Mount Allison
UNIVERSITY

Microsoft EXCEL Training

Level 1

Introduction

In this introductory course to Excel, participants will explore Excel activities that go beyond the basic. After successful completion of this session, participants can expect to have the skills required to work efficiently in an existing worksheet and to also create new worksheets from a template and from scratch.

Topics Include

- Create a basic worksheet by entering text, values, and formulas.
- Change the appearance of worksheet data by using a variety of formatting techniques.
- Create formulas by using some of Excel's built-in functions.
- Filter and sort Excel data.
- Plan, create and modify charts.
- Prepare a document for printing by using a variety of printing options.

Prerequisite

Comfortable with Windows 7, or OSX

Platform

Windows, OSX

Software

Microsoft Excel 2013, Microsoft Excel 2010 (Windows)

Microsoft Excel 2011 (MAC)

Instructor

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1. Opening Excel

Using Windows 7

1. Click on the **Start** Button.
2. In the Search Program and Files box type **Excel.**
3. Click on **Excel 2013** from the Program results.
4. The Microsoft Excel 2013 program will open.

Using Windows 8

1. Press the **Windows key** on the keyboard.
2. Type **Excel**.
3. Click on **Excel 2013** under the Apps results.

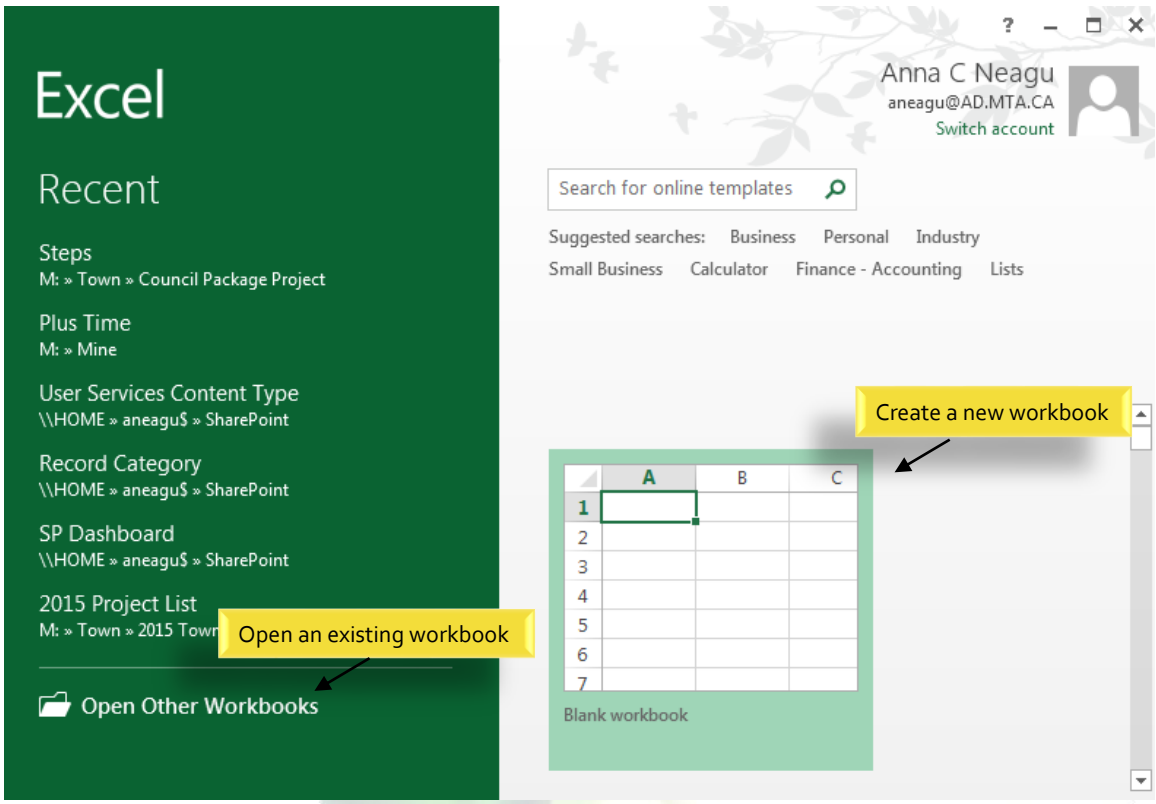
Using iOS 7

1. Click on **Launchpad.**
2. Select Microsoft Excel.

2. Getting Started

When you open Excel 2013 for the first time, the Excel Start Screen will appear. From here, you'll be able to create a new workbook, choose a template, and access your recently edited workbooks.

1. From the **Excel Start Screen**, locate and select **Blank workbook** to access the Excel interface.
2. Click **Open Other Workbooks** to work on an existing workbook.



To set up Excel so it automatically opens a new workbook

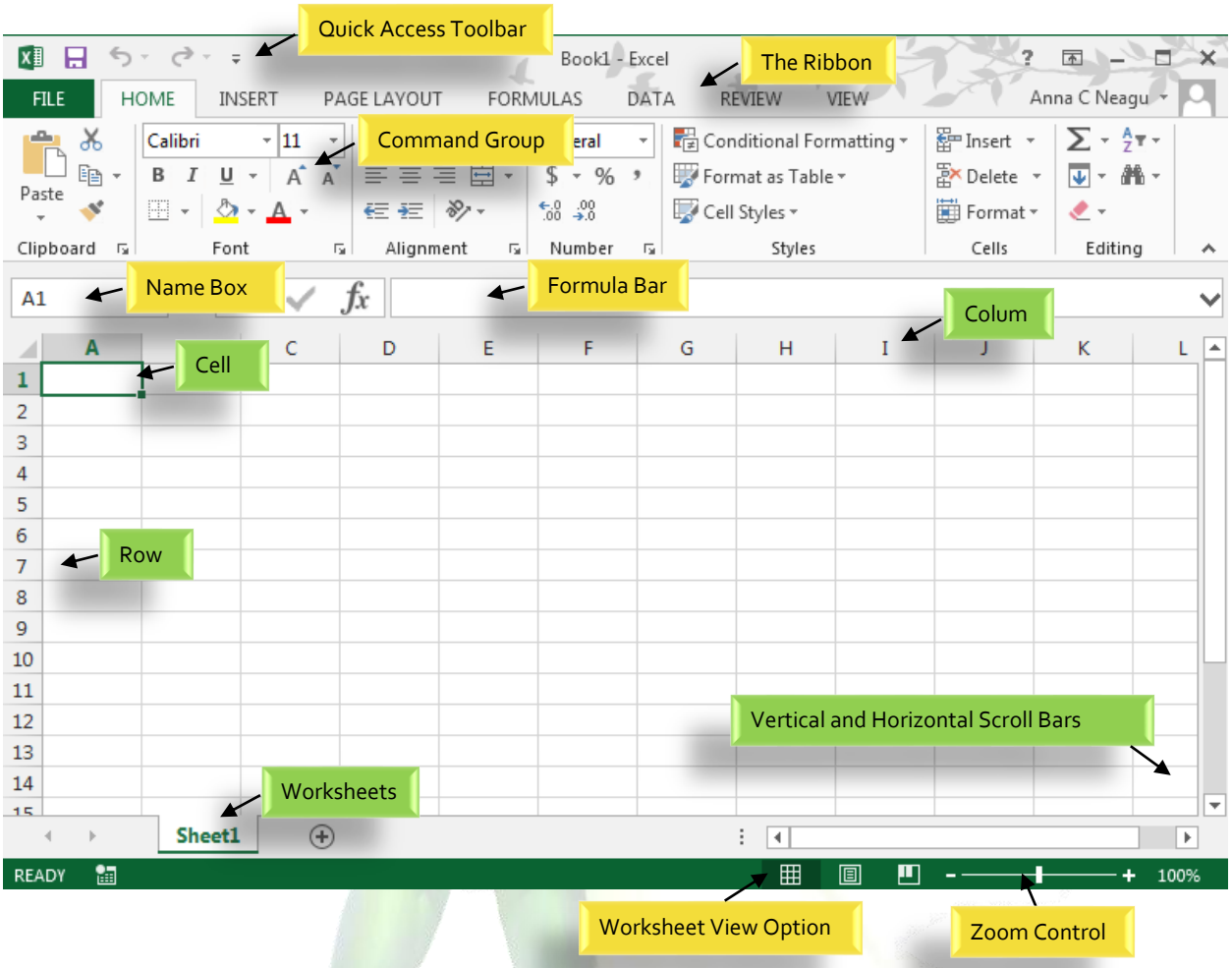
1. Click **File** then **Options**.
2. On the **General** tab, under **Start up options**, uncheck the **Show the Start screen** when this application starts box.
3. The next time you start Excel, it opens a blank workbook automatically similar to older versions of Excel.

2.1. The Excel Interface

After starting Excel, you will see two windows - one within the other. The outer window is the **Application Window** and the inner window is the **Workbook Window**. When maximized, the Excel Workbook Window blends in with the Application Window.

After completing this module, you should be able to:

- Identify the components of the Application Window.
- Identify the components of the Workbook Window.



2.1.1. The Application Window

The Application Window provides the space for your worksheets and workbook elements such as charts. The components of the Application Window are described below.

- ❑ The Quick Access Toolbar

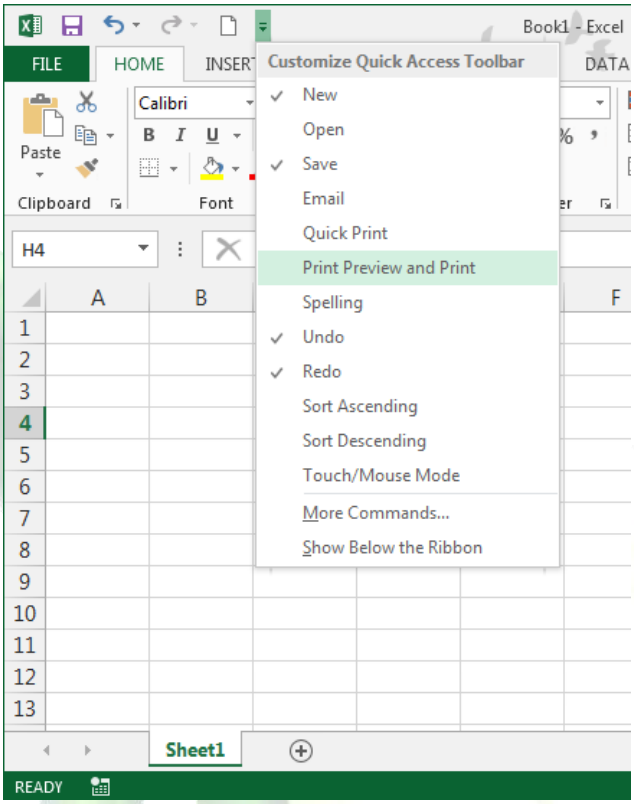
The **Quick Access Toolbar** lets you access common **commands** no matter which tab is selected.

By default, it includes the **Save**, **Undo**, and **Repeat** commands. You can add other commands depending on your preference.

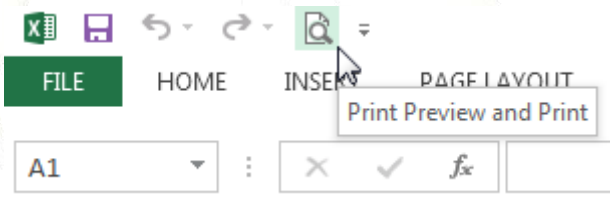
To add commands to the Quick Access toolbar

1. Click the **drop-down arrow** to the right of the **Quick Access toolbar**.

2. Select the **command** you wish to add from the drop-down menu. To choose from more commands, select **More Commands**.

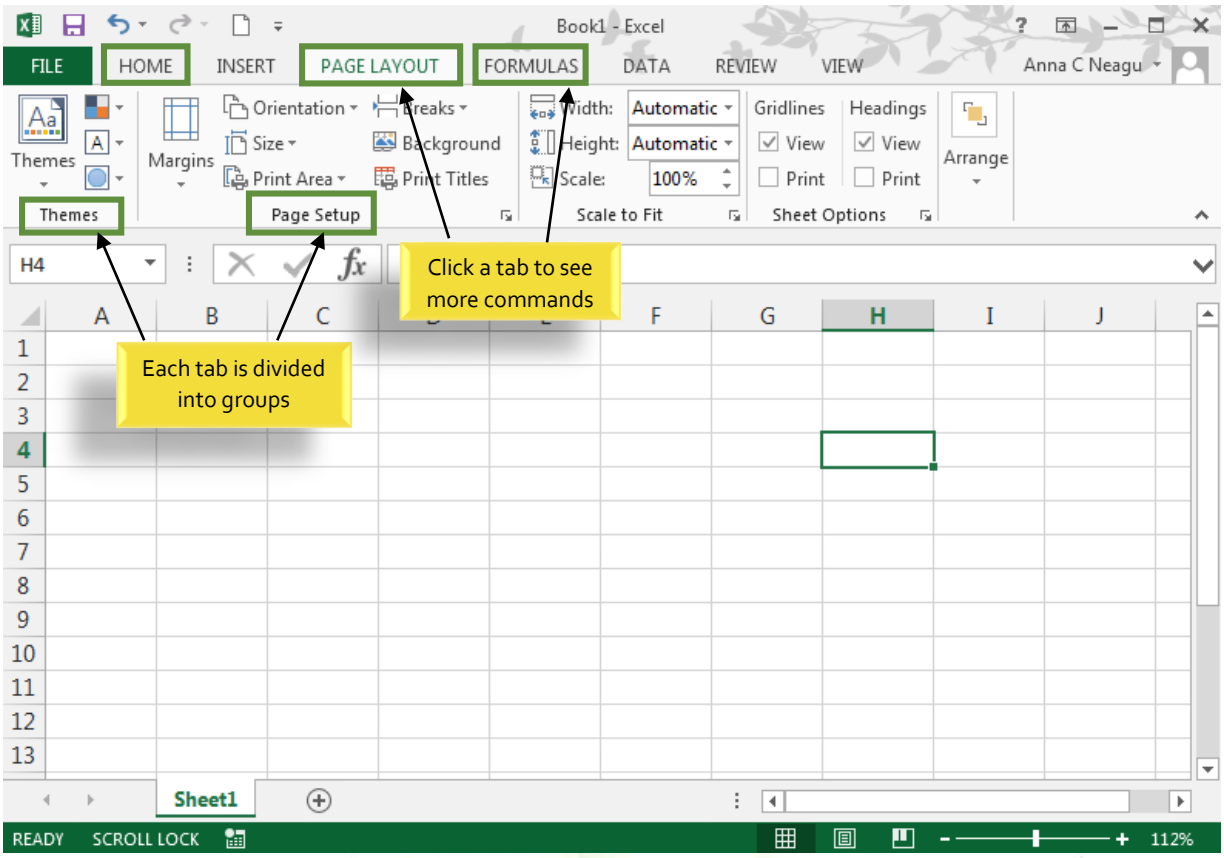


3. The command will be **added** to the Quick Access toolbar.



❑ The Ribbon

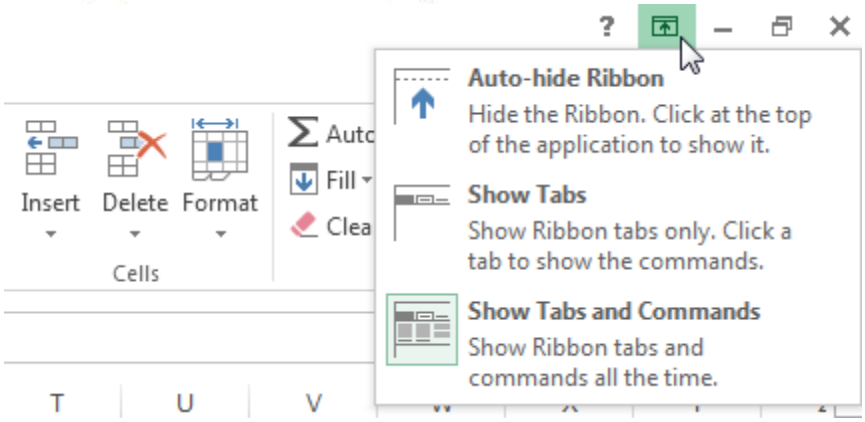
Excel 2013 uses a **tabbed Ribbon system** instead of traditional menus. **The Ribbon** contains **multiple tabs**, each with several **groups of commands**. You will use these tabs to perform the most **common tasks** in Excel.



To minimize and maximize the Ribbon

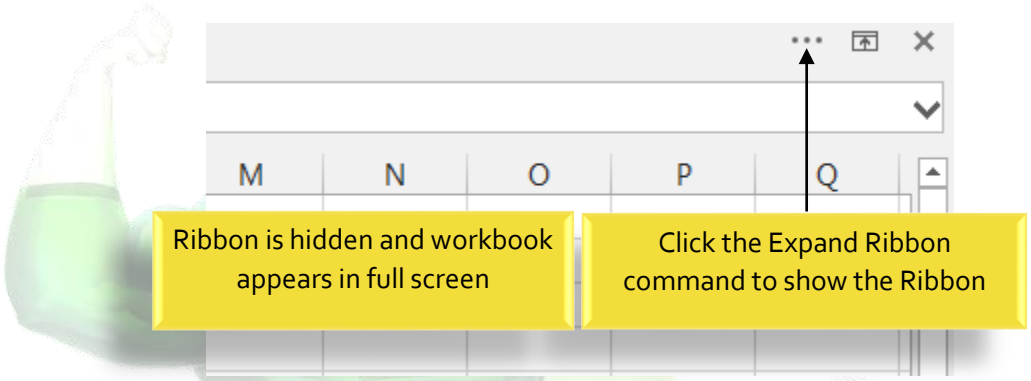
The Ribbon is designed to respond to your current task, but you can choose to **minimize** it if you find that it takes up too much screen space.

1. Click the **Ribbon Display Options** arrow in the upper-right corner of the Ribbon.



2. Select the desired **minimizing option** from the drop-down menu:

☑ **Auto-hide Ribbon:** Auto-hide displays your workbook in full-screen mode and completely hides the Ribbon. To **show the Ribbon**, click the **Expand Ribbon** command at the top of screen.



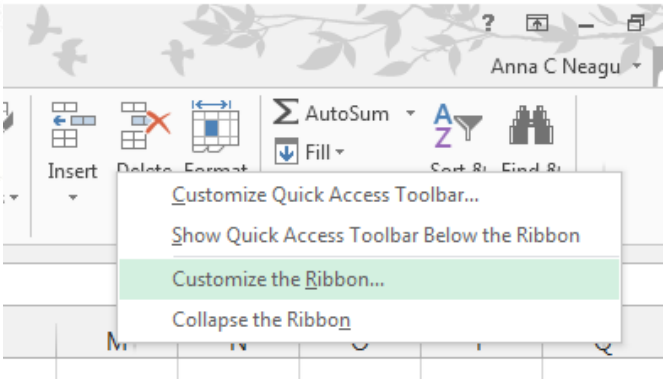
☑ **Show Tabs:** This option hides all command groups when not in use, but **tabs** will remain visible. To **show the Ribbon**, simply click a tab.

☑ **Show Tabs and Commands:** This option maximizes the Ribbon. All of the tabs and commands will be visible. This option is selected by default when you open Excel for the first time.

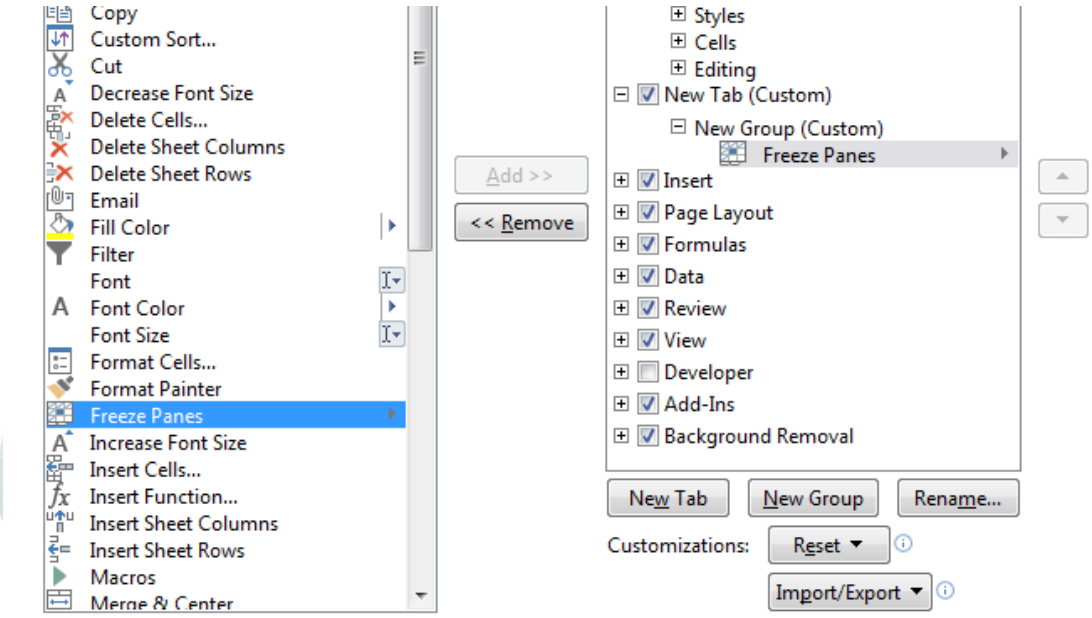
To Customize the Ribbon in Excel 2013

You can customize the Ribbon by creating your own **tabs** with whichever commands you want. Commands are always housed within a **group**, and you can create as many groups as you want in order to keep your tab organized. If you want, you can even add commands to any of the default tabs, as long as you create a custom group in the tab.

1. Right-click the **Ribbon** and then select **Customize the Ribbon…** from the drop-down menu.

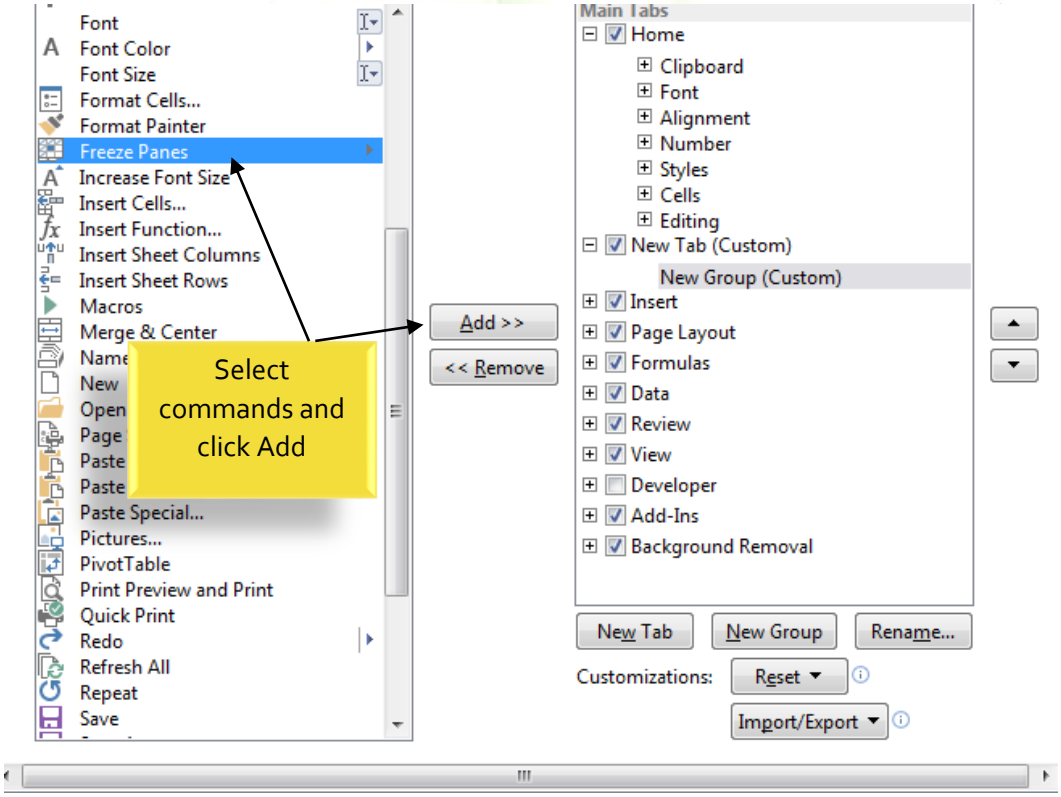


2. The **Excel Options** dialog box will appear. Locate and select **New Tab**.



3. Make sure the **New Group** is selected, select a **command**, and then click **Add**. You can also drag commands directly into a group.

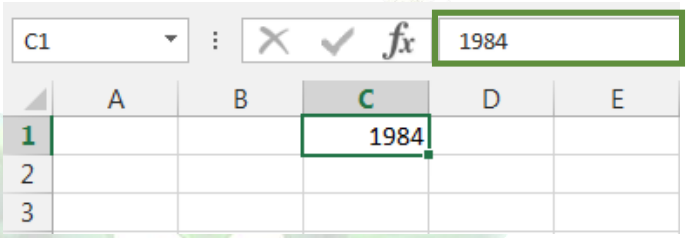
4. When you are done adding commands, click **OK**. The commands will be added to the Ribbon.



❑ The Formula Bar

In the **formula bar**, you can enter or edit **data**, a **formula**, or a **function** that will appear in a specific cell.

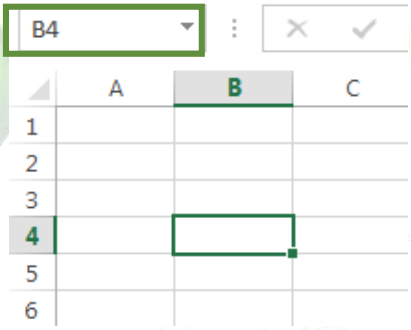
In the image below, cell C1 is selected and 1984 is entered into the formula bar. Note how the data appears in both the formula bar and in cell C1.



❑ The Name Box

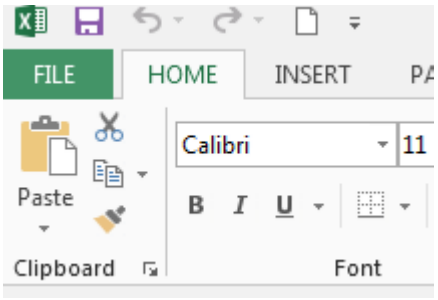
The **Name box** displays the **location**, or "**name**" of a **selected cell**.

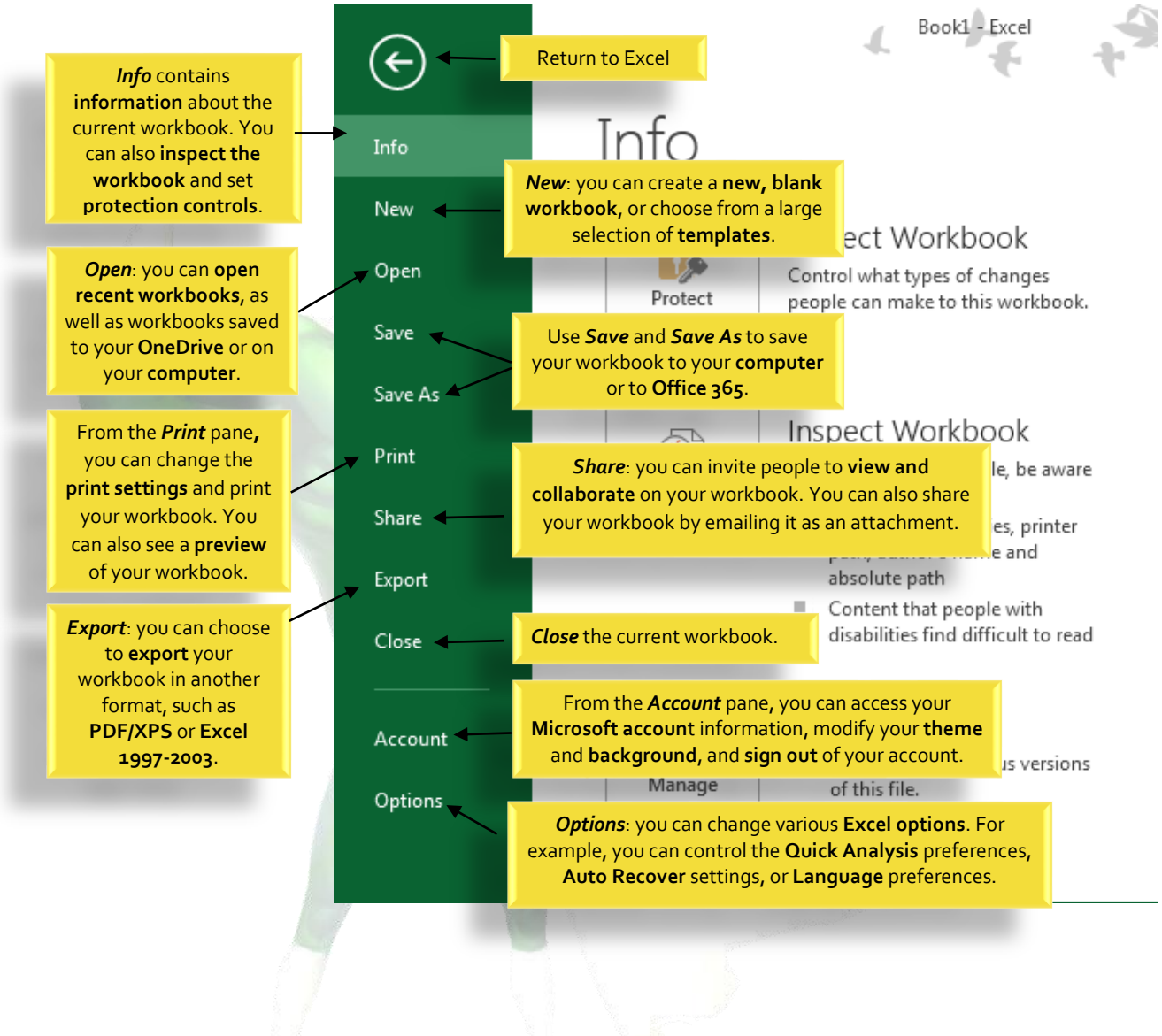
In the image below, cell B4 is selected. Note that cell B4 is where column B and row 4 intersect.



❑ The Backstage View (The File Menu)

Click the **File** tab on the **Ribbon**. **Backstage view** will appear.

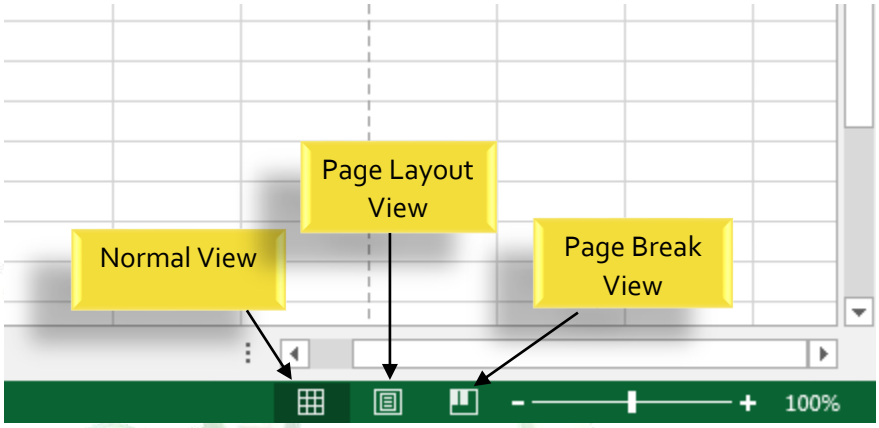




❑ The Worksheet Views

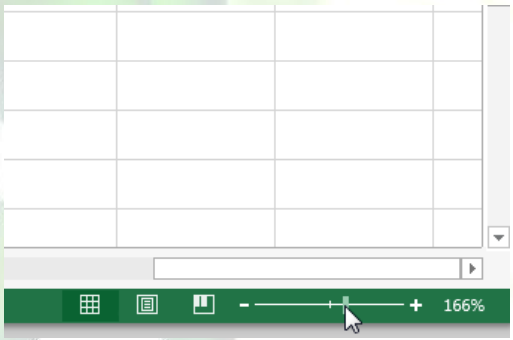
Excel 2013 has a variety of viewing options that change how your workbook is displayed. You can choose to view any workbook in **Normal view**, **Page Layout view**, or **Page Break view**. These views can be useful for various tasks, especially if you're planning to **print** the spreadsheet.

To **change worksheet views**, locate and select the desired **worksheet view command** in the bottom-right corner of the Excel window.



- ❑ Zoom Control

To use the **Zoom control, c**lick and drag the **slider**. The number to the right of the slider reflects the **zoom percentage**.



Challenge!

1. Open Excel 2013.
2. Click through all of the **tabs**, and review the **commands** on the **Ribbon**.
3. Try **minimizing** and **maximizing** the **Ribbon**.
4. Add a **command** to the **Quick Access toolbar**.
5. Navigate to **Backstage view**, and open your **Account settings**.
6. Try switching **worksheet views**.
7. **Close** Excel (you do not have to save the workbook).

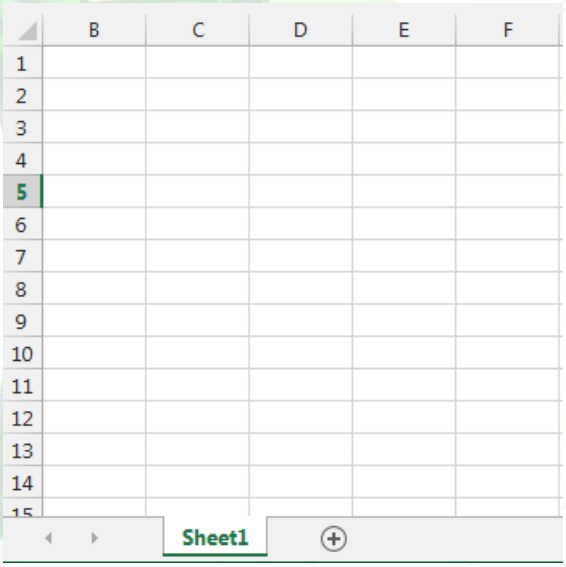
2.1.2. The Workbook Window

In Excel 2013, when you open up a new workbook it now contains only 1 worksheet There can be a max of 1,048,576 rows and 16,384 columns in an excel work sheet.

- ❑ The Worksheet

Excel files are called **workbooks**. Each workbook holds one or more **worksheets** (also known as "spreadsheets").

Whenever you create a new Excel workbook, it will contain **one worksheet** named **Sheet1**. A worksheet is a grid of columns and rows where columns are designated by letters running across the top of the worksheet and rows are designated by numbers running down the left side of the worksheet.

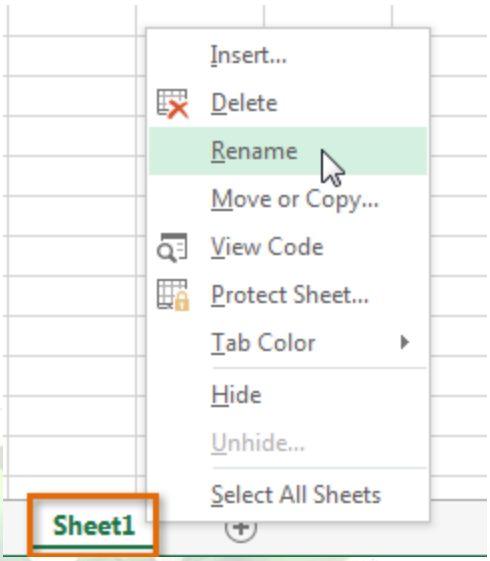


When working with a large amount of data, you can create **multiple worksheets** to help organize your workbook and make it easier to find content. You can also **group** worksheets to quickly add information to multiple worksheets at the same time.

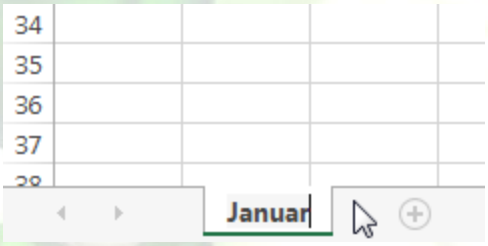
To rename a worksheet

Whenever you create a new Excel workbook, it will contain **one worksheet** named **Sheet1**. You can rename a worksheet to better reflect its content. In our example, we will create a training log organized **by month**.

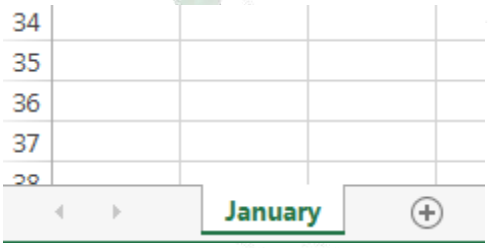
1. Right-click the **worksheet** you wish to rename, then select **Rename** from the **worksheet** menu.



2. Type the **desired name** for the worksheet.

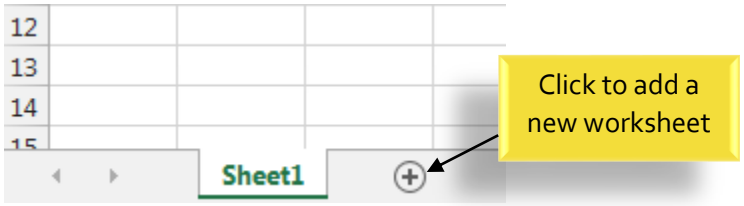


3. Click anywhere outside of the worksheet, or press **Enter** on your keyboard. The worksheet will be **renamed**.



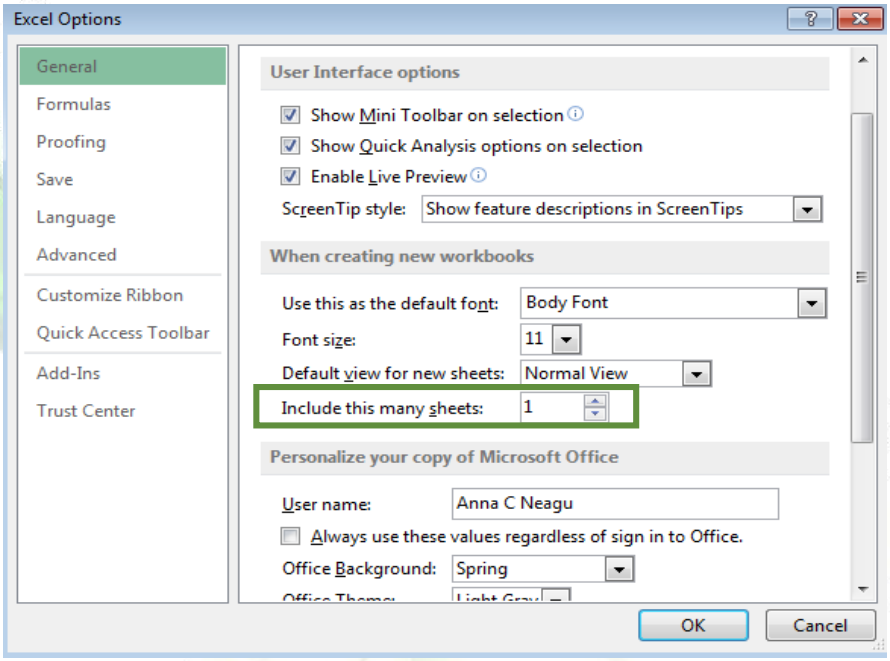
To insert a new worksheet

1. Locate and select the **New sheet** button.



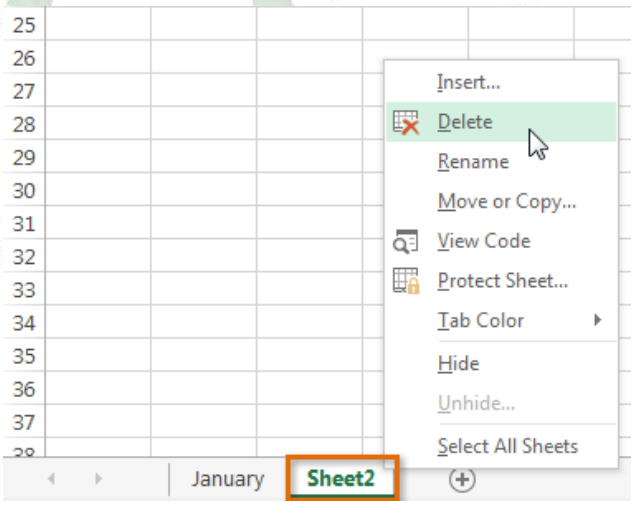
2. A **new**, **blank worksheet** will appear.

TIP: To change the **default number** of worksheets, navigate to **Backstage view**, click **Options**, and then choose the desired number of worksheets to include in each new workbook.

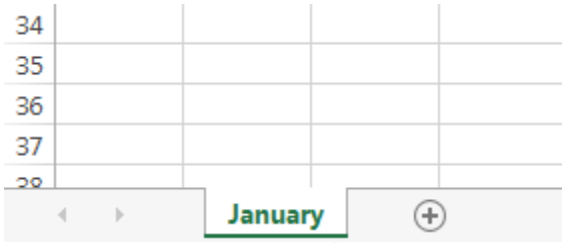


To delete a worksheet

1. Right-click the **worksheet** you wish to delete, then select **Delete** from the **worksheet** menu.



2. The worksheet will be **deleted** from your workbook.



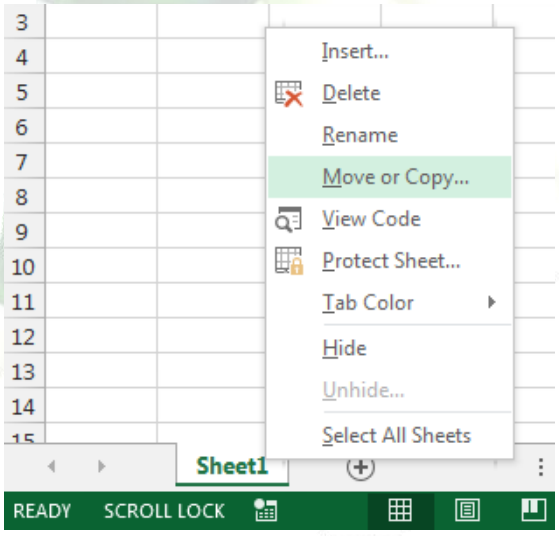
Alternatively, from the **Home Tab** in the **Cells Group** click on Delete and select **Delete Sheet**.

Warning: The Undo button will not undo the deletion of a worksheet.

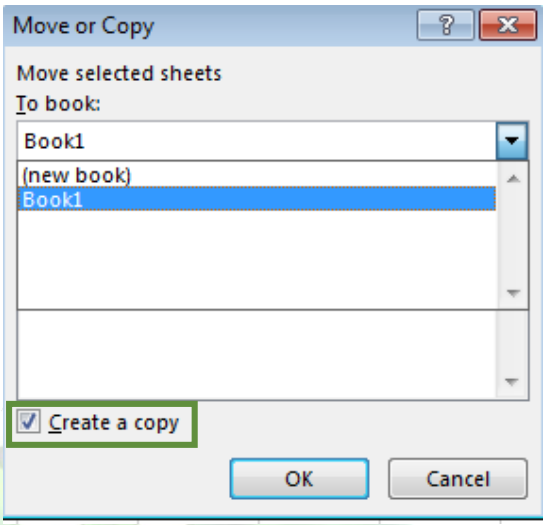
To copy a worksheet

If you need to duplicate the content of one worksheet to another, Excel allows you to copy an existing worksheet.

1. Right-click the worksheet you want to copy, then select **Move or Copy** from the **worksheet** menu.

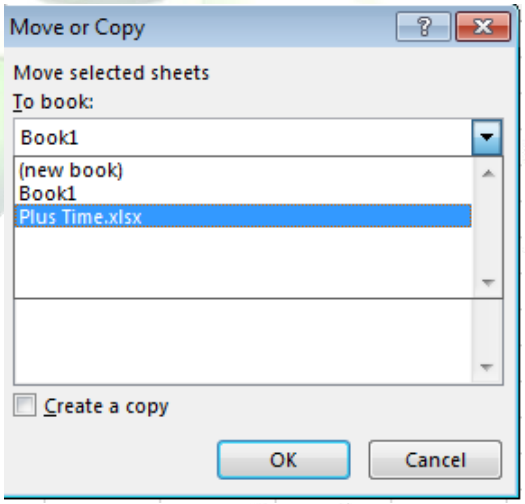


2. The **Move or Copy** dialog box will appear. Choose where the sheet will appear in the **Before sheet:** field. In our example, we'll choose **(move to end)** to place the worksheet to the right of the existing worksheet.
3. **Check the box** next to **Create a copy**, then click **OK**.



4. The worksheet will be **copied**. It will have the same title as the original worksheet, as well as a **version number**.

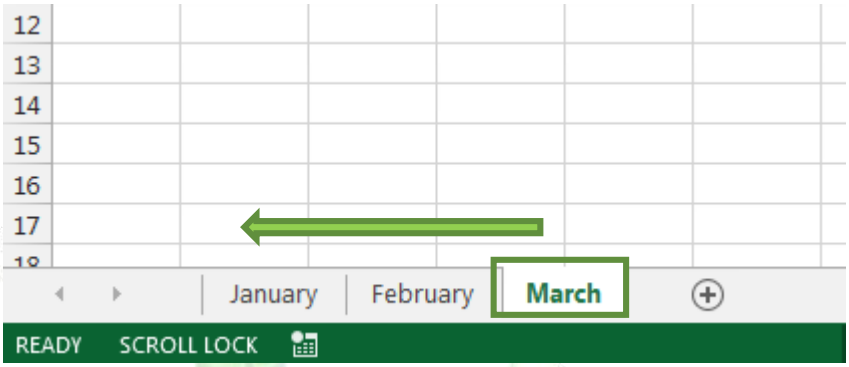
TIP: You can also copy a worksheet to an entirely different **workbook**. You can select any workbook that is currently open from the **To book:** drop-down menu.



To move a worksheet

Sometimes you may want to **move** a worksheet to rearrange your workbook.

1. Select the **worksheet** you wish to move. The cursor will become a **small worksheet** icon .
2. Hold and drag the mouse until a **small black arrow** appears above the desired location.

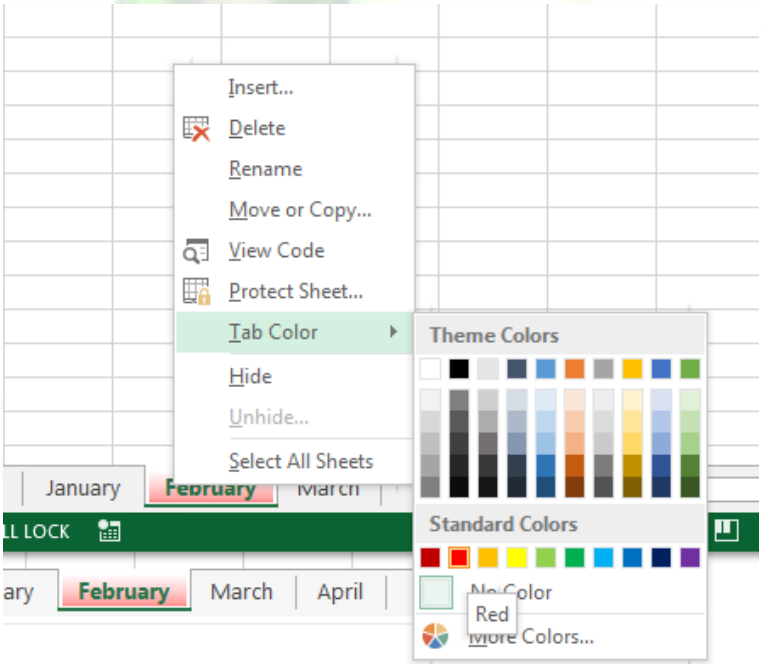


3. Release the mouse. The worksheet will be **moved**.

To change the worksheet color

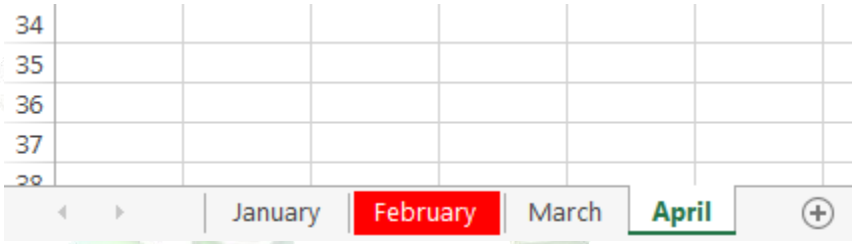
You can change a worksheet's **color** to help organize your worksheets and make your workbook easier to navigate.

1. Right-click the desired worksheet, and hover the mouse over **Tab Color**. The **Color** menu will appear.
2. Select the desired **color**. A **live preview** of the new worksheet color will appear as you hover the mouse over different options. In our example, we'll choose **Red**.



3. The worksheet color will be **changed**.

The worksheet color is considerably **less noticeable** when the worksheet is selected. Select another worksheet to see how the color will appear when the worksheet is not selected.

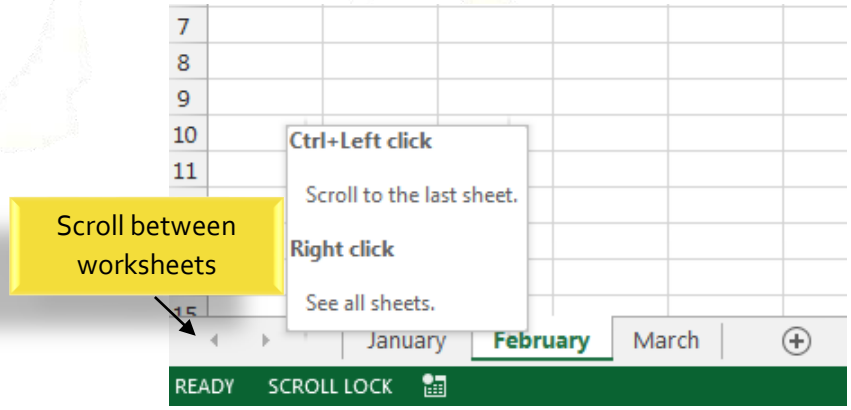


Challenge!

1. Open an existing Excel workbook.
2. **Insert** a new worksheet and **rename** it.
3. **Delete** a worksheet.
4. **Move** a worksheet.
5. **Copy** a worksheet.

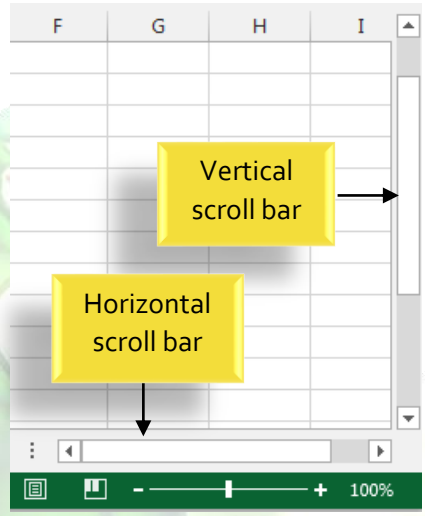
❑ The Scrolling Buttons

These buttons scroll the display of sheet tabs one at a time or to display the first and last grouping of sheet tabs and are located to the left of the sheet tabs.



❑ The Scroll Bars

Your spreadsheet may frequently have more data than you can see on the screen at once. Click, hold and drag the vertical or horizontal scroll bar depending on what part of the page you want to see.

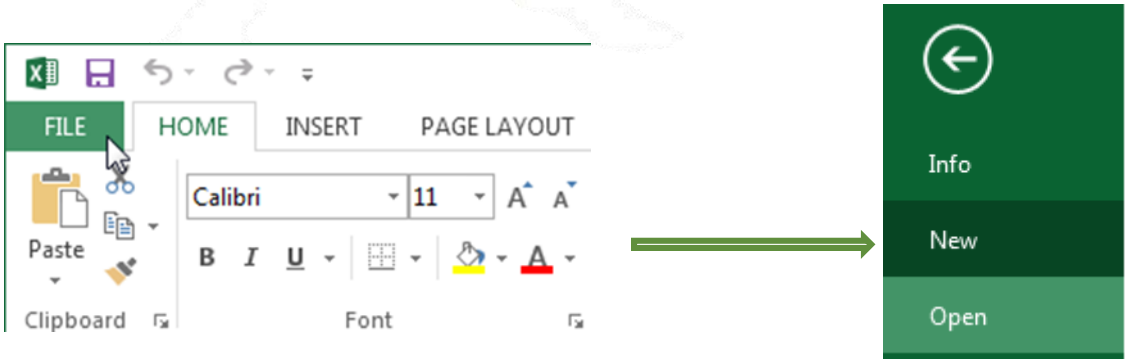


2.2. Creating and Opening Workbooks

Excel files are called **workbooks**. Whenever you start a new project in Excel, you'll need to **create a new workbook**. There are several ways to start working with a workbook in Excel 2013. You can choose to **create a new workbook**—either with a **blank workbook** or a predesigned **template**—or **open an existing** workbook.

2.2.1. Create a new blank workbook

1. Select the **File** tab. **Backstage view** will appear.

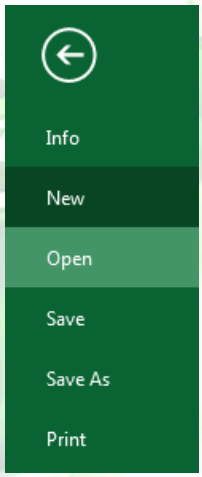


2. Select **New**, then click **Blank workbook**.
3. A new blank workbook will appear.

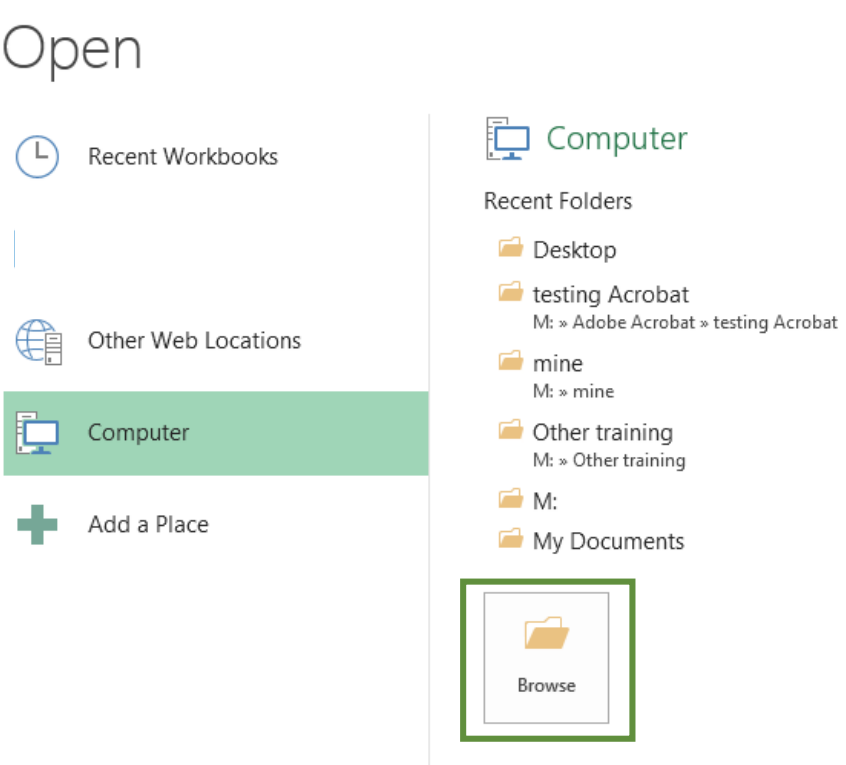
2.2.2. Open an existing workbook

In addition to creating new workbooks, you'll often need to open a workbook that was previously saved.

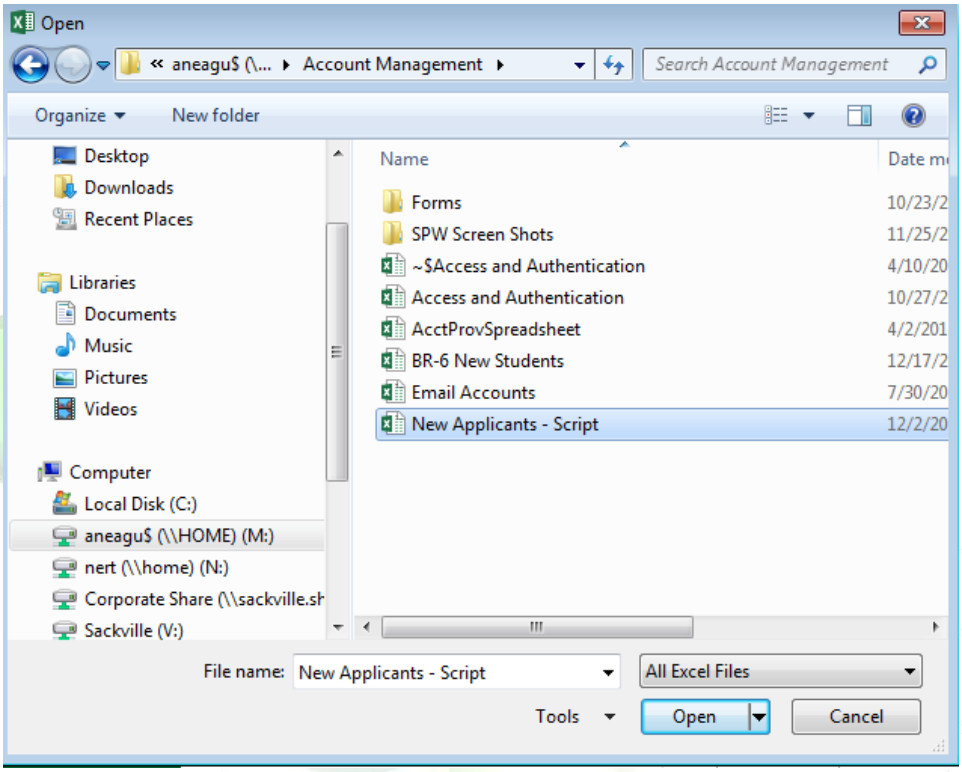
1. Navigate to **Backstage view**, then click **Open**.



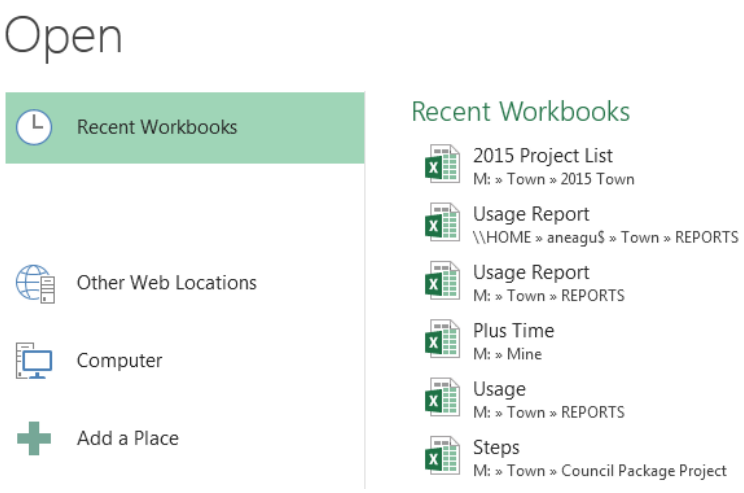
2. Select **Computer**, and then click **Browse**.



3. The **Open** dialog box will appear. Locate and select your **workbook,** then click **Open**.



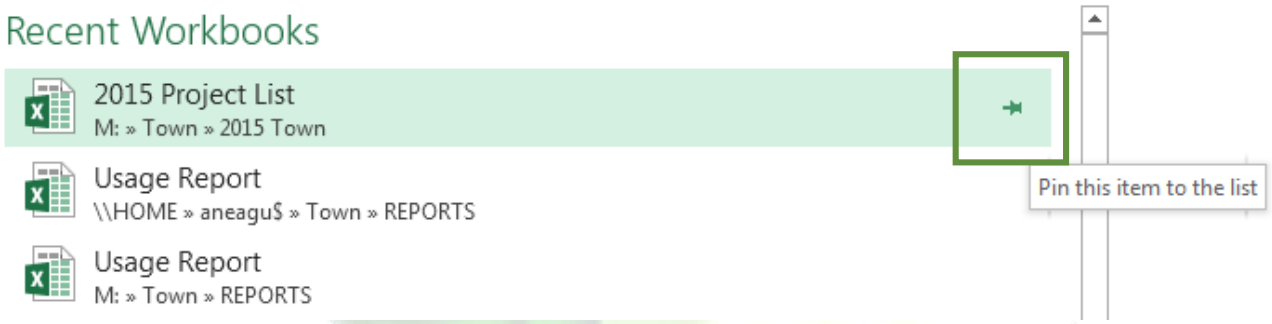
✎ TIP: If you've opened the desired workbook recently, you can browse your **Recent Workbooks** rather than searching for the file.



To pin a workbook

If you frequently work with the **same workbook**, you can **pin it** to Backstage view for quick access.

1. Navigate to **Backstage view and then c**lick **Open**. Your **recently edited workbooks** will appear.
2. Hover the mouse over the **workbook** you wish to pin. A **pushpin icon** will appear next to the workbook. Click the **pushpin icon**.

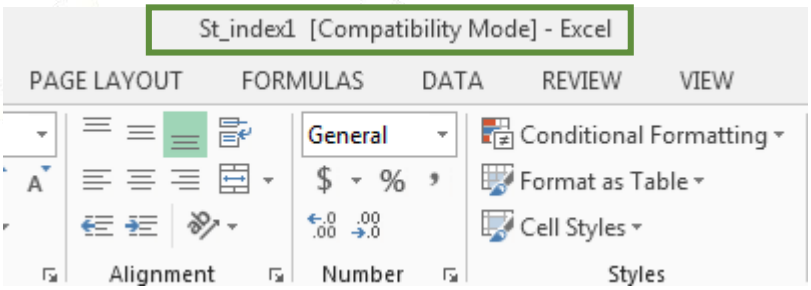


3. The workbook will stay in Recent Workbooks. To **unpin** a workbook, simply click the pushpin icon again.

TIP: You can also **pin folders** to Backstage view for quick access. From Backstage view, click **Open**, then locate the **folder** you wish to pin and click the **pushpin icon**.

2.2.3. Compatibility mode

Sometimes you may need to work with workbooks that were created in earlier versions of Microsoft Excel, such as Excel 2003 or Excel 2000. When you open these kinds of workbooks, they will appear in **Compatibility mode**.



Compatibility mode **disables** certain features, so you'll only be able to access commands found in the program that was used to create the workbook. For example, if you open a workbook created in Excel 2003, you can only use tabs and commands found in Excel 2003.

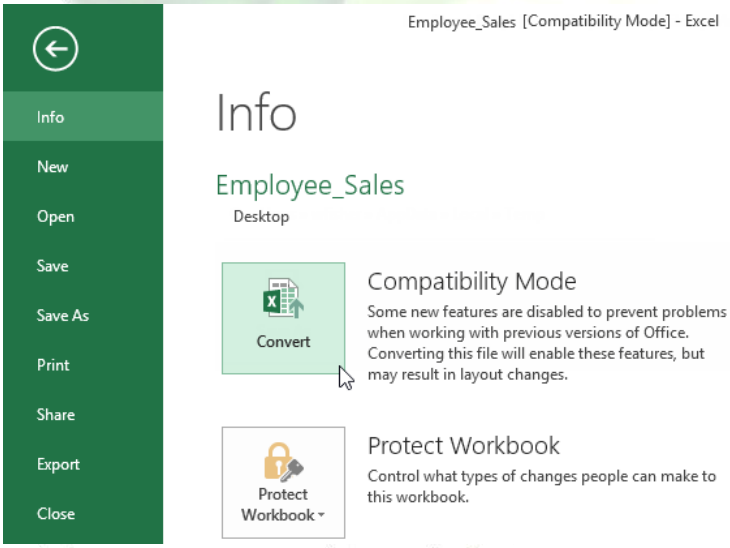
In order to exit Compatibility mode, you'll need to **convert** the workbook to the current version type. However, if you're collaborating with others who only have access to an earlier version of Excel, it's best to leave the workbook in Compatibility mode so the format will not change.

To convert a workbook

If you want access to all of the Excel 2013 features, you can **convert** the workbook to the 2013 file format.

Note that converting a file may cause some changes to the **original layout** of the workbook.

1. Click the **File** tab to access Backstage view.
2. Locate and select **Convert** command.



3. The **Save As** dialog box will appear. Select the **location** where you wish to save the workbook, enter a **file name** for the presentation, and click **Save**.
4. The workbook will be converted to the newest file type.

Challenge!

1. Create a **new blank workbook**.
2. Open an **existing workbook** from your computer.
3. **Pin** a folder to Backstage view.

2.3. Saving and Sharing Workbooks

Whenever you create a new workbook in Excel, you'll need to know how to save it in order to access and edit it later. As with previous versions of Excel, you can save files **locally** to your computer. But unlike older versions, Excel 2013 also lets you save a workbook to **the cloud** using **OneDrive**. You can also **export** and **share** workbooks with others directly from Excel.

2.3.1. Save and Save As

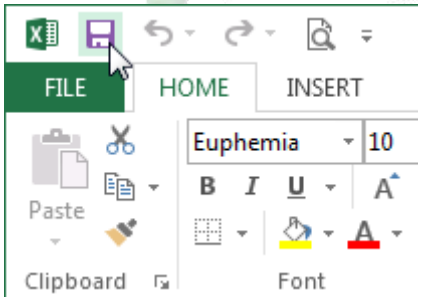
Excel offers two ways to save a file: **Save** and **Save As**. These options work in similar ways, with a few important differences:

- ☑ **Save**: When you create or edit a workbook, you'll use the **Save** command to save your changes. You'll use this command most of the time. When you save a file, you'll only need to choose a file name and location the first time. After that, you can just click the Save command to save it with the same name and location.
- ☑ **Save As**: You'll use this command to create a **copy** of a workbook while keeping the original. When you use Save As, you'll need to choose a different name and/or location for the copied version.

To save a workbook

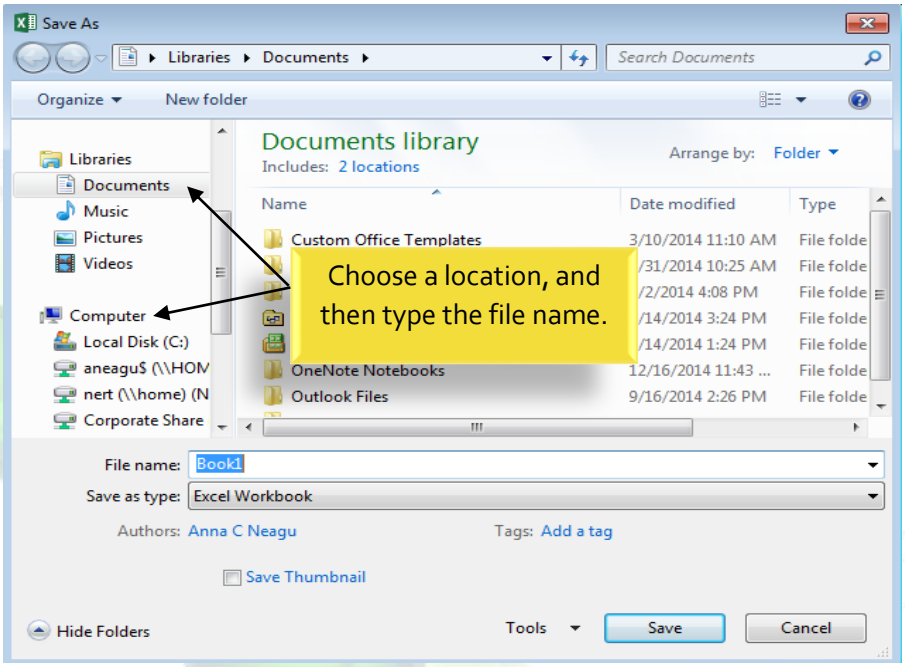
It's important to **save your workbook** whenever you start a new project or make changes to an existing one. Saving early and often can prevent your work from being lost. You'll also need to pay close attention to **where you save** the workbook so it will be easy to find later.

1. Locate and select the **Save** command on the **Quick Access Toolbar**.



2. If you're saving the file for the first time, the **Save As** pane will appear in **Backstage view**.
3. You'll then need to choose **where to save** the file and give it a **file name**. To save the workbook to your computer, select **Computer**, then click **Browse**. Alternatively, you can click **OneDrive** to save the file to your OneDrive.
4. The **Save As** dialog box will appear. Select the **location** where you wish to save the workbook.

5. Enter a **file name** for the workbook, then click **Save**.



6. The workbook will be **saved**. You can click the **Save** command again to save your changes as you modify the workbook.

Using Save As to make a copy

If you want to save a **different version** of a workbook while keeping the original, you can create a **copy**. For example, if you have a file named **"Sales Data"** you could save it as **"Sales Data 2"** so you'll be able to edit the new file and still refer back to the original version.
To do this, you'll click the **Save As** command in Backstage view. Just like when saving a file for the first time, you'll need to choose **where to save** the file and give it a new **file name**.

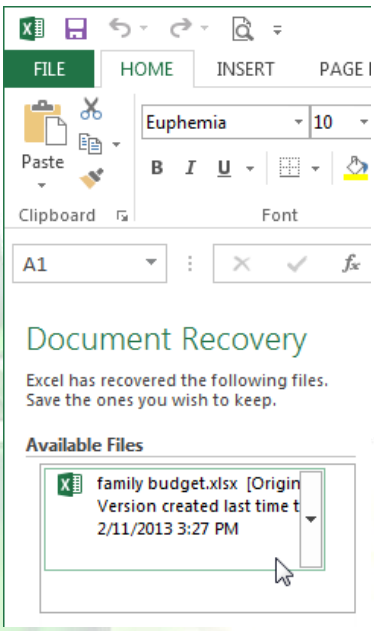
2.3.2. AutoRecover

Excel automatically saves your workbooks to a temporary folder while you are working on them. If you forget to save your changes, or if Excel crashes, you can restore the file using **AutoRecover**.

To use AutoRecover

1. Open Excel 2013. If **auto-saved versions** of a file are found, the **Document Recovery** pane will appear.

2. Click to **open** an available file. The workbook will be **recovered**.



TIP: By default, Excel autosaves **every 10 minutes**. If you are editing a workbook for less than 10 minutes, Excel may not create an autosaved version.

If you don't see the file you need, you can browse all autosaved files from **Backstage view**. Just select the **File** tab, click **Manage Versions,** and then choose **Recover Unsaved Workbooks**.

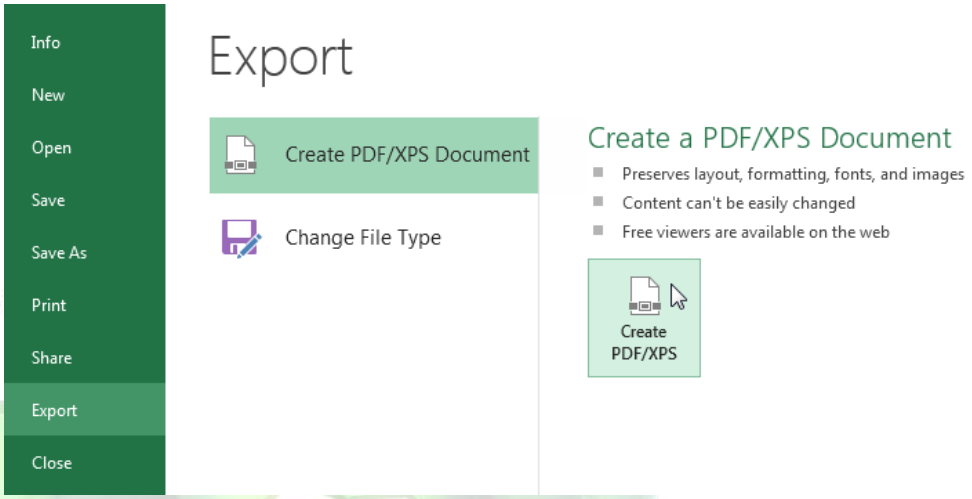
2.3.3. Exporting workbooks

By default, Excel workbooks are saved in the **.xlsx** file type. However, there may be times when you need to use **another file type,** such as a **PDF** or **Excel 97-2003 workbook**. It's easy to **export** your workbook from Excel in a variety of file types.

To export a workbook as a PDF file

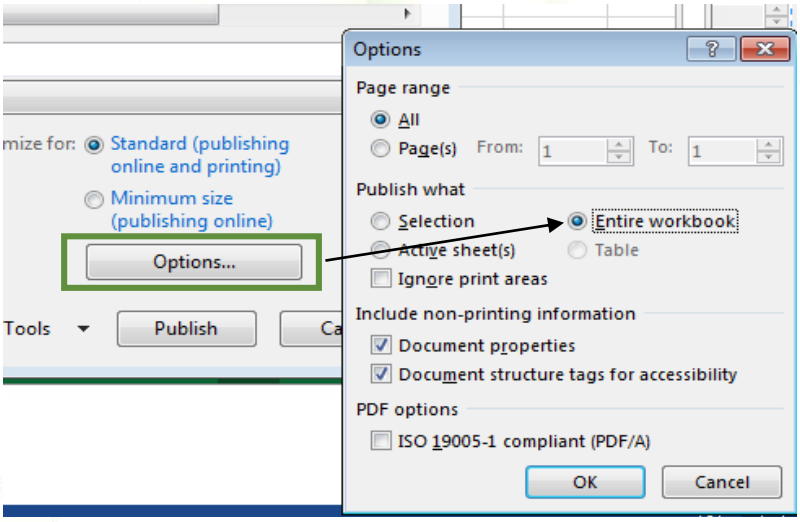
Exporting your workbook as an **Adobe Acrobat document**, commonly known as a **PDF file**, can be especially useful if sharing a workbook with someone who does not have Excel. A PDF will make it possible for recipients to view, but not edit, the content of your workbook.

1. Click the **File** tab to access **Backstage view**.
2. Click **Export**, then select **Create PDF/XPS**.



3. The **Save As** dialog box will appear. Select the **location** where you wish to export the workbook, enter a **file name**, and then click **Publish.**

TIP: By default, Excel will only export the **active worksheet**. If you have multiple worksheets and want to save all of them in the same PDF file, click **Options** in the **Save as** dialog box. The **Options** dialog box will appear. Select **Entire workbook**, then click **OK**.



To export a workbook in other file types

You may also find it helpful to export your workbook in other file types, such as an **Excel 97-2003 Workbook** if you need to share with people using an older version of Excel, or a **.CSV file** if you need a **plain-text version** of your workbook.