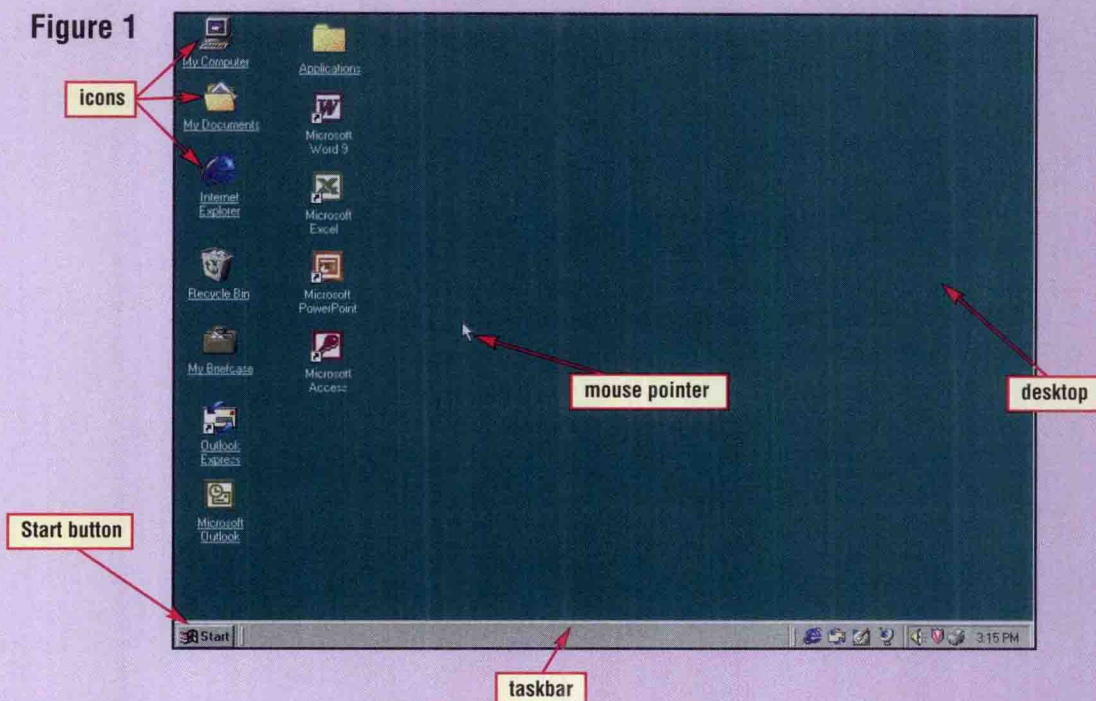
Press **Tab** to move to the next box.


- 1 **Turn on the power switch.** The power switch is commonly located on the back or right side of your computer. It may also be a button that you push on the front of your computer.
- If necessary, turn your monitor on and adjust the contrast and brightness.** Generally, the button to turn on the monitor is located on the front of the monitor. Use the dials (generally located in the panel on the front of the monitor) to adjust the monitor.
- If you are on a network, you may be asked to enter your User Name and Password. Type the required information in the boxes. When you are done, press **Enter**.**

The Windows program is loaded into the main memory of your computer and the Windows desktop is displayed.

Your screen should be similar to Figure 1.

Figure 1

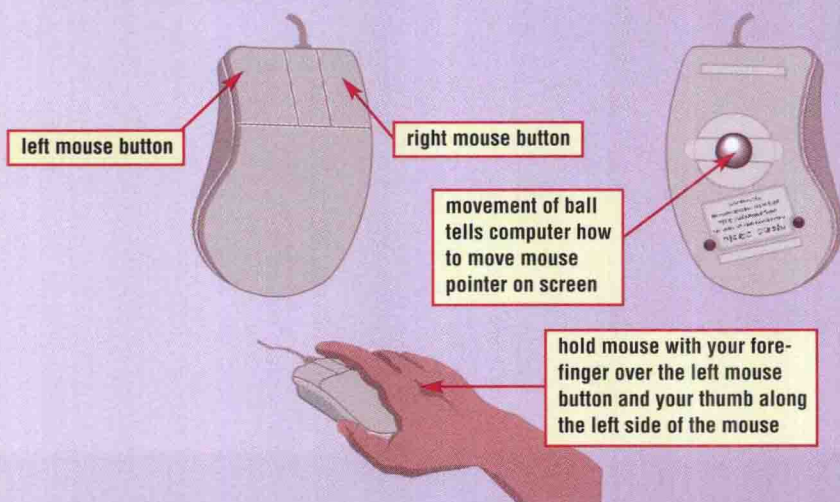


If a Welcome box is displayed, click  (in the upper right corner of the box) to close it.

If you are already familiar with using a mouse, skip to the section Loading an Office Application.

The **desktop** is the opening screen for Windows and is the place where you begin your work using the computer. Figure 1 shows the Windows 98 desktop. If you are using Windows 95, your screen will look slightly different. Small pictures, called **icons**, represent the objects on the desktop. Your desktop will probably display many different icons than those shown here. At the bottom of the desktop screen is the **taskbar**. It contains buttons that are used to access programs and features. The **Start button** on the left end of the taskbar is used to start a program, open a document, get help, find information, and change system settings.

Using a Mouse



The arrow-shaped symbol on your screen is the **mouse pointer**. It is used to interact with objects on the screen and is controlled by the hardware device called a **mouse** that is attached to your computer.