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Paul McFedries
Greg Harvey, PhD

Microsoft® Excel® Workbook

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Introduction

Microsoft Excel is one of the most powerful and sophisticated software programs available today. That power and that sophistication mean Excel can do some extraordinary, just-this-side-of-miraculous things, but they also mean that Excel comes with a learning curve. Sure, you can get productive with Excel amazingly quickly, but if you want to do more than just scratch Excel's surface, then you need to get comfy with many of the program's deeper — and more useful — features.

Sounds like a plan, right? But what's the best way to get to know this wider Excel landscape? Well, consider what you might do when you arrive in a city you've never visited. One way to get the feel for the place would be to wander the streets willy-nilly. Nothing wrong with that, but it will probably mean your knowledge of the city is scattershot and skin-deep. If you want to really get to know the place, then you need a guidebook that tells you what's worth seeing, how to get there, and what to do when you arrive.

Excel is no different. To really get to know the vast "city" of Excel, clicking commands and cells at random won't get the job done. Instead, it's much better to take a few guided tours that tell you what features are worth learning, how to find those features, and how to use them. This gives you the practical, hands-on experience you need to really learn what Excel can do.

About This Book

As its name suggests, *Microsoft Excel Workbook For Dummies* is designed to give you the kind of hands-on

experience with all the major aspects of the program you need to start using the program for business or home with a degree of confidence and efficiency. As you'd expect from this type of book, the workbook is primarily composed of questions and exercises that give you plenty of opportunities to experience the purpose and benefits of Excel's many features.

It's my hope that as a result of doing the exercises in this workbook, you'll not only be in firm command of the basic skills necessary to work with confidence in Excel, but also have a good idea of the overall power of the program and what you can do with it.

Conventions Used in This Book

By convention, all the text entries that you type yourself appear in bold. When it comes to instructions in the exercises throughout the workbook, you'll notice two conventions:

» Ribbon commands often follow the sequence of the tab, command button, and drop-down menu option. For example, the command Home ⇒ Format ⇒ Column Width means that you should select the Home tab, followed by the Format command button, and then finally the Column Width option on the menu that appears.

» Ribbon hot keys are often given following the Ribbon command sequence. For example, Alt+HOW selects the Home tab, followed by the Format command button, and then the Column Width option, entirely from the keyboard.

» Filenames in the exercises are shown in full, including their filename extensions as in Exercise3-1.xlsx or Spring Furniture Sales.xlsx. Keep in mind, however, that the display of filename extensions may be turned off on your computer and, in that case, the filenames appear in file lists without their filename extensions as in Exercise3-1 and Spring Furniture Sales.

One other convention that you'll notice used throughout the text is the display of the names for Excel Ribbon commands, Quick Access toolbar buttons, and dialog box options in the title case, wherein all major words are capitalized except for prepositions. The title case is used to make these names stand out from the rest of the text. Often, however, especially in the case of dialog box options, Microsoft does not always follow this convention, preferring to capitalize only the first letter of the option name.

Foolish Assumptions

I assume that you're a new user of Microsoft Excel motivated to learn its essentials either for work or at home.

To complete most of the exercises in this workbook, you only need to have Microsoft Excel installed on a computer running a version of Microsoft Windows 10 or 11. And it doesn't matter whether you obtained Excel with a Microsoft 365 subscription or an Office 2021 purchase; this book covers the core functionality of both flavors of Excel. For some of the printing exercises, you will benefit from having a printer installed on your system (although you can complete most of their steps and get the gist of the lessons without actually printing the sample worksheets).

Beyond the Book

Some extra content for this book is available on the web. Go online to find the following:

» **The examples used in the book:** The downloadable practice files that come with this workbook are an integral part of the workbook experience. These files contain the practice material that you need to complete most of its exercises. You can find these here:

www.wiley.com/go/excelworkbookfd2e

» **Cheat Sheet:** Besides what you're reading right now, this book also comes with a free access-anywhere Cheat Sheet that provides a handy reference for Excel's hot keys. To get this Cheat Sheet, go to www.dummies.com and type **Microsoft Excel Workbook For Dummies Cheat Sheet** in the Search box.

Icons Used in This Book

Icons are sprinkled throughout the text of this workbook in high hopes that they draw your attention to particular features. Some of the icons are of the heads-up type, whereas others are more informational in nature:

This icon indicates the start of a question-and-answer section in the workbook.

This icon indicates a hint that can help you perform a particular step in the exercise.

This icon indicates a tidbit that, if retained, can make your work somewhat easier in Excel.

This icon indicates a tidbit that is essential to the topic being discussed and is, therefore, worth putting under your hat.

This icon indicates a bit of trickery in the topic that, if ignored, can lead to some sort of trouble in your spreadsheet.

Where to Go from Here

This workbook is constructed such that you don't have to start working through the exercises in Chapter 1 and end with those in Chapter 24. That being said, it's still to your benefit to complete all the exercises within a particular chapter, if not in a single work session, at least in a short time period.

If you're a real newbie to Excel and have no experience with any of the earlier versions of the program, I urge you to complete the exercises in Part 1, Chapters 1 through 5, before you take off in your own direction. The exercises in this part are truly fundamental and are meant to give you a strong foundation in the basic features that all Excel users need to know.

Please keep in mind that I designed the exercises in this workbook to work with my Excel companion book, *Excel*

All-In-One For Dummies. It can therefore provide you with additional information about the Excel features you're using either at the time you go through the workbook exercises or afterwards. To facilitate this crossover usage, I have, wherever possible, used the same example files in the exercises of this workbook as you see illustrated and explained at length in the larger book.

Whatever you do next and wherever you go in this workbook, just be sure that you enjoy yourself!

Part 1
Building Worksheets

IN THIS PART ...

Navigate the commands on the tabs of the Excel Ribbon and on the File menu in the Backstage View.

Customize the Quick Access toolbar and Excel Ribbon.

Perform basic data entry chores.

Format worksheet cells.

Print worksheet data.

Edit your worksheet data.

Chapter 1

Getting Familiar with the Excel Interface

If the proverbial journey of a thousand miles begins with a single step, what should be the first step on your new Excel journey? You can take lots of possible directions, but might I humbly suggest a tour? Nothing exhaustive, mind you; just a quick look at the most basic elements of the Excel program window. Does that sound too elementary? You'd be surprised. One of the secrets of Excel proficiency and efficiency is knowing where to find the command, feature, or setting you want to work with next. Sure, maybe you really *want* to waste precious time clicking aimlessly around the Excel interface until your blood boils and jets of steam blast out of your ears. Hey, it's your life. But my guess is that doesn't sound appealing to you, not even a little. So: A tour it is, then.

To that end, the exercises in this first chapter are designed to get you familiar with the Excel interface.

After doing these exercises, you should be comfortable with all aspects of the Excel window and the command structure and ready to do all the rest of the exercises in this book.

Launching Excel

Excel is one of the primary application programs included as part of Microsoft Office. To get proficient with Excel, you need to be familiar with all the various ways of launching the program.

EXAMPLE **Q.** How many ways are there to start Excel?

A. You should be familiar with the two main methods:

- Click Start and then click Excel in the All Apps list. If you're using Windows 11, you need to first click the Start menu's All Apps button and then click Excel.

- Double-click an Excel workbook file in any folder on any drive to which your computer has access.

Q. Are there quicker ways to launch Excel?

A. Yes, you can use two other methods:

- If you see an Excel icon pinned to the Start menu, click that icon.

- If you see an Excel button pinned to the Windows taskbar, click that button.

Try It

Exercise 1-1: Pinning Excel to the Windows Start Menu and Taskbar

In Exercise 1-1, you pin Excel both to the Windows Start menu and to the Windows taskbar and then launch Excel using each of these two methods:

1. Click Start and then locate Excel in the All Apps list (remember to first click All Apps if you're running Windows 11).

2. Right-click Excel and then click Pin to Start.

   Windows adds a pinned tile for Excel to the bottom of the Start menu.

3. In Windows 11, click Back to return to the main Start menu, right-click the pinned Excel icon, and then click Move to Top.

   Windows moves the pinned Excel tile to the top-left corner of the Start menu.

4. Right-click the pinned Excel tile on the Start menu and then click Pin to Taskbar.

   Windows adds a pinned Excel button to the taskbar.

5. If you don't like where Windows pinned the Excel button, click and drag it to the left or right to your preferred location.

   Windows moves the pinned Excel button along with the mouse pointer and you can drop the button in your preferred position.

6. Practice launching Excel by clicking the pinned Excel Start menu tile and then exiting the program. Then launch Excel again, this time by clicking the pinned Excel button on the Windows taskbar.

   You can leave Excel running for Exercise 1-2.

Identifying the Parts of the Excel Window

When you launch Excel by opening the Windows Start menu and clicking Excel, the Home tab of Excel's Backstage view appears. Click the Blank Workbook thumbnail to start a fresh workbook, which contains a single worksheet named Sheet1.

Before you can start using Excel, you must be familiar with its window. Figure 1-1 shows you the Excel window as it appears when you launch a new workbook. Note the names of the different parts of the window before you perform Exercise 1-2.
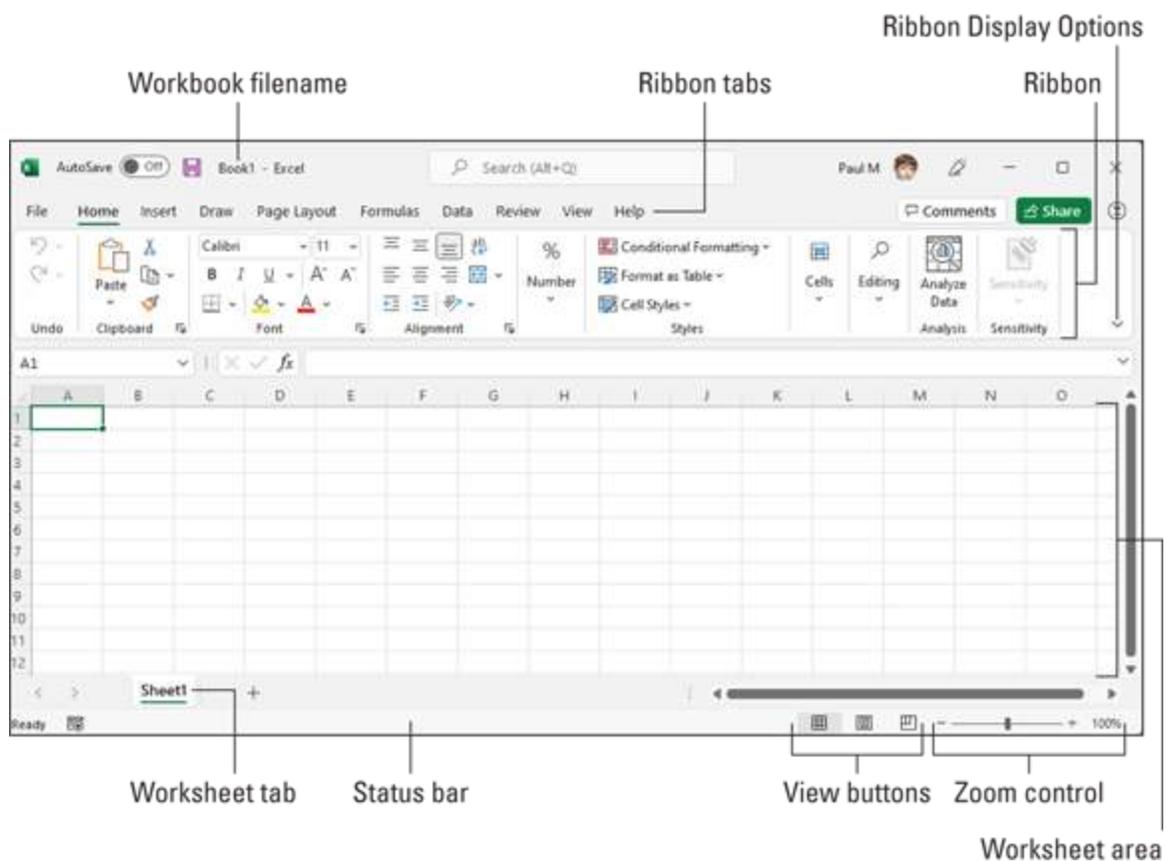
FIGURE 1-1: The Excel program window as it appears immediately after launching a fresh workbook.

Q. What are the primary functions of the commands located on the File menu in the Excel Backstage View?

A. To open, close, save, print, and share your Excel workbook files as well as to modify the Excel program options.

Q. What's the primary function of the Ribbon in Excel?

A. To group related Excel commands together and give you quick and easy access to these commands.

Q. What is the primary function of the Quick Access toolbar?

A. To enable you to quickly select Excel commands that you use all the time without having to open the File menu or use the Ribbon commands.

Selecting Commands in the Backstage View

Clicking the File tab opens the Excel Backstage view with a menu of options that appears down the left side. Almost all the commands on this menu are related to actions that affect the entire file, such as saving and printing. If you prefer, you can open this view and access the menu by pressing Alt+F (F for File) instead of clicking the File menu.

When you select any of the major options on the Backstage view — Home, New, Open, Info, Save, Save As, and so on — panels appear that bring together

further related and commonly used options on the left side along with pertinent information on the right.

Try It

Exercise 1-2: Opening the Backstage View and Selecting Its Buttons

In this exercise, you get familiar with Excel's Backstage view and its commands by opening the Backstage view and selecting some of its buttons. Make sure that Excel is running and a blank workbook with its empty Sheet1 worksheet is active on your computer monitor.

1. Click the File tab to switch to the Excel Backstage view and display the menu of buttons (Home through Options) on the left side of this screen. By default, Excel selects the Home button.

2. Click the Info button on the menu.

   The Info screen now appears to the immediate right of the Info button (see Figure 1-2). The Info screen is divided into two areas: the left side offers commands for working with the file, while the right side displays information about the file.

3. Now, click the Save As button.

   You use the Save As screen to save a new workbook or to save an existing workbook with a new name or location.

4. Click Browse.

   Excel opens the Save As dialog box where you can modify the name, location, and type of Excel workbook file before saving a copy of it.

5. Press the Esc (Escape) key on your keyboard to close the Save As dialog box.

6. Click the Share button.

Excel closes Backstage view and opens the Share dialog box, which enables you to share workbook files with co-workers and clients.

7. Press Esc to close the Share dialog box.

8. Press Ctrl+P (the shortcut key for printing in Excel).

   Excel opens the Backstage view and displays the Print panel where you can preview the printout (when there's data in your worksheet that can be printed) and change several print settings. Because you selected the Print panel from an empty worksheet, the message, "We didn't find anything to print" appears on the right panel where the first page of the workbook's print preview normally appears.

9. Press Esc to return to the normal worksheet view and then press Alt+FT.

   Doing this selects the Options command in the Backstage view, which in turn, opens the Excel Options dialog box. This dialog box contains all the options for changing the Excel program and worksheet options. These options are divided into categories General through Trust Center.

10. Make sure the General category is selected, use the Office Background list to select a background pattern, and then click OK to put the new setting into effect.