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**VISUALLY**™

Microsoft®

# Excel® 2013

The Fast and Easy Way to Learn



Paul McFedries



*Teach Yourself*  
**VISUALLY™**

Excel® 2013



Paul McFedries



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## Teach Yourself VISUALLY™ Excel® 2013

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**Paul McFedries** is a full-time technical writer. He has been authoring computer books since 1991 and has more than 80 books to his credit. Paul's books have sold more than four million copies worldwide. These books include the Wiley titles *Teach Yourself VISUALLY Windows 8*, *Windows 8 Visual Quick Tips*, *The Facebook Guide for People Over 50*, *iPhone 5 Portable Genius*, and *iPad and iPad mini Portable Genius*. Paul is also the proprietor of Word Spy ([www.wordspy.com](http://www.wordspy.com)), a website that tracks new words and phrases as they enter the language. Paul invites you to drop by his personal website at [www.mcfedries.com](http://www.mcfedries.com) or follow him on Twitter @paulmcf and @wordspy.

## Author's Acknowledgments

It goes without saying that writers focus on text, and I certainly enjoyed focusing on the text that you will read in this book. However, this book is more than just the usual collection of words and phrases designed to educate and stimulate the mind. A quick thumb through the pages will show you that this book is also chock-full of treats for the eye, including copious screenshots, beautiful colors, and sharp fonts. Those sure make for a beautiful book, and that beauty comes from a lot of hard work by Wiley's immensely talented group of designers and layout artists. They are all listed in the Credits section on the previous page and I thank them for creating another gem. Of course, what you read in this book must also be accurate, logically presented, and free of errors. Ensuring all of this was an excellent group of editors with whom I got to work directly, including project editor Lynn Northrup, copy editor Marylouise Wiack, and technical editor Namir Shammas. Thanks to all of you for your exceptional competence and hard work. Thanks, as well, to Wiley executive editor Jody Lefever for asking me to write this book.

# How to Use This Book

## Who This Book Is For

This book is for the reader who has never used this particular technology or software application. It is also for readers who want to expand their knowledge.

## The Conventions in This Book

### 1 Steps

This book uses a step-by-step format to guide you easily through each task. **Numbered steps** are actions you must do; **bulleted steps** clarify a point, step, or optional feature; and **indented steps** give you the result.

### 2 Notes

Notes give additional information — special conditions that may occur during an operation, a situation that you want to avoid, or a cross-reference to a related area of the book.

### 3 Icons and Buttons

Icons and buttons show you exactly what you need to click to perform a step.

### 4 Tips

Tips offer additional information, including warnings and shortcuts.

### 5 Bold

**Bold** type shows command names or options that you must click or text or numbers you must type.

### 6 Italics

*Italic* type introduces and defines a new term.

### Adjust the Workbook Margins

CHAPTER 10  
Printing Workbooks

You get more space on the printed page to display your worksheet data by using smaller page margins. The margins are the blank areas that surround the printed data. For example, if you find that Excel is printing extra pages because your data is a bit too wide or a bit too long to fit on a single page, you can reduce either the left and right margins or the top and bottom margins.

If you or another person will be writing notes on the printouts, consider using wider margins to allow more room for the notes.

#### Adjust the Workbook Margins

**Using the Ribbon**

- 1 Open the workbook you want to print.
- 2 Click the **Page Layout** tab.
- 3 Click **Margins** (¶).
- 4 If you see a margin setting you want to use, click the setting and skip the rest of these steps.
- 4 Click **Custom Margins**.

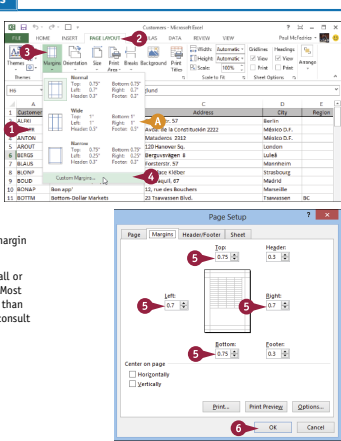
The Page Setup dialog box appears with the Margins tab selected.

- 5 Use the spin boxes to specify the margin sizes in inches.

**Note:** Do not make the margins too small or your document may not print properly. Most printers cannot handle margins smaller than about 0.25 inch, although you should consult your printer manual to confirm this. In particular, see if your printer offers a “borderless” printing option.

- 6 Click **OK**.

Excel adjusts the margin sizes.

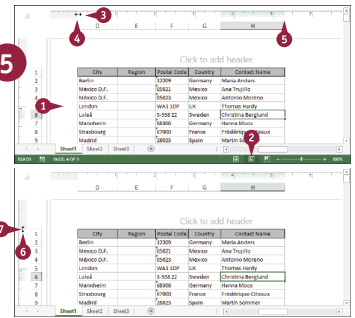


**Using the Ruler**

- 1 Open the workbook you want to print.
- 2 Click **Page Layout** (¶).
- 3 Move the **I** over the right edge of the ruler's left margin area (I changes to ←→).
- 4 Click and drag the edge of the margin to set the left margin width.
- 5 Click and drag the left edge of the right margin area to set the margin width.
- 6 Move the **I** over the bottom edge of the ruler's top margin area (I changes to ↑↓).
- 7 Click and drag the edge of the margin to set the top margin width.
- 8 Click and drag the top edge of the bottom margin area (not shown) to set the bottom margin width.

**Note:** You need to scroll down to the bottom of the page to see the bottom margin.

Excel adjusts the margin sizes.



**TIPS**

I increased my margin sizes to get more room around the text. Is there a way to center the text on the page?

Yes. This is a good idea if you want to ensure that you have the same amount of whitespace above and below the text, and to the left and right of the text. Follow Steps 1 to 4 in the “Using the Ribbon” subsection to open the Page Setup dialog box with the Margins tab selected. Click **Horizontally** (☐) changes to (☑), click **Vertically** (☐) changes to (☑), and then click **OK**.

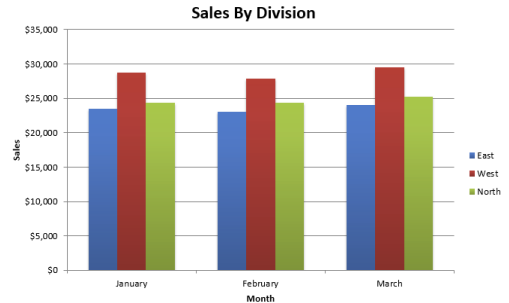
**What are the header and footer margins?**

The header margin is the space between the workbook header and the top of the page, and the footer margin is the space between the workbook footer and the bottom of the page. (See Chapter 9 to learn how to add a header and footer to your workbook.) In the Margins tab of the Page Setup dialog box, use the **Header** and **Footer** spin boxes to set these margins.

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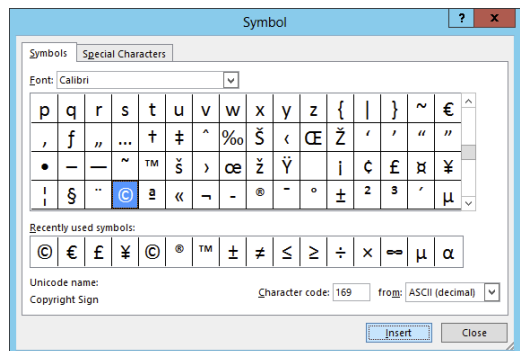
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	A	B	C	D	E
1	<b>Full Name</b>	<b>First Name</b>	<b>Position</b>	<b>Phone</b>	
2	Maria Anders	Maria	Sales Representative	3175559876	
3	Ana Trujillo	Ana	Owner	3175558394	
4	Antonio Moreno	Antonio	Owner	3175559384	
5	Thomas Hardy	Thomas	Sales Representative	3175553826	
6	Christina Berglund	Christina	Order Administrator	3175552288	
7	Hanna Moos	Hanna	Sales Representative	3175552098	
8	Frédérique Citeaux	Frédérique	Marketing Manager	3175552765	
9	Martin Sommer	Martin	Owner	3175551111	
10	Laurence Leblan	Laurence	Owner	3175553373	
11	Elizabeth Lincoln	Elizabeth	Accounting Manager	3175552345	
12	Victoria Ashworth	Victoria	Sales Representative	3175550864	
13	Patricio Simpson	Patricio	Sales Agent	3175552468	
14	Francisco Chang	Francisco	Marketing Manager	3175551331	
15					

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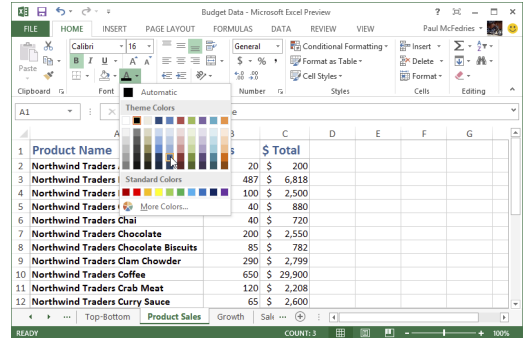
Name	Value	Refers To	Scope	Comment
Down_Payment		=Mortgage Paydo...	Workbo...	
ExtraPayment		=Mortgage Paydo...	Workbo...	
House_Price		=Mortgage Paydo...	Workbo...	
OriginalRate	{...}	=C:\Z\Writing\Exc...	Workbo...	
OriginalTerm	{...}	=C:\Z\Writing\Exc...	Workbo...	
PaymentWithExc...	#REF!	=Mortgage Paydo...	Workbo...	
Principal		=Mortgage Paydo...	Workbo...	
Rate	#REF!	=Mortgage Paydo...	Workbo...	
RegularPayment	#REF!	=Mortgage Paydo...	Workbo...	
RevisedTerm	#REF!	=Mortgage Paydo...	Workbo...	
Scenario1	{Interest Rate (Ann...	=Loan Payment An...	Workbo...	
Scenario2	{Interest Rate (Ann...	=Loan Payment An...	Workbo...	

Refers to:  
 =Mortgage Paydown Analysis!#REF!

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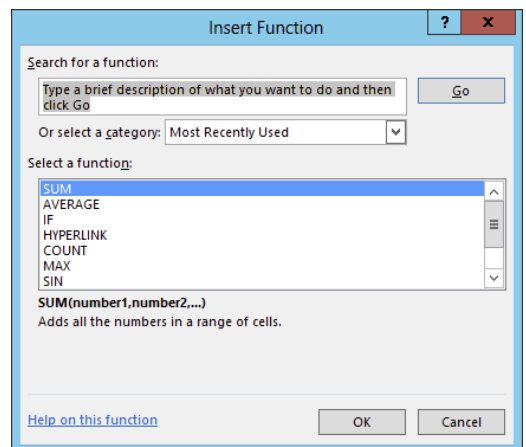
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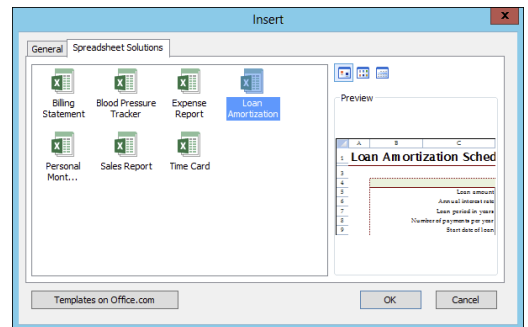
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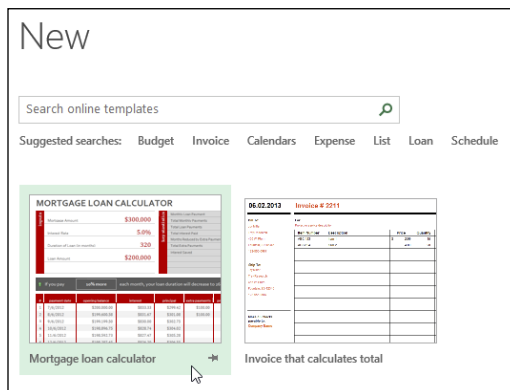
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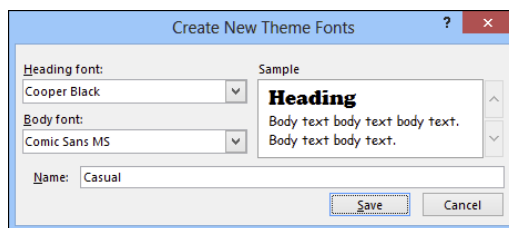
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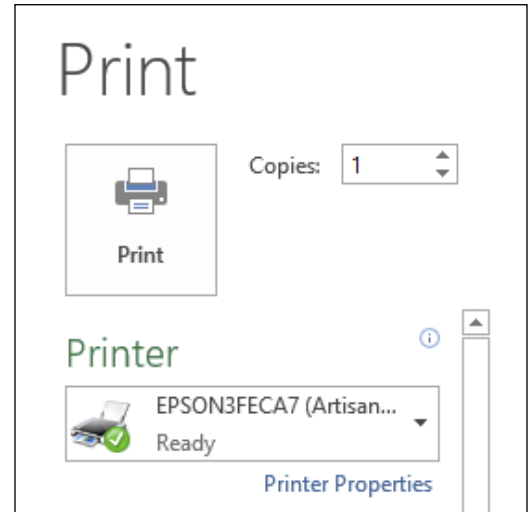
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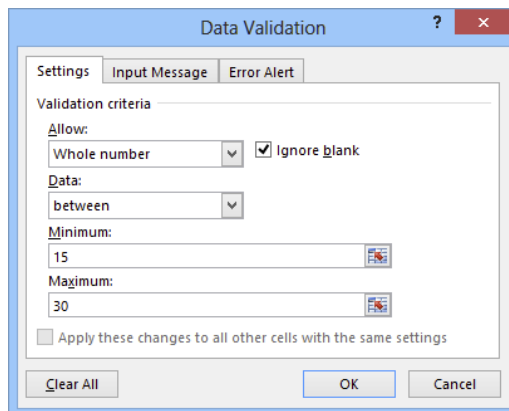
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Parts Database							
Division	Description	Number	Quantity	Cost	Total Cost	Retail	Gross Margin
4	Gangley Pliers	D-178	57	\$10.47	\$596.79	\$17.95	71%
3	H/CAB Washer	A-201	856	\$0.12	\$102.72	\$0.25	108%
3	Finley Sprocket	C-098	357	\$1.57	\$560.49	\$2.95	88%
2	6" Sonotube	B-111	86	\$15.24	\$1,310.64	\$19.95	31%
4	Langstrom 7" Wrench	D-017	75	\$18.69	\$1,401.75	\$27.95	50%
3	Thompson Socket	C-321	298	\$3.11	\$926.78	\$5.95	91%
1	S-Joint	A-182	155	\$6.85	\$1,061.75	\$9.95	45%
2	LAMF Valve	B-047	482	\$4.01	\$1,932.82	\$6.95	73%

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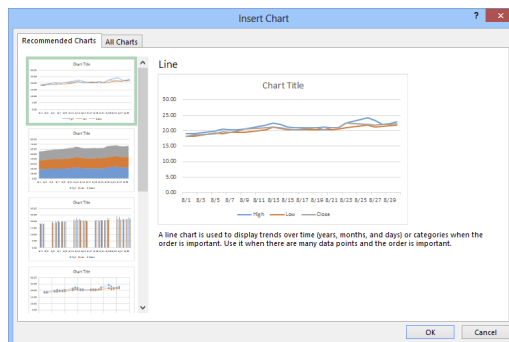
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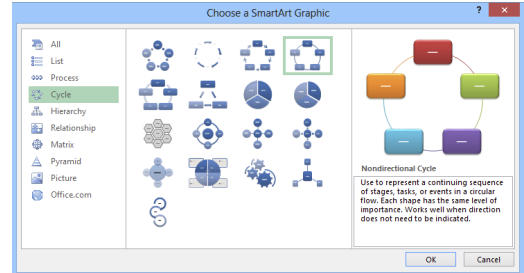
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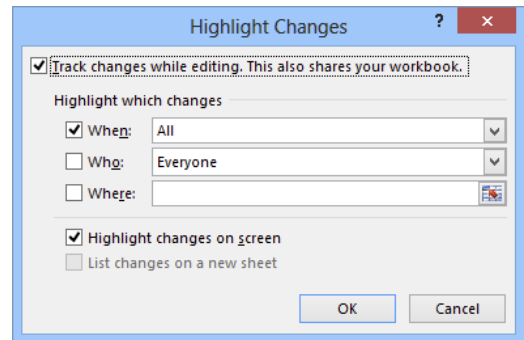
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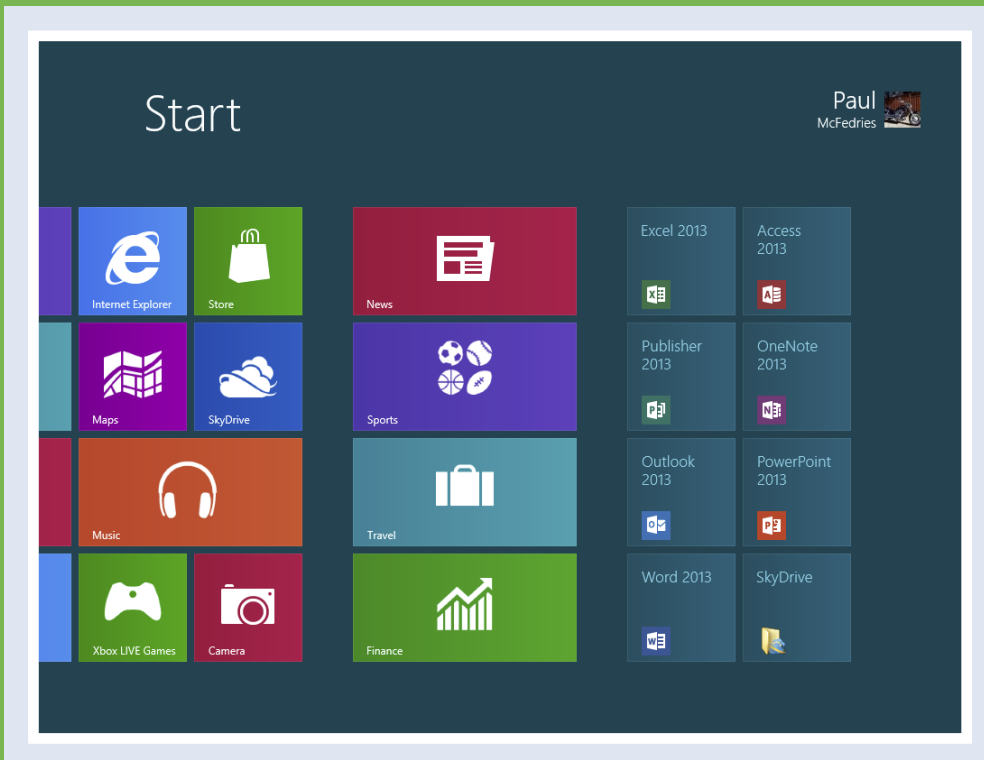


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# CHAPTER 1

# Working with Excel

You use Microsoft Excel to create *spreadsheets*, which are documents that enable you to manipulate numbers and formulas to quickly create powerful mathematical, financial, and statistical models. In this chapter you learn about Excel, take a tour of the program's features, and learn how to customize some aspects of the program.





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# Getting to Know Excel

Working with Excel involves two basic tasks: building a spreadsheet and then manipulating the data on the spreadsheet. Building a spreadsheet involves adding data such as numbers and text, creating formulas that run calculations, and adding functions that perform specific tasks. Manipulating spreadsheet data involves calculating totals, adding data series, organizing data into tables, and visualizing data with charts.

This section just gives you an overview of these tasks. You learn about each task in greater detail as you work through the book.

## Build a Spreadsheet

### Add Data

You can insert numbers, text, and other characters into any cell in the spreadsheet. Click the cell that you want to work with and then type your data in the formula bar. This is the large text box above the column letters. Your typing appears in the cell that you selected. When you are done, press Enter. To edit existing cell data, click the cell and then edit the text in the formula bar.


1	Expense Budget Calculation			
2				
3		January	February	March
4	Advertising	4,600	4,200	5,200
5	Rent	2,100	2,100	2,100
6	Supplies	1,300	1,200	1,400
7	Salaries	16,000	16,000	16,500
8	Utilities	500	600	600
9				

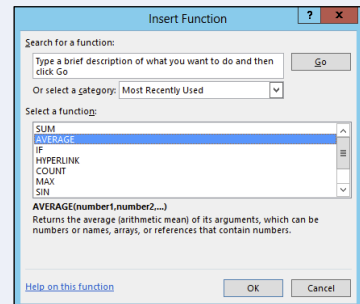
### Add a Formula

A *formula* is a collection of numbers, cell addresses, and mathematical operators that performs a calculation. In Excel, you enter a formula in a cell by typing an equal sign (=) and then the formula text. For example, the formula =B1-B2 subtracts the value in cell B2 from the value in cell B1.

1	Expense Budget Calculation			
2				
3		January	February	March
4	Advertising	4,600	4,200	5,200
5	Rent	2,100	2,100	2,100
6	Supplies	1,300	1,200	1,400
7	Salaries	16,000	16,000	16,500
8	Utilities	500	600	600
9	2012 TOTAL	24,500	24,100	25,800
10				
11				

### Add a Function

A *function* is a predefined formula that performs a specific task. For example, the AVERAGE function calculates the average of a list of numbers, and the PMT function calculates a loan or mortgage payment. You can use functions on their own, preceded by =, or as part of a larger formula. Click **Insert Function** (  ) to see a list of the available functions.



## Manipulate Data

### Calculate Totals Quickly

If you just need a quick sum of a list of numbers, click a cell below the numbers and then click the **Sum** button ( $\Sigma$ ), which is available in the Home tab of the Excel Ribbon. You can also select the cells that you want to sum, and their total appears in the status bar.

	A	B	C	D
1	<b>Sales By Division</b>			
2		<b>January</b>	<b>February</b>	<b>March</b>
3	<b>East</b>	\$23,500	\$23,000	\$24,000
4	<b>West</b>	\$28,750	\$27,900	\$29,500
5	<b>North</b>	\$24,400	\$24,300	\$25,250
6		=SUM(B3:B5)		
7				

### Fill a Series

Excel enables you to save time by completing a series of values automatically. For example, if you need to enter the numbers 1 to 100 in consecutive cells, you can enter just the first few numbers, select the cells, and then click and drag the lower-right corner to fill in the rest of the numbers. With Excel you can also fill in dates, as well as the names for weekdays and months.

	A	B	C
1	January 1, 2013		
2	January 2, 2013		
3	January 3, 2013		
4	January 4, 2013		
5	January 5, 2013		
6	January 6, 2013		
7	January 7, 2013		
8	January 8, 2013		
9	January 9, 2013		
10	January 10, 2013	January 10, 2013	
11			

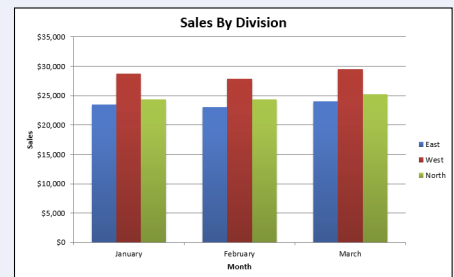
### Manage Tables

The row-and-column format of a spreadsheet makes Excel suitable for simple databases called *tables*. Each column becomes a field in the table, and each row is a record. You can sort the records, filter the records to show only certain values, and add subtotals.

	Account Name	Account Number	Invoice Number	Invoice Amount	Due Date
4	Door Stoppers Ltd.	01-0045	117328	\$58.50	2/2/2013
5	Door Stoppers Ltd.	01-0045	117319	\$78.85	1/16/2013
6	Door Stoppers Ltd.	01-0045	117324	\$101.01	1/26/2013
7	Door Stoppers Ltd.	01-0045	117333	\$1,685.74	2/11/2013
8	Chimera Illusions	02-0200	117334	\$303.65	2/12/2013
9	Chimera Illusions	02-0200	117350	\$456.21	3/15/2013
10	Chimera Illusions	02-0200	117345	\$588.88	3/6/2013
11	Chimera Illusions	02-0200	117318	\$3,005.14	1/14/2013
12	Renaud & Son	07-0025	117331	\$565.77	2/8/2013
13	Renaud & Son	07-0025	117359	\$1,125.75	4/9/2013
14	Renaud & Son	07-0025	117335	\$3,005.14	2/13/2013

### Add a Chart

A *chart* is a graphic representation of spreadsheet data. As the data in the spreadsheet changes, the chart also changes to reflect the new numbers. Excel offers a wide variety of charts, including bar charts, line charts, and pie charts.



# Start Excel

Before you can perform tasks such as adding data and building formulas, you must first start Excel. This brings the Excel window onto the Windows desktop, and you can then begin using the program. How you start Excel depends on which version of Windows you are using. In this section, you learn how to start Excel 2013 in Windows 8 and in Windows 7.

This task and the rest of the book assume that you have already installed Excel 2013 on your computer.

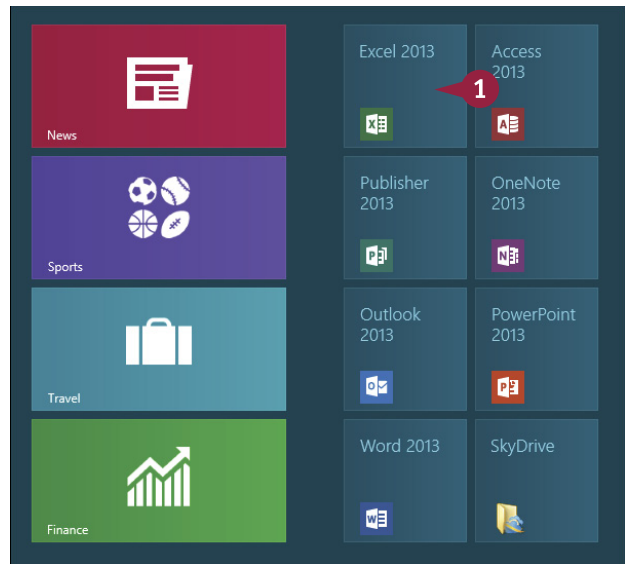
## Start Excel

### Start Excel in Windows 8

- 1 In the Windows 8 Start screen, click **Excel 2013**.

The Microsoft Excel window appears on the desktop.

**Note:** Click **Blank workbook** to open a new Excel file.



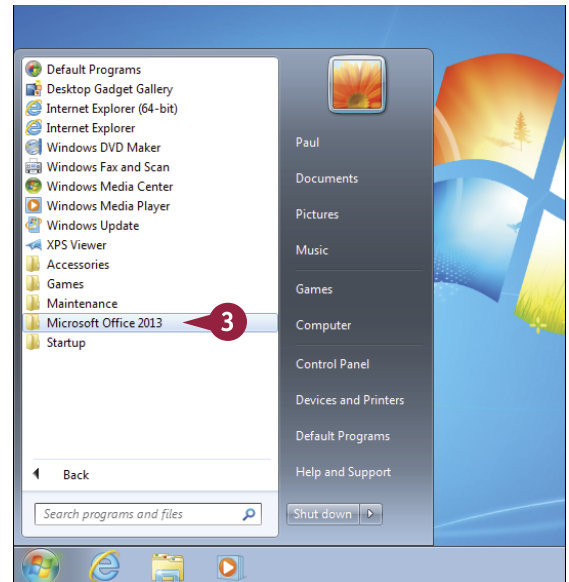
### Start Excel in Windows 7

- 1 Click **Start**.  
The Start menu appears.
- 2 Click **All Programs**.



The All Programs menu appears.

- 3 Click **Microsoft Office 2013**.

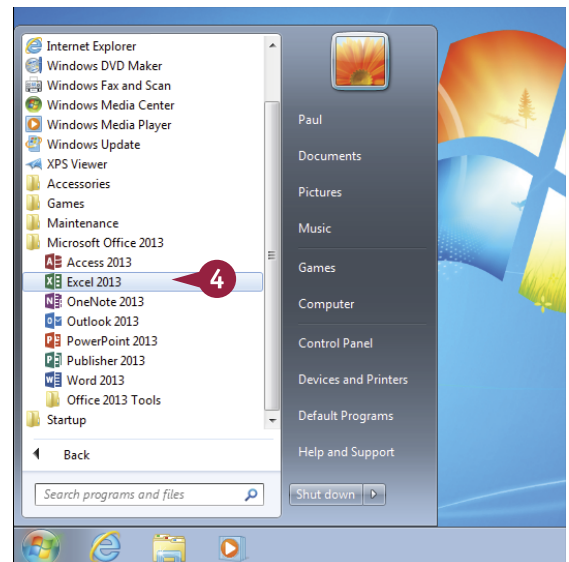


The Microsoft Office menu appears.

- 4 Click **Excel 2013**.

The Microsoft Excel window appears on the desktop.

**Note:** Click **Blank workbook** to open a new Excel file.



## TIP

### Are there faster methods I can use to start Excel?

Yes. After you have used Excel a few times in Windows 7, it should appear on the main Start menu in the list of your most-used programs. If so, you can click that icon to start the program. You can also add the Excel icon to the Start menu by following Steps 1 to 3 in the “Start Excel in Windows 7” subsection, right-clicking the **Excel 2013** icon, and then clicking **Pin to Start Menu**. If you are using Windows 8, you can right-click the **Excel 2013** tile and then click **Pin to Taskbar** to add the Excel icon to the desktop taskbar.

# Tour the Excel Window

To get up to speed quickly with Excel, it helps to understand the various elements of the Excel window. These include standard window elements such as the title bar, window controls, and status bar; Office-specific elements such as the Ribbon, Quick Access Toolbar, and File tab; and Excel-specific elements such as the worksheet.

## A Title Bar

The title bar displays the name of the current workbook.

## B Quick Access Toolbar

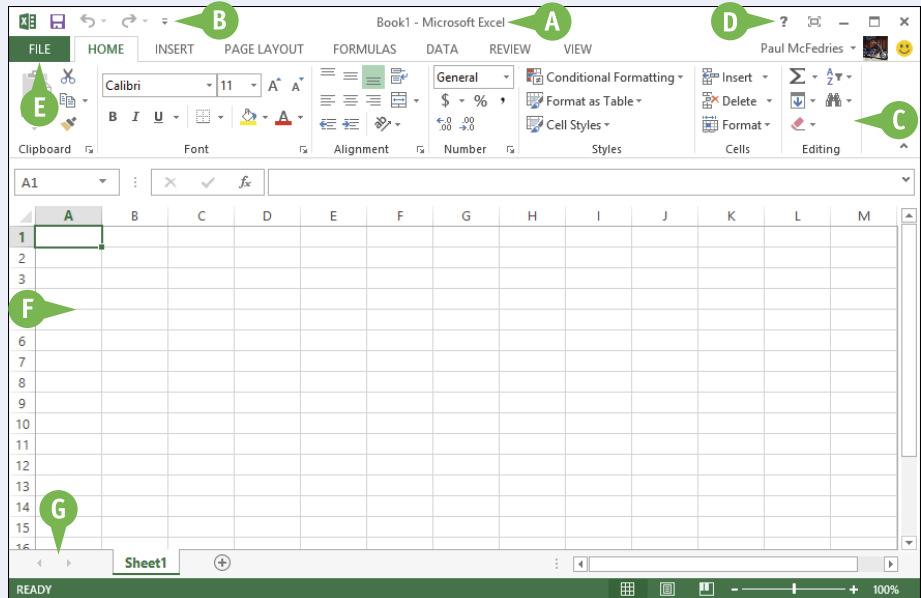
This area gives you one-click access to commands that you use often. To learn how to customize this toolbar, see “Customize the Quick Access Toolbar,” later in this chapter.

## C Ribbon

This area gives you access to all the Excel commands, options, and features. To learn how to use this element, see the following section, “Work with the Excel Ribbon.”

## D Workbook Window Controls

You use these controls to minimize, maximize, restore, and close the current workbook window.



## E File Tab

Click this tab to access file-related commands, such as Save and Open.

## F Worksheet

This area displays the current worksheet, and it is where you will do most of your Excel work.

## G Status Bar

This area displays messages about the current status of Excel, the results of certain operations, and other information.

# Work with the Excel Ribbon


You use the Ribbon element to access all the features, commands, and options in Excel. The Ribbon is organized into various tabs, such as File, Home, and Insert, and each tab contains a collection of controls that are related in some way. For example, the File tab contains controls related to working with files, such as opening, saving, and printing them. Similarly, the Insert tab contains controls related to inserting objects into a worksheet. Each tab usually includes buttons, lists, and check boxes.

There is no menu bar in Excel, so you do not use pull-down menus to access commands.

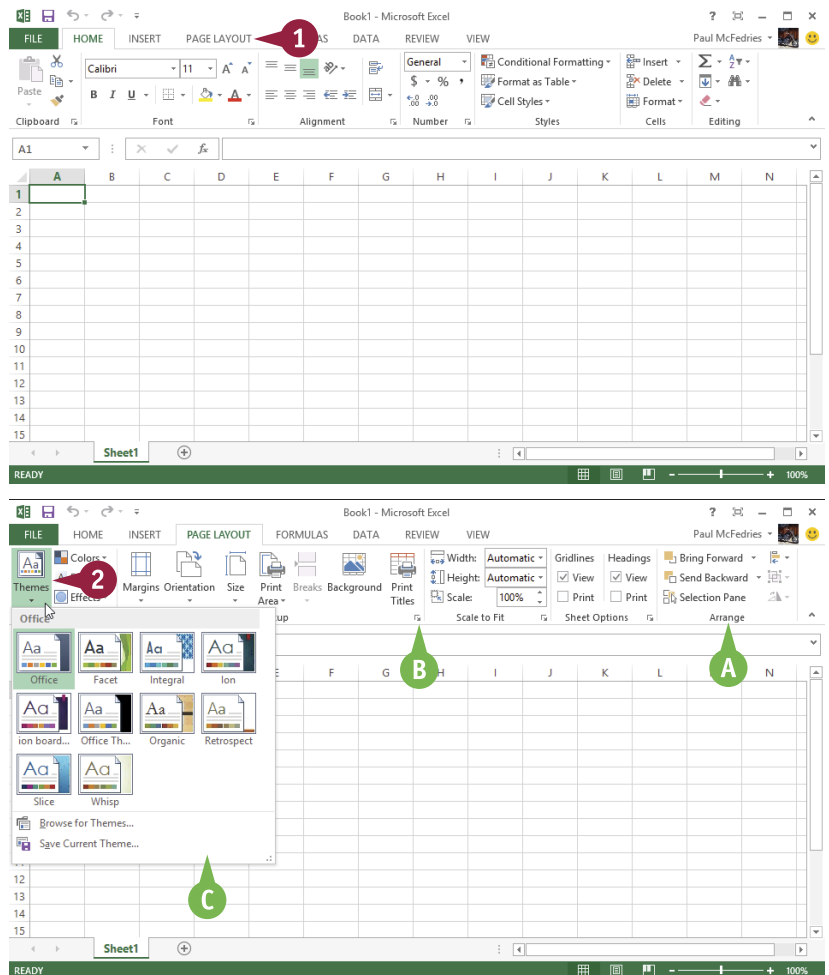
## Work with the Excel Ribbon

- 1 Click the tab that contains the Excel feature you want to work with.

Excel displays the controls in the tab.

- A Each tab is organized into groups of related controls, and the group names appear here.
  - B In many groups you can click the dialog box launcher button (  ) to display a dialog box that contains group settings.
- 2 Click the control for the feature.
  - C If the control displays a list of options, click the option you want.

Excel runs the command or sets the option.



# Work with the Excel Galleries

In the Excel Ribbon, a *gallery* is a collection of preset options that you can apply to the selected object in the worksheet. To get the most out of galleries, you need to know how they work.

Although some galleries are available all the time, in most cases you must select an object — such as a range of cells or a clip art image — before you work with a gallery.

## Work with the Excel Galleries

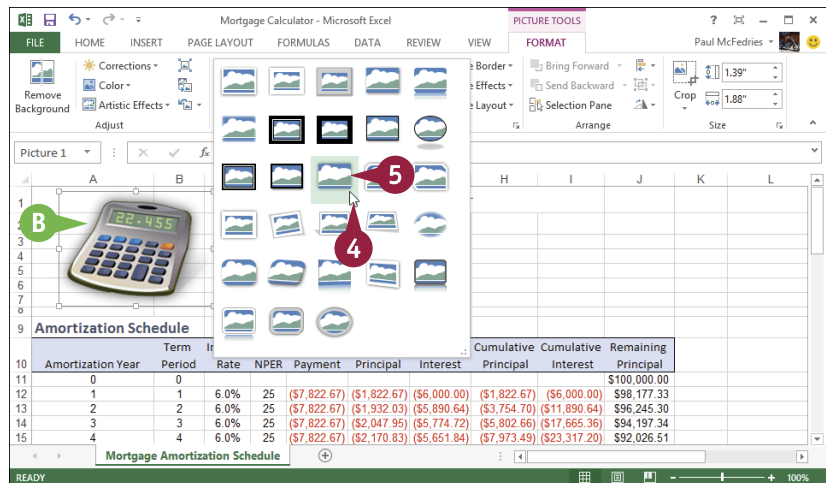
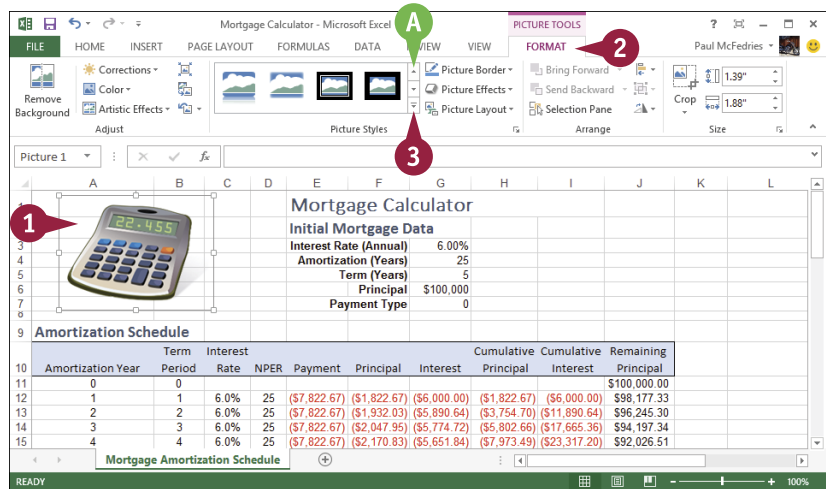
### Work with a Gallery List

- 1 If necessary, click the object to which you want to apply an option from the gallery.
- 2 Click the tab that contains the gallery you want to use.
- 3 Click the gallery's **More** arrow (▾).
- A You can also scroll through the gallery by clicking the **Down** (▾) and **Up** (▴) arrows.

Excel displays a list of the gallery's contents.

- 4 Move the mouse pointer (☞) over a gallery option.
- B Excel displays a preview of the effect.
- 5 Click the gallery option you want to use.

Excel applies the gallery option to the selected object.





## Work with a Drop-Down Gallery

**1** If necessary, click the object to which you want to apply an option from the gallery.

**2** Click the tab that contains the gallery you want to use.


**3** Click the gallery's drop-down arrow (▾).

Excel displays a list of the gallery's contents.

**4** If the gallery contains one or more sub galleries, click the subgallery you want to use.

Excel displays the subgallery's contents.

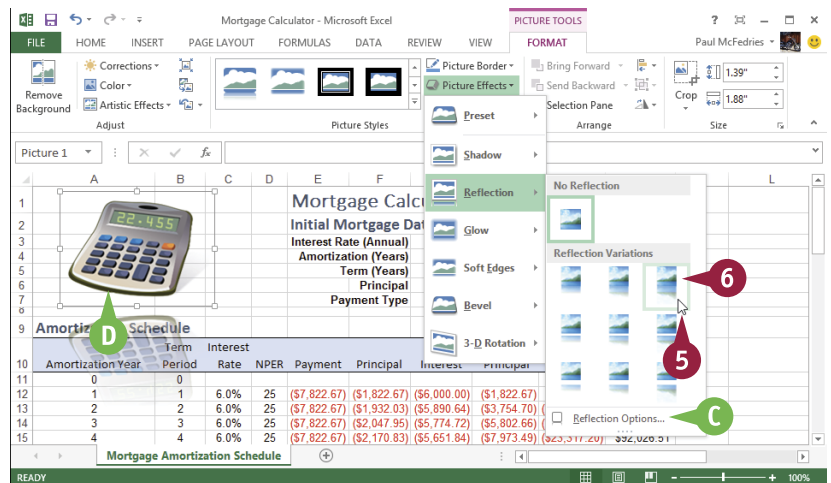
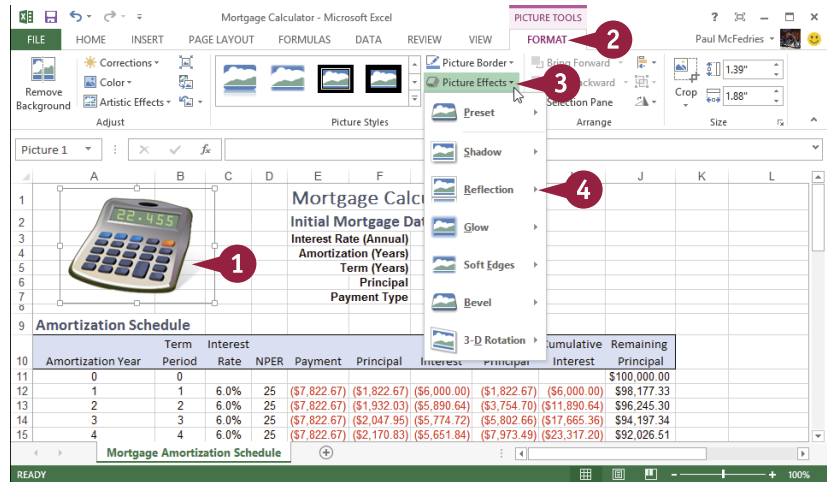
**C** If a gallery has commands that you can run, those commands appear at the bottom of the gallery menu.

**5** Move the mouse  over a gallery option.

**D** Excel displays a preview of the effect.


**6** Click the gallery option you want to use.

Excel applies the gallery option to the selected object.



### TIP

#### If I find the gallery preview feature distracting, can I turn it off?

Yes. The Live Preview feature is often handy because it shows you exactly what will happen when you click a gallery option. However, as you move the mouse  through the gallery, the previews can be distracting. To turn off Live Preview, click the **File** tab, click **Options**, click the **General** tab, click **Enable Live Preview** ( changes to ), and then click **OK**.

# Customize the Quick Access Toolbar

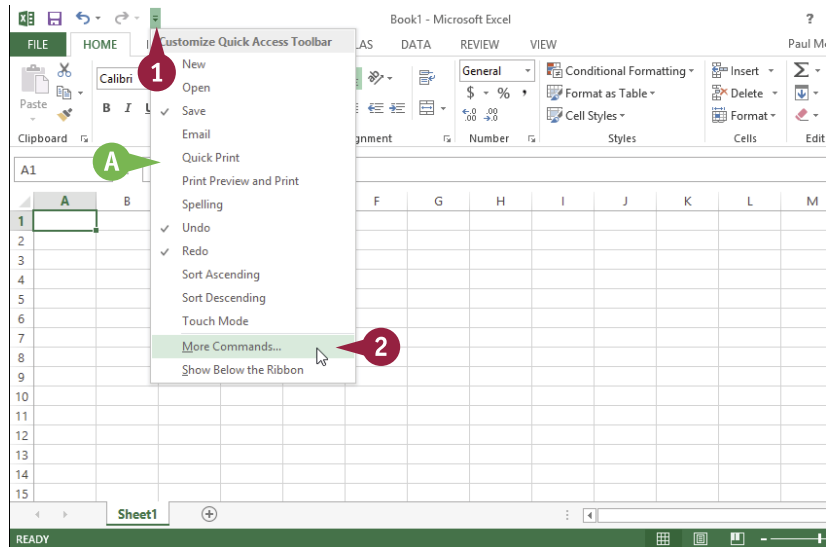
You can make Excel easier to use by customizing the Quick Access Toolbar to include the Excel commands you use most often. You run Quick Access Toolbar commands with a single click, so adding your favorite commands saves time because you no longer have to search for and click a command in the Ribbon. By default, the Quick Access Toolbar contains three buttons: Save, Undo, and Redo. However, with just a couple of clicks, you can also add common commands such as New and Open to the Quick Access Toolbar, as well as hundreds of other Excel commands.

## Customize the Quick Access Toolbar

1 Click the **Customize Quick Access Toolbar** button (☰).

A If you see the command you want, click it and skip the rest of the steps in this section.

2 Click **More Commands**.

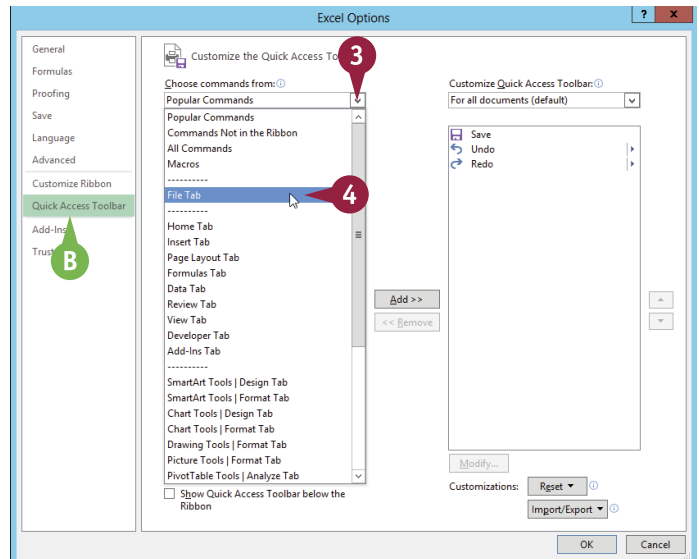


The Excel Options dialog box appears.

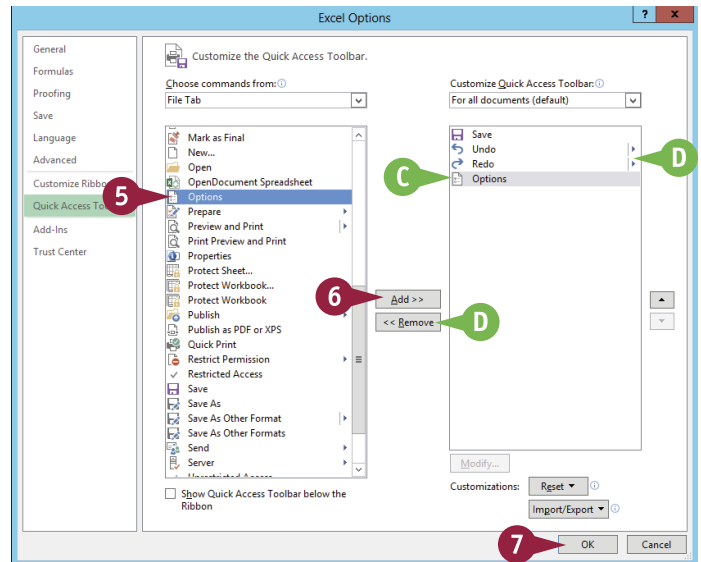
B Excel automatically displays the Quick Access Toolbar tab.

3 Click the **Choose commands from** dropdown.

4 Click the command category you want to use.

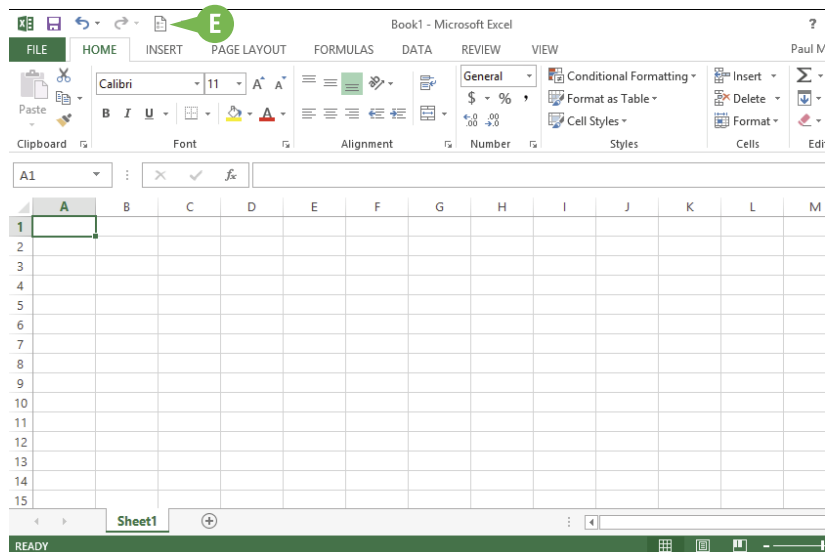


- 5 Click the command you want to add.
- 6 Click **Add**.
- C Excel adds the command.
- D To remove a command, click it and then click **Remove**.
- 7 Click **OK**.



- E Excel adds a button for the command to the Quick Access Toolbar.

**Note:** Another way to remove a command is to right-click the command and then click **Remove** from Quick Access Toolbar.



## TIPS

### Can I get more room on the Quick Access Toolbar to show more buttons?

Yes, you can increase the space available to the Quick Access Toolbar by moving it below the Ribbon. This gives the toolbar the full width of the Excel window, so you can add many more buttons. Click the **Customize Quick Access Toolbar** button (☰) and then click **Show Below the Ribbon**.

### Is there a faster way to add buttons to the Quick Access Toolbar?

Yes. If the command you want to add appears on the Ribbon, you can add a button for the command directly from the Ribbon. Click the Ribbon tab that contains the command, right-click the command, and then click **Add to Quick Access Toolbar**. Excel inserts a button for the command on the Quick Access Toolbar.

# Customize the Ribbon

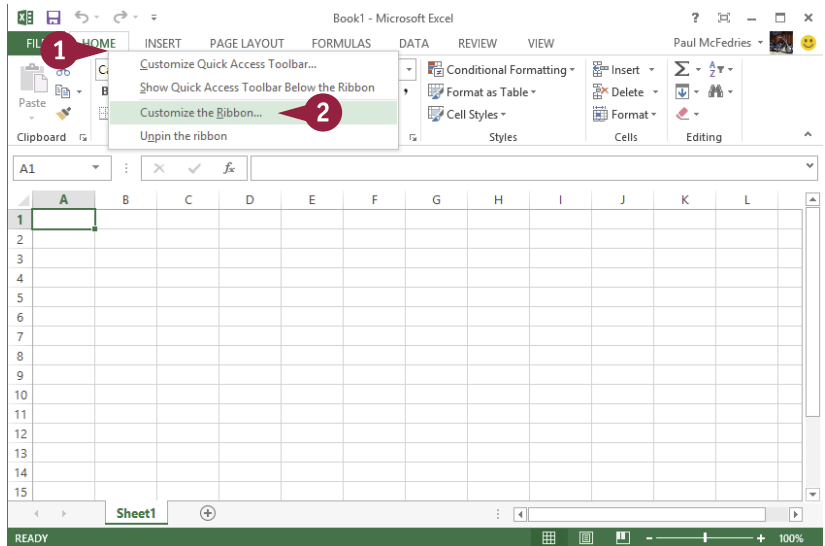
You can improve your Excel productivity by customizing the Ribbon with extra commands that you use frequently. The Ribbon is a handy tool because it enables you to run Excel commands with just a few clicks of the mouse. However, the Ribbon does not include every Excel command. If there is a command that you use frequently, you should add it to the Ribbon for easy access.

To add a new command to the Ribbon, you must first create a new tab or a new group within an existing tab, and then add the command to the new tab or group.

## Customize the Ribbon

### Display the Customize Ribbon Tab

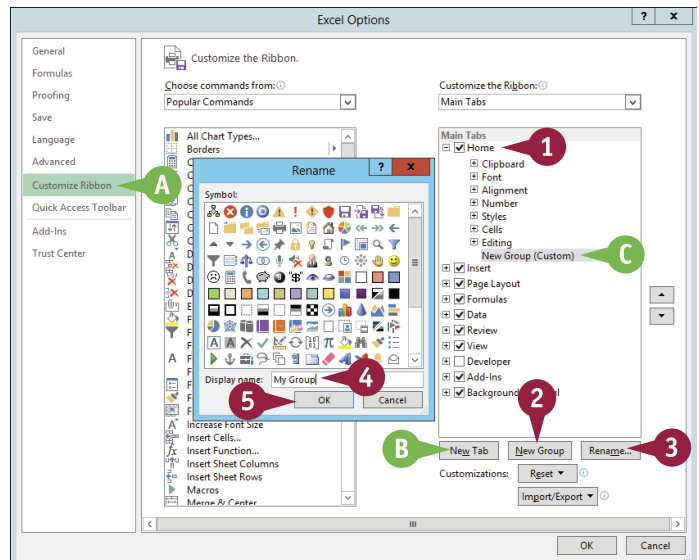
- 1 Right-click any part of the Ribbon.
- 2 Click **Customize the Ribbon**.



### Add a New Tab or Group

The Excel Options dialog box appears.

- A Excel automatically displays the Customize Ribbon tab.
- 1 Click the tab you want to customize.
- B You can also click **New Tab** to create a custom tab.
- 2 Click **New Group**.
- C Excel adds the group.
- 3 Click **Rename**.
- 4 Type a name for the group.
- 5 Click **OK**.



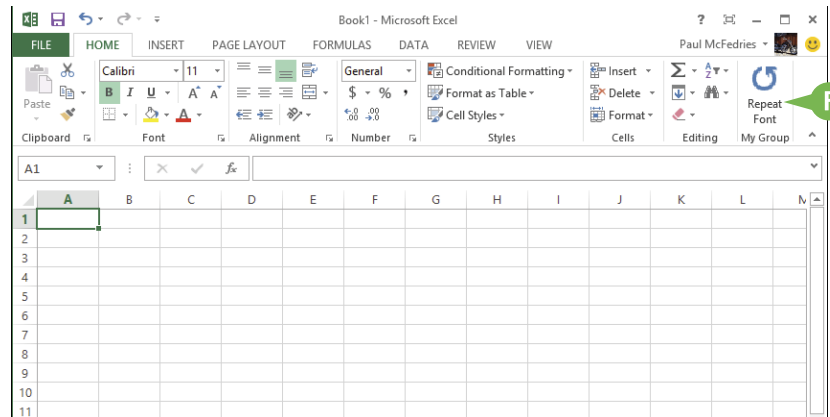
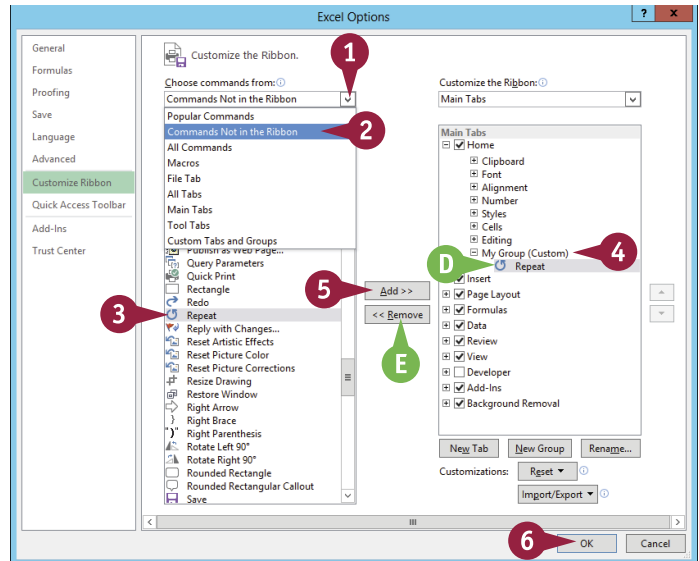
## Add a Command

- 1 Click the **Choose commands from** .
- 2 Click the command category you want to use.
- 3 Click the command you want to add.
- 4 Click the custom group or tab you want to use.
- 5 Click **Add**.
- 6 Click **OK**.

D Excel adds the command.

E To remove a custom command, click it and then click **Remove**.

F Excel adds the new group and command to the Ribbon.



## TIPS

### Can I customize the tabs that appear only when I select an Excel object?

Yes. Excel calls these *tool tabs*, and you can add custom groups and commands to any tool tab. Right-click any part of the Ribbon and then click **Customize the Ribbon** to display the Excel Options dialog box with the **Customize Ribbon** tab displayed. Click the **Customize the Ribbon**  and then click **Tool Tabs**. Click the tab you want and then follow the steps in this section to customize it.

### How do I restore the Ribbon to its default configuration?

Right-click any part of the Ribbon and then click **Customize the Ribbon** to display the Excel Options dialog box with the **Customize Ribbon** tab displayed. To restore a tab, click the tab, click **Reset**, and then click **Restore only selected Ribbon tab**. To remove all customizations, click **Reset** and then click **Restore all customizations**.

# Change the View

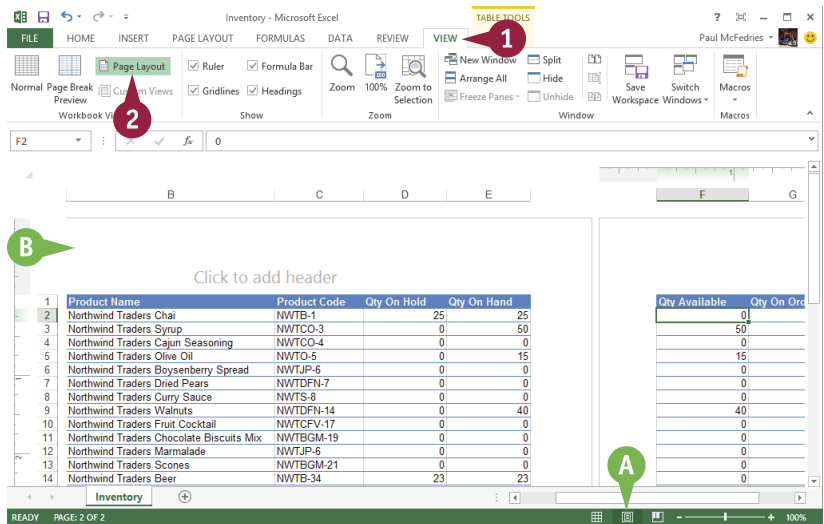
You can adjust Excel to suit what you are currently working on by changing the view to match your current task. The view determines how Excel displays your workbook.

Excel offers three different views: Normal, which is useful for building and editing worksheets; Page Layout, which displays worksheets as printed pages; and Page Break Preview, which displays the page breaks as blue lines, as described in the first Tip in this section.

## Change the View

### Switch to Page Layout View

- 1 Click the **View** tab.
  - 2 Click **Page Layout**.
- A You can also click the **Page Layout** button (🖨️).
- B Excel switches to Page Layout view.



### Switch to Page Break Preview

- 1 Click the **View** tab.
  - 2 Click **Page Break Preview**.
- C You can also click the **Page Break Preview** button (📄).

