

Microsoft Excel
2010/2013
Training Book
LEVEL 1

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Overview 1

LESSON SKILL MATRIX

Skills	Exam Objective	Objective Number
Starting Excel	Create new Blank workbooks.	1.1.1
Working in the Excel Window	Customize the Quick Access Toolbar.	1.4.3
Changing Excel's View	Split the window.	1.4.13
	Change workbook views.	1.4.6
Working with an Existing Workbook	Demonstrate how to use Go To.	1.2.4
	Demonstrate how to use the Name Box.	1.2.5
Working with Excel's Help System		

KEY TERMS

- active cell
- Backstage view
- cell
- column
- command group
- command tabs
- Dialog Box Launcher
- FILE tab
- Help system
- Keytip
- Name Box
- Quick Access Toolbar
- ribbon
- row
- ScreenTips
- workbook
- worksheet



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Contoso, Ltd., provides specialty health care for the entire family—prenatal through geriatric care. The practice, owned by Dr. Stephanie Bourne, has an expanding patient list. It currently employs a staff of 36, which includes three additional family practice physicians. Each physician has unique patient contact hours; the office is open from 7 a.m. to 7 p.m. on Mondays and from 8 a.m. to 4 p.m. other weekdays. The office manager and the new assistant that she will hire must track revenue and expenses for the practice and maintain a large volume of employee data. The office manager will create simulation exercises to test the applicants and one of her target pools of applicants will be new college graduates. In this lesson, you learn how to enter text and numbers into an Excel worksheet to keep up-to-date employee records. By the end of the book, you should be able to accomplish simulation tasks that are required by the Microsoft Office User Specialist Test and the simulations requested by several jobs requiring Excel skills.

SOFTWARE ORIENTATION

Microsoft Excel's Opening Screen

Microsoft Office Excel 2013 provides powerful tools that enable users to organize, analyze, manage, and share information easily. The foundation of Excel and locations where you do your work are cells, rows, and columns within a worksheet, and worksheets as part of a workbook. Many of the tools you use while working in Excel are located on the **ribbon**, running across the top of the window. The ribbon is organized into task-oriented **command tabs**. Each tab is divided into task-specific **command groups** appropriate for the type of work the user is currently performing. Because you can customize the ribbon and new options might appear, such as the DEVELOPER, ADD-IN, and POWERPIVOT tabs depending on your setup, your screen might appear different than Figure 1-1.

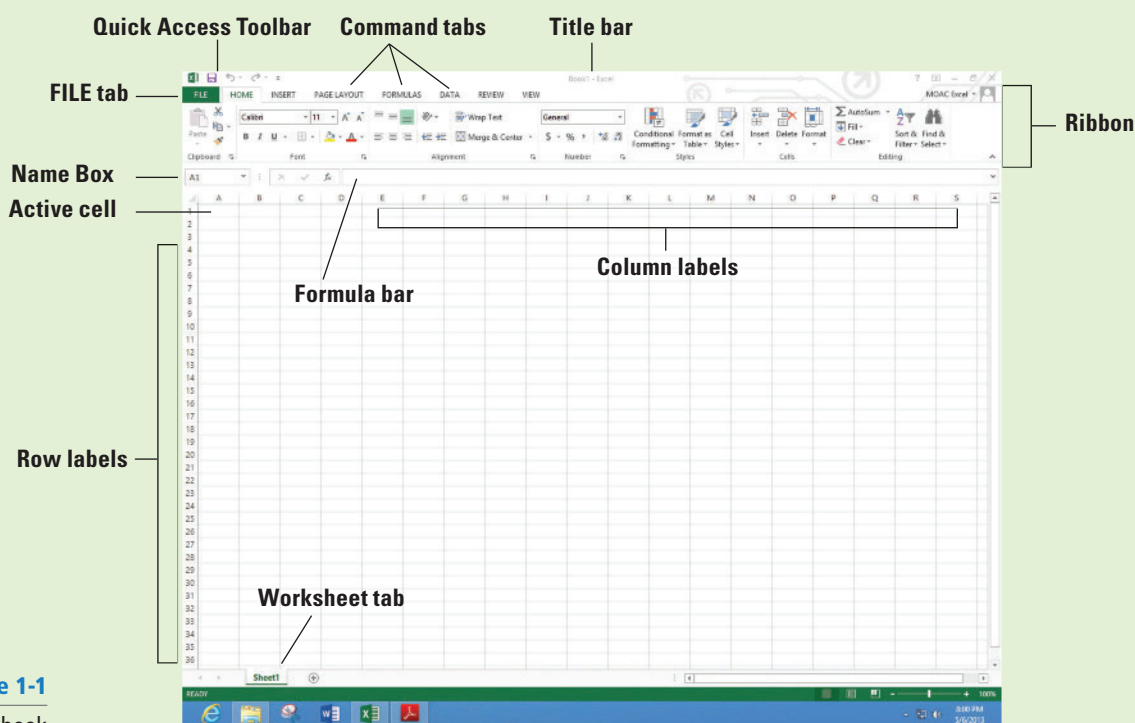


Figure 1-1

Excel's Blank workbook

Bottom Line

STARTING EXCEL

To work efficiently in Microsoft Excel, you need to become familiar with its primary user interface. You can open Microsoft Excel 2013 in Windows 8 by moving to the bottom-left corner of your screen, clicking on Start, right-clicking a blank area of the Start screen, clicking All apps, and clicking Excel 2013.

Excel opens to a list of templates and in most cases you choose Blank workbook or open a previous file. A **workbook**, or spreadsheet file, is shown in Figure 1-1. Think of a workbook as a physical book with many pages. The filename (Book1) and the program name (Excel) appear in the title bar at the top of the screen. Book1 (or Book2, Book3, and so on) is a temporary title for your workbook until you save the workbook with a name of your choice. The new workbook contains one **worksheet** (Sheet1) by default—similar to the first page in a book—where you enter information. If a workbook has more pages (or worksheets), you use the sheet tabs that are located just above the Status bar and are identified as Sheet1, Sheet2, and Sheet3. You can rename worksheets to identify their content and add worksheets with the New sheet (+) button as needed.



Cross
Ref

See Lesson 8, “Managing Worksheets,” for more detail on how to add and rename worksheets.

Opening Excel

In this exercise, you learn to use the Start screen to open Excel and view the new workbook’s first blank worksheet.

STEP BY STEP

Start Excel

CERTIFICATION
READY? 1.1.1

How do you
start Excel?

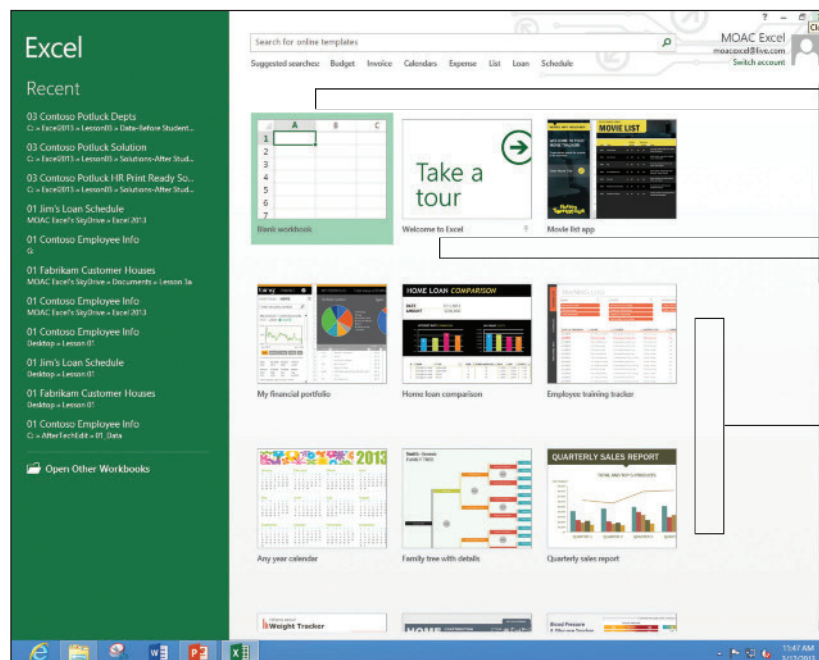
GET READY. Be sure Microsoft Excel is installed on your computer. Then, perform the following steps:

1. If the Windows desktop is displayed, click the **Start screen thumbnail** in the bottom left corner of the Windows 8 screen.
2. Right-click in a blank area of the screen and click **All apps**.
3. In the list of applications under Microsoft Office 2013, click **Excel 2013**. A window opens to recent Excel files you’ve opened and examples of templates you can use (see Figure 1-2).

Figure 1-2

Microsoft Excel’s
opening screen

Recent
files you’ve
opened
(if any)



Click Blank
workbook
to start a
new file.

Click to
learn more
about Excel.

Click other
templates
to see what
you can do
in Excel or
to start with
an example.



**Cross
Ref**

Templates are discussed in more detail in Lesson 3, “Using Office Backstage.”

4. Click **Blank workbook**. A blank workbook opens, and the worksheet named *Sheet1* is displayed as shown previously, in Figure 1-1.

PAUSE. LEAVE the workbook open for the next exercise.

Take Note If you use Excel repeatedly, you will want to pin your application to the Start screen. From the All Apps screen, right-click the app, and choose Pin to Start. You can also choose Pin to taskbar to allow you to click the icon on the bottom of the Windows Desktop screen to start Excel.

A worksheet is a grid composed of rows, columns, and cells. Each worksheet **column** starts at the top of the worksheet and goes to the bottom of the worksheet and is identified by a letter. Each **row** starts at the left edge of the worksheet and continues to the right and is identified by a number. Each box, or **cell**, on the grid is identified by the intersection of a column and a row. Thus, the first cell in an open worksheet is A1. You enter information by typing it into the selected or **active cell**, which is outlined by a bold rectangle. This is also called the *current* or *highlighted cell*.

WORKING IN THE EXCEL WINDOW

Bottom Line

When you launch Excel and click Blank workbook, the program opens a new workbook and displays a blank worksheet. You just learned about some of the most important components of the Excel worksheet such as rows, columns, and cells. In this section, you explore the Excel window and learn to identify and customize the Quick Access Toolbar, the ribbon, and other important onscreen tools and components. You also learn to open and use Backstage view, Microsoft’s replacement for the Office button and File menu commands found in previous versions of Office.

Using the Onscreen Tools

The **Quick Access Toolbar** gives you fast and easy access to the tools you use most often in any given Excel session. It appears on the left side of the title bar, above the ribbon (although you can move the toolbar below the ribbon if you want it closer to your work area). You can add and remove commands to and from the toolbar so that it contains only those commands you use most frequently. In this lesson, you learn to move and customize the Quick Access Toolbar by adding and removing commands. You also learn how to use **ScreenTips**, which are small, onscreen rectangles that display descriptive text when you rest the pointer on a command or control.

STEP BY STEP

Use the Onscreen Tools

GET READY. USE the blank workbook you opened in the previous exercise to perform these steps:

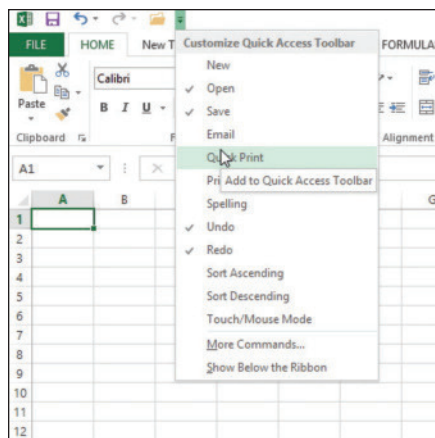
1. Point to each icon on the Quick Access Toolbar and read the description that appears as a ScreenTip.

Take Note Use ScreenTips to remind you of a command’s function. Enhanced ScreenTips display in a larger rectangle that contains more descriptive text than a ScreenTip. Most Enhanced ScreenTips contain a link to a Help topic.

2. On the right side of the Quick Access Toolbar, click the **drop-down arrow**. From the drop-down list, select **Open**. The Open icon is added to the Quick Access Toolbar. Click the **down arrow** again and select **Quick Print** from the drop-down list (see Figure 1-3).

Figure 1-3

Customizing the Quick Access Toolbar



Another Way

To add a command to the Quick Access Toolbar, you can also right-click any icon on the ribbon and then click Add to Quick Access Toolbar.

- Next, right-click anywhere on the Quick Access Toolbar, and then select **Show Quick Access Toolbar Below the Ribbon**.
- Right-click the **HOME** tab and click **Collapse the Ribbon**. Now, only the tabs remain on display, increasing the workspace area.
- Right-click the **HOME** tab again and choose **Collapse the Ribbon** to uncheck the option and make the ribbon commands visible again.
- On the right side of the Quick Access Toolbar, click the **drop-down arrow**. Click **Show Above the Ribbon** from the drop-down list.
- Right-click the **Open** command, and select **Remove from Quick Access Toolbar**.
- On the right side of the Quick Access Toolbar, click the **drop-down arrow** and click **Quick Print** to remove the checkmark from the menu and thus remove the Quick Print icon from the Quick Access Toolbar.

Take Note To add commands to the Quick Access Toolbar that do not appear in the drop-down list, click **More Commands** on the drop-down list. The Excel Options dialog box opens. You can also right-click the Quick Access Toolbar or any ribbon tab and select **Customize Quick Access Toolbar** to open the Excel Options dialog box.

PAUSE. LEAVE the workbook open for the next exercise.

**CERTIFICATION
READY?** **1.4.3**

How do you manipulate the Quick Access Toolbar?

By default, the Quick Access Toolbar contains the Save, Undo, and Redo commands. As you work in Excel, customize the Quick Access Toolbar so that it contains the commands you use most often. Do not, however, remove the Undo and Redo commands. These commands are not available on the ribbon's command tabs.

Navigating the Ribbon

The ribbon organizes tools and commands into an intuitive and useful interface. Having commands visible on the work surface enables you to work quickly and efficiently and is especially helpful for new users. The ribbon in Microsoft Office Excel 2013 is made up of a series of tabs, each related to specific tasks that users perform in Excel. By pressing and releasing the Alt key, you can reveal **Keytips**, or small badges displaying keyboard shortcuts for specific tabs and commands on the ribbon and Quick Access Toolbar. In this exercise, you learn how to navigate between Excel tabs and use their commands and Keytips.

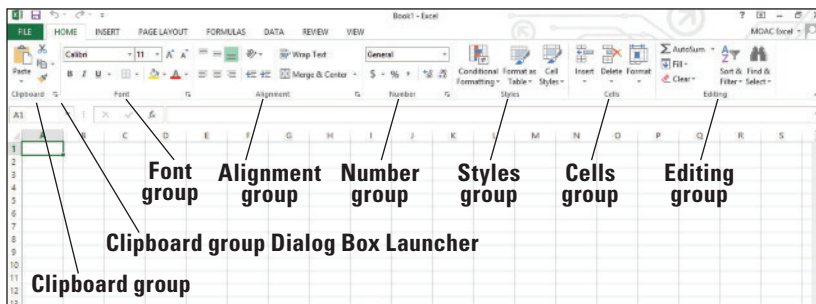
Take Note Keytips are sometimes also referred to as *hotkeys*. Note, however, that when you use the Microsoft Office 2013 Help, no reference is listed for hotkeys. Only Keytips are referenced.

Within each tab on the ribbon, commands are organized into related tasks called *command groups*, or just *groups*, as shown in Figure 1-4. For example, consider the HOME tab. When the HOME tab is displayed, you see the Clipboard group, which contains the command buttons to cut, copy, and paste data. These commands allow you to revise, move, and repeat data in a worksheet. Similarly, you can use commands in the Editing group to fill adjacent cells, sort and filter data, find specific data in a worksheet, and perform other tasks related to editing worksheet data.

Some of the commands have an options arrow that displays additional options for the command. On some of the command groups are icons in the bottom-right corner of the group. These **Dialog Box Launchers** open a dialog box and give more options than display on the ribbon.

Figure 1-4

HOME tab command groups



STEP BY STEP

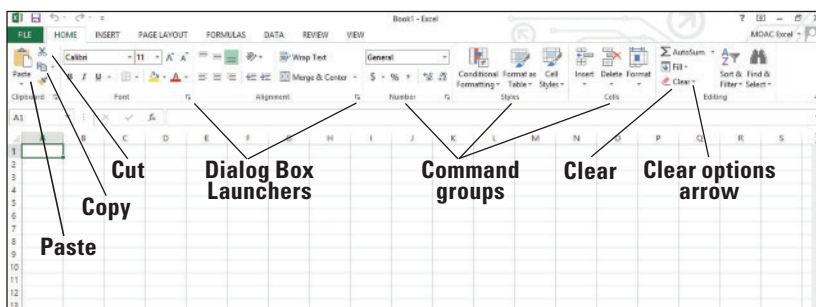
Navigate the Ribbon

GET READY. LAUNCH Excel if necessary and open any workbook.

1. Click the **HOME** tab to make it active and click cell **A1**. Your ribbon should look similar to the one shown in Figure 1-5.

Figure 1-5

Ribbon with HOME tab active

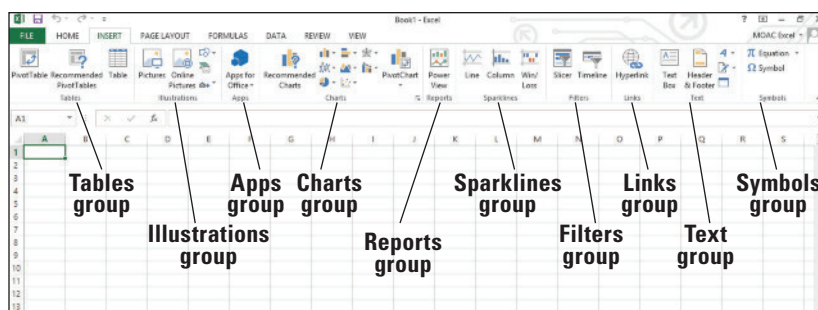


2. In the Alignment group, click the **Dialog Box Launcher** to display the Alignment tab in the Format Cells dialog box.
3. Click the **Cancel** button to close the dialog box.
4. Click the **INSERT** tab.

Your screen should now look similar to Figure 1-6. Commands on the INSERT tab enable you to add charts and illustrations and perform other functions that add items to enhance your Excel worksheets.

Figure 1-6

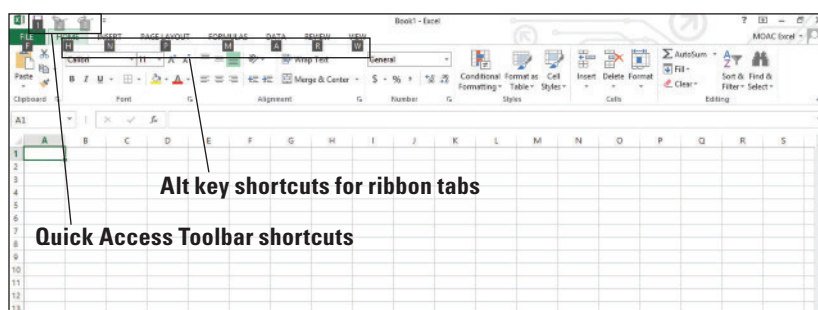
Ribbon with the INSERT tab active



5. Click the **HOME** tab.
6. Press and release the **Alt** key to display onscreen Keytips that show keyboard shortcuts for certain commands (see Figure 1-7).

Figure 1-7

Keytips on the ribbon



7. Type **W** to display the VIEW tab and then type **Q** to display the Zoom dialog box.
8. Click **Cancel** or press **Esc** to close the Zoom dialog box.
9. Press **Alt + H** to return to the HOME tab.
10. Press **Alt** to turn off the Keytips.
11. In the Editing group, click the **Clear arrow** to display the Clear options.
12. Press **Esc** to turn off the options.

PAUSE. CLOSE Excel.

Introducing Office Backstage

The most noticeable new feature in Microsoft Office 2010 and 2013 is Backstage. The **Backstage view** shows you behind-the-scenes options to manage files such as opening, saving, printing, and documenting files. Backstage view is covered in more depth in Lesson 3, but you need to know how to access it for simple commands in this lesson.

STEP BY STEP

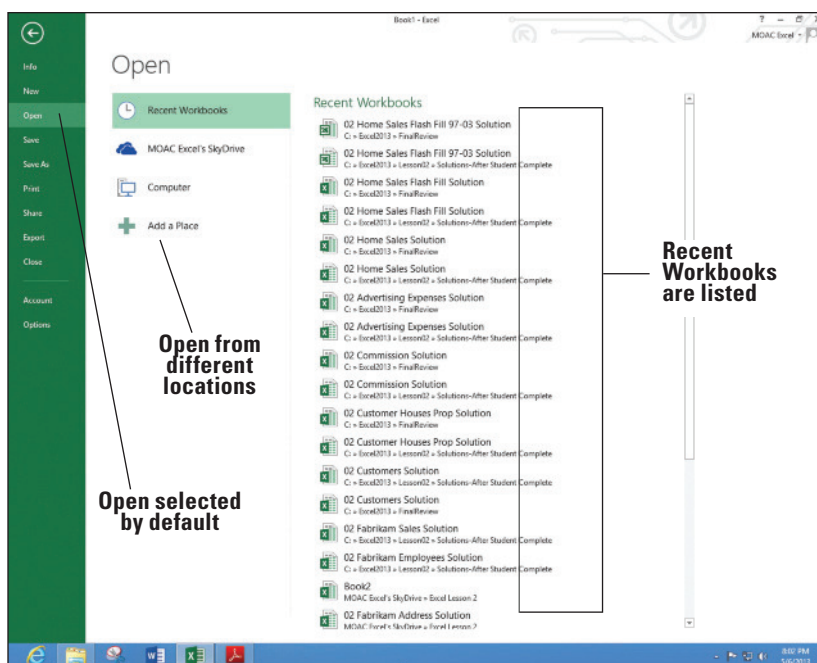
Open Backstage View

GET READY. You should not have Excel running for this exercise.

1. LAUNCH Excel and click **Blank workbook** to start a new workbook. Notice that Book1 displays in the title bar at the top of the screen.
2. Click the **FILE** tab. This opens Backstage view (see Figure 1-8).

Figure 1-8

When you click a command in the left pane, the major portion of the Backstage screen changes to show options related to that command.



3. Notice that the Excel Backstage view and Excel icon on the taskbar are green. The Office suite has customized colors to designate which application you use.



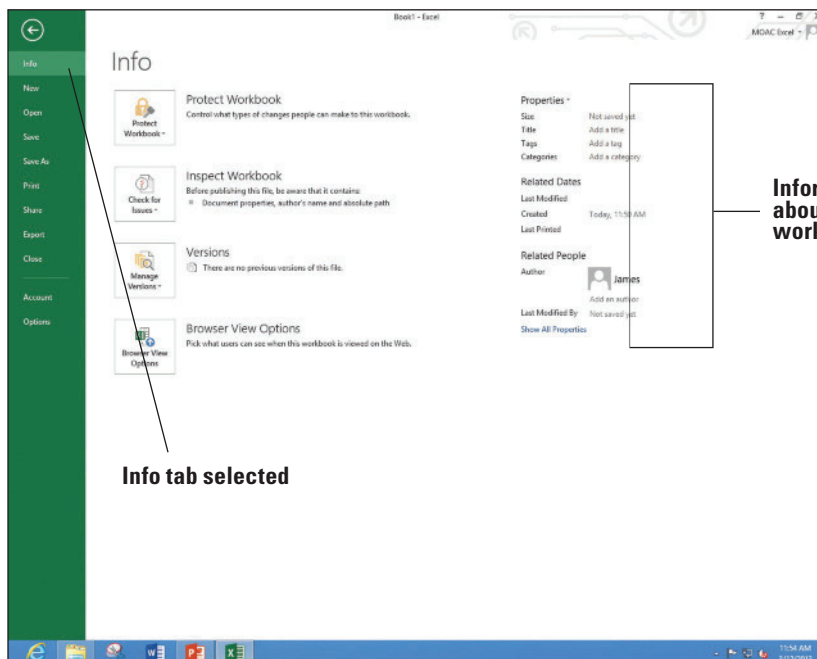
Troubleshooting

Backstage defaults to different commands depending on what you're doing. When you are working in a blank workbook or with no workbooks open, Backstage defaults to the Open command, which shows different options for opening files. If you have started typing in a document, Backstage defaults to the Info.

4. The commands are on the left pane of the screen. Click **Info** and the right pane changes (see Figure 1-9). This shows information about the current file.

Figure 1-9

When the Info tab is selected, information about the current workbook displays.



PAUSE. CLOSE Excel for the next exercise.

Using the Microsoft Office FILE Tab and Backstage View

In Microsoft Office 2013, clicking the **FILE tab** takes you to Backstage view, with its navigation bar of commands extending down the left side of the Excel window. Backstage view helps you access and use file management features, just as the ribbon offers commands that control Excel's authoring features. In this exercise, you learn to use the FILE tab to open Backstage view. You also use Backstage commands to create a new blank workbook.

STEP BY STEP

Use the Microsoft Office FILE Tab and Backstage View

GET READY. LAUNCH Excel and open a new blank workbook.

1. Click the **FILE** tab to open Backstage view.
2. In the left pane, click **Close**. Your worksheet disappears, but Excel remains open.
3. Click the **FILE** tab again, and then click **New**. The right pane shows the available options, which are the same as when you launch Excel.
4. Click **Blank workbook**. A new blank workbook is opened.

PAUSE. CLOSE Excel.

As you have seen, a new blank workbook in Excel 2013 contains one worksheet. You can enter data in the first worksheet and click the New sheet button to create another worksheet and then enter additional data. Excel saves the worksheets together in one workbook rather than as separate documents.

CHANGING EXCEL'S VIEW

Bottom Line

On the ribbon, the VIEW tab holds commands for controlling the appearance of the displayed document. You can also open and arrange new windows and split windows for side-by-side views of different parts of your document.

Change Excel's View

As mentioned in a previous section, some groups on the ribbon tabs have an arrow in their lower-right corner called a *Dialog Box Launcher*. Clicking the arrow opens a dialog box or a window containing more options for that particular group of commands. In this exercise, you learn how to use the VIEW tab commands to change Excel's view.

STEP BY STEP

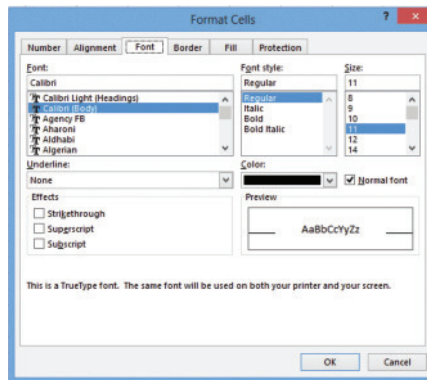
Change Excel's View

GET READY. LAUNCH Excel and start a new workbook.

1. If necessary, click the **HOME** tab to activate it.
2. Select cell **A1** to make it active. Then type **456** and press **Tab**.
3. In the lower-right corner of the Font group, click the **Dialog Box Launcher arrow**. The Format Cells dialog box shown in Figure 1-10 opens. In most cases, your default font in Excel will be Calibri, 11 point, without bold or italic.

Figure 1-10

Format Cells dialog box



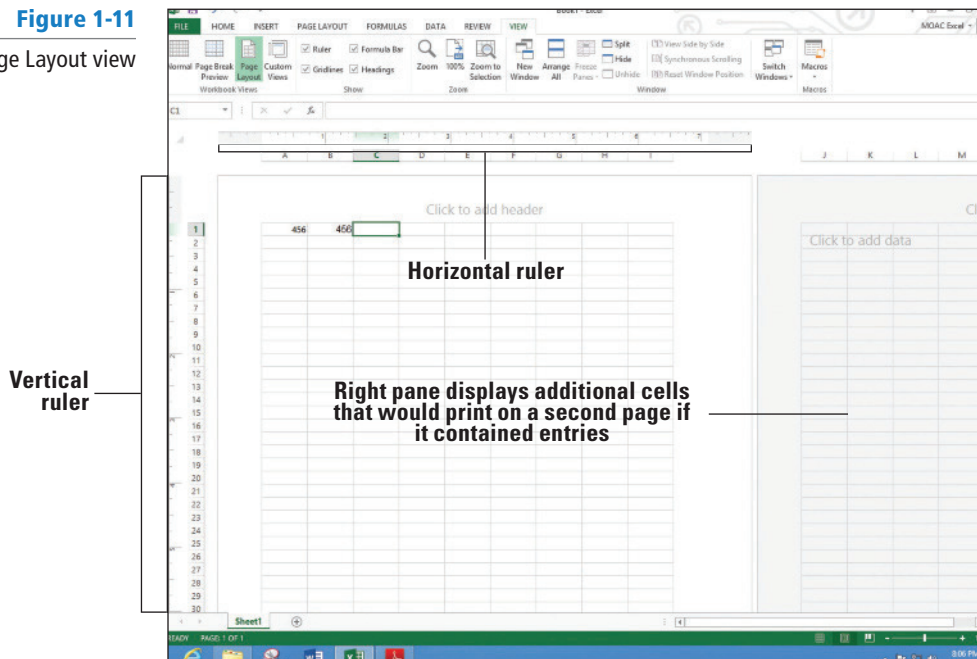
**CERTIFICATION
READY?** 1.4.6

How do you change to Page
Layout view?

4. Notice that the Font tab of the dialog box is active. Scroll down in the **Font** list, click **Arial**, and then click **OK**. Cell B1 is the active cell now.
5. Type **456** in this cell, and then press **Tab**. Notice the difference in size and appearance between this number and the one you entered in cell A1.
6. Click the **VIEW** tab.
7. In the Workbook Views group, click **Page Layout**. In this view, you can see the margins, where pages break, and you can add a header or footer (see Figure 1-11).

Figure 1-11

Page Layout view



**CERTIFICATION
READY?** 1.4.6

How do you change back to
Normal view?

8. In the Workbook Views group, click **Normal** to return the worksheet to the view that no longer shows rulers, headers, footers, or page breaks.

PAUSE. LEAVE the workbook open for the next exercise.



Another Way

You can also change the view among Normal, Page Layout, Page Break Preview, and Zoom by using the icons in the status bar at the bottom of the screen.

As demonstrated in this exercise, you can preview your printed worksheet by clicking the ribbon's **VIEW** tab, and then clicking **Page Layout** in the Workbook Views group (first section). This view enables you to fine-tune pages before printing. You can change your worksheet's layout and format in both this view and Normal view. You can also use the rulers to measure the width and height of your window and determine whether you need to change its margins or print orientation.

Splitting the Window

When a worksheet contains a lot of data, you can see only a small portion of the worksheet in Excel's Normal and Page Layout views. The Split command enables you to overcome this limitation by viewing the worksheet in two panes or four quadrants. After issuing this command, you can use the scroll bars on the right and at the bottom of the window to display different sections of the worksheet at the same time so that you can more easily compare or contrast data or see what effect a change in one part of the worksheet might have on a distant part of the worksheet. In this exercise, you learn to split the Excel window and use the scroll bars to view different sections of a worksheet. You also practice entering data into cells in the split windows, and you learn how to remove the split to return to single-window view.

STEP BY STEP

Split the Window

GET READY. USE the worksheet you left open in the previous exercise or type 456 in cells A1 and B1 in a new workbook.

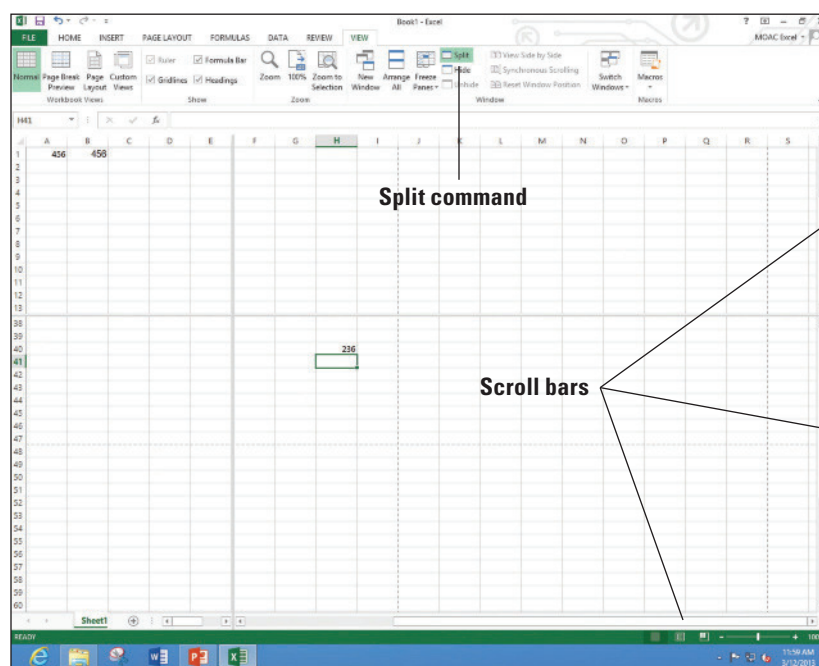
**CERTIFICATION
READY?** **1.4.13**

How do you split
a window?

1. Click cell **F1** to make it active.
2. On the **VIEW** tab, click **Split**. Notice that the screen is split vertically in two different panes.
3. In the horizontal scroll bar of the right pane, hold down the **right arrow** until you see cell AA1. Notice that you can still see cells A1 and B1 in the left pane.
4. Click **Split** again. The screen is no longer split.
5. Click in cell **A17** and click **Split**. The screen is split horizontally in two different panes.
6. Click **Split** again. The screen is no longer split.
7. Click in cell **F14** and click **Split**. The screen is split into four panes this time.
8. Choose the lower-right quadrant by clicking any cell in that pane, and then scroll down to display row 40.
9. In cell H40, type **236** and press **Enter**. The data you entered in cells A1 and B1 should be visible along with what you just entered in cell H40 (see Figure 1-12).

Figure 1-12

Working in a split window



10. Click **Split** to remove the split. The data in cell H40 is no longer visible.

PAUSE. LEAVE the workbook open to use in the next exercise.

Take Note The Split command is especially useful when you need to compare various portions of a long worksheet.

When you use a worksheet that contains a small amount of data, it is easy to scroll through the worksheet and focus on specific cells. As you become experienced in working with Excel, however, you might find yourself working on much larger worksheets. The ability to view more than one section of a worksheet at the same time by using split windows is especially useful when you need to compare different sections of data.



Workplace Ready

LARGE WORKBOOKS

After you complete several of the lessons in this book, you might want to come back to this section on splitting the window. Excel is a great what-if tool for sales projections, assessments, and especially budgets. The following example shows a split workbook with assumptions on one pane and the final results in another pane.

For example, the following Figure represents a five-year school budget. The Net All and All Ending Fund Balance are formulas that depend on the assumptions shown and totals throughout the worksheet. Notice that with the current assumptions, the school loses money each year and eventually exhausts all of its fund balance. Therefore, something needs to change. The school has tried numerous marketing efforts, but because it is in a remote area of the state, the student growth rates are more dependent on the local economy compared to the efforts of the school. The only item on the assumption that is under the control of the school is the salary increase.

	F	G	H	I	J	K	L
	FY 11-12	FY 12-13	FY 13-14	FY 14-15	FY 15-16		
1 Assumptions							
2 Inflation	1.00%	1.00%	2.00%	2.00%	2.00%		
3 PPR increase/decrease	-11.04%	1.00%	1.00%	1.00%	1.00%		
4 Student Growth	0.00%	0.00%	1.00%	1.00%	1.00%		
5 Salary Increase	0.00%	2.00%	2.00%	2.00%	2.00%		
6	Actual	Prelim					
101							
102 Net All	-\$5,346	-\$26,718	-\$35,609	-\$44,562	-\$53,549		
103 All Ending Fund Balance	\$169,097	\$142,379	\$106,770	\$62,209	\$8,660		
104							
105							
106							
107							
108							
109							
110							
111							
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126							
127							

The only way to get a positive net balance with the available assumptions is to cut salaries by 6.5% in the next school year (FY 13-14). Luckily for you, you are just the one filling in the numbers in the model you are given. However, you may want to look deeper at the assumptions, add new assumptions, or start a list of recommendations for your boss. Using the split window gives you a tool to see how the changes might affect the bottom line before you make your presentation.

	FY 11-12	FY 12-13	FY 13-14	FY 14-15	FY 15-16
1 Assumptions					
2 Inflation	1.00%	1.00%	2.00%	2.00%	2.00%
3 PPR increase/decrease	-11.04%	1.00%	1.00%	1.00%	1.00%
4 Student Growth	0.00%	0.00%	1.00%	1.00%	1.00%
5 Salary Increase	0.00%	2.00%	-6.50%	0.00%	0.00%
6					
101					
102 Net All	-\$5,346	-\$26,718	\$830	\$966	\$1,354
103 All Ending Fund Balance	\$169,097	\$142,379	\$143,210	\$144,175	\$145,529
104					
105					
106					
107					
108					
109					
110					
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125					
126					
127					

Opening a New Window

Splitting a window allows you to look at two sections of a worksheet side by side. You can also view two sections of a worksheet by using the New Window command. In this section, you learn to use the New Window command on the VIEW tab to open a new window in Excel. You also learn to use the Switch Window command to change the active window, and you learn how to close multiple windows.

STEP BY STEP

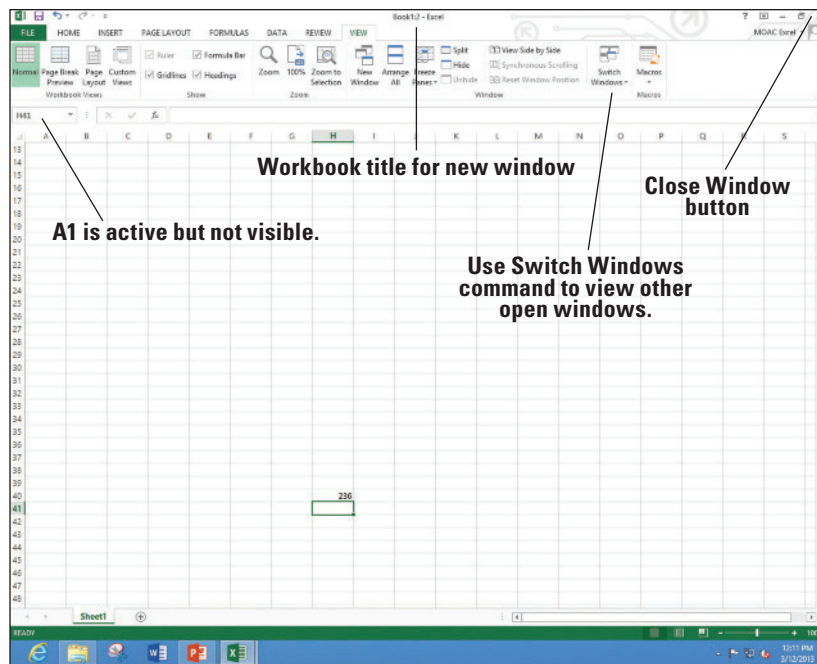
Open a New Window

GET READY. USE the worksheet you left open in the previous exercise or type 456 in cells A1 and B1 and 236 in cell H40 in a new workbook.

1. Press **Ctrl + Home** to make A1 the active cell.
2. With the VIEW tab active, in the Window group, click **New Window**. A new window titled *Book1:2* opens. If you have opened a different number of new workbooks, your title bar might show a different book number. The colon and 2 (:2) indicate that there are two windows from the same workbook open.
3. Scroll down in the window until cell H40 is visible (see Figure 1-13). Although cell A1 is not visible, it is still the active cell. It is important to note that you have opened a new view of the active worksheet—not a new worksheet.

Figure 1-13

A new window

**Another Way**

You also can use the Arrange All command on the VIEW tab to display open windows side by side so that you can compare various parts of a large worksheet. Use the View Side by Side and Synchronous Scrolling commands to have both windows scroll together.

4. Click **Switch Windows**. A drop-down list of all open windows appears. Book 1:2 is checked, which indicates that it is the active window.
5. Click **Book 1:1**. You now see the original view of the worksheet with cell A1 active.
6. Click **Switch Windows** and make **Book1:2** active.
7. Click the **Close Window** button (in the upper-right corner of the workbook window) to close Book1:2. The window closes, and Book1 in the title bar tells you that you are now looking at the only open view of the workbook.

Take Note Clicking the Close Window button closes only the new window opened at the beginning of this exercise. If you use the Close command on the FILE tab, you will close the entire workbook.

8. Click the **FILE** tab, and then click **Close**.
9. When asked if you want to save the changes in Book1, click **Don't Save**.

PAUSE. LEAVE Excel open for the next exercise.

WORKING WITH AN EXISTING WORKBOOK

Bottom Line

Many workbooks require frequent updating because existing data has changed or new data must be added. Workers frequently open an existing workbook, update information, and then save the workbook to be revised again at a later time. Often, files are created by one person, and then used or updated by others. Filenames should reflect the type of data contained in the file. A descriptive filename enables you to locate and retrieve files quickly. Filenames can be up to 255 characters long, including the filename extension. However, most workers use short descriptive filenames that clearly identify the content of the workbook.

**Cross Ref**

You can also use the File Properties, such as tags, to help you and others manage and find files. See Lesson 2, "Working with Microsoft Excel 2013," for more on File Properties.



Another Way

You can press **Alt+F4** to close the current file and Excel at the same time.

5. Click the **FILE** tab, and then click **Close** to close the Employee workbook.

PAUSE. LEAVE Excel open for the next exercise.

If you are familiar with Microsoft Word, you know that when you open a file, the program places your cursor and screen display at the beginning of the document. When you open an Excel workbook, however, the active cell is the same one that was active when you last saved the file. For example, when you open the Contoso Employee Info workbook, A22 is the active cell in Normal view, because A22 was the active cell displayed in Normal view when the file was last saved. This feature enables you to continue working in the same location when you return to the workbook.

Opening a Workbook from Your SkyDrive

SkyDrive is a Microsoft feature that allows you to work with files in the Cloud—a location that is available from any computer in the world as long as you have an Internet connection. When Office 2013 is installed, you have an option of installing SkyDrive or you can go to the Microsoft.com site, search for the SkyDrive download, and install it at a different time.

STEP BY STEP

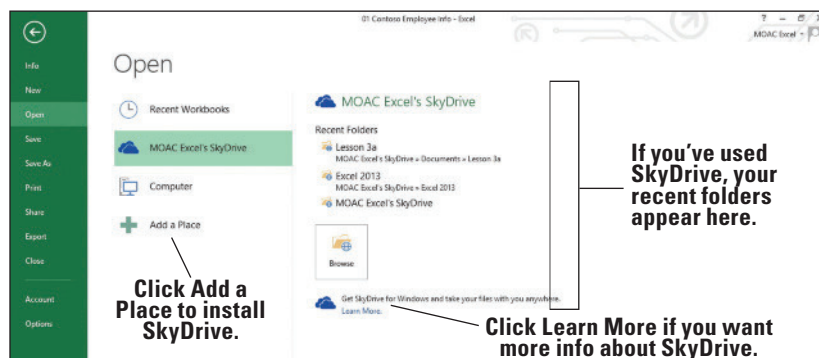
Open a Workbook from Your SkyDrive

GET READY. Excel should be open. You need to have a SkyDrive account for this section.

1. Clicks the **FILE** tab.
2. If it is not selected, click **Open**.
3. If you do not have SkyDrive installed, click **+ Add a Place** (see Figure 1-15), click **SkyDrive**, and go through the steps on the screen.
4. Click **[Your Name] SkyDrive**, and then click **Browse**.

Figure 1-15

A computer with SkyDrive installed



5. If you have folders on the SkyDrive, double-click the folder where the file is located.
6. If there are subfolders, double-click the subfolder.
7. Continue to navigate to the folder where the file is located and click the file name.
8. Click **Open**. The file is displayed.

CLOSE the file and LEAVE Excel open for the next exercise.

Navigating a Worksheet

An Excel worksheet can contain more than one million rows and more than sixteen thousand columns. There are several ways to move through worksheets that contain numerous rows and columns. You can use the arrow keys, the scroll bars, or the mouse to navigate through a worksheet. In the following exercises, you explore the different methods for moving through a worksheet.

Take Note A worksheet can be very large or quite small depending on your needs. Available columns go from A through XFD, and available rows can go from 1 through 1,048,567.

STEP BY STEP

Navigate a Worksheet



GET READY. Click the **File** tab, and then click **Open**. In the Recent Workbooks area, click **01 Contoso Employee Info** or go to the class folder and open this file.

1. Press **Ctrl + End** to move to the end of the document (cell D27).
2. Press **Ctrl + Home** to move to the beginning of the document (cell A1).
3. Click in the **Name Box**, type **A3**, and press **Enter** to make the cell active.
4. Press **Ctrl + Down Arrow** to go to the last row of data (cell A27).

Take Note Ctrl + Arrow allows you to move to the start and end of ranges of data. The worksheet title, which spans all of the columns, is not considered part of the worksheet's data range.

5. Press **Ctrl + Right Arrow**. Cell D27, the last column in the range of data, becomes the active cell.
6. Press **Ctrl + Down Arrow**. The last possible row in the worksheet displays.
7. Press **Ctrl + Home**.
8. Press **Scroll Lock**. Then press the **Right Arrow** key. This moves the active column one column to the right, and the whole worksheet moves.
9. Use the vertical scroll bar (if necessary, refer to Figure 1-12) to navigate from the beginning to the end of the data.
10. If your mouse has a wheel button, roll the wheel button forward and back to quickly scroll through the worksheet.

CERTIFICATION READY? 1.2.5

Where is the Name Box located and what is it used for?

Take Note When Scroll Lock is on, SCROLL LOCK is displayed on the left side of the Status bar. To use the arrow keys to move between cells, you must turn off Scroll Lock. Some keyboards come equipped with an onboard Scroll Lock key, whereas others do not. This is an option, not a necessity.

PAUSE. Press **Scroll Lock** again to turn it off. LEAVE the workbook open for the next exercise.



Cross Ref

You learn about ranges in more depth in Lesson 2.

Navigating Data with the Go To Command

The workbook used in these exercises is neither long nor particularly complicated. When you begin dealing with much larger databases, or longer sets of workbooks, you might wish you had some easier means to get around the data than just scrolling. The **Name Box** indicates the current cell you are in as well as gives you the opportunity to name the cell or a range. The Go To command can take you to particular points in a worksheet, including cells and cell ranges that you name yourself.

STEP BY STEP**Navigate Data with the Go To Command****CERTIFICATION
READY?****1.2.4**

How do you name a range
and go to a cell or range
using the Go To dialog box?

Figure 1-16

Worksheet with A17 in the
Name Box selected

Name Box

The screenshot shows the Excel interface with the 'Name Box' displaying 'A17'. The worksheet contains the following data:

Contoso, Ltd.			
Last Name	First Name	Job Title	Hours
Bourne	Stephanie	Physician	36
Holliday	Nicole	Physician	36
Laszlo	Rebecca	Physician	36
Barnhill	Josh	Billing Clerk	36
Kane	John	Registered Nurse	30
Trenary	Jean	Registered Nurse	30
Da Silva	Sergio	Physician Assistant	36
Wang	Jian	Referral Specialist	36
Wilson	Dan	Physician	36
Valdez	Rachel	Receptionist	30
Giest	Jenny	Office Manager	40
Gottfried	Jim	Receptionist	30
Delaney	Aidan	Receptionist	20
Dellamore	Luca	Medical Assistant	36
Hamilton	David	Medical Assistant	36
Hoeing	Helge	Medical Assistant	36
Munson	Stuart	Referral Specialist	36

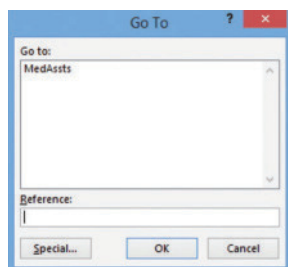
USE the **01 Contoso Employee Info** workbook from the previous exercise.

1. Select cell **A17**.
2. In the Name Box to the left of the formula bar, select cell **A17**, as indicated in Figure 1-16.

3. Delete **A17**, type **MedAssts**, and press **Enter**.
4. Select cell **M11**.
5. On the HOME tab, in the Editing group, click **Find & Select**. Click **Go To**. The Go To dialog box appears (see Figure 1-17).

Figure 1-17

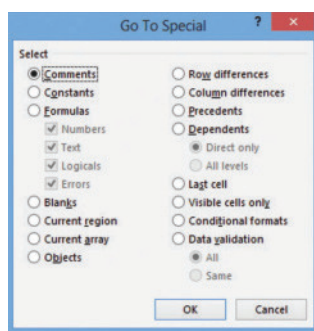
Go To dialog box



6. In the Go to list, click **MedAssts**, and then click **OK**. Cell A17 becomes the active cell.
7. Click **Find & Select** again, and then click **Go To Special**. The Go To Special dialog box appears (see Figure 1-18).

Figure 1-18

Go To Special dialog box



8. In the Go To Special dialog box, click **Last cell**.

9. Click **OK**. Cell D27 becomes the active cell. The last cell is the lower-right cell in the worksheet with contents or formatting.

CLOSE the workbook and do not save. LEAVE Excel open for the next exercise.

WORKING WITH EXCEL'S HELP SYSTEM

Bottom Line

The **Help system** in Excel 2013 is rich in information, illustrations, and tips that can help you complete any task as you create worksheets and workbooks. When you install Excel, you automatically install hundreds of help topics on your computer. Excel can also access thousands of additional help topics online.

Using the Help System

Finding the right information in Excel's Help system is easy: You can pick a topic from popular searches, see what's new, get training, or perform keyword searches by entering terms that best describe the task you want to complete. In this exercise, you learn to open the Help window and move between its online and offline topics.

Take Note If you aren't sure what an onscreen tool does, just point to it. Once the mouse pointer rests on a tool, a box called a *ScreenTip* appears. A basic ScreenTip displays the tool's name and shortcut key (if a shortcut exists for that tool). Some of the ribbon's tools have enhanced ScreenTips, which also provide a brief description of the tool.

STEP BY STEP

Use the Help System



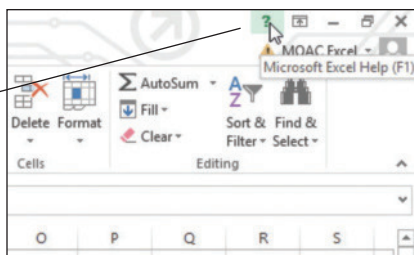
GET READY. OPEN a new workbook for this exercise.

1. Position your mouse pointer over the **Help** button, as shown in Figure 1-19, in the upper-right corner of the Excel window. A ScreenTip appears, telling you that this button enables you to access Excel's Help features and that you can click the button or press F1.

Figure 1-19

Help button

Office Help button



2. Click the **Help** button; the Help window opens, as shown in Figure 1-20.

Figure 1-20

Help window

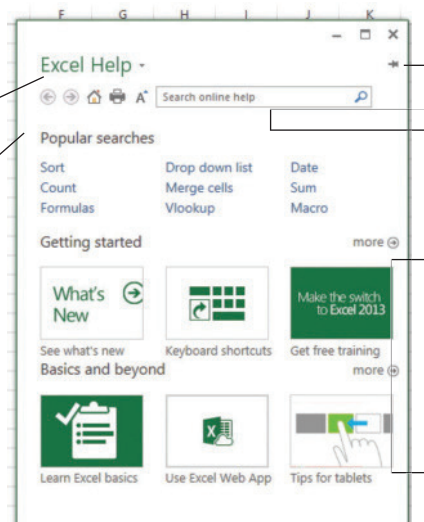
Help Toolbar

Links to Help topics

Keep Help on Top

Keyword Search

Major Training Topics

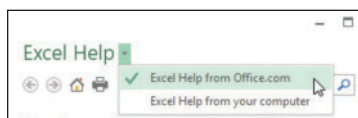
**Another Way**

You can also press F1 to open the Help window.

3. In the Help window, click the **What's New** icon. The next screen gives you additional hyperlinked subcategories.
4. Navigate through three of the subtopics in the Help window.
5. In the Help window toolbar, click the **Home** button to return to the first screen.
6. Click the **Excel Help drop-down arrow**. This displays the Connection Status options shown in Figure 1-21. This feature enables you to choose whether the Help window displays content from files installed on your computer or from Office.com on the Internet.

Figure 1-21

Connection Status options



7. Click in the workbook behind the Help window. Notice that the Help window is hidden and the workbook becomes the top window.
8. Click the **Help** button to display the Help window again.

**Another Way**

You can also press Ctrl+T to keep the Help window as the top window.

9. Click the **Keep Help on Top** pin button.
10. Now click the workbook and notice that you can still see the Help window.
11. **CLOSE** the Help window.

CLOSE your workbook.

Excel's Help window gives you access to various help topics that offer information about specific Excel features or tools. Help topics can assist you with virtually any task, feature, or problem you encounter when working with Excel. The Help window is set up like a browser, with links to specific categories and topics, and it features some of the same tools you find in your web browser, including:

- **Back:** Jumps to the previously opened Help topic.
- **Forward:** Jumps to the next opened Help topic.
- **Home:** Returns to the initial Help window.
- **Print:** Allows you to print the current Help topic.
- **Use Large Text:** Shows larger text in the Help window.

Figure 1-22

The Excel Help Toolbar



Take Note Many Excel dialog boxes contain a **Help** button. When you click it, a Help window opens with information about that dialog box.

You can find help in several different ways. For example, you can click one of the links under *Popular searches* or click a topic listed under *Getting started* or *Basics and beyond*. You can also type a keyword or phrase in the Search box, and then press Enter. When you do this, related help topics appear in the Help window.

When you click the arrow next to Excel Help at the top of the Help window, the resulting menu lets you choose between searching help topics that are available online and just those topics installed on your computer (referred to as *offline help*). If your computer has an “always on” connection to the Internet, such as a cable modem or LAN connection, you might want to select Excel Help from Office.com, which is Microsoft’s online-based built-in Help system. If your computer uses a dial-up modem, or if you simply choose not to access online help information, choose the Excel Help from your computer option to access the topics installed on your computer.

SKILL SUMMARY

In this lesson you learned how:	Exam Objective	Objective Number
To start Excel	Create new Blank workbooks.	1.1.1
To work in the Excel window	Customize the Quick Access Toolbar.	1.4.3
To change Excel's view	Split the window.	1.4.13
	Change workbook views.	1.4.6
To work with an existing workbook	Demonstrate how to use Go To.	1.2.4
	Demonstrate how to use Name Box.	1.2.5
To work with Excel's Help system		

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

- An arrow in the bottom-right corner of a group on the ribbon tells you that which of the following is available?
 - dialog box
 - additional workbook
 - list of worksheets
 - additional part of the current range
- Which of the following is a selected cell?
 - current command
 - default option
 - active cell
 - default cell
- Which feature enables you to preview headers and footers, page breaks, and other features that will print?
 - Page Layout
 - Print Layout
 - Synchronous Scrolling
 - Window view
- After a file has been opened, the filename appears in which of the following?
 - title bar
 - footer
 - header
 - Description pane
- When you split a window, the window is divided into how many panes?
 - two
 - three
 - four
 - two or four
- When you click the Help button, what opens?
 - ScreenTips
 - Keytips
 - Help window
 - dialog box

7. Which is the intersection of a row and column?
 - a. range
 - b. tab
 - c. bar chart
 - d. cell
8. Which of the following starts off with Save, Undo, and Redo and can be customized to contain the commands you use most frequently?
 - a. A worksheet
 - b. The Help window
 - c. The Quick Access Toolbar
 - d. The ribbon
9. How many worksheets does a new Excel 2013 workbook open with?
 - a. one
 - b. two
 - c. three
 - d. four
10. To get to the last cell on the worksheet, which of the following should you press?
 - a. Ctrl + Home
 - b. Ctrl + End
 - c. Ctrl + Right
 - d. Ctrl + Left

True / False

Circle T if the statement is true or F if the statement is false.

- T F 1. Pressing the F1 key displays Backstage view.
- T F 2. Pressing the Alt key activates Keytips that allow you to use the keyboard to choose ribbon tabs instead of clicking them with the mouse.
- T F 3. Ctrl + O opens a new blank workbook.
- T F 4. The Quick Access Toolbar appears on the right side of the title bar, above the ribbon.
- T F 5. Ctrl + F displays Backstage view.
- T F 6. Click the FILE tab to get to Backstage view.
- T F 7. Press Ctrl + Home to go to cell A1.
- T F 8. The columns in a worksheet are identified by numbers.
- T F 9. The active cell in a worksheet is outlined by a bold rectangle.
- T F 10. Page Layout view is useful when preparing your data for printing.

Competency Assessment

Project 1-1: Utilizing Help

Use this project to better familiarize yourself with the Help system.

GET READY. LAUNCH Excel if it is not already running.

1. On the right side of the title bar, click the **Help** button.
2. When the Help window opens, choose **Learn Excel basics** and read the first few topics displayed in the window.
3. Click the **Home** button.
4. Across from Getting started, click the **more** button and review the topics in the online help.
5. Close the browser window.

6. In the Excel Help window in the Search box, type **select cells** and read one of the topics.
7. Click the **Close** button in the upper-right corner of the window to close the Help window.

LEAVE Excel open for the next project.

Project 1-2: Printing Shortcuts

GET READY. LAUNCH Excel if it is not already running.

Having a list of shortcuts can be helpful.

1. Click the **Help** button to display the Excel Help window.
2. Click the **Keyboard shortcuts** link and find the list of shortcuts.
3. If you have permission to print, click the **Print** icon to print the list. CLOSE the Help window.

LEAVE Excel open for the next project.

Proficiency Assessment

Project 1-3: Utilizing the Ribbon

GET READY. LAUNCH Excel if it is not already running and display a blank workbook.

1. Click the **FILE** tab. This is your instant access to Backstage view. Click several of the commands in Backstage view that are shown on the navigation bar in the left pane.
2. Click the **Return to document** arrow to return to the workbook. Click the **HOME** tab, if it isn't already displayed. Move the mouse pointer over the ribbon, reading the various ScreenTips that appear as the pointer rests over individual ribbon elements.
3. On the HOME tab, in the Font group, click the **Font** arrow. Note that the first font at the top of the font list is displayed. Click the arrow again to hide the list.
4. Click the **Font** arrow again, and choose **Times New Roman**. Note the corresponding change in font on the Font list.
5. Move the pointer to the Quick Access Toolbar and click the **Undo** button. Note that your font returns to the default font, usually Calibri.
6. Click the **INSERT** tab. Move the pointer over the ribbon and examine it while reading the ScreenTips.
7. Click the **VIEW** tab. Once again, point to the ribbon and examine its features.
8. Click the **FILE** tab again to display Backstage view.
9. Click the **Close** command at the bottom of the left pane to close the workbook. If prompted to save the document, choose **Don't Save**.

LEAVE Excel open for the next project.

Project 1-4: Navigating a List of Homes for Sale

Fabrikam, Inc., a realtor, has a list of homes for sale. You need to know how large the list is.

GET READY. LAUNCH Excel if it is not already running.

1. Open the **01 Fabrikam Customer Houses** file.
2. Press **Ctrl + End** to move to the last cell in the workbook.
3. Press **Ctrl + Home** to move to the first cell.
4. Click cell **B6**.
5. Press **Ctrl + Right Arrow** to go to the right edge of the active range.
6. Press **Ctrl + Left Arrow** to go to the left edge.
7. Press **Ctrl + Up Arrow** to go to the top edge of the active range.
8. CLOSE the workbook.

LEAVE Excel open for the next project.

Mastery Assessment

Project 1-5: Viewing an Excel Training Video

Use this project to better familiarize yourself with tutorials that come with Excel.

GET READY. LAUNCH Excel if it is not already running.

1. Press **F1** to display the Excel Help window.
2. Click the **Get free training** icon.
3. Click the **Download** button.
4. If prompted, choose **Open** in the message bar to allow the application to load. This will launch a training exercise in Microsoft PowerPoint.
5. Follow the instructions in PowerPoint and go through the training. Press **Esc** when you are done.

CLOSE PowerPoint, the Web browser, and the Excel Help window. LEAVE Excel open for the next project.

Project 1-6: Home Loan Calculator

Excel can help you create a loan payment schedule for major purchases. However, to navigate within the workbook used in this project, you need to change the views.

GET READY. LAUNCH Excel if it is not already running.



1. OPEN the **01 Jim's Loan Schedule** file.
2. Go to **Page Layout** view and scroll to the end of the document to see how the pages will lay out.
3. Return to **Normal** view.
4. Split the screen into two windows and scroll so you can see the 360th payment as well as the top part of the worksheet (A1 through J17).

5. Change the Loan amount to **200,000** at **4.5%** interest and edit the start date of the loan for the first of next month. Notice the change in scheduled payment and total interest.
6. Change the loan period to **15** years and notice that the payment numbers seem to disappear. Scroll up in the lower window until you see the last payments.
7. CLOSE Excel. If prompted to save the workbook, choose **Don't Save**.

Working with Microsoft Excel 2013 2

LESSON SKILL MATRIX

Skills	Exam Objective	Objective Number
Creating Workbooks	Create new blank workbooks.	1.1.1
Saving Workbooks	Save workbooks in alternate file formats.	1.5.2
	Maintain backward compatibility.	1.5.6
	Save files to remote locations.	1.5.8
Entering and Editing Basic Data in a Worksheet	Append data to a worksheet.	2.1.1
	Find and replace data.	2.1.2
	Adjust column width.	1.3.5
	Demonstrate how to use the Auto Fill tool.	2.1.4
	Expand data across columns.	2.1.5
	Delete cells.	2.1.6
Using Data Types to Populate a Worksheet	Apply Number formats.	2.2.6
Cutting, Copying, and Pasting Data	Copy and paste data.	2.1.3
Editing a Workbook's Properties	Add values to workbook properties.	1.4.8



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KEY TERMS

- Auto Fill
- AutoComplete
- copy
- copy pointer
- cut
- fill handle
- Flash Fill
- formula bar
- keywords
- label
- move pointer
- natural series
- Office Clipboard
- paste
- range
- selecting text
- workbook properties



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Purchasing a home is generally the biggest financial investment most people make in a lifetime. Real estate agents advise and assist those who want to buy a new home or sell their present home. Some real estate agents can also help people find rental homes. When people are ready to sell their homes, they often list with a real estate agent who earns a commission or percentage of the home's selling price when the home sells. Agents take an exam to be licensed by their state. Many licensed agents also become Realtors®. This is a trademarked name that an agent can use only when he or she joins the local, state, and national associations of Realtors®. Fabrikam, Inc., located in Columbus, Ohio, is a real estate firm owned by Richard Carey and David Ortiz. Fabrikam has five fulltime sales agents and a college intern. Fabrikam's intern uses Excel to help manage sales, expenses, and support the business. In this lesson, you continue to view, add, and manipulate data in an Excel 2013 spreadsheet similar to that used by Fabrikam, Inc.

SOFTWARE ORIENTATION

Excel's HOME Tab

The ribbon in Microsoft Office Excel 2013 is made up of a series of tabs, each related to specific kinds of tasks that you perform in Excel. The HOME tab, shown in Figure 2-1, contains the commands that people use the most when creating Excel documents. Having commands visible on the work surface enables you to see at a glance most tasks you want to perform. Each tab contains groups of commands related to specific tasks or functions.

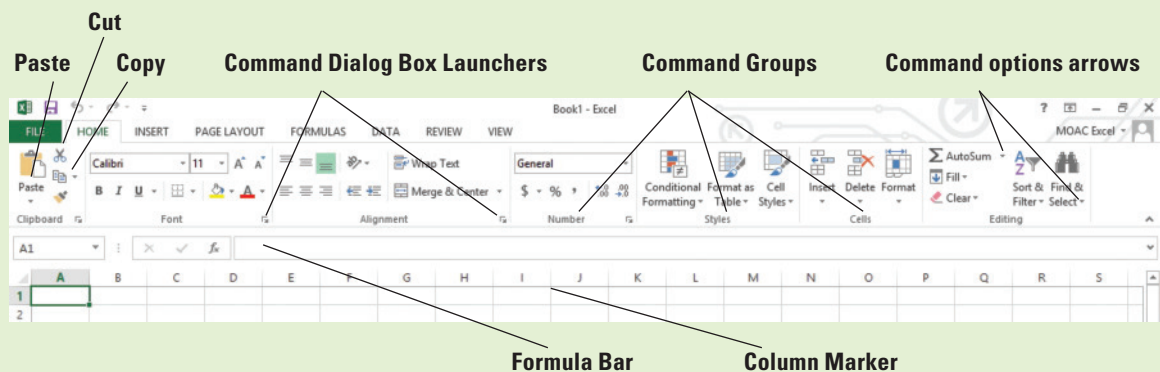


Figure 2-1

Ribbon, formula bar, and command options

Some commands have an arrow associated with them. In Figure 2-1, you see the option arrows associated with AutoSum and Find & Select. This indicates that in addition to the default task, other options are associated with the task. Similarly, some of the groups have Dialog Box Launchers associated with them. Clicking these displays additional commands not shown on the ribbon. In Figure 2-1, the Clipboard, Font, Alignment, and Number groups have associated dialog boxes, whereas Styles, Cells, and Editing do not.

Bottom Line

CREATING WORKBOOKS

There are three ways to create a new Microsoft Excel workbook. You can open a new, blank workbook using the FILE tab to access Backstage view or when you launch Excel. You can open an existing Excel workbook, enter new or additional data, and save the file with a new name, thus creating a new workbook. You can also use a template to create a new workbook. A template is a model that has already been set up to display certain kinds of data, such as sales reports, invoices, and so on.

Creating a Workbook from Scratch

To create a new workbook, launch Excel and select a blank workbook or another type of template. If you are working in Excel and want to begin a new workbook, click the FILE tab, click New, and then click Blank workbook. Worksheets often begin with text that describes the content of the worksheet. In this exercise, you create two Excel workbooks: one with a company address and one with a quick phone message.

STEP BY STEP

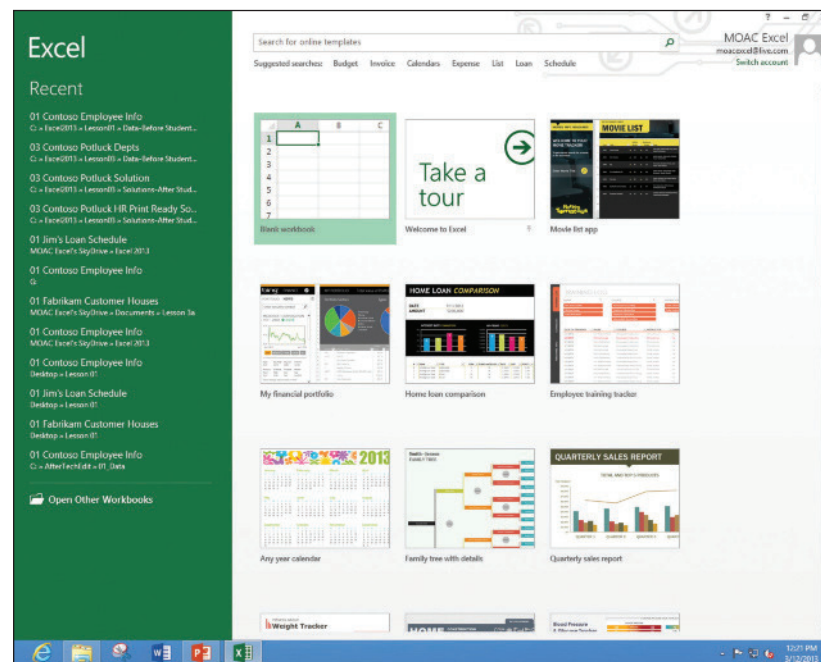
Create a Workbook from Scratch



GET READY. LAUNCH Excel. Excel gives you options for starting a blank workbook, taking a tour, or using templates (see Figure 2-2).

Figure 2-2

Available options after Excel is launched

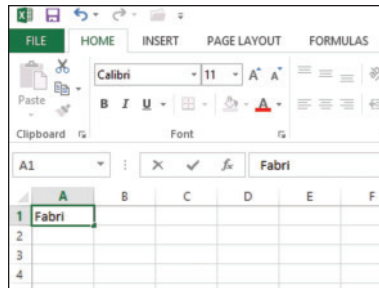
CERTIFICATION
READY? 1.1.1

How do you create a new workbook file?

1. Click **Blank workbook**. If you have just launched Excel, *Book1 – Excel* appears in the title bar at the top of the window. A blank workbook opens with A1 as the active cell.
2. In cell A1, type **Fabrikam Inc.** This cell is the primary title for the worksheet. Note that as you type, the text appears in the cell and in the formula bar (see Figure 2-3). See the definition of formula bar in the “Editing a Cell’s Contents” section on page 37.

Figure 2-3

Typed text appears in both the active cell and the formula bar.



3. Press **Enter**. The text is entered into cell A1, but appears as if it flows into cell B1.
4. In cell A2, type **123 Fourth Street** and press **Enter**.
5. In cell A3, type **Columbus, OH 43204** and press **Enter**.
6. Sometimes you need a quick work area to complete another task while you are in the middle of a workbook. You can open another workbook as a scratch area. Click the **FILE** tab, and in the left pane, click **New**. The different templates available appear (refer to Figure 2-2).
7. In the Backstage view, click **Blank workbook**. A second Excel workbook opens and *Book2* appears in the title bar.
8. In cell A1, type **Phone Calls** and press **Enter**.
9. In cell A2, type **David Ortiz UA flight 525 arriving 4:30 pm** and press **Enter**.

PAUSE. LEAVE both Excel workbooks open for the next exercise.



Another Way

When you work in Excel, you can open a blank workbook with the shortcut combination **Ctrl + N**.

Switching Between Open Workbooks

The ability to multitask is prized by most employers. Windows and Excel enable you to work on multiple projects simultaneously. When the phone rings, you can quickly go to another area, make notes, or research a question, and then return to your work. If you have multiple workbooks open, you might need to move quickly between the workbooks to finish your tasks.

STEP BY STEP

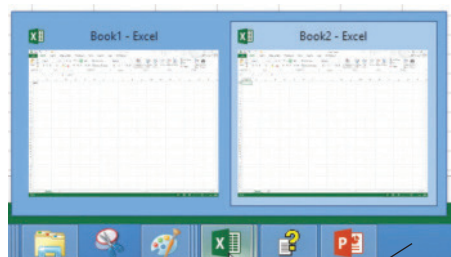
Switch Between Open Workbooks

GET READY. Both temporary workbooks with the address and phone message should be open. The Phone Calls workbook is the current workbook in this case.

1. To return to the company address, click the **Excel** icon on the taskbar (see Figure 2-4). Each of the open workbooks appears in a preview window. When you move the mouse pointer over each workbook, it previews on the screen.

Figure 2-4

Open workbooks appear by clicking the Excel icon on the taskbar.



Excel icon
(open)

Taskbar



Another Way

You can also switch between two recent active workbooks with **Ctrl + Tab**.

2. Click **Book1 - Excel**. The unsaved company address becomes the active workbook.

Take Note Unlike previous versions, Excel now displays each workbook in a separate window.

SAVING WORKBOOKS

Bottom Line

When you save a file, you can save it to a folder on your computer's hard drive, a network drive, disc, CD, USB drive, SkyDrive, or other storage location. You must first identify where the document is to be saved. The remainder of the Save process is the same, regardless of the location or storage device.

Naming and Saving a Workbook

When you save a file for the first time, you are asked two important questions: Where do you want to save the file? What name will you give to the file? In this lesson, you practice answering these questions for two different files. By default in all Office applications, documents are saved to the My Documents folder.

STEP BY STEP

Name and Save a Workbook



Another Way

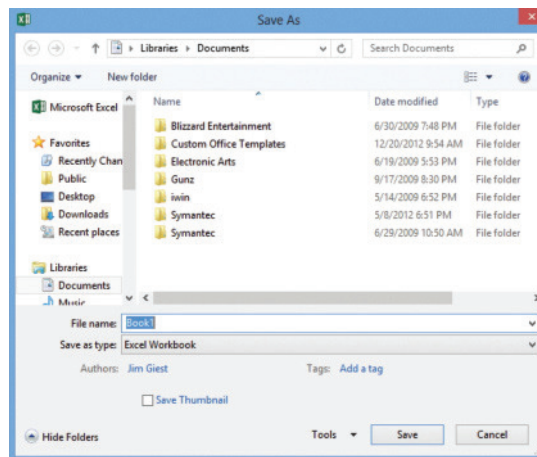
You can also save the workbook with Ctrl + S.

GET READY. USE the workbook from the previous exercise or type your name and address in a new workbook.

1. Click the **FILE** tab to open Backstage view. In the left pane, click **Save As** to display the save options.
2. Double-click **Computer** to open the Save As dialog box (see Figure 2-5).

Figure 2-5

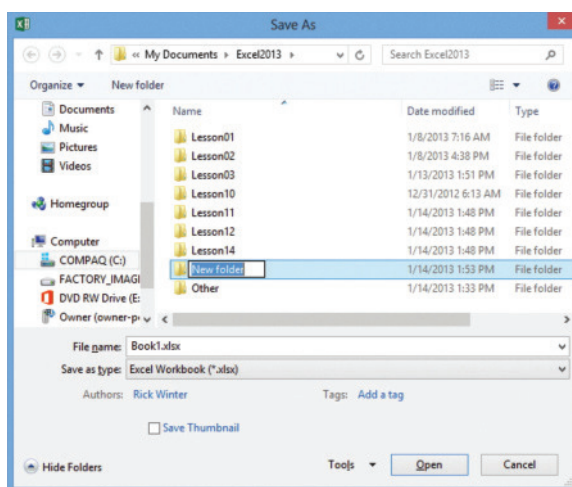
Save As dialog box



3. From the left-hand navigation pane, in the Save As dialog box, click **Desktop**. The Desktop becomes the new destination of your saved file.
4. In the Save As dialog box, click **New folder**. A folder icon appears with the words *New folder* selected (see Figure 2-6).

Figure 2-6

Type a new name in place of New folder.



**CERTIFICATION
READY?**

1.5.2

How do you name and save a workbook to a specific location?

5. Type **Excel Lesson 2** and press **Enter**.

6. Click the **Open** button.

7. In the File name box, type **02 Fabrikam Address Solution**.

8. Click the **Save** button.

PAUSE. LEAVE the workbook open to use in the next exercise.

Take Note

Save your workbook often and especially before opening another workbook, printing, or after you enter information.



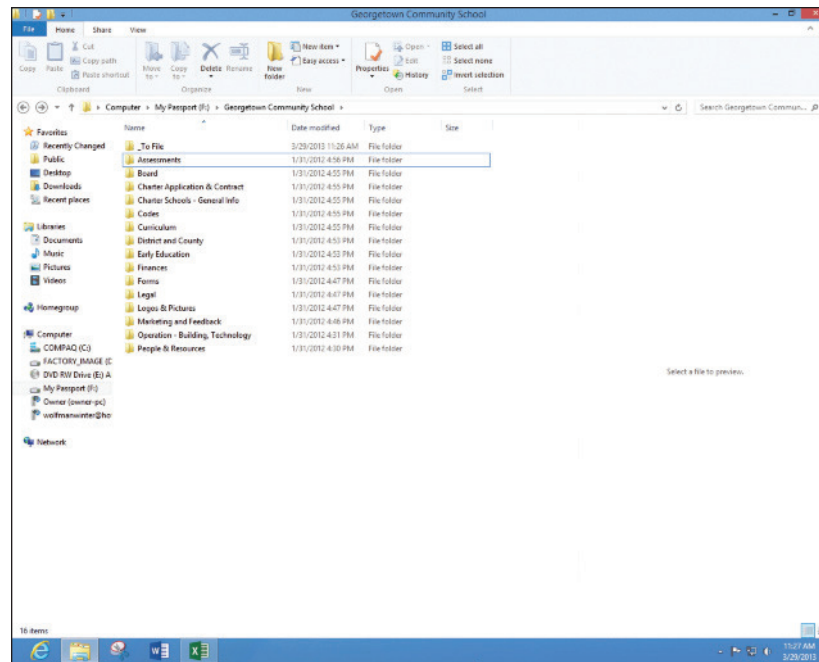
Workplace Ready

ORGANIZATIONS' FILE CONVENTIONS

When you first start working at any organization, your employer might give you conventions to use when naming files or editing those files. File conventions might include adding the date or your name or initials to a portion of a file name or adding "r" or "rev" followed by a revision number. An example might be 2014-03-17FiveYearBudgetR3.

In addition to file naming, your organization might want you to save files to specific network drives and folders for different kinds of documents. They might have rules for which files require passwords, when files should be destroyed, and frequencies required for backups. If you go into the business knowing how to manage files, you will be an asset to the organization. Even if there are no existing conventions, you might want to think about your own personal conventions to ensure you can find and protect your files.

Following is an example of a simple drive structure for a charter school.



Saving to Your SkyDrive

SkyDrive is a cloud-based application that allows you to store your files so you can retrieve them anywhere and share them with other people if desired. SkyDrive is also a great place to store backup files of important documents. SkyDrive comes with Windows 8 or you can install the free desktop app on Windows 7 and Windows Vista. This exercise assumes you have Windows 8 already loaded with SkyDrive.

STEP BY STEP

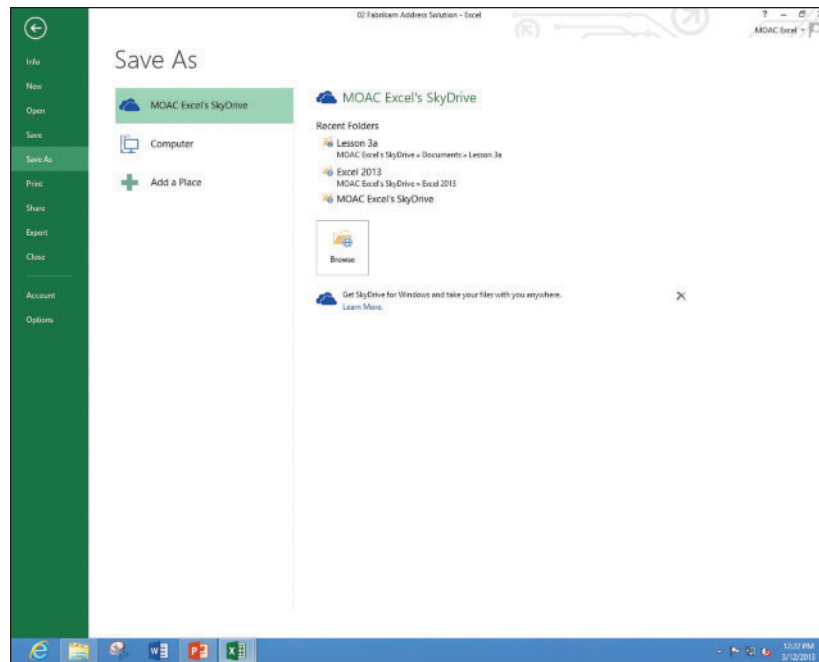
Save to Your SkyDrive

GET READY. USE the workbook from the previous exercise or type your name and address in a new workbook.

1. Click the **FILE** tab and then click **Save As**.
2. In the Backstage view, under Save As, click **[Your name] SkyDrive** (see Figure 2-7). You may need to sign in to SkyDrive if you haven't already.

Figure 2-7

SkyDrive information on the Backstage view



**CERTIFICATION
READY? 1.5.8**

How do you save a file to SkyDrive?

3. Click the **Browse** button.
4. Click the **New folder** button.
5. In the New folder text box, type **Excel Lesson 2** to save a folder for this lesson on your SkyDrive and press **Enter**.
6. Double-click the **Excel Lesson 2** icon to move to that folder.
7. Keep the file with the same name (or type **02 Fabrikam Address Solution** in the File name box), and then click the **Save** button.

PAUSE. LEAVE the workbook open to use in the next exercise.

Saving a Workbook Under a Different Name

You can rename an existing workbook to create a new workbook. For example, the address you created in the preceding exercise is current. When you have multiple offices, you can save the file with a new name and use it to enter data for another office. You can also use an existing workbook as a template to create new workbooks. In this exercise, you learn how to use the Save As dialog box to implement either of these options.

STEP BY STEP

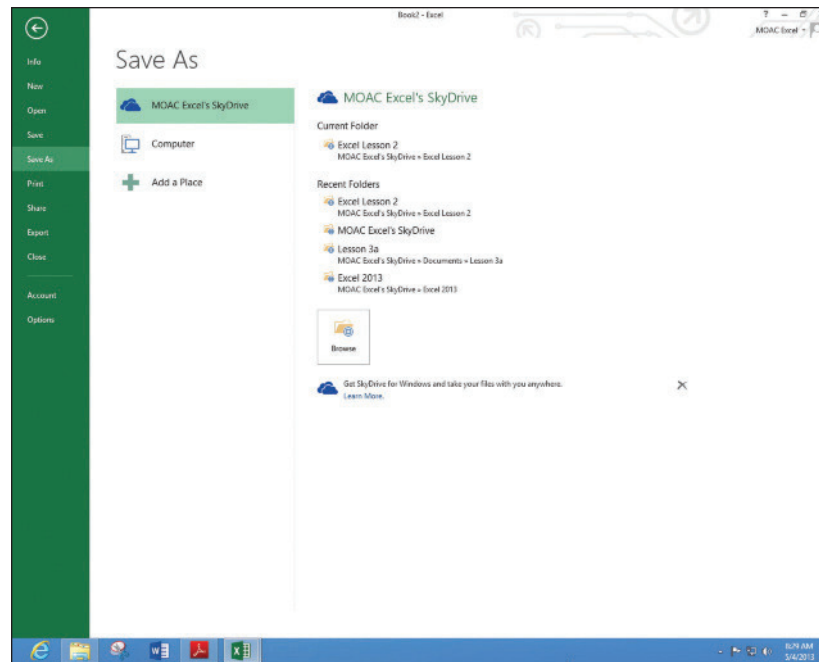
Save a Workbook Under a Different Name

GET READY. USE the workbook from the previous exercise or type **Fabrikam Inc.** in cell A1.

1. In cell A2, type **87 East Broad Street** and press **Enter**.
2. In cell A3, type **Columbus, OH 43215** and press **Enter**.
3. Click the **FILE** tab, and in the left pane, click **Save As**. The Backstage view shows that the Current Folder (see Figure 2-8) is Excel Lesson 2 on your SkyDrive, because it was the folder that was last used to save a workbook.

Figure 2-8

Current and Recent folders used



4. Click **Computer** to return to the drive you used before.
5. In the right pane, double-click **Excel Lesson 2**.
6. Click in the **File name** box, click after **Fabrikam**, and type **Broad** so the name reads **02 Fabrikam Broad Address Solution**.
7. Click **Save**. You created a new workbook by saving an existing workbook with a new name.
8. Click the **FILE** tab, click **Save As** in the left pane, and click **Browse**.
9. In the File name box, type **02 Fabrikam Address Template Solution**.
10. In the Save a type box, click the **drop-down arrow** and choose **Excel Template**. Click the **Save** button.

Take Note Templates are automatically saved in another location so they can be opened with the **FILE**, **New** option.

CERTIFICATION READY? 1.5.2

How do you rename and save an existing workbook?

PAUSE. CLOSE Excel. Do not save the Phone Calls workbook.

Creating a template to use for each new workbook based on the example file eliminates the possibility that you might lose data because you might overwrite a file after you enter new data. To use the template, you choose **FILE > New > Personal** and select the template you saved. When you exit, you are prompted to save the file with a new name.



Cross Ref

For more information on templates, see the “Accessing and Using Excel Templates” section in Lesson 3.

Saving a Workbook in a Previous Excel Format

Files created in earlier Excel versions can be opened and revised in Excel 2013. However, if some of your users do not have the latest version or use other applications, they might not be able to open your file. You can save a copy of an Excel 2013 workbook (with the .xlsx file extension) to a version that is compatible with Excel 97 through Excel 2013 (with the .xls file extension) versions. The program symbol displayed with the filenames is different, but it is a good idea to give the earlier edition file a different name. It is also a good idea to check which issues might be lost with Excel's compatibility checker.

STEP BY STEP**Save a Workbook in a Previous Excel Format**

GET READY. LAUNCH Excel.

1. At the bottom of the left pane, click **Open Other Workbooks**.
2. In the Backstage Recent Workbooks pane, click **02 Fabrikam Broad Address Solution**.
3. First check for compatibility issues. Click the **FILE** tab, click **Info**, click **Check for Issues**, and then click **Check Compatibility**. The Microsoft Excel – Compatibility Checker dialog box in Figure 2-9 opens.

Figure 2-9

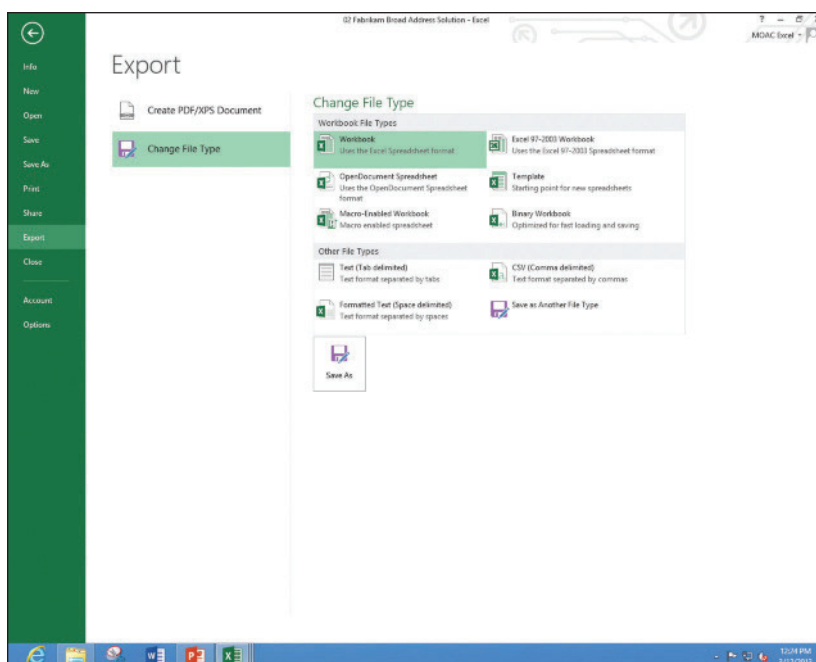
The Compatibility Checker showing no compatibility issues



4. Read the information in the Compatibility Checker dialog box and click **OK**.
5. Click the **FILE** tab, click **Export**, and then click **Change File Type**. The Backstage view shows the different file types (see Figure 2-10).

Figure 2-10

Change File Type options in Backstage view.



6. Click **Excel 97-2003 Workbook (*.xls)** and click **Save As**.
7. In the File name box, click before **Solution** and type **97-03**, and then click **Save**.
8. Click the **FILE** tab, and then click **Open**. The Recent Workbooks pane in Backstage view shows the last set of documents that have been saved.
9. Click **02 Fabrikam Broad Address Solution**.

PAUSE. LEAVE the workbook open to use in the next exercise.

**CERTIFICATION
READY?**

1.5.6

How do you save a workbook for use in a previous version of Excel?

Saving in Different File Formats

You can save an Excel 2013 file in a format other than .xlsx or .xls. The file formats that are listed as options in the Save As dialog box or on the FILE tab depend on what type of file format the application supports. When you save a file in another file format, some of the formatting, data, and features might be lost.

STEP BY STEP

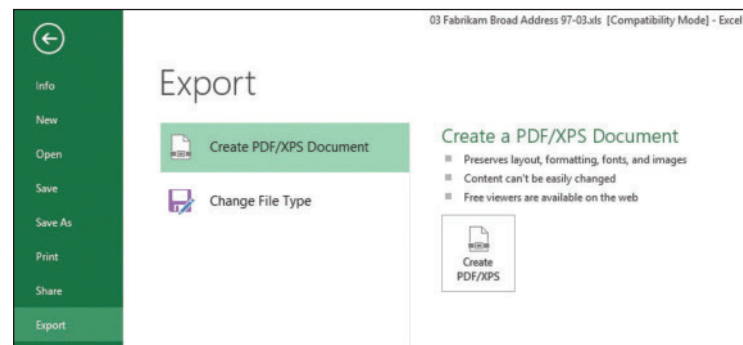
Save in Different File Formats

GET READY. USE the workbook from the previous exercise or type your name and address in a new workbook.

1. Click the **FILE** tab, and then click the **Export** button.
2. Click the **Change File Type** button. Excel explains the different file types (refer to Figure 2-10).
3. Click the **Create PDF/XPS Document** option. Figure 2-11 shows the reason for using this format.

Figure 2-11

Backstage preview giving you information about the PDF/XPS format



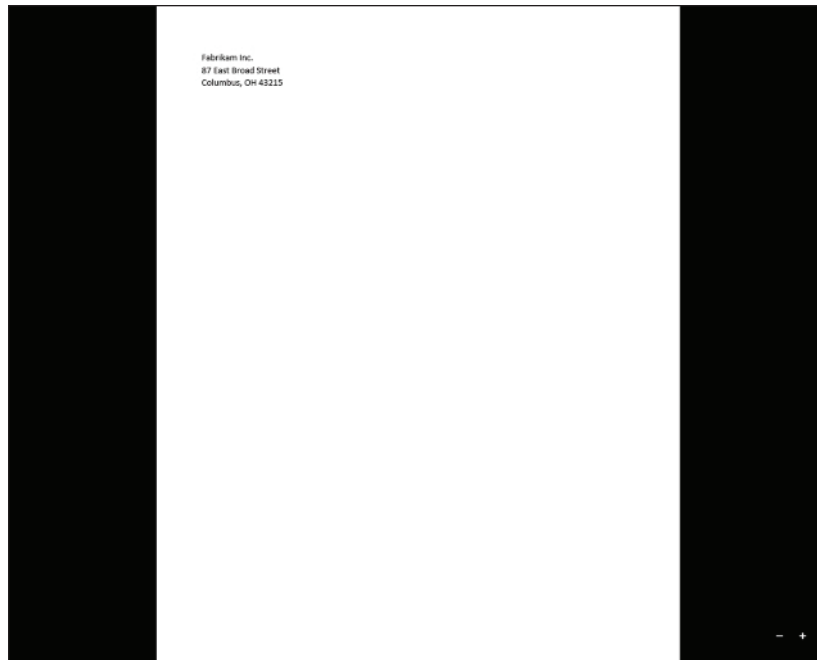
CERTIFICATION READY? 1.5.2

How do you save a workbook in PDF format?

4. In the right pane, click the **Create PDF/XPS** button.
5. In the left navigation pane, click **Desktop**.
6. Double-click **Excel Lesson 2** to move to that folder.
7. The file name gives the last name with a PDF extension.
8. Click **Publish**.
9. The Reader application opens with the PDF file displayed (see Figure 2-12).

Figure 2-12

PDF Reader



10. Press **Alt + F4** to close the Reader application.

11. If necessary, press **Alt + Tab** to return to the Excel file.

PAUSE. CLOSE all open workbooks and LEAVE Excel open to use in the next exercise.

Take Note Adobe PDF (Portable Documents Format) ensures that your printed or viewed file retains the formatting that you intended, but the file cannot be easily changed. You can also save your workbooks in a Web page format for use on websites with Single File Web Page or Web Page options. To import data into another format, you can also try Text (Tab delimited) or CSV (Comma delimited) formats. All of these options are available from the Save a type drop-down menu or the FILE tab.

ENTERING AND EDITING BASIC DATA IN A WORKSHEET

Bottom Line

You can type data directly into a worksheet cell or cells. You can also copy and paste information from another worksheet or from other programs. **Copy** takes the information from one location and duplicates it. You use **Paste** to put this information into another location. To enter data in a cell in a worksheet, you must make the desired cell active and then type the data. To move to the next column after text is entered, press Tab. Continue to press Tab to go to the next column.

Entering Basic Data in a Worksheet

When you finish typing the entries in a row, press Enter to move to the beginning of the next row. You can also use the arrow keys to move to an adjacent cell or click on any cell to make that cell active. Press Enter to accept the entry. In the following exercise, you create a list of people working in the office.

STEP BY STEP

Enter Basic Data in a Worksheet

GET READY. If necessary LAUNCH Excel and **OPEN** a new workbook.

1. Click cell **A1**, type **Fabrikam Inc.**, and press **Enter**. Notice that the active cell moves to the next row, to cell A2.

- 2. In cell A2, type **Employee List** and press **Enter**.
- 3. Click cell **A4**, type **Name**, and press **Tab**. Notice that the active cell moves to the next column, to cell B4.



Troubleshooting

If you type the wrong data, you can click the cell and retype the entry. In the following sections, you see how to edit text.

CERTIFICATION READY? 2.1.1

How do you add text and values to a workbook?

- 4. Type **Extension** and press **Enter**. Notice that the active cell moves to the first cell in the next row.
- 5. Type **Richard Carey** and press **Tab**.
- 6. Type **101** and press **Enter**. Richard Carey looks cut off.
- 7. Click cell **A5** and notice that the complete entry for Richard Carey appears in the formula bar.
- 8. Click cell **A6**, type **David Ortiz**, and press **Enter**.
- 9. Type **Kim Akers** and press **Enter**.
- 10. Type **Nicole Caron** and press **Enter**.
- 11. SAVE the workbook in the Computer’s Excel Lesson 2 folder as **02 Fabrikam Employees Solution**. Your file should look like Figure 2-13.

Figure 2-13

The completed 02 Fabrikam Employees workbook

A17		
	A	B
1	Fabrikam Inc.	
2	Employee List	
3		
4	Name	Extension
5	Richard C	101
6	David Ortiz	
7	Kim Akers	
8	Nicole Caron	

CERTIFICATION READY? 2.1.5

How do you display characters that extend longer than one column?

PAUSE. LEAVE the workbook open for the next lesson.

Take Note

Text is stored in only one cell, even when it appears to extend into adjacent cells. If an entry is longer than the cell width and the next cell contains data, the entry appears in truncated form. To edit the data, you need to go to the cell where the text starts and not in the adjacent cells.

Changing the Column Width

In Excel, column width is established based on the existing data. When you add an entry in a column that extends beyond the column’s width, it is necessary to adjust the column width to accommodate the entry.

STEP BY STEP

Change the Column Width

GET READY. Use the **02 Fabrikam Employees Solution** file from the previous exercise.

- 1. Move the mouse pointer between columns A and B, to the column markers at the top of the worksheet (see Figure 2-14). The mouse pointer changes to a double-headed arrow.

Figure 2-14

Column markers for columns A and B

	A	B
1	Fabrikam Inc.	
2	Employee List	
3		
4	Name	Extension
5	Richard C	101
6	David Ortiz	
7	Kim Akers	
8	Nicole Caron	

Column width double-headed arrow

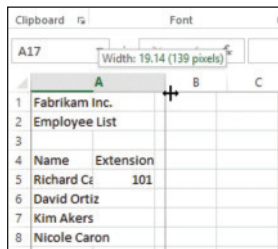
2. Double-click the column marker between A and B. The width of the column changes to the widest entry in column A. In this case, the widest entries are Employee List and Richard Carey's name.

Take Note To change the column width manually, point to the column marker between columns A and B and drag the pointer left or right instead of double-clicking.

3. Drag the double-headed arrow mouse pointer between columns B and C until the ScreenTip shows *Width: 20 (145 pixels)* or something close to this amount (see Figure 2-15).

Figure 2-15

By dragging the double-headed arrow the ScreenTip shows the width of the column



**CERTIFICATION
READY?** 1.3.5

How do you change the width of a column?

4. SAVE the **02 Fabrikam Employees Solution** file. This overwrites your previous version without the column width change.

PAUSE. CLOSE the workbook and LEAVE Excel open for the next exercise.

Take Note When you type text that is longer than the cell's width, the text appears as if it extends into the next cell. However, when you type in the next cell, the overflow text does not display. The text is still there. It is often easier to proof your work if you have the column widths match the longest text. You can double-click on the column markers to automatically adjust to the widest entry or drag the column marker to adjust the column width to your desired width.

Editing a Cell's Contents

One advantage of electronic records versus manual records is that changes can be made quickly and easily. To edit information in a worksheet, you can make changes directly in the cell or edit the contents of a cell in the **formula bar**, located between the ribbon and the worksheet. When you enter data in a cell, the text or numbers appear in the cell and in the formula bar. You can also enter data directly in the formula bar. Before changes can be made, however, you must select the information that is to be changed. **Selecting text** means that you highlight the text that is to be changed. You can select a single cell or a portion of the cell's text in the formula bar before you make changes. You can also double-click in a cell to position the insertion point for editing.

STEP BY STEP

Edit a Cell's Contents

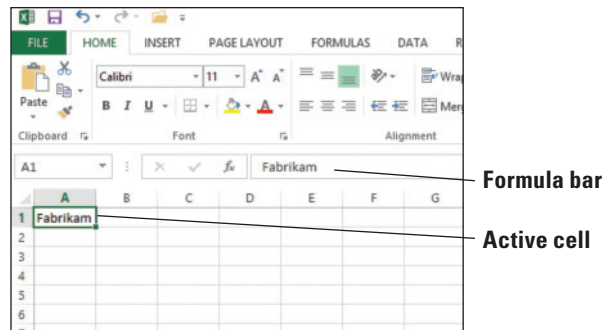


GET READY. OPEN a blank workbook.

1. Click cell **A1**, type **Fabrikam**, and press **Enter**. The insertion point moves to cell A2 and nothing appears in the formula bar.
2. Click cell **A1**. Notice that the formula bar displays *Fabrikam* (see Figure 2-16).

Figure 2-16

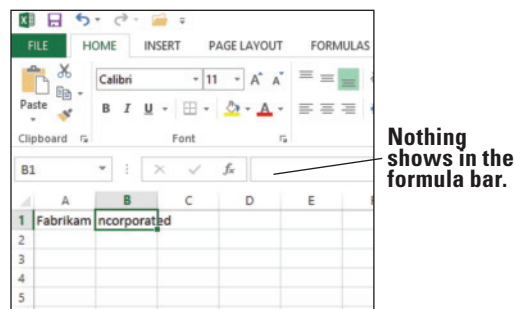
Active cell and formula bar displaying the same information



3. Click after **Fabrikam** in the formula bar, type a space, type **Incorporated**, and press **Tab**. The insertion point moves to cell B1 and nothing appears in the formula bar (see Figure 2-17).

Figure 2-17

Although it looks like text is in B1, it is extended text from A1.



4. Click cell **A1** and in the formula bar, double-click on **Incorporated** to select it. Type **Inc.** and press **Enter**.
5. Type **Sales** and press **Enter**.
6. Click cell **A2** and click after **Sales** in the formula bar.
7. Press **Home**. The insertion point moves to the beginning of the formula bar.

Take Note

While you are editing in the formula bar, you can press **Home** to move to the beginning, **End** to move to the end, or the left or right arrow keys to move one character at a time. Press **Delete** to delete characters after the insertion point. Press **Backspace** to delete characters before the insertion point.

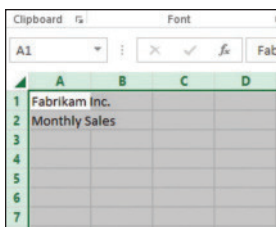
**CERTIFICATION
READY? 2.1.2**

How do you change a cell's data?

8. Type **Monthly** and then press the **spacebar**. Press **Enter**.
9. In cell A3, type **January** and press **Enter**.
10. Click cell **A3**, type **February**, and press **Enter**. Cell A3's original text is gone and February replaces January.
11. Click cell **A3** and press **Delete**. The entry in A3 is removed.
12. Above row 1 and to the left of column A, click the **Select All** button (see Figure 2-18). All cells on the worksheet are selected.

Figure 2-18

The mouse pointer changes to a white cross when moved to the Select All button.



13. Press **Delete**. All entries are removed.

PAUSE. CLOSE the workbook without saving and LEAVE Excel open for the next exercise.

Take Note

If you edit a cell's contents and change your mind before you press Enter, press Esc and the original text will be restored. If you change the contents of a cell and then do not want the change, click the Undo button on the Quick Access Toolbar or press Ctrl + Z. The deleted text will be restored.



Another Way

You can right-click a cell or a selected range of cells and choose Delete from the shortcut menu that appears.

You can edit a cell by double-clicking the cell and then typing the replacement text in the cell. Or, you can click the cell and then click in the formula bar.

When you are in Edit mode:

- The insertion point appears as a vertical bar and most commands are inactive.
- You can move the insertion point by using the left and right arrow keys.

Use the Home key on your keyboard to move the insertion point to the beginning of the cell, and use the End key to move the insertion point to the end of the cell. You can add new characters at the location of the insertion point.

To select multiple characters while in Edit mode, press Shift while you press the arrow keys. You also can use the mouse to select characters while you are editing a cell. Just click and drag the mouse pointer over the characters that you want to select.

As in the preceding exercises, there are several ways to modify the values or text you enter into a cell:

- **Erase** the cell's contents.
- **Replace** the cell's contents with something else.
- **Edit** the cell's contents.

Deleting and Clearing a Cell's Contents

To erase the entire contents of a cell, click the cell and press Delete. This deletes what is in the cell rather than the cell itself. To erase the contents of more than one cell, select all the cells that you want to erase and on your keyboard, press Delete. Pressing Delete removes the cell's contents, but does not remove any formatting (such as bold, italic, or a different number format) that you might have applied to the cell.

**CERTIFICATION
READY?**

2.1.6

Delete and Clear a Cell's Contents

GET READY. OPEN a blank workbook.

How do you delete data in a workbook?

1. In cell A1, type **1** and press **Enter**.
2. Type **2** and press **Enter**.



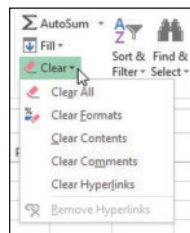
Another Way

You can right-click a cell or a selected range of cells and choose Delete from the shortcut menu that appears.

3. Type **3** and press **Enter**.
4. Type **4** and press **Enter**.
5. Highlight cells **A1** through **A4** (containing the numbers 1 through 4).
6. Press **Delete**. All the cells are erased.
7. On the Quick Access Toolbar, click the **Undo** button to return the cell entries.
8. Click cell **B5**, type **\$275,000**, and press **Enter**. The value and format are placed into the cell.
9. Click cell **B5** and press **Delete**.
10. Type **225000** without the dollar sign and comma and press **Enter**. Notice that \$225,000 is formatted. Although the original entry is gone, the cell retains the previous format when you press **Delete**.
11. Click cell **B5** and on the HOME tab, in the Editing group, click **Clear** (see Figure 2-19).

Figure 2-19

The Clear menu



12. Click **Clear Formats**. **225000** displays without the dollar sign and comma.

Take Note Clear displays a number of options. To remove both the entry and the format, choose **Clear All**.

PAUSE. CLOSE the workbook without saving and LEAVE Excel open for the next exercise.

USING DATA TYPES TO POPULATE A WORKSHEET

Bottom Line

You can enter three types of data into Excel: text, numbers, and formulas. In the following exercises, you enter text (labels) and numbers (values). You enter formulas in Lesson 4, “Using Basic Formulas.” Text entries contain alphabetic characters and any other characters that do not have a purely numeric value. The strength of Excel is its capability to calculate and analyze numbers based on the numeric values you enter. Of course, if you enter the wrong numbers, you get the wrong calculations. For that reason, accurate data entry is crucial.

Entering Labels and Using AutoComplete

Labels are used to identify numeric data and are the most common type of text entered in a worksheet. Labels are also used to sort and group data. If the first few characters that you type in a column match an existing entry in that column, Excel automatically enters the remaining characters. This **AutoComplete** feature works only for entries that contain text or a combination of text and numbers.

STEP BY STEP

Enter Labels and Use AutoComplete

GET READY. OPEN a blank workbook.



Troubleshooting

To verify that AutoComplete is enabled, click the FILE tab accessing Backstage view, click Options, and then click Advanced in the navigation pane. In the Editing options section, click the Enable AutoComplete for cell values check box if it is not already checked. Click OK.

1. In cell **A1**, type **Fabrikam Inc.** and press **Enter**.

2. Type **Monthly Sales**.
3. Click cell **A4** and type **Agent** and press **Tab**.
4. In cell B4, type **Last Closing Date** and press **Tab**.
5. In cell C4, type **January** and press **Enter**.
6. In cell A5, type **Richard Carey**, and press **Enter**.
7. In cell A6, type **David Ortiz** and press **Enter**.
8. In cell A7, type **Kim Akers** and press **Enter**.
9. Type **Nicole Caron** and press **Enter**.
10. Click cell **A9** and type **R**. As shown in Figure 2-20, AutoComplete is activated when you type the R because it matches the beginning of a previous entry in this column. AutoComplete displays the entry for Richard Carey.

Figure 2-20

AutoComplete displaying a previous entry with matching first character

	A	B	C	D
1	Fabrikam Inc.			
2	Monthly Sales			
3				
4	Agent	Last Closir	January	
5	Richard Carey			
6	David Ortiz			
7	Kim Akers			
8	Nicole Caron			
9	Richard Carey			
10				

11. Type **y**. The AutoComplete entry disappears. Finish typing the entry for **Ryan Calafato** and press **Enter**.
12. Type **R**. Notice that no AutoComplete entry appears this time. Type **i** and notice that the AutoComplete entry shows **Richard Carey**.
13. Press **Esc** to undo the entry.
14. Increase the column widths for columns A and B so you can see the entries in row 4 and below (see Figure 2-21).



**Cross
Ref**

See “Changing the Column Width” previously in this lesson for information on how to change the column widths.

Figure 2-21

Column widths for columns A and B adjusted to see items in all cells

	A	B	C
1	Fabrikam Inc.		
2	Monthly Sales		
3			
4	Agent	Last Closing Date	January
5	Richard Carey		
6	David Ortiz		
7	Kim Akers		
8	Nicole Caron		
9	Ryan Calafato		
10			
11			
12			

PAUSE. LEAVE the workbook open to use in the next exercise.

Take Note Excel bases the list of potential AutoComplete entries on the text in the rows above the current row. If different rows start with the same character, you might have to type more than one character for the AutoComplete entry to display.

To accept an AutoComplete entry, press Enter or press Tab. When you accept AutoComplete, the completed entry matches the pattern of uppercase and lowercase letters of the existing entry. To delete the automatically entered characters, press Backspace. Entries that contain only numbers, dates, or times are not automatically completed. If you do not want to use the AutoComplete option, the feature can be turned off by selecting FILE > Options > Advanced > Editing options section > Enable AutoComplete for cell values.

Entering Numeric Values

Numeric values are the foundation for Excel’s calculations, analyses, charts, and graphs. Numbers can be formatted as currency, percentages, decimals, and fractions. By default, numeric entries are right-justified in a cell. Applying formatting to numbers changes their appearance but does not affect the cell value that Excel uses to perform calculations. The value is not affected by formatting or special characters (such as dollar signs) that are entered with a number. The true value is always displayed in the formula bar.

STEP BY STEP

Enter Numeric Values

GET READY. USE the workbook from the previous exercise.

1. Click cell C5, type \$275,000, and press Enter.
2. Click cell C5 and notice that 275000 appears in the formula bar and the formatted value appears in the cell.
3. Click cell C6, type 125,000, and press Enter. Be sure to include the comma in your entry. The number is entered in C6 and C7 becomes the active cell. The number appears in the cell with the comma and no dollar sign (unlike the entry in C5); however, the formula bar displays the true value and disregards the special characters.
4. Type 209000 and press Enter. The number is entered with no dollar sign and no comma.
5. Type 258,000 and press Enter.
6. Type 145700 and then click cell C5. Figure 2-22 illustrates how your worksheet should look with the values you just typed.

Figure 2-22

The actual value of the cell entry in C5 is unaffected by formatting.

	A	B	C
1	Fabrikam Inc.		
2	Monthly Sales		
3			
4	Agent	Last Closing Date	January
5	Richard Carey		\$275,000
6	David Ortiz		125,000
7	Kim Akers		209000
8	Nicole Caron		258,000
9	Ryan Calafato		145700
10			

PAUSE. LEAVE the workbook open to use in the next exercise.

Special characters that indicate the type of value can also be included in the entry. Table 2-1 illustrates special characters that can be entered with numbers.

Table 2-1

Characters used to identify values

Character	Description
+	Indicates a positive value.
- or ()	Indicates a negative value.
\$	Indicates a currency value.
%	Indicates a percentage (typed after number).
/	Indicates a fraction or a date.
=	Indicates what follows is a number (or a formula). This is useful when there is an ambiguous entry. For example, 4/5 assumes April 5th of the current year, whereas =4/5 enters four-fifths or 0.8.
.	Indicates a decimal.
,	Separates the digits of an entry (thousands, millions, and so on).

Entering Dates

Dates are often used in worksheets to track data over a specified period of time. Like text, dates can be used as row and column headings. However, dates are considered serial numbers, which means that they are sequential and can be added, subtracted, and used in calculations. Dates can also be used in formulas and in developing graphs and charts. The way a date is initially displayed in a worksheet cell depends on the format in which you type the characters. In Excel 2013, the default date format uses four digits for the year. Also by default, dates are right-justified in the cells.

STEP BY STEP

Enter Dates

GET READY. Use the workbook from the previous exercise.

1. Click cell **B5**, type **1/4/2014**, and press **Enter**.
2. Click cell **B6**, type **1/25/14**, and press **Enter**. The date is entered in C6 as **1/25/2014** and B7 becomes the active cell.
3. Type **1/17** and press **Enter**. **17-Jan** is entered in the cell. Click cell **B7**, and notice that **1/17/20XX** (with XX representing the current year) appears in the formula bar.
4. If the year is not 2014, click cell **B7** and press **F2**. Change the year to **2014** and press **Enter**.
5. In cell **B8**, type **1/28/14** and press **Enter**.
6. Type **January 21, 2014** and press **Enter**. **21-Jan-14** appears in the cell. If you enter a date in a different format than specified or had already entered something in the cell and deleted it, your worksheet might not reflect the results described. The date formats in column B are not consistent (see Figure 2-23). You apply a consistent date format in the next section.

Figure 2-23

If you don't type dates the same way, the formats are inconsistent in a workbook.

	A	B	C	D
1	Fabrikam Inc.			
2	Monthly Sales			
3				
4	Agent	Last Closing Date	January	
5	Richard Carey	1/4/2014	\$275,000	
6	David Ortiz	1/25/2014	125,000	
7	Kim Akers	17-Jan	209,000	
8	Nicole Caron	1/28/2014	258,000	
9	Ryan Calafato	21-Jan-14	145,700	
10				
11				
12				

7. In cell B9, type **1/1/10** and press **Enter**. Notice that the value changes but the formatting remains the same.
8. Click the **Undo** button to return to the workbook shown in Figure 2-23.

PAUSE. LEAVE the workbook open to use in the next exercise.



Another Way

Ctrl + ; (semicolon) enters the current date into a worksheet cell; Ctrl + : (colon) enters the current time.

Excel interprets two-digit years from 00 to 29 as the years 2000 to 2029; two-digit years from 30 to 99 are interpreted as 1930 to 1999. If you enter 1/28/28, the date will be displayed as 1/28/2028 in the cell. If you enter 1/28/37, the cell will display 1/28/1937.

If you type January 28, 2020, the date will display as 28-Jan-20. If you type 1/28 without a year, Excel interprets the date to be the current year. 28-Jan will display in the cell, and the formula bar will display 1/28/ followed by the current year. In the next section, you learn to apply a consistent format to a series of dates.

Take Note When you enter a date into a cell in a particular format, the cell is automatically formatted even if you delete the entry. Subsequent numbers entered in that cell will be converted to the date format of the original entry.

Regardless of the date format displayed in the cell, the formula bar displays the date in month/day/four-digit-year format because that is the format required for calculations and analyses.

Filling a Series with Auto Fill

Excel provides **Auto Fill** options that automatically fill cells with data and/or formatting. To populate a new cell with data that exists in an adjacent cell, use the Auto Fill feature either through the command or the fill handle. The **fill handle** is a small green square in the lower-right corner of a selected cell or range of cells. A **range** is a group of adjacent cells that you select to perform operations on all of the selected cells. When you refer to a range of cells, the first cell and last cell are separated by a colon (for example, C4:H4). To use the fill handle, point to the lower-right corner of the cell or range until the mouse pointer turns into a +. Click and drag the fill handle from cells that contain data to the cells you want to fill with that data, or have Excel automatically continue a series of numbers, numbers and text combinations, dates, or time periods, based on an established pattern. In this exercise, you use the Auto Fill command and fill handle to populate cells with data. To choose an interval for your series, type the first two entries, select them, and then use the fill handle to expand the series using the pattern of the two selected cells.

STEP BY STEP

Fill a Series with Auto Fill

GET READY. USE the workbook from the previous exercise or type the text in Figure 2-23.

1. Select the range **C4:H4**. January is in the first cell.
2. On the HOME tab, in the Editing group, click the **Fill** button. The Fill menu appears (see Figure 2-24).

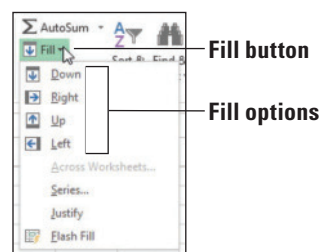
Figure 2-24

Fill drop-down menu



Another Way

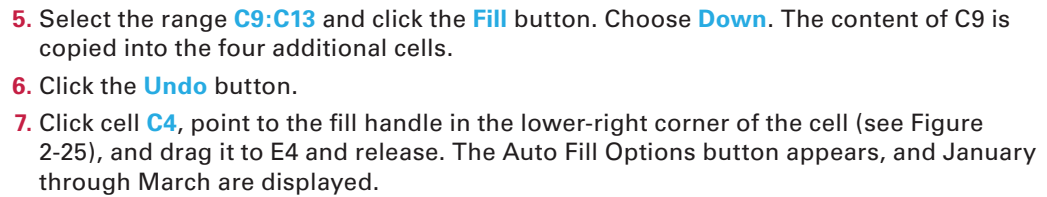
To quickly fill a range of cells with the contents of the first cell, select the range, and then press Ctrl + D (cells below) or Ctrl + R (cells to the right).



3. From the menu, click **Right**. The contents of C4 (January) are filled into all the cells.
4. Click the **Undo** button.

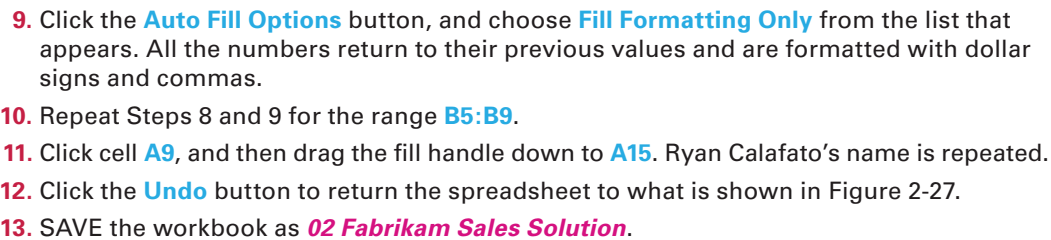
How do you copy a cell's contents using Auto Fill?

Mouse pointer changes to a black + in the bottom right of a selected range



- Click cell **C5**, point to the fill handle, and drag it to **C9** and release. All the numbers turn to **\$275,000** in column C. The Auto Fill Options button appears in D10 (see Figure 2-26).

You can fill numbers, formats,
or other options.



How do you apply
formatting with Auto Fill?

The completed sales workbook

PAUSE. CLOSE Excel.

When Excel recognizes a series, the default fill option is to complete the series. When you use the fill handle and a series is not present, the default is to copy the cell contents. The Auto Fill Options button also allows you to fill formatting only or to fill without formatting.

How do you fill a series using Auto Fill?

After you fill cells using the fill handle, the Auto Fill Options button appears so that you can choose how the selection is filled. In Excel, the default option is to copy the original content and formatting. With Auto Fill, you can select how the content of the original cell appears in each cell in the filled range.

Take Note When you type sufficient data for Excel to recognize a series, the fill handle will do the rest. For example, to record daily sales, you might want to have consecutive columns labeled with the days of the week. If you type Monday in the first cell, you can fill in the rest of the days by dragging the fill handle from the Monday cell to complete the series.

Excel recognizes January as the beginning of a natural series and completes the series as far as you take the fill handle. By definition, a **natural series** is a formatted series of text or numbers that are in a normal sequence such as months, weekdays, numbers, or times. For example, a natural series of numbers could be 1, 2, 3, or 100, 200, 300, or a natural series of text could be Monday, Tuesday, Wednesday, or January, February, March. For different natural series, see Table 2-2.

Table 2-2
Examples of Auto Fill series

Initial Selection	Extended Series
1	1, 1, 1, 1, ...
1, 2	3, 4, 5, ...
2012, 2013	2014, 2015, 2016, ...
8:00	9:00, 10:00, 11:00, ...
6:00 PM	7:00 PM, 8:00 PM, ...
Mon	Tue, Wed, Thu, ...
Monday	Tuesday, Wednesday, Thursday, ...
Jan	Feb, Mar, Apr, ...
January	February, March, April, ...
Qtr1	Qtr2, Qtr3, Qtr4, Qtr1, ...
2/8/2014, 2/15/2014	2/22/2014, 3/1/2014, 3/8/2014, ...
1st anytext	2nd anytext, 3rd anytext, 4th anytext, ...
Anytext 1	Anytext 2, Anytext 3, Anytext 4, ...

Take Note Note that you might have to select two cells rather than one to continue some of the previous patterns. To create your own custom list, go to FILE > Options > Advanced > General section > Create lists for use in sorts and fill sequences > Edit Custom Lists.

Filling Cells with Flash Fill

Flash Fill is like Auto Fill, but Excel does more work. This is a new feature in Excel 2013. When Excel recognizes a pattern based on other information in your workbook, it will use the pattern. This is helpful in an example where you have typed first and last names in one column and later decide that you want to sort by last name and then first name. You can create two more columns to separate the names. After you start typing the first names, Excel completes the column. You can repeat with the last name column.

STEP BY STEP

Fill Cells with Flash Fill



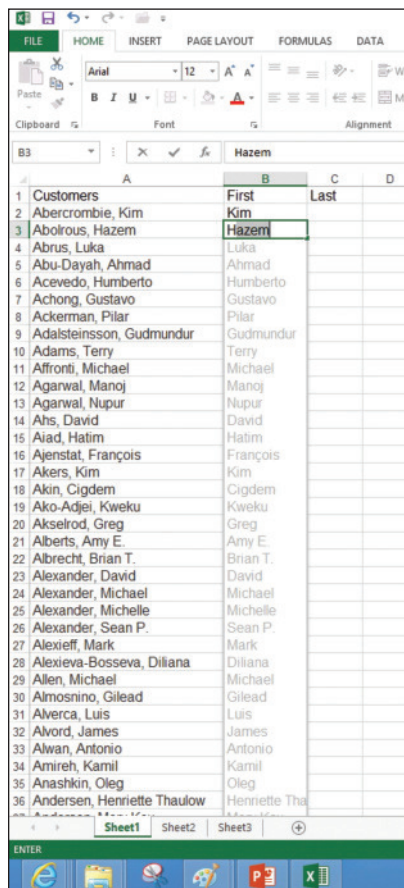
GET READY. Before you begin these steps, LAUNCH Microsoft Excel.

1. Open the **02 Customers** file.
2. Click cell **B1**, type **First**, and press **Tab**.
3. Click cell **C1**, type **Last**, and press **Enter**.

4. Click cell **B2**, type **Kim**, and press **Enter**.
5. In cell **B3**, type **H**. Notice that Hazem shows in the rest of the cell and the other first names of the customers appear (see Figure 2-28).

Figure 2-28

Flash Fill showing a possible list for all first names



6. Press **Enter**.
7. Click cell **C2**, type **Abercrombie**, and press **Enter**.
8. In cell **C3**, type **A** and notice that **Abercrombie** is repeated with AutoComplete. Continue typing **bol** and notice that the last names all appear. Press **Enter**.
9. Double-click the right border of columns **B** and **C** to set the column width.
10. Scroll down and notice that the entire worksheet is filled in.
11. SAVE the file as **02 Customers Solution**.

PAUSE. CLOSE Excel.

CUTTING, COPYING, AND PASTING DATA

Bottom Line

After you enter data into a worksheet, you frequently need to rearrange or reorganize some of it to make the worksheet easier to understand and analyze. You can use Excel's Cut, Copy, and Paste commands to copy or move entire cells with their contents, formats, and formulas. These processes are discussed as the exercises in this section continue. You can also copy specific contents or attributes from the cells. For example, you can copy the format only without copying the cell value, or copy the resulting value of a formula without copying the formula itself. You can also copy the value from the original cell but retain the formatting of the destination cell.

Cut, copy, and paste functions can be performed in a variety of ways by using:

- The mouse
- Ribbon commands
- Shortcut commands, such as Ctrl + C (copy), Ctrl + X (cut), and Ctrl + V (paste)
- The Office Clipboard pane

Copying a Data Series with the Mouse

By default, drag-and-drop editing is turned on so that you can use the mouse to copy (duplicate) or move cells. Just select the cell or range of cells you want to copy and hold down Ctrl while you point to the border of the selection. When the pointer becomes a **copy pointer** (arrow with a plus), you can drag the cell or range of cells to the new location. As you drag, a scrolling ScreenTip identifies where the selection will be copied if you release the mouse button. In this exercise, you practice copying data with the mouse.

STEP BY STEP

Copy a Data Series with the Mouse

GET READY. Before you begin these steps, LAUNCH Microsoft Excel.



1. Open the **02 Customer Houses** file.
2. Select the range **A12:A22**.
3. Press **Ctrl** and hold the mouse button down as you point to the right border of the selected range. The copy pointer is displayed.



Troubleshooting

Be sure to hold down the Ctrl key the entire time you are dragging a data series for copying with the mouse, or you will move the series instead of copying it.

CERTIFICATION READY? 2.1.3

How do you copy a data series with the mouse?

4. With the copy pointer displayed, hold down the left mouse button and drag the selection to the right, until H12:H22 appears in the scrolling ScreenTip next to the selection.
5. Release the mouse button and then release **Ctrl**. The data in A12:A22 also appears in H12:H22.

PAUSE. LEAVE the workbook open to use in the next exercise.

Moving a Data Series with the Mouse

Data can be moved from one location to another within a workbook in much the same way as copying. To move a data series, select the cell or range of cells and point to the border of the selection. When the pointer becomes a **move pointer**, you can drag the cell or range of cells to a new location. When data is moved, it replaces any existing data in the destination cells. In this exercise, you practice moving a data series from one range of cells to another.

STEP BY STEP

Move a Data Series with the Mouse

GET READY. USE the **02 Customer Houses** workbook from the previous exercise.

CERTIFICATION READY? 2.1.3

How do you move a data series with the mouse?

1. Select **E12:E22**.
2. Point to the right border of the selected range. The move pointer is displayed.
3. With the move pointer displayed, hold down the left mouse button and drag the selection to the right, until I12:I22 appears in the scrolling ScreenTip beside the selected range.

4. Release the mouse button. In your worksheet, the destination cells are empty; therefore, you are not concerned with replacing existing data. The data previously in E12:E22 is now in I12:I22.
5. Drag **A1** to **H12**. Note that a dialog box warns you about replacing the contents of the destination cells.
6. Click **Cancel**.
7. Drag **A1** to **H11**.
8. Drag **E1** to **I11**. Your worksheet should look like the one shown in Figure 2-29.

PAUSE. LEAVE the workbook open to use in the next exercise.

Figure 2-29

02 Customer Houses

	A	B	C	D	E	F	G	H	I	J
1		Bedrooms	Baths	SqFt						
2	Delaney, Aidan	4	3	3,044	\$380,500					
3	Thorell, Iben	3	2	3,838	\$479,750					
4	Valdes, Rene	4	3	2,834	\$354,250					
5	Mihelcic, Goran	3	2	2,068	\$258,500					
6	Patel, Rajesh M.	4	3	2,753	\$344,125					
7	Kerr, Melissa	4	2	4,387	\$548,375					
8	Kemmotsu, Yukari	3	1	2,228	\$278,500					
9	Piaseczny, Michal	3	2	3,216	\$402,000					
10	Gimp, Diane R.	3	1	1,245	\$155,625					
11	Suominen, Ari	5	3	1,813	\$226,625					
12	Langvad-Nielsen, Anders	5	3	2,940					Custom Price	
13	Low, Jeff	5	3	1,913					Langvad #####	
14	Ciccu, Alice	2	1	4,090					Low, Jeff #####	
15	Ruggiero, Michael	5	3	3,138					Ciccu, A #####	
16	Wickham, Jim	2	1	2,036					Ruggiero #####	
17	Forde, Viggo	2	1	1,366					Wickham #####	
18	Vasa, Petr	5	3	2,543					Forde, V #####	
19	Pereira, Michel	5	4	2,014					Vasa, P #####	
20	Pfeiffer, Michael	2	1	1,717					Pereira, #####	
21	Hance, Jim	2	1	2,675					Pfeiffer, I #####	
22	Yamagishi, Makoto	3	2	2,394					Hance, J #####	
23									Yamagis #####	

Take Note When you attempt to move a selection to a location that contains data, a caution dialog box opens. “There’s already data here. Do you want to replace it?” is a reminder that moving data to a new location replaces the existing data. You can click OK or cancel the operation.

Copying and Pasting Data

The **Office Clipboard** collects and stores up to 24 copied or cut items that are then available to be used in the active workbook, in other workbooks, and in other Microsoft Office programs. You can **paste** (insert) selected items from the Clipboard to a new location in the worksheet. **Cut** (moved) data is removed from the worksheet but is still available for you to use in multiple locations. If you copy multiple items and then click Paste, only the last item copied will be pasted. To access multiple items, you must open the Clipboard pane. In this exercise, you use commands in the Clipboard group and the Clipboard pane to copy and paste cell data.

STEP BY STEP

Copy and Paste Data

GET READY. USE the **02 Customer Houses** workbook from the previous exercise.



Another Way

To copy, you can use Ctrl + C or right-click and choose Copy. To paste, you can use Ctrl + V or right-click and choose Paste.

1. On the HOME tab of the ribbon, click the **Clipboard** Dialog Box Launcher. The Clipboard pane opens on the left side of the worksheet. The most recently copied item is always added at the top of the list in this pane, and it is the item that will be copied when you click Paste or a shortcut command.
2. Select **A1:E22** and press **Delete**.
3. Select **H11:I22** and in the Clipboard group, click the **Copy** button. The border around the selected range becomes a moving border.

4. Select **A1** and click the **Paste** button. The moving border remains active around H11:I22. A copied range does not deactivate until you type new text, issue another command, or double-click on another cell, or press **Esc**.
5. Select **A20** and click the down arrow on the **Paste** button. The Paste options menu appears (see Figure 2-30).

Figure 2-30

Paste options



CERTIFICATION READY? 2.1.3

How do you copy and paste a data series?

6. Under Paste Values, select the first option. Notice that the values in column B are no longer formatted.
7. Click the **Undo** button.
8. Select **H11:I22** and press **Delete**.
9. Press **Ctrl + Home** to return to the top of the workbook.
10. **SAVE** the workbook as **02 Customer Houses Solution**.

PAUSE. LEAVE the workbook open to use in the next exercise.

Take Note Paste with Live Preview was new as of Office 2010. If you point to the Paste options in either the shortcut menu or the Paste command options in the Clipboard group, you will be able to view your changes before actually implementing them.

Cutting and Pasting Data

Most of the options for copying and pasting data also apply to cutting and pasting. The major difference is that data copied and pasted remains in the original location as well as in the destination cell or range. Cut and pasted data appears only in the destination cell or range. In this exercise, you cut and paste cell contents.

STEP BY STEP

Cut and Paste Data

GET READY. USE the **02 Customer Houses Solution** workbook from the previous exercise.

1. Select **A1:B12** to highlight the Customer House Prices table.
2. In the Clipboard group, click the **Cut** button. The contents of A1:B12 are displayed in the Clipboard pane. Close the Clipboard pane.
3. Click the **New sheet** button on the bottom of the worksheet. Sheet2 is created and cell A1 is the active cell.
4. Click **Paste** to move the former contents of Sheet1 to cell A1 into Sheet2.

PAUSE. CLOSE Excel and do not save the workbooks if requested.



Another Way

To cut, you can use **Ctrl + X** or right-click and choose **Cut**.

Take Note When you delete text, it is not stored on the Clipboard. To remove data and use the text later, use **Cut** rather than **Delete**. By using the **Cut** feature, you are able to access the data or information from the Clipboard if needed. Deleted text can be restored only with **Undo**.

Bottom Line

EDITING A WORKBOOK'S PROPERTIES

The workbook has a number of properties that are associated with it to make managing it easier. The properties include items that you indirectly change such as file size and last edit date. The **workbook properties** also include items you directly change such as keywords. Assigning **keywords** to the document properties makes it easier to organize and find documents. You can also add more notes to your file for classification and document management.

Assigning Keywords

If you work for Fabrikam, Inc., you might assign the keyword *sales* to worksheets that contain data about revenue. You can then search for and locate all files containing information about sales. You can assign more than one keyword to a document.

STEP BY STEP

Assign Keywords

GET READY. Before you begin these steps, LAUNCH Microsoft Excel.



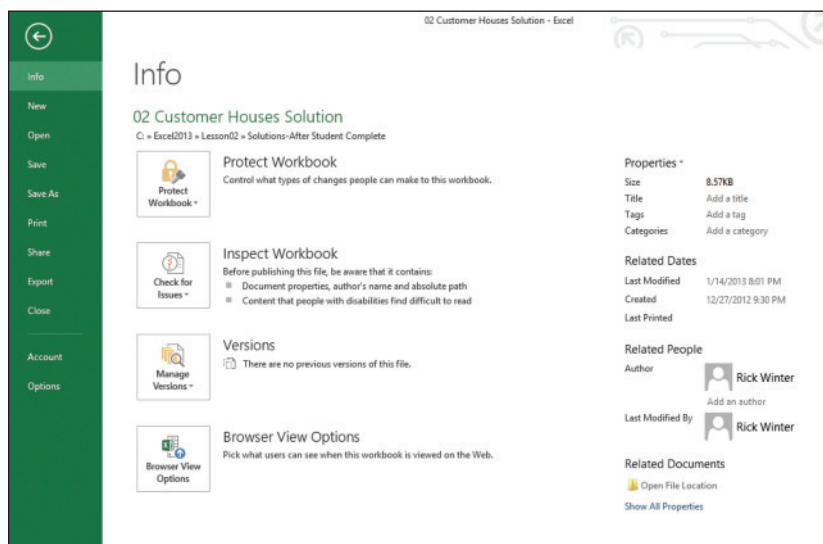
1. OPEN the **02 Customer Houses Solution** file you worked with in the previous exercises.
2. Click **FILE**. The Backstage view displays current properties on the right side of the window (see Figure 2-31).

Figure 2-31

Current document's properties

CERTIFICATION
READY?

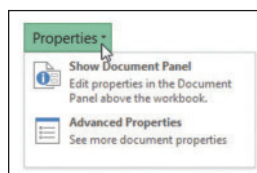
1.4.8

How do you add keywords
to a workbook's properties?

3. At the top of the right pane, click the **Properties** button. The Properties drop-down menu shows two options (see Figure 2-32). Click **Show Document Panel**.

Figure 2-32

Properties drop-down menu



4. Click the **Keywords** field and type **Customer, Sq Ft, Price**.
5. Click the **Category** field and type **Revenue**.
6. Click the **Author** field and type your name.

7. Above the Author field, click the **Document Properties** drop-down arrow, and then click **Advanced Properties**. The Properties dialog box opens.
8. Click the **Summary** tab in the dialog box to see the properties you entered.
9. Click the **Statistics** tab to see the date you modified the file.
10. Click **OK** to close the Properties dialog box.
11. At the top right corner of the Document Information panel, click the **Close** button.
12. **SAVE** the workbook in the Lesson 2 folder as **02 Customer Houses Prop Solution**.

PAUSE. CLOSE Excel.

After a file is saved, the Statistics tab records when the file was accessed and when it was modified. It also identifies the person who last saved the file. After a workbook is saved, the Properties dialog box title bar displays the workbook name and location.

SKILL SUMMARY

In this lesson you learned how:	Exam Objective	Objective Number
To create workbooks	Create new blank workbooks.	1.1.1
To save workbooks	Save workbooks in alternate file formats.	1.5.2
	Maintain backward compatibility.	1.5.6
	Save files to remote locations.	1.5.8
To enter and edit basic data in a worksheet	Append data to a worksheet.	2.1.1
	Find and replace data.	2.1.2
	Adjust column width.	1.3.5
	Demonstrate how to use the Auto Fill tool.	2.1.4
	Expand data across columns.	2.1.5
	Delete cells.	2.1.6
To use data types to populate a worksheet	Apply Number formats.	2.2.6
To cut, copy, and paste data	Copy and paste data.	2.1.3
To edit a workbook's properties	Add values to workbook properties.	1.4.8

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

1. Which of the following consists of details that describe or identify a file, including the author?
 - a. Paste
 - b. Document properties
 - c. Copy
 - d. Range

2. Which command is used to insert a cut or copied selection to a cell or range of cells?
 - a. Paste
 - b. Document properties
 - c. Copy
 - d. Range
3. Which of the following is a group of adjacent cells that you select to perform operations on all of the selected cells?
 - a. Paste
 - b. Document properties
 - c. Copy
 - d. Range
4. Which of the following places a duplicate of a selection in the Office Clipboard?
 - a. Paste
 - b. Document properties
 - c. Copy
 - d. Range
5. If you want to use a workbook in another kind of document, you have the option to save as which of the following?
 - a. File format
 - b. Worksheet
 - c. File sheet
 - d. File range
6. Which is a small green square in the lower-right corner of a selected cell or range that you can use to copy one cell to adjacent cells or to create a series?
 - a. Cell pointer
 - b. Column marker
 - c. Fill handle
 - d. Formula bar
7. Which of the following is used to drag or double-click to change the width of a column?
 - a. Cell pointer
 - b. Column marker
 - c. Fill handle
 - d. Formula bar
8. Which of the following is a bar near the top of the Excel window where you can enter or edit cell entries or formulas?
 - a. Cell pointer
 - b. Column marker
 - c. Fill handle
 - d. Formula bar
9. Which Excel feature helps you quickly enter existing data into adjacent cells?
 - a. AutoComplete
 - b. AutoData
 - c. QuickComplete
 - d. QuickData
10. Which Excel feature automatically fills cells with data from another cell or range or completes a data series?
 - a. Range Fill
 - b. Auto Fill
 - c. Data Fill
 - d. Complete Fill

True / False

Circle T if the statement is true or F if the statement is false.

- T F** 1. When data is too wide for a cell, the part of the data that will not fit is automatically deleted.
- T F** 2. Using the Delete key removes both text and formats from a cell.
- T F** 3. Use Ctrl + : to enter the current date in a worksheet cell.

- T F 4.** You can assign keywords so that others can search for your documents online.
- T F 5.** To remove only the formats from a cell, you can use the Delete key.
- T F 6.** Dates can be displayed in only one way in Excel.
- T F 7.** All dates in Excel are actually stored in the serial date number system.
- T F 8.** The formula bar is found at the bottom of the Excel window.
- T F 9.** Use the fill handle to create a natural series, such as the months of the year.
- T F 10.** Workbooks can be saved as web pages, PDF files, and for use in previous versions of Excel.

Competency Assessment

Project 2-1: Creating a Highly Desired Housing Options Workbook

Create a new workbook for Fabrikam, Inc., that is a result of a focus group showing the most desired options for houses for first-time home buyers.

GET READY. LAUNCH Excel and start a new blank workbook.

1. Click cell **A1** and type **Fabrikam, Inc.** and press **Enter**.
2. Click cell **A2** and type **Focus Group Requests (Age 20-30)**.
3. Beginning in **A4**, type the following labels and values. Press **Tab** between each new cell and **Enter** to move to a new row:

Option	Priority	Cost
Gameroom	Low	25,000
Exercise equipment	Low	2500
Fenced yard for dog	Medium	\$10,000
Flat screen HDTV	Medium	1000
Furnished	Medium	15000
Washer & dryer	High	1500
Dishwasher	Medium	1000
Near bike path	High	0
Basketball hoop	Low	100
4. If necessary, adjust the column widths to display all of the text in the columns.
5. Drag the fill handle from **C5** through **C13** and choose **Fill Formatting Only**.
6. SAVE the workbook as **02 Focus Group Solution** in the Excel Lesson 2 folder you created in a previous exercise.

PAUSE. LEAVE the workbook open for the next project.

Project 2-2: Setting Document Properties and Assigning Keywords

Use Document Properties to assign document properties to an existing workbook.



GET READY. If necessary, OPEN the **02 Focus Group Solution** workbook you created in the previous project.

1. Click the **FILE** tab.
2. Click **Properties**, and then click **Show Document Panel**.
3. Click the **Author** field, type **[your name]**, and press **Tab**.
4. In the Title field, type **Focus Group Requests** and press **Tab**.
5. In the Subject field, type **Sales** and press **Tab**.
6. In the Keywords field, type **20-30, options, priorities**.

7. Click the Status field, and type **Needs to be formatted**.
8. SAVE the file as **02 Focus Properties Solution**.
9. At the top of the Document Information Panel, click the **Close (X)** button.
10. CLOSE the file.

PAUSE. LEAVE Excel open for the next project.

Proficiency Assessment

Project 2-3: Creating a Commission Schedule

You have been asked to create a commission schedule in 5 minutes or less. Because you know how to use the fill handle, you should be able to quickly create the following workbook.

GET READY. OPEN a blank workbook.

1. Create the entries shown in Figure 2-33.

Figure 2-33

Create the worksheet in 5 minutes or less

	A	B	C	D	E	F	G
1	Sales	Jan	Feb	Mar	Apr	May	Jun
2	100,000	2.80%	2.80%	2.80%	2.80%	2.80%	3.00%
3	200,000	2.90%	2.90%	2.90%	2.90%	2.90%	3.10%
4	300,000	3.00%	3.00%	3.00%	3.00%	3.00%	3.20%
5	400,000	3.10%	3.10%	3.10%	3.10%	3.10%	3.30%
6	500,000	3.20%	3.20%	3.20%	3.20%	3.20%	3.40%
7							

2. Move the table so you can add text in cell A1, cell A2, and a blank cell in A3.
3. Click cell **A1** and type **Fabrikam Incorporated**.
4. Click cell **A2** and type **Commission Schedule**.
5. Add the following Document Properties:

Property	Value
Author	[Your Name]
Title	Commission Schedule
Keywords	Agent, Amount, Sales
Category	Revenue

6. SAVE the file as **02 Commission Solution** and CLOSE the workbook.

PAUSE. LEAVE Excel open for the next project.

Project 2-4: Advertising Expenditures

Fourth Coffee specializes in unique coffee and tea blends. Create a workbook to track and classify expenditures for January.

GET READY. OPEN a blank workbook.

1. Click cell **A1** and type **Fourth Coffee**.
2. Click cell **A2** and type **January Expenditures**.
3. Enter the following column headings in row 4: **Date**, **Check No**, **Paid to**, **Category**, and **Amount**.
4. Enter the following expenditures data in the appropriate columns:

January 3, paid \$3,000 to World Wide Importers for coffee, Check No. 4076

January 20, paid \$600 to Northwind Traders for tea, Check No. 4077

January 22, paid \$300 to City Power and Light for utilities
 January 28, paid \$200 to A. Datum Corporation for advertising
 January 29, paid \$2,500 to World Wide Importers for coffee

5. Checks are written sequentially. Use the fill handle to enter the missing check numbers.
6. Adjust column widths as needed.
7. SAVE the workbook as **02 Advertising Expenses Solution**. CLOSE the workbook.

LEAVE Excel open for the next project.

Mastery Assessment

Project 2-5: Creating a Home Sales Workbook

Richard Carey asked you to keep track of the home sales for the Fabrikam staff. Each person sends you an e-mail with the home sales information.

GET READY. OPEN a blank workbook.

1. Create the workbook with the data in Figure 2-34.

Figure 2-34

Create this workbook for
Project 2-5

	A	B	C
1	Fabrikam Inc.		
2	Sales Data		
3			
4	Agent	Date	Sales
5	Kim Akers	1/18/2014	\$179,898
6	Kim Akers	1/27/2014	\$426,611
7	Ryan Calafato	1/28/2014	\$308,431
8	Nicole Caron	2/3/2014	\$422,161
9	David Ortiz	2/10/2014	\$140,477
10	Ryan Calafato	2/16/2014	\$473,953
11	Richard Carey	2/25/2014	\$130,510
12	David Ortiz	3/4/2014	\$439,371
13	Kim Akers	3/5/2014	\$418,616
14	Richard Carey	3/10/2014	\$467,949
15	Ryan Calafato	3/15/2014	\$349,203
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
26			
27			
28			
29			

2. SAVE the workbook as **02 Home Sales Solution**.
3. Create a New workbook and copy the data and titles for the first quarter only.
4. Click cell **A3** and type **First Quarter 2014**.
5. Move the Agent, Date, and Sales titles and data down so there is a blank row in row 4.
6. SAVE the new workbook as **02 Home Sales Q1 Solution**.
7. Repeat for the second quarter (4/9/2014-5/20/2014) and SAVE the workbook as **02 Home Sales Q2 Solution**.

CLOSE the workbooks and LEAVE Excel open for the next project.

Project 2-6: Using Flash Fill

Fabrikam's director has asked you to redo the workbook you created in Project 2-5 with separate columns for first name and last name and sequentially numbered sales. Save this as a PDF and Excel 1997-2003 file formats and with document properties in the new file.

1. OPEN the **02 Home Sales Solution** file.
2. Use Flash Fill to create columns for the First and Last name.
3. Delete the content of cells **A4:A29**.
4. In **A4**, type **Item#** and then use Auto Fill to create numbers starting with **1** that are sequential through **25**.
5. Add a label in A3 that says **2014 To-Date**.
6. Make sure there is a blank row 4.
7. Add your own Document Properties for **Author**, **Title**, **Subject**, **Keywords**, **Category**, and **Status**. In the Comments, type **Project 2-6 final review**.
8. SAVE the workbook as **02 Home Sales Flash Fill Solution**.
9. Create a PDF file and SAVE it with the same name.
10. Verify whether there are any compatibility issues for earlier versions of Excel.
11. Create an Excel 1997-2003 file and SAVE it as **02 Home Sales Flash Fill 97-03 Solution**.

CLOSE Excel.

Using Office Backstage 3

LESSON SKILL MATRIX

Skills	Exam Objective	Objective Number
Accessing and Using Backstage View		
Printing with Backstage	Set a print area.	1.5.1
	Print individual worksheets.	1.5.3
	Set print scaling.	1.5.4
	Configure workbooks to print.	1.5.7
Changing the Excel Environment	Customize the Quick Access Toolbar.	1.4.3
	Customize the ribbon.	1.4.4
Accessing and Using Excel Templates	Create new workbooks using templates.	1.1.2

KEY TERMS

- default settings
- group
- navigation pane
- print options
- tab
- template





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Contoso, Ltd., employs hundreds of employees. The company rewards its employees with monthly potluck dinners in their departments and between departments. In the past, there were too many drinks and desserts and not enough main dishes and salads. Contoso has asked the new assistant office manager to create some way of organizing the potlucks so the meals are balanced and still fun. In this lesson, you learn how to create the types of workbooks Contoso uses for this task. You also learn how to print these workbooks.

SOFTWARE ORIENTATION

Microsoft Excel 2013 Backstage View

The ribbon is a visual interface that allows you to work in a file and perform tasks such as changing fonts, creating charts, and formatting numbers. The Backstage view, on the other hand, is a visual interface that enables you to use and master Excel's file management features—functions that allow you to do things to a file rather than in a file. Backstage view's left-side *navigation pane* (see Figure 3-1) gives you access to workbook and file-related commands through a series of *tabs*, including Info, New, Open, Save, Save As, Print, Share, Export, Close, Account, and Options. Some of the tabs give you additional tabs. Other tabs allow you to select from many different options or settings. Finally, some tabs accomplish a task and return you to the workbook.

Take Note

The Exit command is no longer available in Office 2013, at least in the same way it was available in prior versions. In this case, the Close tab in Backstage view closes the workbook. The Close (X) button in the upper right corner of the Excel 2013 window closes Excel (see Figure 3-1).

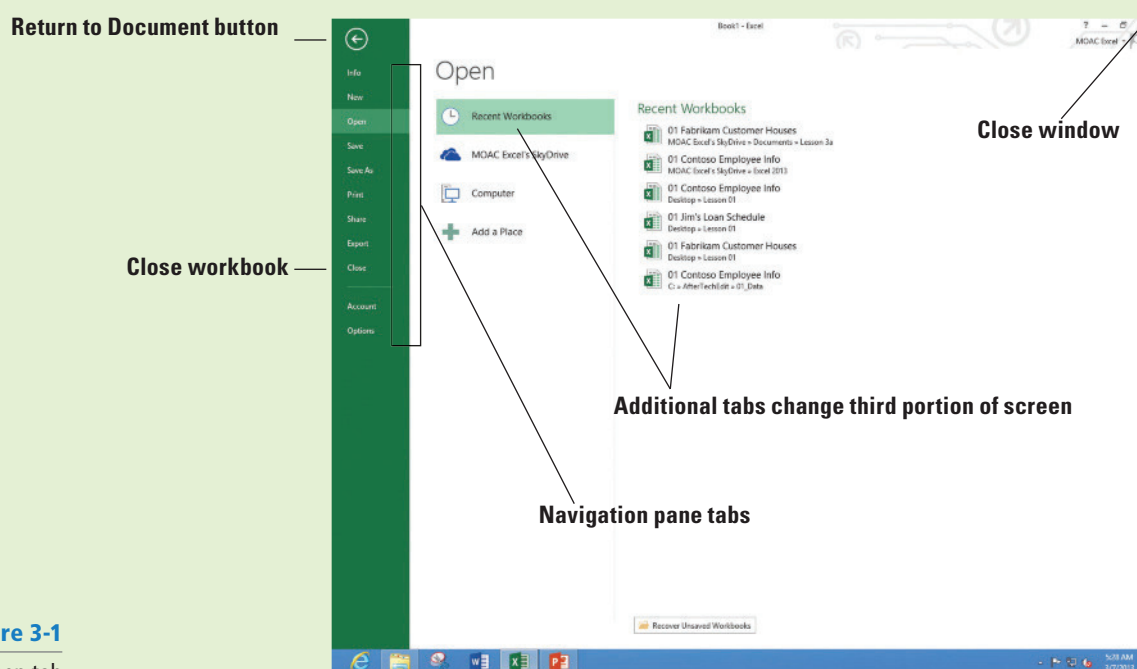


Figure 3-1

Backstage view—Open tab

Bottom Line

ACCESSING AND USING BACKSTAGE VIEW

In the Excel 2013 window, you see the green FILE tab in the upper left corner. This is your access to Backstage view. When you click the FILE tab to access Backstage view, you see the navigation pane containing many of the same commands that can be accessed through the Microsoft Office button in previous versions of Excel. In this section, you access Backstage view and use these commands to close a file.

STEP BY STEP

Access Backstage View

**Another Way**

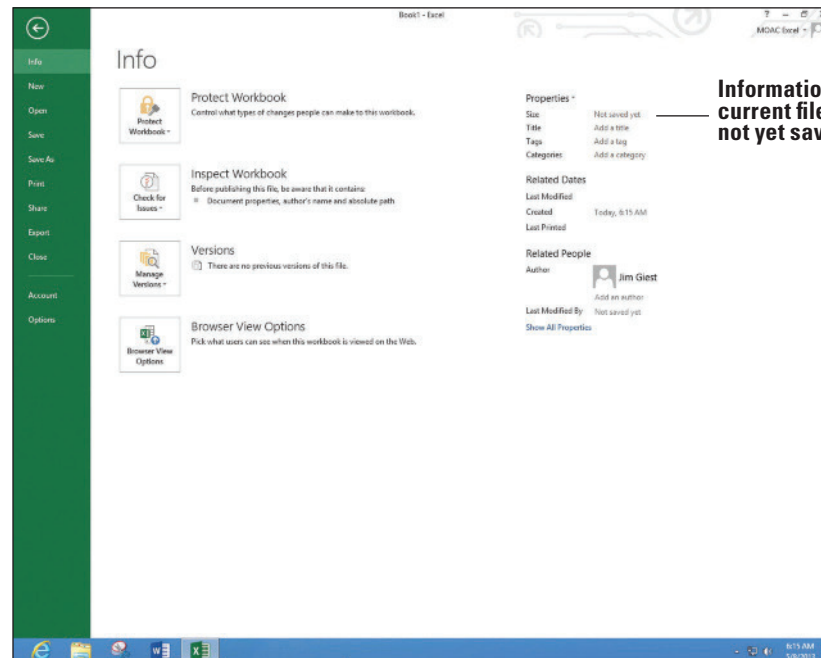
You can also press Alt + F to select FILE and go to the Backstage view.

GET READY. LAUNCH Excel and OPEN a blank workbook.

1. Click the **FILE** tab to display Backstage view with the Open tab selected (see Figure 3-1).
2. In the upper left corner of Backstage view, click the **Return to document** button.
3. In cell A1, type **abc** and press **Enter**.
4. Click the **FILE** tab. Backstage view, like the ribbon, is context-sensitive and changes to the Info tab (see Figure 3-2).

Figure 3-2

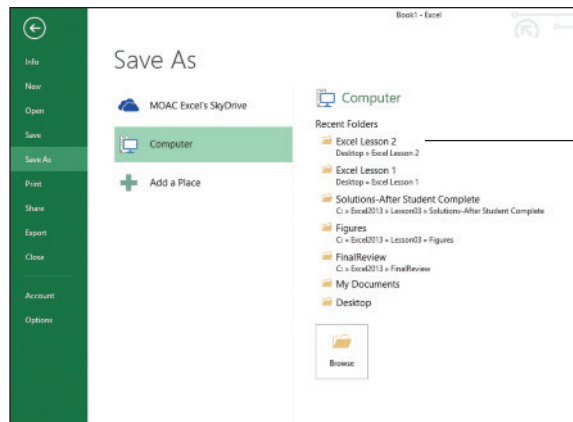
Backstage view—Info tab



5. Click the **Save** tab. Notice that there are additional tabs depending on your setup. In this case, SkyDrive, Computer, and Add a Place appear.
6. Click the **Save As** tab. Notice that this looks identical to the Save tab. This is how it looks the first time you save the file.
7. Click **Computer** and notice that the Recent Folders section where you last saved your previous workbooks appears (see Figure 3-3).

Figure 3-3

Backstage view—Save As tab

Recent locations
(drives and folders)
that you have accessed

8. Click **Browse**. In the File name box, type **Temp**, and then click **Save**.
9. Click **FILE**. Notice the Info tab appears.
10. Click **Save**. Notice that you do not see the options shown in Figure 3-3 (and Step 5 previously), but that you return directly to the workbook.
11. Click **FILE** and click **Close**. This action closes the workbook, but not Excel.
12. Click **FILE** and the **Open** tab appears. In the list of Recent Workbooks, select **Temp** and your workbook returns.

PAUSE. CLOSE Excel.

Cross
Ref

Backstage view is introduced in Lesson 1. Creating a new workbook and saving a file are discussed in more detail in Lesson 2, “Working with Microsoft Excel 2013.”

PRINTING WITH BACKSTAGE

Bottom Line

Backstage view contains Excel’s Print commands and options. You can use the Print settings to manipulate workbook elements such as margins, orientation, paper size, and so on.

Printing and Previewing a Document

Backstage view includes a Print tab with a Print Preview pane so you can preview your workbook as you click Print options. **Print options** are a series of settings that allow you to change how a document prints. You can print the document so it is horizontal or vertical, display gridlines on the page, scale the text to make it fit on a single page, and select from many other options. In this exercise, you create a form for a potluck and learn to use the Print and Print Preview features in Excel.

STEP BY STEP

Print and Preview a Document

GET READY. LAUNCH Microsoft Excel 2013.

1. Create a new workbook, enter the worksheet data shown in Figure 3-4, and save it as **03 Contoso Potluck solution** in a folder called Excel Lesson 3.

Figure 3-4

03 Contoso Potluck solution
worksheet

	A	B	C
1	Contoso Potluck Form		
2		Name	Extension
3	Salad 1		
4	Salad 2		
5	Entrée 1		
6	Entrée 2		
7	Drink 1		
8	Drink 2		
9	Desserts 1		
10	Desserts 2		
11	Utensils		
12	Plates		
13	Napkins		
14			



Another Way

Another way to
create a new workbook is with
the Ctrl + N keyboard shortcut.

2. CLOSE Excel.

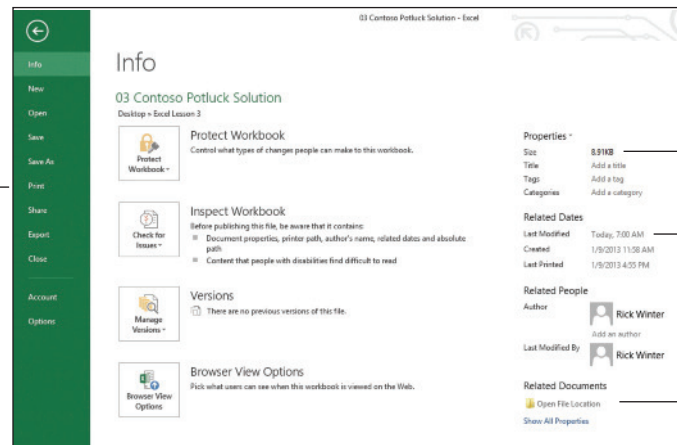
3. LAUNCH Excel again and notice that **03 Contoso Potluck Solution** appears in your Recent list. Click the file to bring it back up.

4. Click the **FILE** tab to automatically display the Info tab. As shown in Figure 3-5, the Properties area shows the size of the file, when it was last modified, and who the author is.

Figure 3-5

File Properties area

Print tab



Size of file

Last Modified date

Author

Click to go to the
folder for the file.

Take Note A handy feature, Open File Location, allows you to open the folder where the current file is located.



Cross Ref

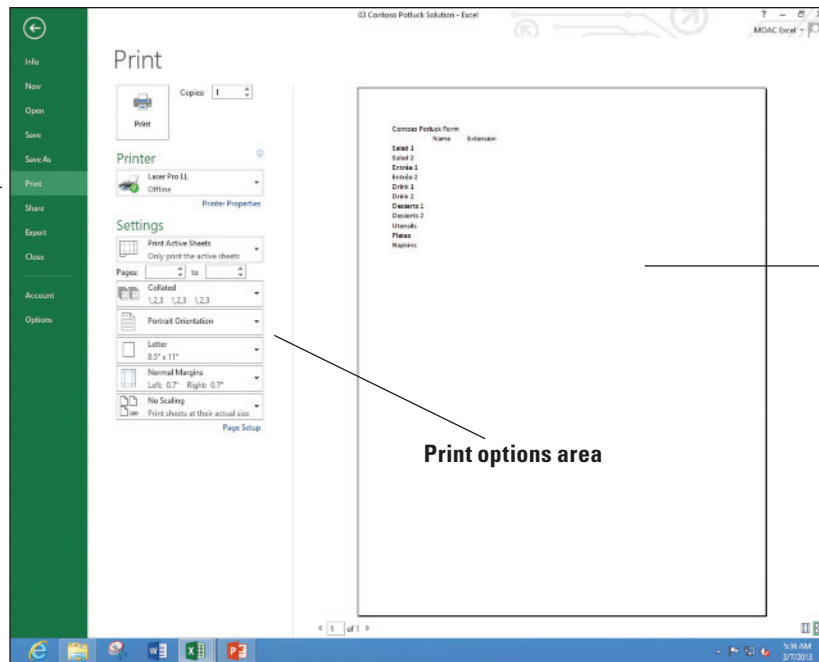
In Lesson 2, the “Editing a Workbook’s Properties” section demonstrates how to make changes to some of the properties in a workbook.

5. Click the **Print** tab. Note that this displays the Print options in Backstage view. Take a moment to preview the workbook in the Print Preview section in the right pane and read through the Print options listed in the center section of the page (see Figure 3-6).

Figure 3-6

Document preview

Print tab in navigation pane



Print preview area

Print options area

**Another Way**

You can also activate Backstage view and access Print options by pressing Ctrl + P.

6. To print your worksheet, at the top of the Print screen, click the **Print** button.

PAUSE. LEAVE the workbook open for the next exercise.

Using Quick Print to Print a Worksheet

Use the Print tab in Backstage view when you need to review a draft of a worksheet before you are ready to print the final workbook. If you click the Quick Print icon on the Quick Access Toolbar, the worksheet is sent directly to the printer. The Quick Print command on the Quick Access Toolbar is useful because worksheets are frequently printed for review and editing or distribution to others.

STEP BY STEP

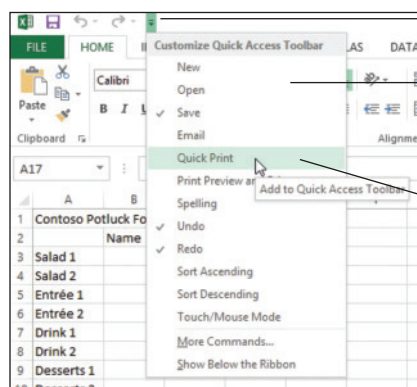
Use Quick Print to Print a Worksheet

GET READY. USE the open workbook from the previous exercise or open **03 Contoso Potluck Solution**.

1. On the Quick Access Toolbar, if you do not see the Quick Print button, click the **Customize Quick Access Toolbar** arrow at the end of the toolbar, and select **Quick Print** (see Figure 3-7).

Figure 3-7

Customizing the Quick Access Toolbar menu



Arrow to access menu

Customize Quick Access Toolbar

Quick Print is not checked so it needs to be selected.

Take Note Discuss with your instructor whether you can print in the classroom. If you cannot, view all the documents in preview mode to see how the document would print whenever printing is mentioned in this book.

2. On the Quick Access Toolbar, click **Quick Print** (see Figure 3-8).

Figure 3-8

Quick Access Toolbar



Quick Print

3. Retrieve the printed copy of the worksheet from your printer.
4. Click the **FILE** tab, and then click **Print**. The preview pane should match what was printed.
5. Click the **Return to document** button.
6. Notice that a dotted vertical line appears in the middle of the screen. The line shows the right edge of the printed page. The line displays the first time you print or preview a page.

PAUSE. LEAVE the workbook open for the next exercise.

Setting the Print Area

You can use the Print options in Backstage view to print only a selected portion, or print area, of an Excel workbook. In this exercise, you learn to select an area of a workbook for printing. You print just the list of items and have a couple of people verify that these are items you should have people bring to the potluck.

STEP BY STEP

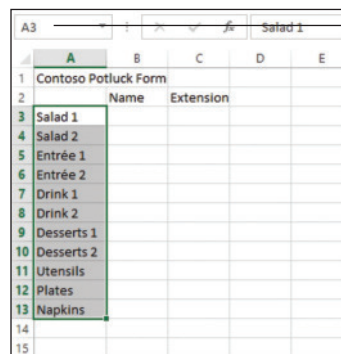
Set the Print Area

GET READY. USE **03 Contoso Potluck Solution** that is already open or create the workbook shown in Figure 3-4.

1. Click the **PAGE LAYOUT** tab.
2. In the Page Setup group, point to the **Print Area** button. Note the ScreenTip that displays and defines the task to be completed.
3. On the worksheet, click cell **A3**, hold the mouse button, and drag to cell **A13**. Your cell range should be highlighted in gray (see Figure 3-9).

Figure 3-9

Selecting a print area

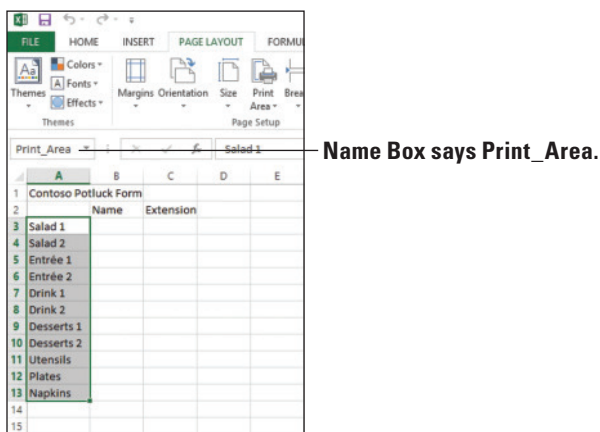


Name Box says A3.

- With these cells highlighted, from the menu that appears, click the **Print Area drop-down arrow** and click **Set Print Area**. You have now set the print area. While the area is still selected, note that the Name Box now says *Print_Area* (see Figure 3-10).

Figure 3-10

Selected print area

Name Box says *Print_Area*.CERTIFICATION
READY?

1.5.1

How do you set the print
area in a worksheet?

- Click the **FILE** tab to open Backstage view.
- Click **Print** and notice in the Print Preview pane that you can see only the list of items to bring and not the text in rows 1 and 2 and columns B and C.
- Click the **Return to document** button. You will not print at this time.

PAUSE. SAVE the workbook in your Lesson 3 folder with the current name **03 Contoso Potluck Solution** and CLOSE Excel.

Printing Selected Worksheets

In this exercise, you learn to access the options for printing individual worksheets in a workbook. You can use these options to print the current worksheet only or to print multiple worksheets.

STEP BY STEP

Print Selected Worksheets

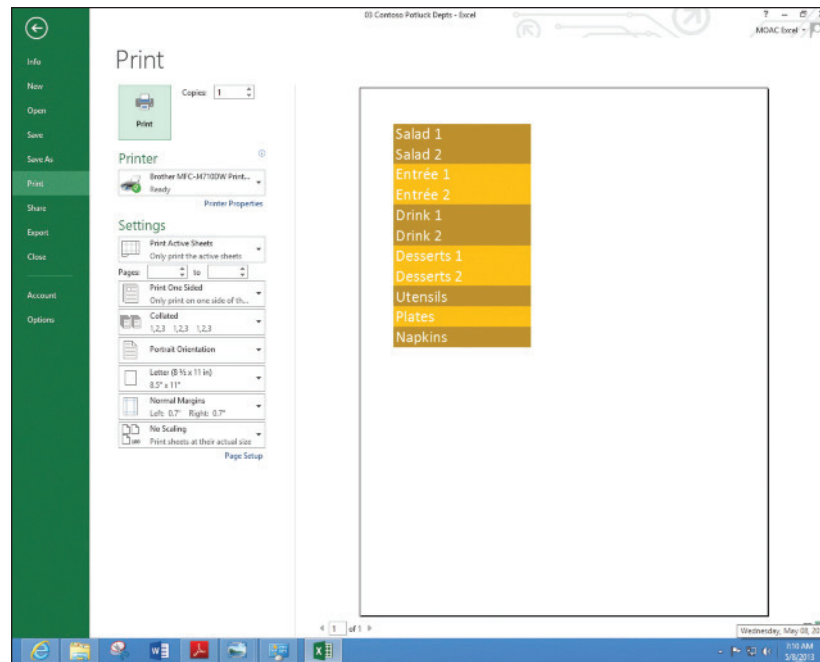


GET READY. LAUNCH Excel 2013, and then perform these steps:

- OPEN **03 Contoso Potluck Depts**. This is a modified version of the potluck workbook you created previously. In this case, there are three different worksheets for three different departments.
- Click each of the three worksheet tabs: **HR**, **Operations**, and **Finance**. Notice that the title in C1 shows the department name and there are a different number of items to bring to each potluck depending on the size of the department. Click the **HR** tab.
- Press **Ctrl + P** to display the Print options in the Backstage view. In the Print Preview pane, the entire worksheet does not display (see Figure 3-11). This is because of the selected print area.

Figure 3-11

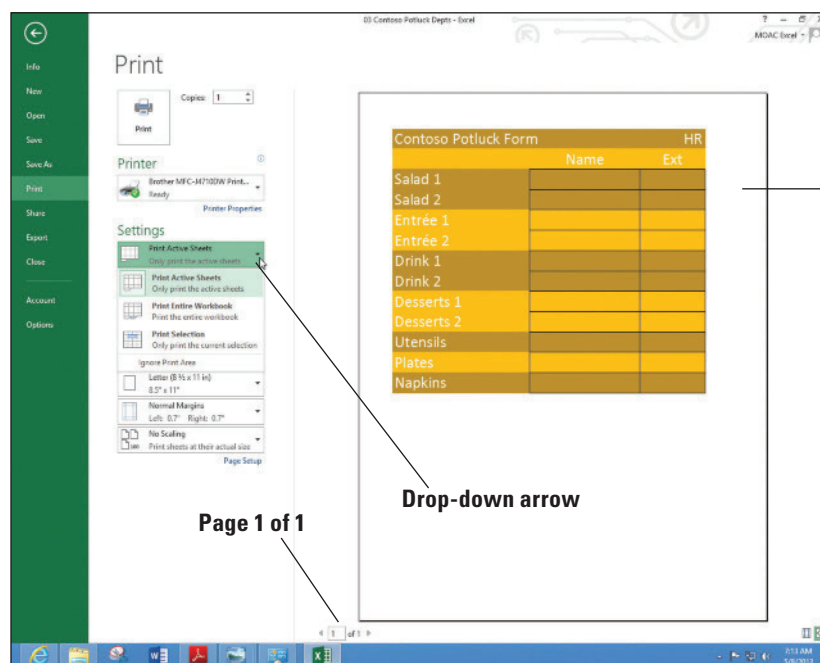
The entire worksheet does not display because print area is selected.



4. Press **Esc** or click the **Return to document** button.
5. Click the **PAGE LAYOUT** tab, click **Print Area**, and then select **Clear Print Area**.
6. Click the **FILE** tab and click **Print**. Notice that the entire worksheet for HR appears. Also notice that the page number shows 1 out of 1 indicating that only one of the worksheets will print, and it will all fit on one page.
7. In the Settings section of the center pane in Print options, click the **Print Active Sheets** drop-down arrow. In the drop-down menu that appears, as shown in Figure 3-12, you can select several printing options for your workbook or worksheet.

Figure 3-12

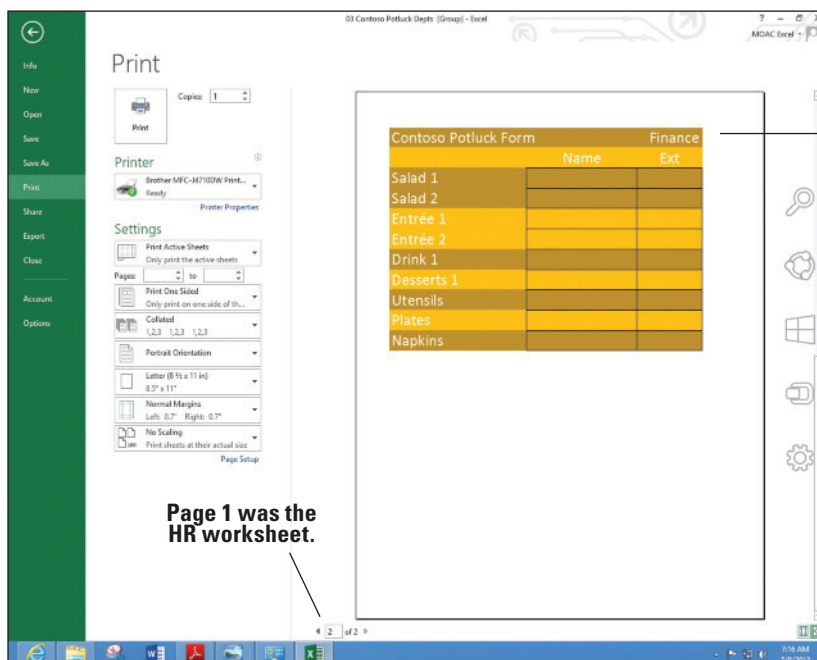
Worksheet print options



8. Click the **Return to document** button.
9. While the HR worksheet is active, hold down **Ctrl** and click on the **Finance** tab. Now both the HR and Finance worksheets are selected.
10. Click the **FILE** tab and click **Print**. Now in the Print Preview area, the bottom of the screen shows 1 of 2 with the HR worksheet preview. Click the right arrow to go to the second page and notice that the Finance worksheet previews (see Figure 3-13).

Figure 3-13

Two worksheets will print this time.



The current Page 2 is the Finance worksheet.

Page 1 was the HR worksheet.

CERTIFICATION READY? 1.5.3

How do you print selected worksheets?

11. Click the **Return to document** button to return to the workbook without printing.

PAUSE. CLOSE the workbook without saving. **LEAVE** Excel open for the next exercise.

Printing Selected Workbooks

In most scenarios in business, workbooks are composed of multiple worksheets. It is much easier to print an entire workbook than to print the workbook's worksheets individually. In this exercise, you use commands in Backstage view to print an entire workbook.

STEP BY STEP

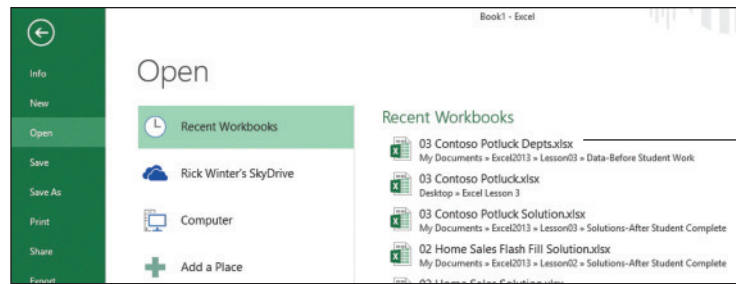
Print Selected Workbooks

GET READY. With Excel open from the previous exercise, perform the following steps:

1. Click the **FILE** tab and click **Open** if it is not selected. Because you just used the **03 Contoso Potluck Depts** workbook, it should be at the top of the list of the Recent Workbooks (see Figure 3-14).

Figure 3-14

03 Contoso Potluck Depts is the most recent workbook used.

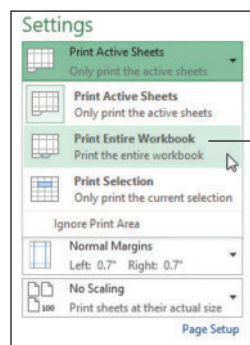


03 Contoso Potluck Depts

2. Click **03 Contoso Potluck Depts** to open it.
3. Click the **FILE** tab and click **Print**.
4. Notice that the complete worksheet for HR does not display. This is because you did not save the workbook after you cleared the print area. Clear the print area as you did in Step 5 of the previous section and return to the Print tab of Backstage view.
5. In the Print window's Settings options, click the **Print Active Sheets** drop-down arrow and click **Print Entire Workbook** (see Figure 3-15). You will not print at this time.

Figure 3-15

Printing an entire workbook



Print Entire Workbook

**CERTIFICATION
READY?**

1.5.7

How do you print a
workbook?

PAUSE. CLOSE Excel and do not SAVE the workbook.

Applying Printing Options

The Print command in Backstage view offers a number of options for customizing printed workbooks. This exercise prepares you to customize such options as page setup, scale, paper selection, and gridlines, all using the commands in Backstage view.

STEP BY STEP

Apply Print Options

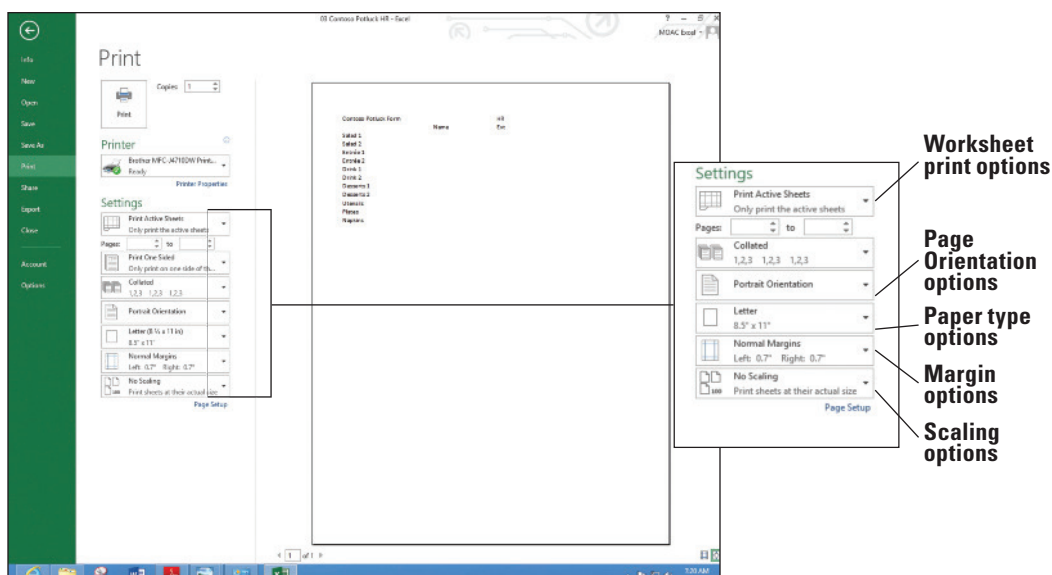


GET READY. LAUNCH Excel, OPEN **03 Contoso Potluck HR**, and make sure the HR-P1 worksheet is selected.

1. Click the **FILE** tab and select **Print** (see Figure 3-16). Notice that the worksheet is small and it might be nice to have lines for people to write in on a printed page.

Figure 3-16

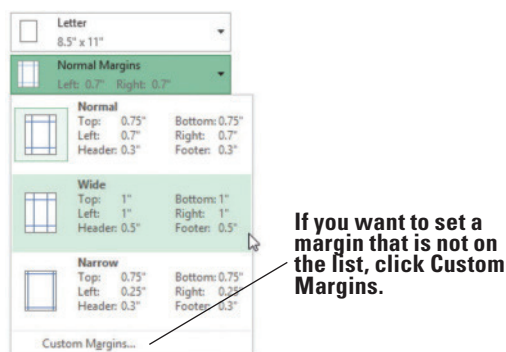
Print Settings area



2. In the Settings section of the Print window, click the **Margins drop-down** and click **Wide** (see Figure 3-17). The new margins will allow the worksheet to be hole-punched and put in a binder.

Figure 3-17

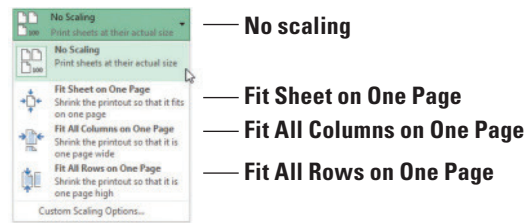
Normal margins are about $\frac{3}{4}$ of an inch. Wide margins are 1 inch.



3. Click the **Scaling drop-down** and see the choices below (see Figure 3-18). The scaling options ensure that all columns, rows, or the entire worksheet fit on one page.
- Current choice is No scaling, so the document prints the same size as the screen.
 - If you want to fit everything that is on the worksheet on one page, select Fit Sheet on One Page.
 - If there are just a couple of columns extra, click Fit All Columns on One Page.
 - If there are just a couple of rows extra, click Fit All Rows on One Page.

Figure 3-18

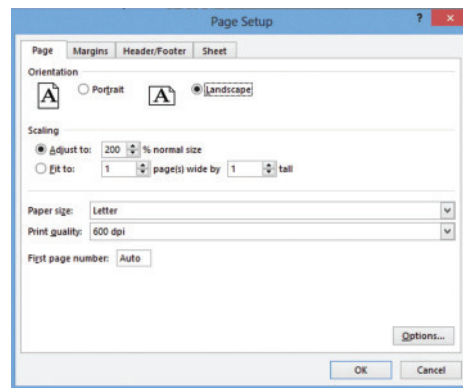
Print scaling options



4. In this case, you make the text larger without changing the font. Click **Custom Scaling Options**. The Page Setup dialog box opens.
5. Make sure that the **Page** tab is selected and select **Landscape** so the page prints horizontally.
6. In the Scaling area, type **200** for the % normal size (see Figure 3-19).

Figure 3-19

Page Setup dialog box



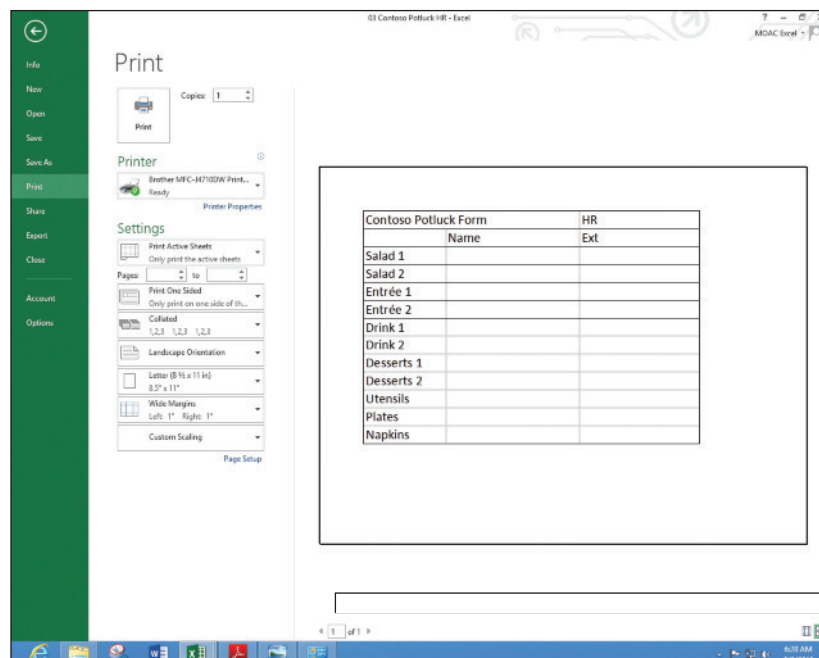
**CERTIFICATION
READY?** 1.5.4

How do you set print scaling to make the entire document larger?

7. Click the **Sheet** tab and in the Print section, select the **Gridlines** box.
8. Click **OK** to return to Backstage view. Notice that the bottom of the screen still says, **1 of 1**, meaning that only one page will print and notice that Print Preview shows larger text with boxes around each cell (see Figure 3-20).

Figure 3-20

Final view of HR-P1 before printing



Indicates 1 page will print



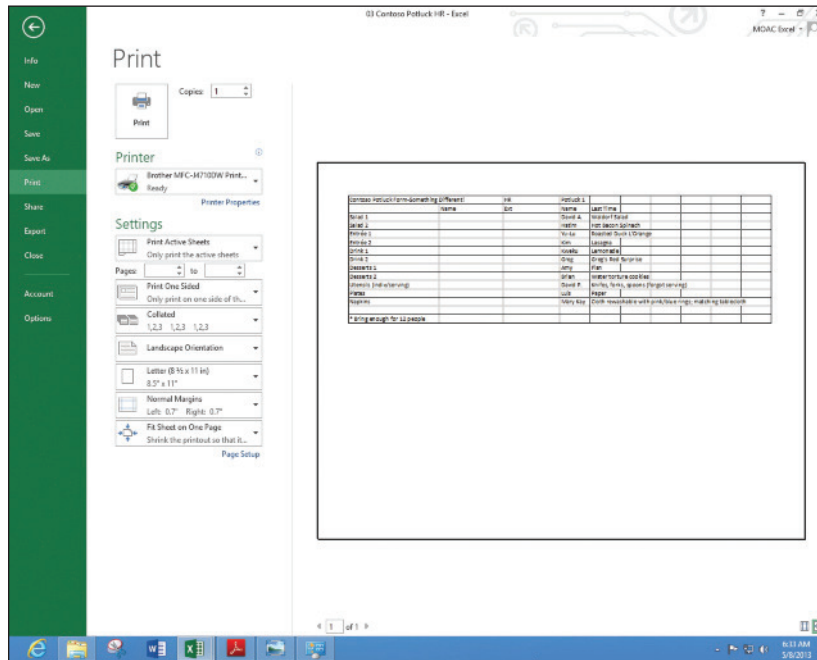
Another Way

You can customize the workbook settings and options from the PAGE LAYOUT tab in the Page Setup, Scale to Fit, and Sheet Options groups.

9. Without printing the document, click the **Return to document** button and then click the HR-P2 worksheet.
10. Press **Ctrl + P** to go to the Print tab of the Backstage view and notice that the bottom of the screen indicates that the document will print on two pages.
11. Change the Settings to print Landscape, to Fit Sheet on One Page, and add gridlines based on the previous steps in this section. Print Preview should look like Figure 3-21.

Figure 3-21

Final view of HR-P2 before printing



CERTIFICATION READY? 1.5.7

How do you apply printing options?

12. **SAVE** the workbook in your Lesson 3 folder as **03 Contoso Potluck HR Print Ready Solution**.

PAUSE. LEAVE the workbook open for the next exercise.



Cross Ref

See Lesson 7 for additional options for preparing a document for printing, including options for page breaks, margins, orientation, and scaling a worksheet to print on a page. See Lesson 11 to print comments in a workbook.

Changing a Printer

In many business settings, you print documents on multiple printers. Some of the printers allow you to print documents with color. Other printers might have special options such as large paper sizes. Some printers print quickly for large standard jobs of many pages. In this exercise, you learn how to change the selected printer using Backstage view.

Take Note If you use multiple printers in your office, make sure you understand the costs associated with printing for each printer; some printers can print for around a penny per page, whereas others can be almost a dollar per page. Other Print options allow you to send a document by e-mail (see Lesson 11) or to a shared location (see Lesson 1).

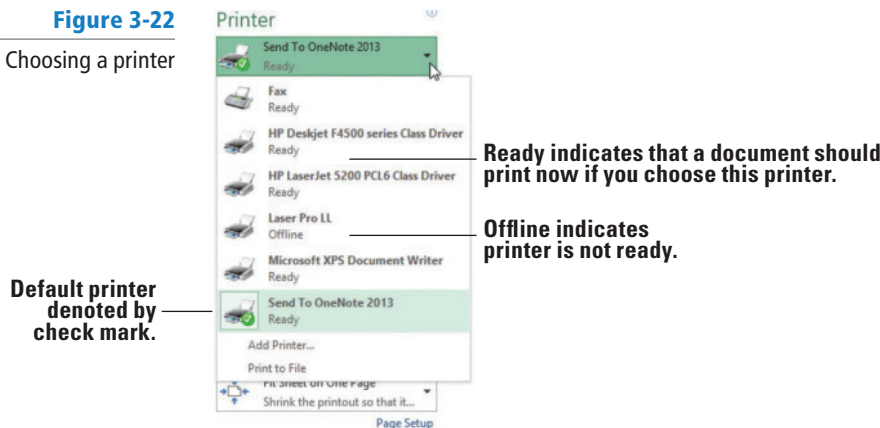
STEP BY STEP**Change a Printer**

GET READY. Continue with the previous workbook or if necessary, open **03 Contoso Potluck HR Print Ready Solution**.

1. Press **Ctrl + P** to display the Print tab of the Backstage view.
2. Your current default printer is displayed in the Printer options section of the Print tab. Click the **Printer drop-down arrow** to produce a menu of installed printers, similar to the one shown in Figure 3-22. Your printers will be either Ready or Offline.

Figure 3-22

Choosing a printer



3. Click on a printer (other than your default printer) in the printer list. This printer should now be visible as your active printer. Should you attempt to print at this time with an inactive printer, you will get an error.
4. Once again, click the **Printer drop-down arrow**, and select your default printer (the one with the checkmark).

PAUSE. CLOSE your workbook and don't save if prompted.

**Troubleshooting**

To change a default printer in Windows 8, click the Start button, type devices and printers, click Settings, click Change Devices and Printers, right-click your printer, and select Set as default printer.

CHANGING THE EXCEL ENVIRONMENT**Bottom Line**

Backstage view also offers a number of commands and options for changing the Excel work environment. In this section, you learn to manipulate various elements of the Excel environment, such as the ribbon, Quick Access Toolbar, Excel default settings, and workbook properties. **Default settings** are pre-set options that determine how Excel will behave when performing an action. For example, a default printer is the one your documents always print to unless you change the setting. By default, there is one worksheet in a workbook and the font is 11 points—but you can change those settings too.

Customizing the Quick Access Toolbar

You can't change the size of the Quick Access Toolbar, but you can customize it by adding and removing command buttons. In this exercise, you customize the Quick Access Toolbar by adding commands for functions you use most frequently in Excel, and by organizing the command buttons on the toolbar to best suit your working needs and style.

Take Note After you change the Excel environment in these exercises, you return it to the defaults in the Resetting Default Settings, the Ribbon, and Quick Access Toolbar exercise.

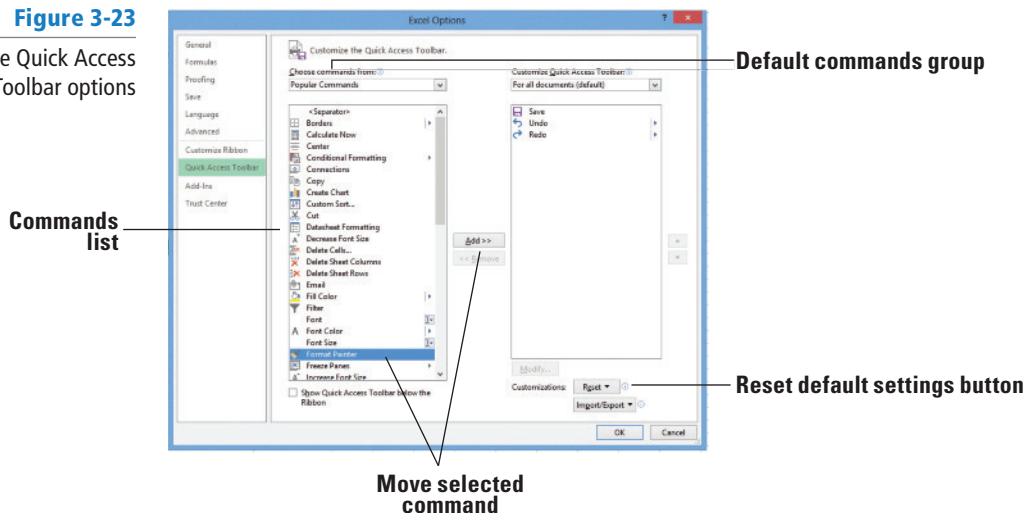
STEP BY STEP**Customize the Quick Access Toolbar**

GET READY. OPEN a blank workbook in Excel.

1. Click the **FILE** tab to access Backstage view.
2. In the navigation pane, click the **Options** tab. The Excel Options dialog box opens.
3. In the left pane of the dialog box, click **Quick Access Toolbar** to display the Quick Access Toolbar options (see Figure 3-23). In the right pane, the list on the left includes the commands that you can add to the toolbar. The list on the right shows the commands that are currently included on the toolbar.

Figure 3-23

Customizing the Quick Access Toolbar options



**CERTIFICATION
READY?**

1.4.3

How do you customize the Quick Access Toolbar?

4. In the list on the left, scroll down and click **Format Painter**, and then click the **Add** button in the center of the two lists to add the Format Painter to the Quick Access Toolbar.
5. Using the same process, move five more commands you use often to the Quick Access Toolbar. When you are done, click **OK** to apply your changes (the changes don't take effect until you click OK).
6. Your Quick Access Toolbar should now include additional command buttons, much like the example shown in Figure 3-24. Similarly, you can remove any command that you added to the toolbar. At any time, you can reset the toolbar to its default settings. See the Reset button in Figure 3-23.

Figure 3-24

Customized Quick Access Toolbar

**Another Way**

You can right-click on any button on the ribbon and select **Add to Quick Access Toolbar** to instantly add it to the Quick Access Toolbar.

PAUSE. CLOSE Excel.

Customizing the Ribbon

As mentioned in Lesson 1, the ribbon is a visual interface that allows you to manipulate items on your worksheet. You can add a new ribbon tab, add a group on any ribbon tab, and add commands within a group. A **group** of commands on the default ribbon tabs are related in functionality. For example, on the HOME tab, the Font group allows you to change the font, font size, add bold, italic, or underline, or change the color of the cell or font. The Excel Options dialog box also offers selections for customizing the ribbon. You can add and remove commands, and you can change the location of ribbon commands to make accessing those you use most frequently more convenient. In this exercise, you use the commands in the Excel Options dialog box to create a new tab and command group to contain your frequently used commands.

STEP BY STEP

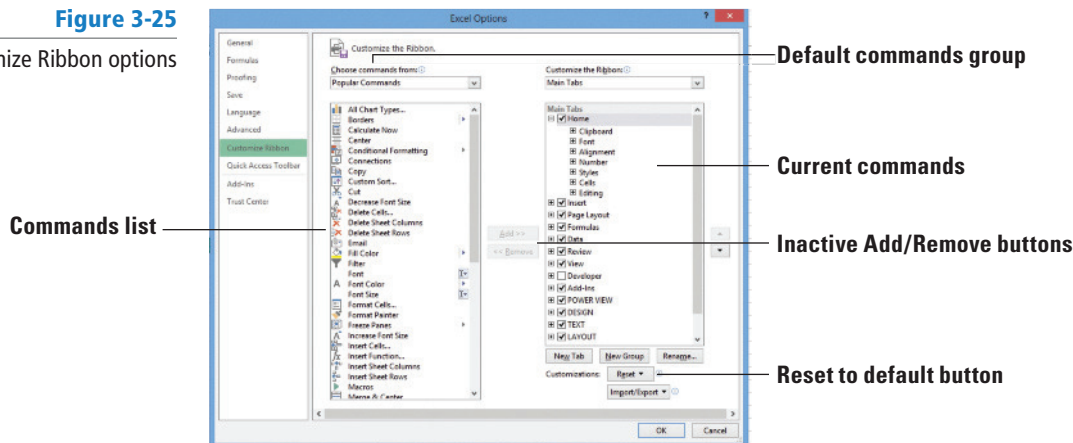
Customize the Ribbon

GET READY. OPEN a blank workbook in Excel.

1. Click the **FILE** tab to open Backstage view.
2. Click the **Options** tab.
3. In the Excel Options dialog box, click **Customize Ribbon**. The Customize the Ribbon options appear (see Figure 3-25). By default, Popular Commands is selected in the Choose Commands From drop-down box. The list of Popular Commands appears in the list below the drop-down box. Also, by default, the Main Tabs option appears in the Customize the Ribbon box on the right, with the ribbon's main tabs listed below.

Figure 3-25

Customize Ribbon options



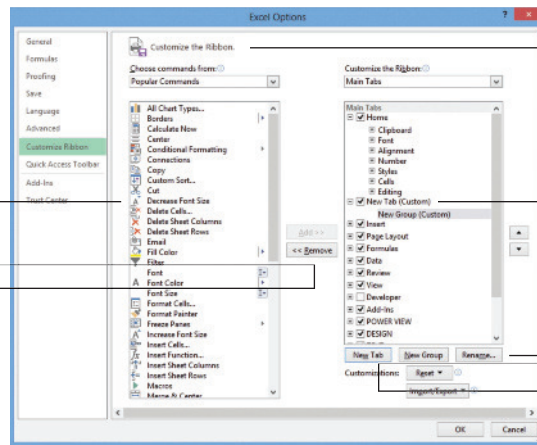
4. In the list of Popular Commands, click **Format Painter**. Note the Add button in the center of the dialog box is now active.
5. In the Customize the Ribbon list on the right, click the + preceding Home to expand the list of command groups within the Home tab if it isn't already expanded. You can use this method to display the current groups available on a ribbon tab.
6. Under the Customize the Ribbon options, click the **New Tab** button (see Figure 3-26) to insert a new blank tab into the Customize the Ribbon list. When you create a New Tab, New Group is automatically created inside that New Tab.

Figure 3-26

Customize the ribbon

Commands list

Active Remove button



Customize the Ribbon options

New Tab and Group

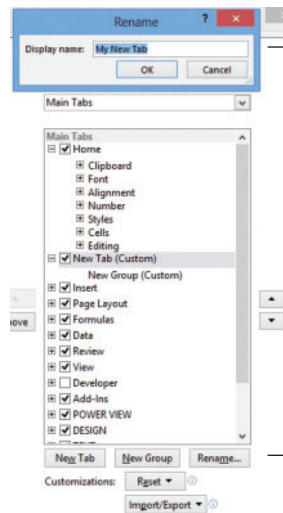
Rename button

New Tab button

- Click the **New Tab (Custom)** list item on the right to select it, and then click the **Rename** button. In the Rename dialog box that appears, type **My New Tab** (see Figure 3-27), and then click **OK**.

Figure 3-27

Rename dialog box and tab to be renamed



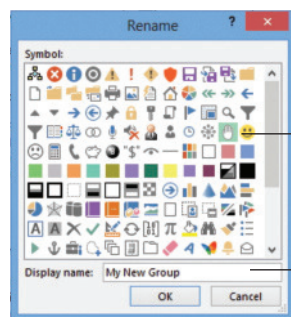
Rename dialog box

Click Rename.

- Under your new tab, click **New Group (Custom)** to select it. Click the **Rename** button again. This time, the Rename dialog box allows you to select a symbol (see Figure 3-28). Select the **hand symbol**. In the Display name box, type **My New Group**, and then click **OK**. You see the New Group renamed.

Figure 3-28

Rename group dialog box



Hand symbol

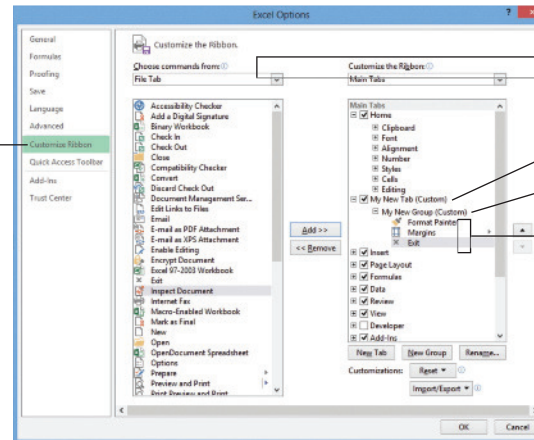
Type a group name

9. In the Customize the Ribbon list on the right, click the **My New Group** list item. In the command list on the left, click on a command of your choice, and then click the **Add** button. The command appears on your new ribbon tab. In the *Choose commands from* list, select **All Commands** and then add another command from this list. In the **Choose commands from** list, select **File Tab** and then add another command. Your screen should look similar to Figure 3-29.

Figure 3-29

Added commands

Customize Ribbon option highlighted



File tab

Newly added tab

Group

and Commands

CERTIFICATION
READY? 1.4.4

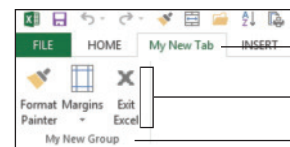
How do you customize
the ribbon?

10. Click **OK** to close the Excel Options dialog box. When you exit, you see your tab named **My New Tab** on the ribbon.

11. Click the **My New Tab** tab. Your commands display in the tab's **My New Group** (see Figure 3-30).

Figure 3-30

New tab and group on the ribbon



New tab

New commands

New group

PAUSE. LEAVE the workbook open for the next exercise.

Customizing the Excel Default Settings

The Excel Options dialog box commands also enable you to modify the default settings in Excel. These defaults can include worksheet properties, printer settings, font style and size, and much more. By default, for example, Excel 2013 opens with one worksheet displayed in a new workbook and a default font size of 11pt. In this exercise, you change Excel's default settings using Backstage view.

STEP BY STEP

Customize the Excel Default Settings

GET READY. Continue with a blank workbook from the previous exercise.

1. Click the **FILE** tab to open Backstage view.
2. In the navigation pane, click **Options**. By default, the Excel Options dialog box opens with the General options displayed.
3. In the When creating new workbooks section, click in the **Include this many sheets** text box and type **5** to change the number of worksheets that appear by default in new workbooks.



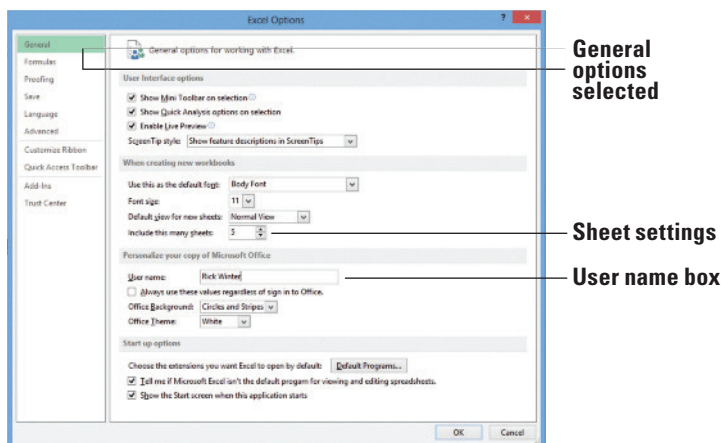
**Cross
Ref**

To insert or delete worksheets in one workbook, see “Organizing Worksheets” in Lesson 8.

- In the Personalize your copy of Microsoft Office section, click the **User name** box and type **[your first and last name]** in the text box (see Figure 3-31). Click **OK**.

Figure 3-31

General options

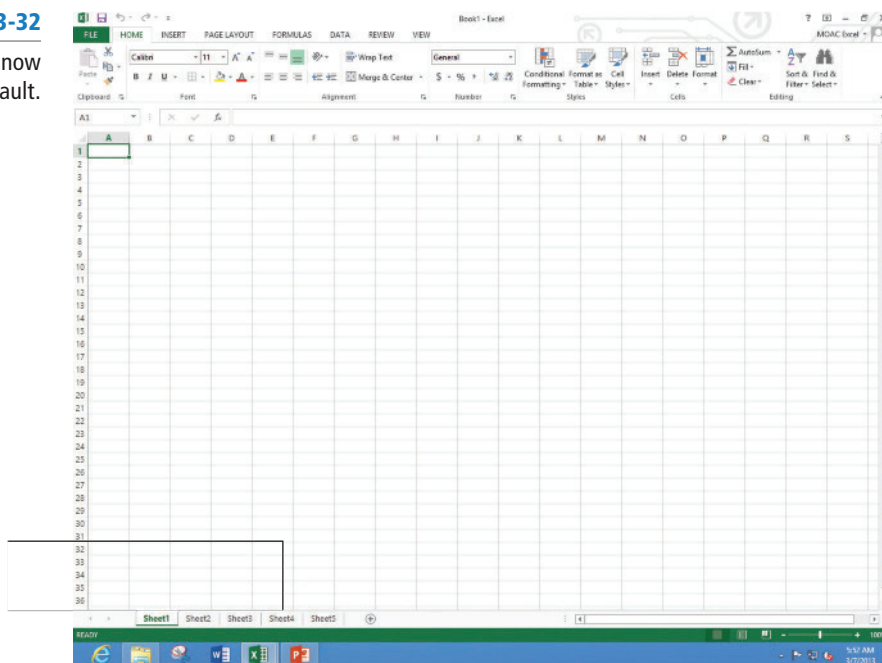


- CLOSE** and **RESTART** Excel and select **Blank workbook**. Note that instead of one worksheet tab, you now have five in your workbook (see Figure 3-32).

Figure 3-32

Five worksheet tabs now appear by default.

**New default
worksheet tab
settings**



PAUSE. LEAVE the workbook open for the next exercise.

Resetting Default Settings, the Ribbon, and Quick Access Toolbar

You should give some thought about how to be the most productive with Excel. Because this lesson shows you examples of how to change settings, you will want to return your settings to their normal state until you are ready to make changes.

STEP BY STEP

Reset Default Settings, the Ribbon, and Quick Access Toolbar

GET READY. Continue with a blank workbook from the previous exercise.

1. Click the **FILE** tab, and click **Options**.
2. On the General tab, in the When creating new workbooks section, in the Include this many sheets box, type **1**.
3. Click the **Customize Ribbon** tab.
4. In the bottom right of the dialog box, click the **Reset** button, and then click **Reset all customizations**.
5. In the Confirmation dialog box, click **Yes** to clear all ribbon and Quick Access Toolbar customizations for this program.
6. Click **OK** to return to the workbook.

Take Note The ribbon and Quick Access Toolbar changes are immediate, but you need to open a new, blank workbook to notice the change for the number of displayed workbooks.

PAUSE. LEAVE the workbook open for the next exercise.

ACCESSING AND USING EXCEL TEMPLATES

Bottom Line

Excel has several templates that are available when you start Excel or when you click the FILE tab and select New, and many more templates for which you can search. **Templates** are files that already include formatting and formulas complete with designs, tools, and specific data types. This exercise familiarizes you with where the templates are located and how to select and use them.

Selecting a Template from the New Tab

Templates allow you to create professional workbooks in a fraction of the time it would take you to develop them from scratch. Examples of these are budgets, loan models, invoices, calendars, and so on.

STEP BY STEP

Select a Template from the New Tab

CERTIFICATION READY? 1.1.2

How do you create a new workbook using a template?

GET READY. If necessary, OPEN a blank workbook.

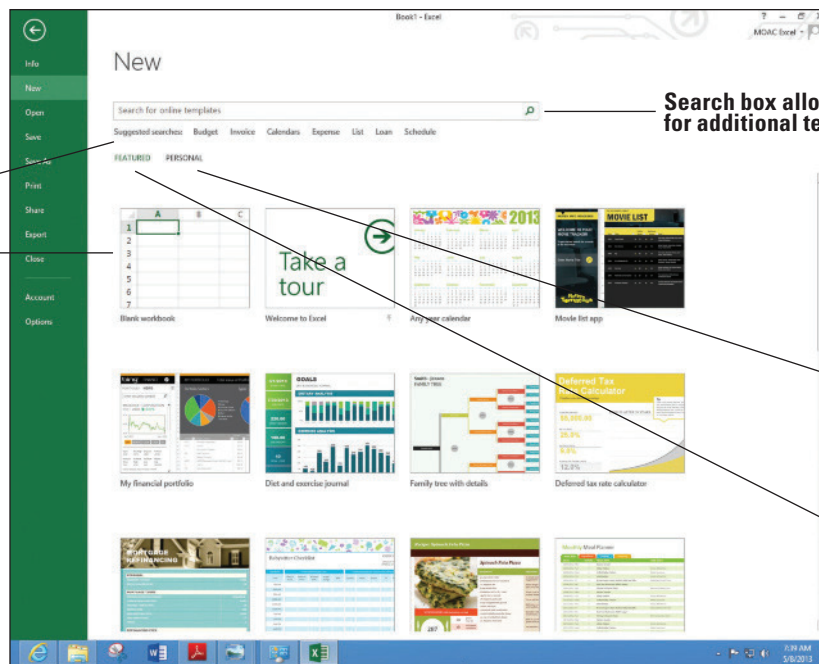
1. Click the **FILE** tab and click **New**. The New window displays as shown in Figure 3-33, with a series of featured templates. You already used the Blank workbook template in this book.

Figure 3-33

Templates available in the New window

Suggested searches show additional templates not on the original screen.

Blank workbook



Search box allows you to look for additional templates.

Use the scroll bar to see additional templates.

PERSONAL allows you to create and use your own templates.

FEATURED button shows you over 20 business templates.



Cross Ref

In Lesson 2, the section, “Save a Workbook Under a Different Name,” demonstrates how to save one of the workbooks as a template. If you completed this exercise, this template is shown by clicking on the PERSONAL screen. (Click FEATURED to return to Excel’s templates.) To save any workbook as a template, go to the Save As dialog box (press F12) and change the Save as type setting to Excel Template.

2. Scroll down if necessary, and click the **Project Tracker** icon. Figure 3-34 shows a larger window with a larger picture and description of the template.



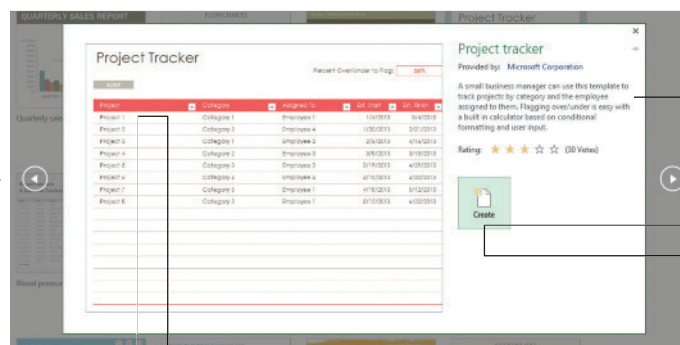
Troubleshooting

In some cases you will need to search for a template if it doesn’t appear by default. If you can’t find the Project Tracker template, type it in the Search box.

Figure 3-34

Project Tracker template preview

Previous template



Description

Next template

Create button

Preview of template

3. Click the **Create** button. Excel might take a moment to download the workbook.
4. Notice that there are two worksheets in this workbook: Project Tracker with the sample data you can change and Setup that allows you to input a list of categories and

employees. When you are finished looking at this template, click **FILE** and click **Close**. If prompted, do not save changes.

5. Click the **FILE** tab, click **New**.
6. Look for *Any year calendar* template and click the **Create** button..
7. Click on **the year** and use the up or down arrow to change to the current year if necessary.
8. Print the worksheet and put on your wall, if desired.
9. SAVE the workbook in your Lesson 3 folder as **03 My Calendar Solution**.
10. Click the **FILE** tab and click **New**. Notice that the *Any year calendar* template appears as the third item on your list of templates because it was recently used.

PAUSE. CLOSE the workbook and LEAVE Excel open for the next exercise.

Take Note You can modify this new workbook with your name, company name, and favorite pictures to personalize your calendar and make it your own or use as a gift for others.

Searching for Additional Templates

There are thousands of online templates available to you, many more than are on the original New window.

STEP BY STEP

Search for Additional Templates



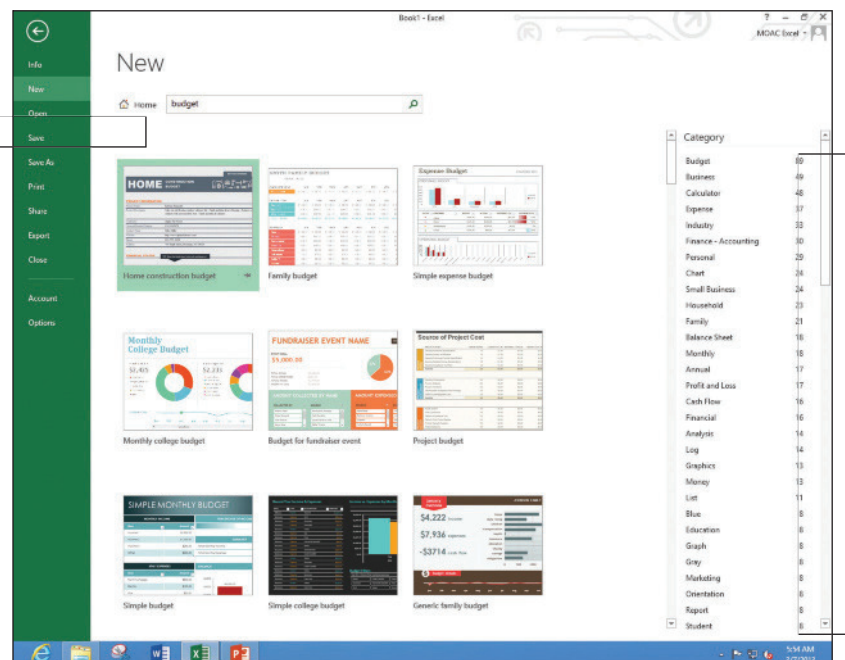
GET READY. If necessary, OPEN a blank workbook.

1. Click the **FILE** tab and click **New**. Notice the Suggested searches and Search for online templates box.
2. Click **Budget** on the Suggested searches row. As shown in Figure 3-35, the New window changes to show templates specifically related to working with budgets.

Figure 3-35

Budget templates

Home button
returns to the
original
New window



Categories
of templates

3. Scroll to the bottom of the window and click on a few templates to see their descriptions.
4. Scroll back to the top of the New window and click **Home** to return to the original templates screen.
5. In the Suggested searches row, click **Calendars**.
6. In the Category pane to the right, click **Student**.
7. Scroll to the Student assignment planner, click it, and read the description. Close the template description window.
8. In the Search box, type **College** and press **Enter**. Scroll through the list of suggested templates for college students and open the **Weekly college schedule** template.
9. In cell B1, type in **[Monday's date]**, and then review the workbook.
10. SAVE the workbook in your Lesson 3 folder as **03 My Weekly Schedule Solution**. Click **Yes** when prompted to save this as a macro-free workbook.



**Cross
Ref**

Macros allow you to automate your tasks. Some templates come with macros to make your work even quicker. Macros are discussed in Lesson 9, “Saving Work with Macros.”

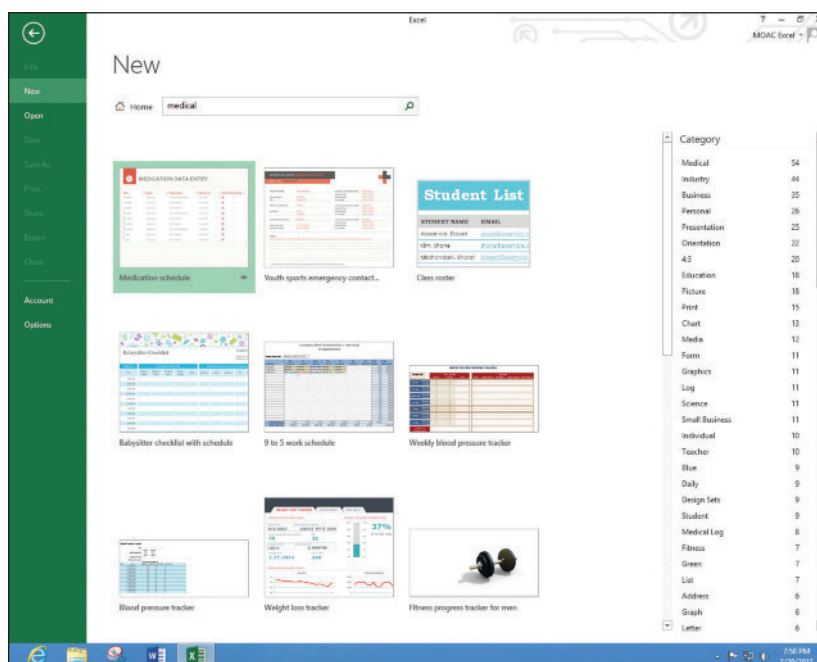
PAUSE. CLOSE Excel.



Workplace Ready

JOB INTERVIEW HINT

If Excel is a requirement for a job you are interviewing for, you can search for relevant templates. Open those that seem applicable to the job and study the important details for terms, how the office might be organized, and for some potential follow-up questions. Depending on your perceptions of the first interview, for the second interview you might print out two or three templates and ask if the office uses something similar to these documents. For example, if you are applying for a job in a doctor's office, medical supply warehouse, or pharmaceutical company, some of the templates shown in the figure below are what you find when you search for medical templates.



If you enjoy Excel, you might even use the templates for brainstorming related job opportunities that use Excel. For example in the figure, you can see that medical templates also relate to Youth sports (school or after-school activities), Babysitter checklists (part-time work while job searching or create your own business), and Fitness progress trackers (personal trainer, gyms, and recreation centers).

SKILL SUMMARY

In this lesson you learned how:	Exam Objective	Objective Number
To access and use Backstage View		
To print with Backstage	Set a print area.	1.5.1
	Print individual worksheets.	1.5.3
	Set print scaling.	1.5.4
	Configure workbooks to print.	1.5.7
To change the Excel environment	Customize the Quick Access Toolbar.	1.4.3
	Customize the ribbon.	1.4.4
To access and use Excel templates	Create new workbooks using templates.	1.1.2

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

- Which of the following is where you can save, select a template, change document properties, and close or exit Excel?
 - Backstage
 - Print
 - Edit
 - Windows
- To change printer, layout, or margin settings, you click the FILE tab and use which of the following options?
 - Info
 - Options
 - Print
 - Open
- Which of the following can you customize for quicker access to the most commonly used commands?
 - Print Preview
 - Quick Access Toolbar
 - Printer setup
 - Workbook
- Which feature enables you to create custom tabs and groups?
 - ribbon
 - Quick Access Toolbar
 - view
 - Tab

5. Which command in the Backstage view navigation pane enables you to view and open your most recently used workbooks or workbooks stored on SkyDrive or your computer?
 - a. Info
 - b. Options
 - c. Print
 - d. Open
6. Which dialog box in Backstage view should you access to view and alter your workbook's properties?
 - a. Info
 - b. Options
 - c. Print
 - d. Open
7. When you modify the ribbon, which of the following do you create?
 - a. command
 - b. tab
 - c. button
 - d. worksheet
8. Which of the following do you use to open Backstage view?
 - a. Backstage menu
 - b. FILE tab
 - c. INSERT tab
 - d. WORKBOOK tab
9. Which of the following do you click in the navigation pane to change Excel's default settings by accessing Backstage view?
 - a. Info
 - b. Options
 - c. Print
 - d. Open
10. What predesigned file already has a significant amount of formatting, text, and other features?
 - a. Blank workbook
 - b. Preset file
 - c. Text file
 - d. Template

True/False

Circle T if the statement is true or F if the statement is false.

- T F 1. You do not have the ability to modify the number of default worksheets in a workbook.
- T F 2. The Open dialog box enables you to access the Microsoft website for custom templates.
- T F 3. Use Ctrl + N to create a new workbook.
- T F 4. To access an Excel template, you can click the FILE tab and click New.
- T F 5. You cannot have more than one worksheet in an Excel workbook.
- T F 6. If you have too many columns on a page, the only option to see them all on a printed page is to decrease the column width.
- T F 7. You can access Backstage view by pressing Ctrl + B.
- T F 8. By default, Excel starts a new workbook with four worksheets.
- T F 9. In Excel, you can add your most commonly used commands to the Quick Access Toolbar.
- T F 10. You can create a completely new ribbon tab as well as groups on that ribbon.

Competency Assessment

Project 3-1: Search and Use a Template

In this project, you find a template for movies and add your own movie.

GET READY. LAUNCH Excel if it is not already running.

1. From Backstage view, click **New** and search for the movie list template.
2. Click the **Create** button.
3. Add an additional movie to the list.
4. SAVE the workbook as **03 My Movies Solution** and then close the file.

LEAVE Excel open for the next project.

Project 3-2: Print a Specific Area or Worksheet

You print a selected area in the worksheet and a specific worksheet.



GET READY. OPEN the file from the Lesson 3 folder titled **03 My Movies Solution**.

1. Select the range **D5:L9**.
2. OPEN Backstage view.
3. Click **Print** in the Backstage view navigation pane.
4. In the Settings section of the Print window, click the **Print Active Sheets** drop-down arrow, and click the **Print Selection** option in the drop-down menu.
5. Click the **Print** button to print the selected area of the worksheet.
6. From Backstage view, click the **Print** tab to return to the Settings options, open the **Print Selection drop-down menu**, and click **Print Active Sheets**.
7. Click the **Print** button to print the active worksheet.
8. CLOSE the workbook.

LEAVE Excel open for the next project.

Proficiency Assessment

Project 3-3: Change the Quick Access Toolbar

You customize the Quick Access Toolbar to add commands for users who are not familiar with Excel and the ribbon.

GET READY. LAUNCH Excel if it is not already running.

1. OPEN Backstage view. Click the **Options** tab.
2. In the left pane of the Excel Options dialog box, click **Quick Access Toolbar**.
3. In the Popular Commands list, add the **Center** button to the Quick Access Toolbar.
4. Repeating these steps as necessary, using the appropriate categories, add the following commands to the toolbar: **Borders**, **Increase Indent**, **Copy**, **Cut**, and **Paste**. Click **OK**. Note the changes to the toolbar in the upper-left portion of the screen.

LEAVE Excel open for the next project.

Project 3-4: Access a Template

You are in need of an invoice template for a client.

GET READY. LAUNCH Excel if it is not already running.

1. Click **FILE** to access Backstage view.
2. Click **New**.
3. On the Suggested searches row, click **Invoice**. If you are without an Internet connection, this process will not work.
4. Browse the results for invoices in the New window.
5. Click a template to preview it and read the description. Click the **Create** button.
6. After the download is complete, Excel automatically opens the template for you. Make note of what features the invoice you chose has to offer. Make changes to the template to see changes and actions.
7. SAVE the invoice as **03 My Invoice Solution**.

LEAVE Excel open for the next project.

Mastery Assessment

Project 3-5: Manage a Custom Ribbon

In order for your client to use and maintain the invoice you downloaded in the previous exercise, he has requested that you customize several tabs on the ribbon to make the worksheet easier to manage and edit.

GET READY. LAUNCH Excel if it is not already running.

1. OPEN **03 My Invoice Solution** from the Lesson 3 folder, if necessary.
2. OPEN Backstage view, and click **Options**.
3. In the Excel Options dialog box, click the **Customize Ribbon** tab.
4. Click the **Reset** button at the bottom right of the window and click **Reset all customizations**. When prompted to delete all customizations, click **Yes**.
5. Create a new tab named **Invoice Edits**.
6. Rename the new command group in Invoice Edits to **Invoice Tools**.
7. Select five commands to add to the Invoice Tools command group.
8. Create another new tab named **My Edits**.
9. Rename the new command group in My Edits to **My Tools**.
10. Add five commands to the My Tools command group.
11. Click **OK**.
12. Examine your changes to the ribbon.
13. OPEN Backstage view and click **Options**. Undo all the changes you just made to the ribbon. When prompted to delete all customizations, click **Yes**.

LEAVE Excel open for the next project.

Project 3-6: Create a List of the Five Templates You Most Likely Will Use

Because templates can make you look good in your current or a potential job, it's a good idea to explore them in more depth here and figure out which ones you will mostly likely use.

GET READY. LAUNCH Excel if it is not already running.

1. In a blank workbook, in cell A1, type **Potential Templates**.
2. In A2, type **Template**.
3. In B2, type **Location**.
4. In C2, type **Priority (1=High, 5=Low)**.
5. Click the **FILE** tab and click the **New** tab. Navigate through the list of templates on the screen, the menu for the suggested templates, and the search box to select five templates.
6. Fill out rows 3 through 7 with templates you plan on using later.
7. Format the worksheet so you can read all text. An example of what your workbook should look like is shown in Figure 3-36. Do not use the same examples.

Figure 3-36

An example of a favorite templates list

	A	B	C
1	Potential Templates		
2	Template	Location	Priority (1=High, 5=Low)
3	Family Budget	Budgets	1
4	Personal Address Book	New	3
5	Loan Calculator	Loans	2
6	College Move Checklist	Search: College	3
7	Daily Work Schedule	Schedule	1
8			

8. SAVE the workbook as **03 My Favorite Templates Solution**.

CLOSE Excel.