Lesson 2: Working with MS Excel 2013

# Step-by-Step 1 – Create A Workbook from Scratch

**GET READY. LAUNCH Excel. Excel gives you options for starting a blank workbook, taking a tour, or using templates.**

**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 the definition of formula bar in the “Editing a Cell’s Contents” section on page 37.

**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.

**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.**

# Step-by-Step 2 – 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. Each of the open workbooks appears in a preview window. When you move the mouse pointer over each workbook, it previews on the screen.



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

## Step-by-Step 3 – Name and Save a Workbook

**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.

**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.

**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.**

# Step-by-Step 7 – 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**. You may need to sign in to SkyDrive if you haven’t already.

**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.**

# Step-by-Step 8 – 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 is Excel Lesson 2 on your SkyDrive, because it was the folder that was last used to save a workbook.

**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.

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

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

# Step-by-Step 9 – 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 opens.

**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.

**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.

# Step-by-Step 10 – 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.

**3.** Click the **Create PDF/XPS Document** option. Figure 2-11 shows the reason for using this 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.

**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.**

# Step-by-Step 11 – 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.

*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.*

**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****.*

**PAUSE. LEAVE the workbook open for the next lesson.**

# Step-by-Step 12 – 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. The mouse pointer changes to a 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.

*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.

**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.**

# Step-by-Step 13 – 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*.

**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.

**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.

*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.*

**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. All cells on the worksheet are selected.

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

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

# Step-by-Step 14 – Delete and Clear a Cell’s Contents

**GET READY. OPEN a blank workbook.**

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

**2.** Type **2** and press **Enter**.

**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**.

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

*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.**

# Step-by-Step 15 – Enter Labels and Use AutoComplete

**GET READY. OPEN a blank workbook.**

*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**. 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.

**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.

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

# Step-by-Step 16 – 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.

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

# Step-by-Step 17 – 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. You apply a consistent date format in the next section.

**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.

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

# Step-by-Step 18 – Fill a Series with Auto Fill

**GET READY. USE the workbook from the previous exercise.**

**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.

**3.** From the menu, click **right**. The contents of C4 (January) are filled into all the cells.

**4.** Click the **Undo** button.

**5.** Select the range **C9:C13** and click the **Fill** button. Choose **Down**. The content of C9 is copied into the four additional cells.

**6.** Click the **Undo** button.

**7.** Click cell **C4**, point to the fill handle in the lower-right corner of the cell, and drag it to E4 and release. The Auto Fill Options button appears, and January through March are displayed.

**8.** 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.

**9.** Click the **Auto Fill Options** button, and choose **Fill Formatting Only** from the list that appears. All the numbers return to their previous values and are formatted with dollar signs and commas.

**10.** Repeat Steps 8 and 9 for the range **B5:B9**.

**11.** Click cell **A9**, and then drag the fill handle down to **A15**. Ryan Calafato’s name is repeated.

**12.** Click the **Undo** button to return the spreadsheet to its previous state.

**13.** SAVE the workbook as ***02 Fabrikam Sales Solution***.

**PAUSE. CLOSE Excel.**

# Step-by-Step 19 – 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.

**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.**

# Step-by-Step 20 – Copy a Data Series with a 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.

*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.*

**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.

# Step-by-Step 21 – Move a Data Series with the Mouse

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

**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 on page 52.

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

# Step-by-Step 22 – Copy and Paste Data

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

**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.

**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.

# Step-by-Step 23 – 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.**

# Step-by-Step 24 – 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.

**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**.

**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.**