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**Greg Harvey, PhD**

Bestselling author of  
Excel All-in-One For Dummies





***Excel* 2013**  
FOR  
**DUMMIES®**

**by Greg Harvey, PhD**



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# About the Author

**Greg Harvey** has authored tons of computer books, the most recent and most popular being *Excel 2010 For Dummies* and *Excel 2010 All-in-One For Dummies*. He started out training business users on how to use IBM personal computers and their attendant computer software in the rough-and-tumble days of DOS, WordStar, and Lotus 1-2-3 in the mid-80s of the last century. After working for a number of independent training firms, Greg went on to teach semester-long courses in spreadsheet and database management software at Golden Gate University in San Francisco.

His love of teaching has translated into an equal love of writing. *For Dummies* books are, of course, his all-time favorites to write because they enable him to write to his favorite audience: the beginner. They also enable him to use humor (a key element to success in the training room) and, most delightful of all, to express an opinion or two about the subject matter at hand.

Greg received his doctorate degree in Humanities in Philosophy and Religion with a concentration in Asian Studies and Comparative Religion last May. Everyone is glad that Greg was finally able to get out of school before he retired.

# Dedication

*An Erucolindo melindonya*

# Author's Acknowledgments

Let me take this opportunity to thank all the people, both at John Wiley & Sons, Inc., and at Mind over Media, whose dedication and talent combined to get this book out and into your hands in such great shape.

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We're proud of this book; please send us your comments at <http://dummies.custhelp.com>. For other comments, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

Some of the people who helped bring this book to market include the following:

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# Contents at a Glance

---

<b><i>Introduction</i></b> .....	<b>1</b>
<b><i>Part I: Getting Started with Excel 2013</i></b> .....	<b>9</b>
Chapter 1: The Excel 2013 User Experience .....	11
Chapter 2: Creating a Spreadsheet from Scratch .....	41
<b><i>Part II: Editing without Tears</i></b> .....	<b>95</b>
Chapter 3: Making It All Look Pretty .....	97
Chapter 4: Going Through Changes .....	143
Chapter 5: Printing the Masterpiece .....	175
<b><i>Part III: Getting Organized and Staying That Way</i></b> .....	<b>201</b>
Chapter 6: Maintaining the Worksheet .....	203
Chapter 7: Maintaining Multiple Worksheets .....	229
<b><i>Part IV: Digging Data Analysis</i></b> .....	<b>251</b>
Chapter 8: Doing What-If Analysis .....	253
Chapter 9: Playing with Pivot Tables .....	267
<b><i>Part V: Life beyond the Spreadsheet</i></b> .....	<b>289</b>
Chapter 10: Charming Charts and Gorgeous Graphics .....	291
Chapter 11: Getting on the Data List .....	327
Chapter 12: Linking, Automating, and Sharing Spreadsheets .....	351
<b><i>Part VI: The Part of Tens</i></b> .....	<b>375</b>
Chapter 13: Top Ten Beginner Basics .....	377
Chapter 14: The Ten Commandments of Excel 2013 .....	379
<b><i>Index</i></b> .....	<b>381</b>

# Table of Contents

<b><i>Introduction</i></b> .....	<b>1</b>
About This Book .....	1
How to Use This Book.....	2
What You Can Safely Ignore .....	2
Foolish Assumptions.....	2
How This Book Is Organized .....	3
Part I: Getting Started with Excel 2013.....	4
Part II: Editing without Tears .....	4
Part III: Getting Organized and Staying That Way .....	4
Part IV: Digging Data Analysis .....	4
Part V: Life beyond the Spreadsheet.....	5
Part VI: The Part of Tens.....	5
Conventions Used in This Book.....	5
Selecting Ribbon commands .....	5
Icons used in this book.....	7
Where to Go from Here.....	7
<b><i>Part I: Getting Started with Excel 2013</i></b> .....	<b>9</b>
<b>Chapter 1: The Excel 2013 User Experience</b> .....	<b>11</b>
Excel's Ribbon User Interface .....	12
Going Backstage.....	14
Using the Excel Ribbon .....	15
Customizing the Quick Access toolbar .....	21
Having fun with the Formula bar .....	25
What to do in the Worksheet area.....	26
Showing off the Status bar.....	33
Launching and Quitting Excel .....	34
Starting Excel from the Windows 8 Start screen .....	35
Starting Excel from the Windows 7 Start menu .....	35
Adding an Excel 2013 shortcut to your Windows 7 desktop.....	36
Pinning Excel 2013 to your Windows 7 Start menu .....	37
Pinning Excel 2013 to the Windows 7 taskbar.....	38
Exiting Excel .....	38
Help Is on the Way.....	39
<b>Chapter 2: Creating a Spreadsheet from Scratch</b> .....	<b>41</b>
So What Ya Gonna Put in That New Workbook of Yours? .....	42
The ins and outs of data entry .....	43
You must remember this . . . ..	44

Doing the Data-Entry Thing.....	45
It Takes All Types .....	47
The telltale signs of text.....	48
How Excel evaluates its values .....	49
Fabricating those fabulous formulas!.....	56
If you want it, just point it out.....	58
Altering the natural order of operations .....	59
Formula flub-ups .....	60
Fixing Those Data Entry Flub-Ups .....	62
You really AutoCorrect that for me.....	62
Cell editing etiquette .....	63
Taking the Drudgery out of Data Entry.....	65
I'm just not complete without you.....	65
Fill 'er up with AutoFill .....	66
Fill it in a flash .....	74
Inserting special symbols .....	76
Entries all around the block.....	76
Data entry express.....	77
How to Make Your Formulas Function Even Better.....	78
Inserting a function into a formula with the	
Insert Function button.....	79
Editing a function with the Insert Function button .....	82
I'd be totally lost without AutoSum.....	83
Sums via Quick Analysis Totals .....	86
Making Sure That the Data Is Safe and Sound .....	87
Changing the default file location .....	90
The difference between the XLSX and XLS file formats .....	91
Saving the Workbook as a PDF File .....	91
Document Recovery to the Rescue .....	92

## ***Part II: Editing without Tears .....*** 95

### **Chapter 3: Making It All Look Pretty .....** 97

Choosing a Select Group of Cells.....	98
Point-and-click cell selections .....	99
Keyboard cell selections.....	103
Using the Format as Table Gallery .....	105
Cell Formatting from the Home Tab.....	108
Formatting Cells Close to the Source with the Mini-bar.....	111
Using the Format Cells Dialog Box .....	112
Understanding the number formats.....	113
The values behind the formatting .....	118
Make it a date! .....	119
Ogling some of the other number formats .....	120
Calibrating Columns.....	121
Rambling rows.....	122
Now you see it, now you don't.....	123

Futzung with the Fonts.....	125
Altering the Alignment.....	126
Intent on indents.....	127
From top to bottom.....	128
Tampering with how the text wraps.....	129
Reorienting cell entries.....	130
Shrink to fit.....	132
Bring on the borders!.....	132
Applying fill colors, patterns, and gradient effects to cells.....	134
Doing It in Styles.....	135
Creating a new style for the gallery.....	135
Copying custom styles from one workbook into another.....	136
Fooling Around with the Format Painter.....	137
Conditional Formatting.....	138
Formatting with scales and markers.....	139
Highlighting cells ranges.....	140
Formatting via the Quick Analysis tool.....	141

## **Chapter 4: Going Through Changes . . . . . 143**

Opening Your Workbooks for Editing.....	144
Opening files in the Open screen.....	145
Operating the Open dialog box.....	146
Changing the Recent files settings.....	148
Opening multiple workbooks.....	148
Find workbook files.....	149
Using the Open file options.....	149
Much Ado about Undo.....	150
Undo is Redo the second time around.....	151
What to do when you can't Undo?.....	151
Doing the Old Drag-and-Drop Thing.....	152
Copies, drag-and-drop style.....	154
Insertions courtesy of drag and drop.....	154
Copying Formulas with AutoFill.....	155
Relatively speaking.....	157
Some things are absolutes!.....	157
Cut and Paste, Digital Style.....	160
Paste it again, Sam . . . . .	161
Keeping pace with Paste Options.....	161
Paste it from the Clipboard task pane.....	163
So what's so special about Paste Special?.....	165
Let's Be Clear about Deleting Stuff.....	167
Sounding the all clear!.....	167
Get these cells outta here!.....	168
Staying in Step with Insert.....	169
Stamping Out Your Spelling Errors.....	169
Eliminating Errors with Text to Speech.....	171

**Chapter 5: Printing the Masterpiece. . . . .175**

Previewing Pages in Page Layout View.....	176
Using the Backstage Print Screen.....	177
Printing the Current Worksheet .....	180
My Page Was Set Up! .....	182
Using the buttons in the Page Setup group.....	182
Using the buttons in the Scale to Fit group.....	188
Using the Print buttons in the Sheet Options group.....	189
From Header to Footer.....	189
Adding an Auto Header and Footer.....	190
Creating a custom header or footer .....	192
Solving Page Break Problems.....	196
Letting Your Formulas All Hang Out .....	198

***Part III: Getting Organized  
and Staying That Way .....* 201****Chapter 6: Maintaining the Worksheet . . . . .203**

Zooming In and Out.....	204
Splitting the Worksheet into Windows .....	206
Fixed Headings with Freeze Panes .....	208
Electronic Sticky Notes.....	211
Adding a comment to a cell.....	211
Comments in review.....	212
Editing comments in a worksheet .....	213
Getting your comments in print.....	214
The Range Name Game.....	214
If I only had a name . . . ..	215
Name that formula!.....	216
Naming constants .....	217
Seek and Ye Shall Find . . . ..	218
Replacing Cell Entries .....	222
Doing Your Research .....	223
Controlling Recalculation .....	225
Putting on the Protection .....	226

**Chapter 7: Maintaining Multiple Worksheets . . . . .229**

Juggling Multiple Worksheets.....	229
Sliding between the sheets.....	230
Editing en masse.....	232



- Don't Short-Sheet Me!..... 233
  - A worksheet by any other name . . . . . 234
  - A sheet tab by any other color . . . . . 235
  - Getting your sheets in order . . . . . 236
- Opening Windows on Your Worksheets..... 238
- Comparing Worksheets Side by Side . . . . . 242
- Shifting Sheets to Other Workbooks..... 244
- Summing Stuff on Different Worksheets . . . . . 247

***Part IV: Digging Data Analysis..... 251***

**Chapter 8: Doing What-If Analysis . . . . . 253**

- Playing What-If with Data Tables..... 254
  - Creating a one-variable data table..... 254
  - Creating a two-variable data table..... 257
- Playing What-If with Goal Seeking . . . . . 259
- Making the Case with Scenario Manager..... 261
  - Setting up the various scenarios . . . . . 262
  - Producing a summary report . . . . . 264

**Chapter 9: Playing with Pivot Tables . . . . . 267**

- Data Analysis with Pivot Tables . . . . . 268
  - Pivot tables via the Quick Analysis tool . . . . . 268
  - Pivot tables by recommendation..... 271
  - Manually producing pivot tables . . . . . 271
- Formatting Pivot Tables . . . . . 275
  - Refining the Pivot Table style..... 275
  - Formatting values in the pivot table . . . . . 276
- Sorting and Filtering Pivot Table Data..... 276
  - Filtering the report . . . . . 277
  - Filtering column and row fields . . . . . 277
  - Filtering with slicers . . . . . 279
  - Filtering with timelines..... 279
  - Sorting the pivot table..... 280
- Modifying Pivot Tables . . . . . 281
  - Modifying the pivot table fields . . . . . 282
  - Pivoting the table's fields..... 282
  - Modifying the table's summary function . . . . . 283
- Creating Pivot Charts . . . . . 284
  - Moving pivot charts to separate sheets . . . . . 285
  - Filtering pivot charts . . . . . 286
  - Formatting pivot charts . . . . . 287

***Part V: Life beyond the Spreadsheet* ..... 289**

**Chapter 10: Charming Charts and Gorgeous Graphics .....291**

- Making Professional-Looking Charts..... 291
  - Charts thanks to Recommendation..... 292
  - Charts from the Ribbon ..... 293
  - Charts via the Quick Analysis tool ..... 294
  - Charts on their own chart sheets ..... 297
  - Moving and resizing embedded charts..... 297
  - Moving embedded charts to chart sheets..... 299
  - Customizing charts from the Design tab ..... 299
  - Customizing chart elements..... 300
  - Editing the generic titles in a chart ..... 302
- Adding Great-Looking Graphics..... 305
  - Sparking up the data with sparklines ..... 305
  - Telling all with a text box..... 308
  - Downloading online images..... 311
  - Inserting local images..... 313
  - Editing inserted pictures ..... 313
  - Formatting inserted images..... 314
  - Adding preset graphic shapes ..... 316
  - Working with WordArt ..... 317
  - Make mine SmartArt..... 318
  - Screenshots anyone?..... 320
  - Theme for a day ..... 321
- Controlling How Graphic Objects Overlap..... 322
  - Reordering the layering of graphic objects..... 322
  - Grouping graphic objects ..... 324
  - Hiding graphic objects ..... 324
- Printing Just the Charts ..... 325

**Chapter 11: Getting on the Data List . . . . . 327**

- Creating Data Lists ..... 327
  - Adding records to data lists..... 328
  - Moving through records in the data form ..... 333
  - Finding records with the data form..... 333
- Sorting Data Lists..... 335
  - Sorting on a single field..... 336
  - Sorting on multiple fields..... 336
- Filtering Data Lists..... 340
  - Using ready-made number filters..... 341
  - Using ready-made date filters..... 342
  - Using custom filters..... 343

Importing External Data.....	346
Querying Access database tables.....	346
Performing web queries.....	348
<b>Chapter 12: Linking, Automating, and Sharing Spreadsheets . . . . .</b>	<b>351</b>
Using Apps for Office .....	351
Using Excel Add-Ins .....	354
Adding Hyperlinks to a Worksheet .....	355
Automating Commands with Macros.....	358
Recording new macros.....	358
Running macros .....	362
Assigning macros to the Ribbon and the Quick Access toolbar.....	363
Sharing Your Worksheets.....	365
Sharing workbooks via OneDrive .....	365
E-mailing workbooks .....	369
Sharing workbooks with IM.....	370
Presenting worksheets online .....	370
Editing worksheets online .....	371
Reviewing workbooks online.....	374
<b><i>Part VI: The Part of Tens</i> .....</b>	<b>375</b>
<b>Chapter 13: Top Ten Beginner Basics . . . . .</b>	<b>377</b>
<b>Chapter 14: The Ten Commandments of Excel 2013. . . . .</b>	<b>379</b>
<b><i>Index</i> .....</b>	<b>381</b>

# Introduction

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I'm very proud to present you with *Excel 2013 For Dummies*, the latest version of everybody's favorite book on Microsoft Office Excel for readers with no intention whatsoever of becoming spreadsheet gurus.

*Excel 2013 For Dummies* covers all the fundamental techniques you need to know in order to create, edit, format, and print your own worksheets. In addition to showing you around the worksheet, this book also exposes you to the basics of charting, creating data lists, and performing data analysis. Keep in mind, though, that this book just touches on the easiest ways to get a few things done with these features — I don't attempt to cover charting, data lists, or data analysis in the same definitive way as spreadsheets: This book concentrates on spreadsheets because spreadsheets are what most regular folks create with Excel.

## About This Book

This book isn't meant to be read cover to cover. Although its chapters are loosely organized in a logical order (progressing as you might when studying Excel in a classroom situation), each topic covered in a chapter is really meant to stand on its own.

Each discussion of a topic briefly addresses the question of what a particular feature is good for before launching into how to use it. In Excel, as with most other sophisticated programs, you usually have more than one way to do a task. For the sake of your sanity, I have purposely limited the choices by usually giving you only the most efficient ways to do a particular task. Later, if you're so tempted, you can experiment with alternative ways of doing a task. For now, just concentrate on performing the task as I describe.

As much as possible, I've tried to make it unnecessary for you to remember anything covered in another section of the book. From time to time, however, you will come across a cross-reference to another section or chapter in the book. For the most part, such cross-references are meant to help you get more complete information on a subject, should you have the time and interest. If you have neither, no problem. Just ignore the cross-references as if they never existed.

## *How to Use This Book*

This book is similar to a reference book. You can start by looking up the topic you need information about (in either the Table of Contents or the index) and then refer directly to the section of interest. I explain most topics conversationally (as though you were sitting in the back of a classroom where you can safely nap). Sometimes, however, my regiment-commander mentality takes over, and I list the steps you need to take to accomplish a particular task in a particular section.

## *What You Can Safely Ignore*

When you come across a section that contains the steps you take to get something done, you can safely ignore all text accompanying the steps (the text that isn't in bold) if you have neither the time nor the inclination to wade through more material.

Whenever possible, I have also tried to separate background or footnote-type information from the essential facts by exiling this kind of junk to a sidebar (look for blocks of text on a gray background). Often, these sections are flagged with icons that let you know what type of information you will encounter there. You can easily disregard text marked this way. (I'll scoop you on the icons I use in this book a little later.)

## *Foolish Assumptions*

I'm only going to make one foolish assumption about you and that is that you have some need to use Microsoft Excel 2013 in your work or studies. If pushed, I further guess that you aren't particularly interested in knowing Excel at an expert level but are terribly motivated to find out how to do the stuff you need to get done. If that's the case, this is definitely the book for you. Fortunately, even if you happen to be one of those newcomers who's highly motivated to become the company's resident spreadsheet guru, you've still come to the right place.

As far as your hardware and software goes, I'm assuming that you already have Excel 2013 (usually as part of Microsoft Office 2013) installed on your computing device, using a standard home or business installation running under either Windows 7 or 8. I'm not assuming, however, that when you're

using Excel 2013 under Windows 7 or 8 that you're sitting in front of a large-screen monitor and making cell entries and command selections with a physical keyboard or connected mouse. With the introduction of Microsoft's Surface tablet for Windows 8 and the support for a whole slew of different Windows tablets, you may well be entering data and selecting commands with your finger or stylus using the Windows Touch keyboard and Touch Pointer.



To deal with the differences between using Excel 2013 on a standard desktop or laptop computer with access only to a physical keyboard and mouse and a touchscreen tablet or smartphone environment with access only to the virtual Touch keyboard and Touch Pointer, I've outlined the touchscreen equivalents to common commands you find throughout the text such as "click," "double-click," "drag," and so forth in the section entitled, "Selecting commands by touch" in Chapter 1.

Keep in mind that although most of the figures in this book show Excel 2013 happily running on Windows 7, you will see the occasional figure showing Excel running on Windows 8 in the rare cases (as when opening and saving files) where the operating system you're using does make a difference.



This book is intended *only* for users of Microsoft Excel 2013! Because of the diversity of the devices that Excel 2013 runs on and the places where its files can be saved and used, if you're using Excel 2007 or Excel 2010 for Windows, much of the file-related information in this book may only confuse and confound you. If you're still using a version prior to Excel 2007, which introduced the Ribbon interface, this edition will be of no use to you because your version of the program works nothing like the 2013 version this book describes.

## How This Book Is Organized

This book is organized in six parts with each part containing two or more chapters (to keep the editors happy) that more or less go together (to keep you happy). Each chapter is divided further into loosely related sections that cover the basics of the topic at hand. However, don't get hung up on following the structure of the book; ultimately, it doesn't matter whether you find out how to edit the worksheet before you learn how to format it, or whether you figure out printing before you learn editing. The important thing is that you find the information — and understand it when you find it — when you need to perform a particular task.

In case you're interested, a synopsis of what you find in each part follows.

## ***Part I: Getting Started with Excel 2013***

As the name implies, in this part I cover such fundamentals as how to start the program, identify the parts of the screen, enter information in the worksheet, save a document, and so on. If you're starting with absolutely no background in using spreadsheets, you definitely want to glance at the information in Chapter 1 to discover the secrets of the Ribbon interface before you move on to how to create new worksheets in Chapter 2.

## ***Part II: Editing without Tears***

In this part, I show you how to edit spreadsheets to make them look good, including how to make major editing changes without courting disaster. Peruse Chapter 3 when you need information on formatting the data to improve the way it appears in the worksheet. See Chapter 4 for rearranging, deleting, or inserting new information in the worksheet. Read Chapter 5 for the skinny on printing your finished product.

## ***Part III: Getting Organized and Staying That Way***

Here I give you all kinds of information on how to stay on top of the data that you've entered into your spreadsheets. Chapter 6 is full of good ideas on how to keep track of and organize the data in a single worksheet. Chapter 7 gives you the ins and outs of working with data in different worksheets in the same workbook and gives you information on transferring data between the sheets of different workbooks.

## ***Part IV: Digging Data Analysis***

This part consists of two chapters. Chapter 8 introduces performing various types of what-if analysis in Excel, including setting up data tables with one and two inputs, performing goal seeking, and creating different cases with Scenario Manager. Chapter 9 introduces Excel's vastly improved pivot table and pivot chart capabilities that enable you to summarize and filter vast amounts of data in a worksheet table or data list in a compact tabular or chart format.

## *Part V: Life beyond the Spreadsheet*

In Part V, I explore some of the other aspects of Excel besides the spreadsheet. In Chapter 10, you find out just how ridiculously easy it is to create a chart using the data in a worksheet. In Chapter 11, you discover just how useful Excel's data list capabilities can be when you have to track and organize a large amount of information. In Chapter 12, you find out about using add-in programs to enhance Excel's basic features, adding hyperlinks to jump to new places in a worksheet, to new documents, and even to web pages, as well as how to record macros to automate your work.

## *Part VI: The Part of Tens*

As is the tradition in *For Dummies* books, the last part contains lists of the top ten most useful and useless facts, tips, and suggestions. In this part, you find two chapters. Chapter 13 provides you with the top ten beginner basics you need to know as you start using this program. Chapter 14 gives you the King James Version of the Ten Commandments of Excel 2013. With this chapter under your belt, how canst thou goest astray?

## *Conventions Used in This Book*

The following information gives you the lowdown on how things look in this book. Publishers call these items the book's *conventions* (no campaigning, flag-waving, name-calling, or finger-pointing is involved, however).

### *Selecting Ribbon commands*

Throughout the book, you'll find Ribbon command sequences (the name on the tab on the Ribbon and the command button you select) separated by a command arrow, as in:

HOME↪Copy

This shorthand is the Ribbon command that copies whatever cells or graphics are currently selected to the Windows Clipboard. It means that you click the Home tab on the Ribbon (if it isn't displayed already) and then click the Copy button (that sports the traditional side-by-side page icon).

Some of the Ribbon command sequences involve not only selecting a command button on a tab, but then also selecting an item on a drop-down menu. In this case, the drop-down menu command follows the name of the tab and command button, all separated by command arrows, as in:

Formulas↔Calculation Options↔Manual

This shorthand is the Ribbon command sequence that turns on manual recalculation in Excel. It says that you click the Formulas tab (if it isn't displayed already) and then click the Calculation Options button followed by the Manual drop-down menu option.

The book occasionally encourages you to type something specific into a specific cell in the worksheet. When I tell you to enter a specific function, the part you should type generally appears in **bold** type. For example, **=SUM(A2:B2)** means that you should type exactly what you see: an equal sign, the word **SUM**, a left parenthesis, the text **A2:B2** (complete with a colon between the letter-number combos), and a right parenthesis. You then, of course, have to press Enter to make the entry stick.

Occasionally, I give you a *hot key combination* that you can press in order to choose a command from the keyboard rather than clicking buttons on the Ribbon with the mouse. Hot key combinations are written like this: Alt+FS or Ctrl+S (both of these hot key combos save workbook changes).

With the Alt key combos on a physical keyboard, you press the Alt key until the hot key letters appear in little squares all along the Ribbon. At that point, you can release the Alt key and start typing the hot key letters (by the way, you type all lowercase hot key letters — I only put them in caps to make them stand out in the text).

Hot key combos that use the Ctrl key are of an older vintage and work a little bit differently. On physical keyboards you have to hold down the Ctrl key while you type the hot key letter (though again, type only lowercase letters unless you see the Shift key in the sequence, as in Ctrl+Shift+C).

Excel 2013 uses only one pull-down menu (File) and one toolbar (the Quick Access toolbar). You open the File pull-down menu by clicking the File button or pressing Alt+F to access the Excel Backstage view. The Quick Access toolbar with its four buttons appears directly above the File button.

Finally, if you're really observant, you may notice a discrepancy in how the names of dialog box options (such as headings, option buttons, and check boxes) appear in the text and how they actually appear in Excel on your computer screen. I intentionally use the convention of capitalizing the initial letters of all the main words of a dialog box option to help you differentiate the name of the option from the rest of the text describing its use.

## Icons used in this book

The following icons are placed in the margins to point out stuff you may or may not want to read.



This icon alerts you to nerdy discussions that you may well want to skip (or read when no one else is around).



This icon denotes a tidbit only for Excel users who are running Excel 2013 on some sort of touchscreen device such as a Windows 8 tablet or smartphone.



This icon alerts you to shortcuts or other valuable hints related to the topic at hand.



This icon alerts you to information to keep in mind if you want to meet with a modicum of success.



This icon alerts you to information to keep in mind if you want to avert complete disaster.

## Where to Go from Here

If you've never worked with a computer spreadsheet, I suggest that you first go to Chapter 1 and find out what you're dealing with. Then, as specific needs arise (such as, "How do I copy a formula?" or "How do I print just a particular section of my worksheet?"), you can go to the Table of Contents or the index to find the appropriate section and go right to that section for answers.

Occasionally, John Wiley & Sons, Inc., has updates to its technology books. If this book has technical updates, they will be posted at [www.dummies.com/go/excel2013updates](http://www.dummies.com/go/excel2013updates).



# Part I

# getting started with **Excel** **2013**



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## *In this part...*

- ✓ Explore the Excel user Ribbon interface.
- ✓ Make sense of the most commonly used tabs and command buttons.
- ✓ Customize the Quick Access toolbar.
- ✓ Start (and stop) Excel 2013.
- ✓ Find help through the online Excel 2013 Help window.
- ✓ Become familiar with the prominent buttons and boxes for entering spreadsheet data.
- ✓ Recover a lost workbook when disaster strikes.
- ✓ Visit [www.dummies.com](http://www.dummies.com) for more great Dummies content online.

## Chapter 1

# The Excel 2013 User Experience

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### *In This Chapter*

- ▶ Getting familiar with the Excel 2013 program window and Backstage view
  - ▶ Selecting commands from the Ribbon
  - ▶ Customizing the Quick Access toolbar
  - ▶ Methods for starting Excel 2013
  - ▶ Surfing an Excel 2013 worksheet and workbook
  - ▶ Getting some help with using this program
- 

**E**xcel 2013, like Excel 2010 and Excel 2007 before it, relies upon a single strip at the top of the worksheet called the Ribbon that puts the bulk of the Excel commands you use at your fingertips at all times.

Add to the Ribbon a File tab and a Quick Access toolbar — along with a few remaining task panes (Clipboard, Clip Art, and Research) — and you end up with the handiest way to crunch your numbers, produce and print polished financial reports, as well as organize and chart your data. In other words, to do all the wonderful things for which you rely on Excel.

Best of all, the Excel 2013 user interface includes all sorts of graphical elements that make working on spreadsheets a lot faster and a great deal easier. Foremost is Live Preview that shows you how your actual worksheet data would appear in a particular font, table formatting, and so on before you actually select it. This Live Preview extends to the new Quick Analysis and Recommended PivotTables and Recommended Charts commands to enable you to preview your data in various formats before you apply them.

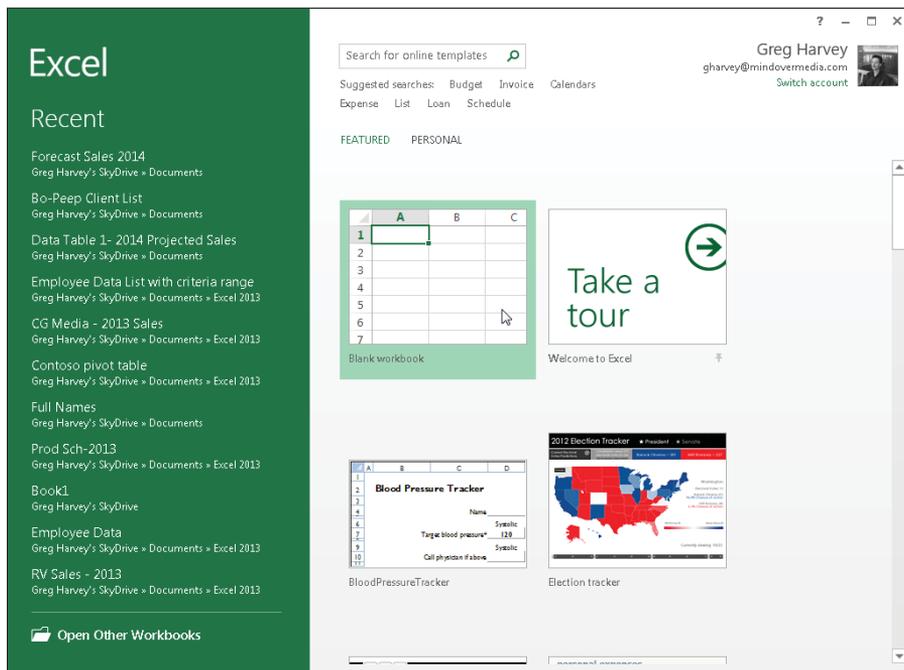
Additionally, Excel 2013 supports a Page Layout View that displays rulers and margins along with headers and footers for every worksheet with a Zoom slider at the bottom of the screen that enables you to zoom in and out on the spreadsheet data instantly. Finally, Excel 2013 is full of pop-up galleries that make spreadsheet formatting and charting a real breeze, especially in tandem with Live Preview.

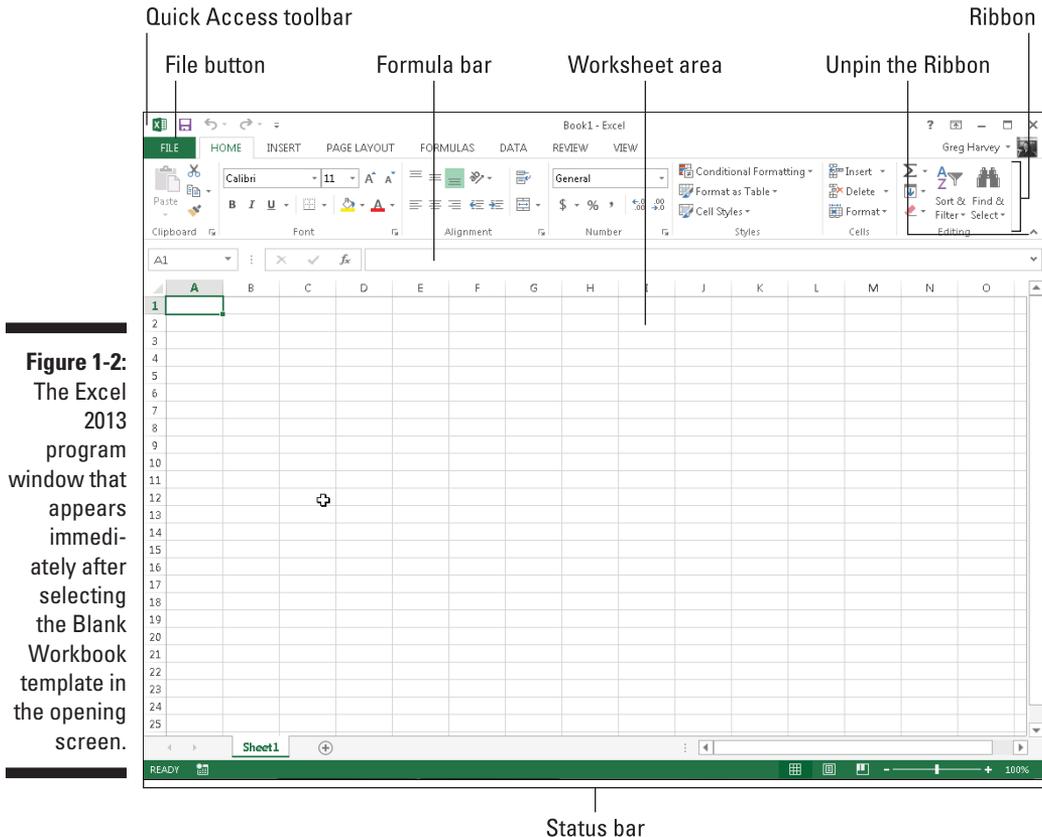
## Excel's Ribbon User Interface

When you launch Excel 2013, the Start screen similar to the one shown in Figure 1-1 opens. Here you can start a new blank workbook by clicking the Blank workbook template, or you can select any of the other templates shown as the basis for your new spreadsheet. If none of the templates shown in the Start screen suits your needs, you can search for templates online. After you've worked with Excel for some time, the Start screen also displays a list of recently opened workbooks that you can reopen for further editing or printing.

When you select the Blank workbook template from the Excel 2013 Start screen, the program opens an initial worksheet (named Sheet1) in a new workbook file (named Book1) inside a program window like the one shown in Figure 1-2.

**Figure 1-1:**  
The Excel 2013 Start screen enables you to open a new blank workbook, a recently opened workbook, or find a template to use as the basis for a new workbook.





**Figure 1-2:**  
The Excel 2013 program window that appears immediately after selecting the Blank Workbook template in the opening screen.

The Excel program window containing this worksheet of the workbook contains the following components:

- ✦ **File button** that when clicked opens the Backstage view — a menu on the left that contains all the document- and file-related commands, including Info, New, Open (selected by default when you first launch Excel), Save, Save As, Print, Share, Export, and Close. Additionally, at the bottom, there's an Account option with User and Product information and an Options item that enables you to change many of Excel's default settings. Note that you can exit the Backstage view and return to the normal worksheet view.

- ✔ Customizable **Quick Access toolbar** that contains buttons you can click to perform common tasks, such as saving your work and undoing and redoing edits. This toolbar is preceded by an **Excel program** button (sporting the Excel 2013 icon) with a drop-down menu of options that enable you to control the size and position of the Excel window and even close (exit) the program.
- ✔ **Ribbon** that contains the bulk of the Excel commands arranged into a series of tabs ranging from Home through View.
- ✔ **Formula bar** that displays the address of the current cell along with the contents of that cell.
- ✔ **Worksheet area** that contains the cells of the worksheet identified by column headings using letters along the top and row headings using numbers along the left edge; tabs for selecting new worksheets; a horizontal scroll bar to move left and right through the sheet; and a vertical scroll bar to move up and down through the sheet.
- ✔ **Status bar** that keeps you informed of the program's current mode and any special keys you engage and enables you to select a new worksheet view and to zoom in and out on the worksheet.

## *Going Backstage*

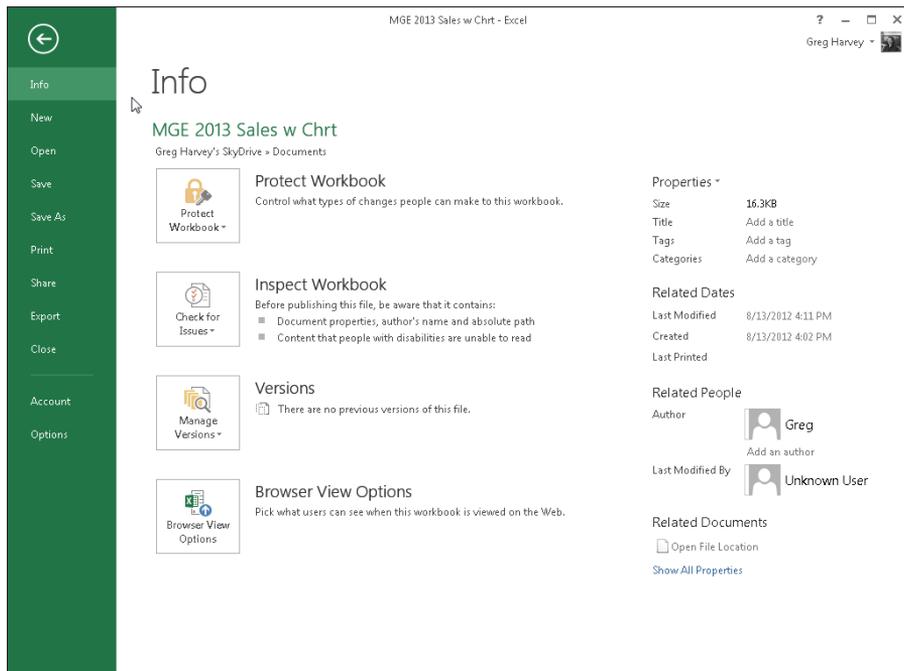
To the immediate left of the Home tab on the Ribbon right below the Quick Access toolbar, you find the File button.

When you select File, the Backstage view opens. This view contains a menu similar to the one shown in Figure 1-3. When you open the Backstage view with the Info option selected, Excel displays at-a-glance stats about the workbook file you have open and active in the program.

This information panel is divided into two panes. The pane on the left contains large buttons that enable you to modify the workbook's protection status, check the document before publishing, and manage its versions. The pane on the right contains a list of fields detailing the workbook's various Document Properties, some of which you can change (such as Title, Tags, Categories, Author, and Last Modified By), and many of which you can't (such as Size, Last Modified, Created, and so forth).

Below the Info option, you find the commands (New, Open, Save, Save As, Print, Share, Export, and Close) you commonly need for working with Excel workbook files. Near the bottom, the File tab contains an Account option that, when selected, displays an Account panel in the Backstage view. This panel displays user, connection, and Microsoft Office account information. Below the Account menu item, you find options that you can select to change the program's settings.

**Figure 1-3:**  
Open  
Backstage  
view to get  
at-a-glance  
information  
about the  
current file,  
access all  
file-related  
commands,  
and modify  
the program  
options.



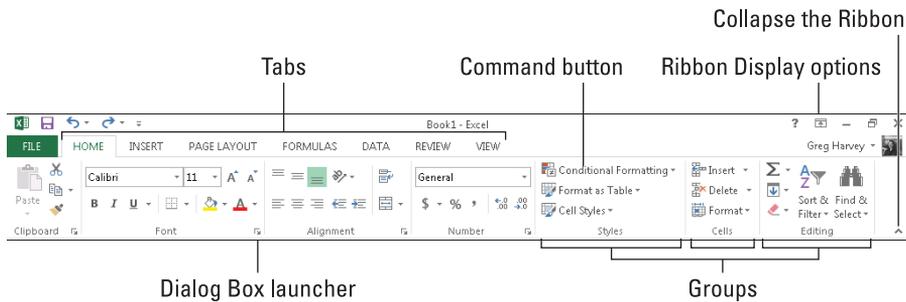
Select the Open option to open an Excel workbook you've worked on of late for more editing. When you select Open, Excel displays a panel with a list of all the workbook files recently opened in the program. To re-open a particular file for editing, all you do is click its filename in this list.

To close the Backstage view and return to the normal worksheet view, you select the Back button at the very top of the menu or simply press Esc on your keyboard.

## Using the Excel Ribbon

The Ribbon (shown in Figure 1-4) groups the most commonly used options needed to perform particular types of Excel tasks.

**Figure 1-4:**  
Excel's Ribbon consists of a series of tabs containing command buttons arranged into different groups.



To do this, the Ribbon uses the following components:

- ✓ **Tabs** for each of Excel's main tasks that bring together and display all the commands commonly needed to perform that core task.
- ✓ **Groups** that organize related command buttons into subtasks normally performed as part of the tab's larger core task.
- ✓ **Command buttons** within each group that you select to perform a particular action or to open a gallery from which you can click a particular thumbnail. **Note:** Many command buttons on certain tabs of the Ribbon are organized into mini-toolbars with related settings.
- ✓ **Dialog Box launcher** in the lower-right corner of certain groups that opens a dialog box containing a bunch of additional options you can select.



To display more of the Worksheet area in the program window, collapse the Ribbon so that only its tabs are displayed by simply clicking the Collapse the Ribbon button on the right side above the vertical scroll bar. You can also double-click (or double-tap on a touchscreen) any one of the Ribbon's tabs, or press Ctrl+F1 on your keyboard. To once again pin the Ribbon in place so that all the command buttons on each of its tabs are always displayed in the program window, double-click (or double-tap) any one of the tabs, or press Ctrl+F1 a second time. You can also do this by selecting the Pin the Ribbon button (whose icon looks just like a pin) that replaces the Unpin the Ribbon button and appears whenever you temporarily activate a tab to use its command buttons.