

# Lesson Notes for Microsoft Excel

## Lesson 1: Introducing Excel

Slide	Topic/Exercise Heading	Obj	Instructor Notes	Timing (mins)
	<b>The Microsoft Office Specialist Exam Objectives listed at the right are covered in this lesson.</b>	<b>1.4.4</b> <b>1.5.4</b>	<b>Change window views</b> <b>Inspect workbooks for issues</b>	
3	Lesson Objectives		Review the objectives on Slide 3 with students so they know what will be covered in the lesson.	5-10
4	What is Excel?		Administer the Benchmark to assess student strengths and weaknesses (50 minutes – not included in suggested lesson timing).  Discuss the three main parts of Excel: Spreadsheet Graphics Database	20-30
5	– Starting Excel		The text lists three ways to start the application. Students will eventually select the method that they prefer to use.  Have students start Excel on their devices and use guided practice to manipulate the software.  Have students follow along and practice the various ways to start Excel as outlined in the text.	10-15
6	Looking at the Screen		It is essential that students are able to recognize, locate, and use these items as it decreases the difficulty they will have when using Excel.  Take a few moments to go over the screen with the students allowing them to move the mouse pointer to each item as you explain the purpose of each one.	10-20
7	– Understanding Basic Terminology		Explain and discuss each term using a visual reference to the Excel screen.	5-15
8	– Mouse Symbols		These symbols are very important in Excel, but they will be described in more depth as they are encountered by students.  Explain these symbols to students while you use Excel to demonstrate their use but do not cover them in-depth at this point. These will be mastered by students as they complete the lesson activities.	5-15

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9	– Using the Quick Access Toolbar		<p>Explain to students the reason for the QAT. Allow them to locate it on their own screens and to understand the use of the items located on it.</p> <p>You may wish to show them other ways to save, undo, and redo using the Backstage View and keyboard shortcuts (CTRL+Z and CTRL+Y).</p> <p>You may also wish to show them how the QAT can be moved to display below the ribbon and how it can be customized. Do not spend a great amount of time on these items; they could simply be beneficial for students on their own.</p>	10-15
10-12	– Using the Ribbon		<p>Help students learn to identify tabs, groups, dialog box launchers, dialog boxes, task panes, More drop-downs, and contextual tabs.</p> <p>This is <b>essential knowledge</b> for working with Excel and this courseware.</p> <ul style="list-style-type: none"> <li>• Show the students how to use the shortcut and right-click menus.</li> <li>• Show them how to use the “Tell me what you want to do” feature as a tool to assist them in finding the necessary tools that they may otherwise be unable to locate.</li> <li>• You may want to extend their knowledge by reviewing a few of the basic keyboard shortcuts. These will be taught at various points throughout the course, however, so you may find it unnecessary.</li> <li>• Explain that dialog box launchers are strategically placed throughout the Ribbon as a means of offering more options. Encourage students to click some of the dialog box launchers.</li> <li>• Introduce them to galleries and task panes, as shown on Slides 11-12.</li> </ul>	10-15
	<b>Learn to use the Ribbon</b>		Students launch Excel and create a workbook while utilizing various Ribbon tabs and features.	15-20
13	– Identifying Screen Symbols		Briefly explain these symbols but do not expect students to understand them at this point. These will become more apparent as students begin to work in Excel.	5-10

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14	Entering Data in a Worksheet – Types of Data		Introduce the different types of data that can be entered into worksheet cells: <ul style="list-style-type: none"><li>• Numeric</li><li>• Text</li><li>• Formulas</li></ul> Point out that numeric data is essentially the core of all worksheets.	10-15
15	– Entering Text		Introduce the different ways to enter text into an Excel worksheet and the various methods for moving from cell to cell.  Have students practice using the BACKSPACE key so they will know how to erase typographical errors.	10-15
	Learn to enter text data		Students enter text data into worksheet cells. The entries will become labels for numeric data.	10-15
16	– Entering Numbers		Make sure that students understand that numerical formatting can be applied to change the appearance of numbers as needed.	10-15
	Learn to enter numeric data		Students enter numeric data into worksheet cells.	10-15
17	– Entering Dates and Times		Make sure students understand that date and time formatting can be applied to change dates and times into many formats as needed.	5-15
	Learn to work with dates		Students enter dates in various formats into worksheet cells.	10-15
18	– Moving Around the Worksheet		Have students follow you in practicing various ways to move around in a worksheet.  This may simply be done by using the spreadsheet that the students have just created with the numeric data, dates and times.  Explain that some methods may be better than others when a worksheet is very large.	5-10
19-20	Working with Workbooks – Saving Workbooks		Differentiate between the Save As command and the Save command.  Students should understand how to save a workbook as a different file type, such as an earlier version of Excel, by using the Save as type drop-down list in the Save As dialog box.	5-15
	Learn to save workbooks		Students save a workbook.	10-15
21	– Creating a New Workbook		Demonstrate how easily and quickly a new workbook can be created using various methods.	5-10

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			<ul style="list-style-type: none"> <li>Click File, click New, click Blank workbook</li> <li>Press CTRL+N</li> <li>Click <b>File</b>, click <b>New</b> and choose a template</li> </ul> <p>As time permits, you may include a discussion on how to find specific templates</p>	
	<b>Learn to create new workbooks</b>		Students create new workbooks using different methods.	5-15
22	– Switching Between Workbooks	1.4.4	Demonstrate the various methods of switching between workbooks.	5-10
	<b>Learn to switch between workbooks</b>		Students switch between multiple workbooks that are open at the same time.	5-10
23-24	– Opening a Workbook		Direct the students through at least some of the various methods of opening files.	5-15
25	– Closing a Workbook		<p>Demonstrate ways to close a workbook:</p> <ul style="list-style-type: none"> <li>Click <b>File</b> and then click <b>Close</b></li> <li>Press CTRL+W</li> <li>Press CTRL+F4</li> <li>Click the <b>Close</b> button</li> </ul>	5-10
	<b>Learn to close workbooks</b>		Students use several different techniques to save, and then close multiple workbooks.	5-10
26	– Working with the Compatibility Mode	1.5.4	<p>Discuss the importance of backward compatibility.</p> <p>Students should understand the data shown in the Compatibility Checker dialog box.</p>	5-15
	<b>Learn to check compatibility</b>		Students will check a workbook for compatibility before saving it in the .xls format.	5-15
27-28	Selecting Cells		<p>Selecting a range of cells is a fundamental skill in Excel.</p> <p>You may wish to demonstrate each of the cell selection procedures.</p>	5-15
	<b>Learn to select cell ranges</b>		Students will select ranges of cells using the mouse in a blank worksheet so they can quickly identify the ranges.	10-15
29	Lesson Summary		Review the objectives with students to remind them of what was covered in the lesson. Provide a short summary of the features and give students a chance to complete exercises if they did not complete them earlier.	10-15
			<b>Total (Hours)</b>	<b>4.5-8.0</b>