Excel Overview

This chapter is a brief overview of Microsoft Excel. Excel is one of the top-used business applications across virtually any industry. It's much more than graphed paper; the programing in this application streamlines and solves complicated business problems. It has data management abilities, meaning you can store a database of customer information and perform analysis to gather important data about your business like sales data, popular items, etc.

Understanding how to properly use Excel is a highly employable skill and can lead to opportunities for promotion. It helps you lead in resolving challenging issues and share the most important information.

This textbook provides practice instructions to understand how to use Excel. Take your time to use this text to practice and rework skills in Excel to quickly learn how to use the program. It will take practice and effort, but as you learn Excel, you will see benefits throughout your life. Speak with your instructor, tutors, and group chats to better understand this content.

Let's get started by learning some of the Excel basics:

Download Excel

To install Excel on your computer, follow the steps located in the **class syllabus**. It's important to note that you **cannot** use the online version of Excel for this class. You need the **full version of Excel** not the mobile app or browser version.

Opening Excel

After downloading Excel on your computer, open it by accessing the Start Menu and searching **Excel**. Open the application.

The first menu available to you will show you template workbooks and recent workbooks. A workbook is a collection of one or more spreadsheets, or worksheets, in a single file.

Open a blank workbook. It should look like **Figure 38.1**.

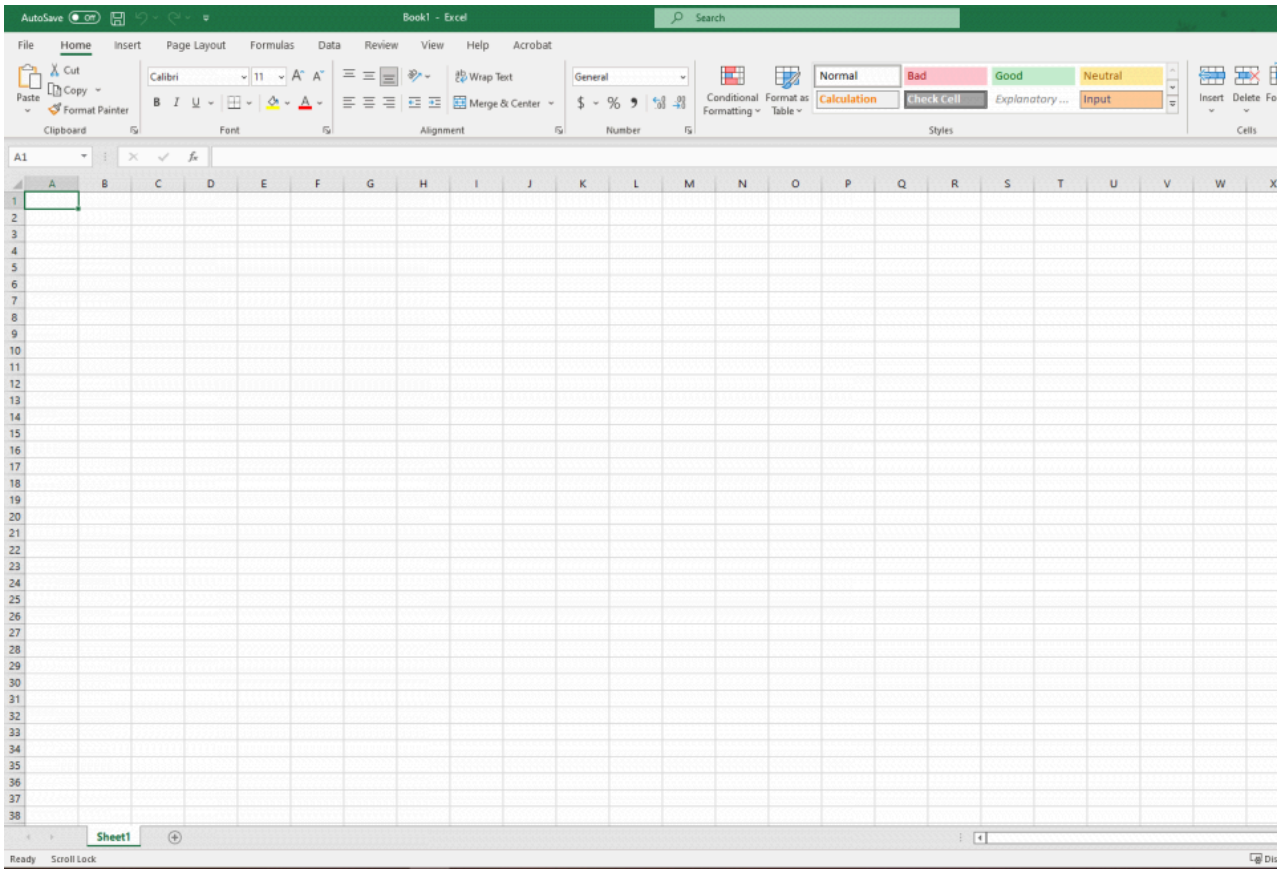


Figure 38.1

Let's take a look at different elements of a workbook.

Ribbon & Tabs

The **Ribbon** has a selection of **Tabs that offer** different tools available in Excel. (See **Figure 38.2**)

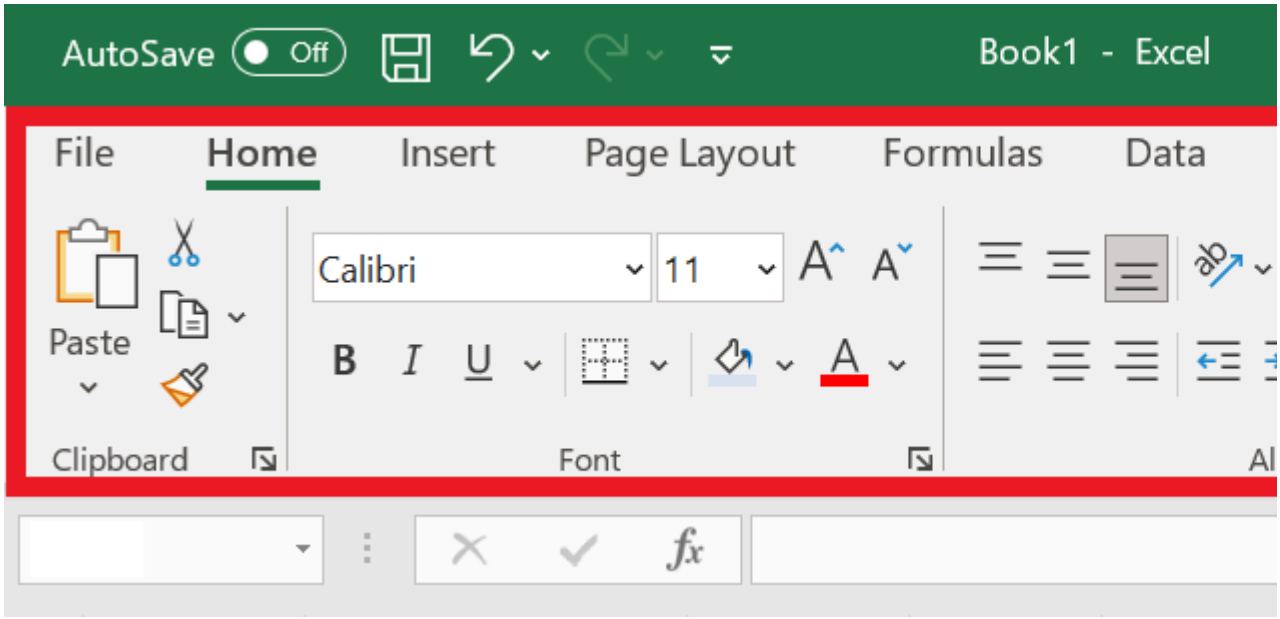


Figure 38.2

- In the **File** tab, you'll be directed to a menu where you can get more information, save, print, share, etc. your workbook.

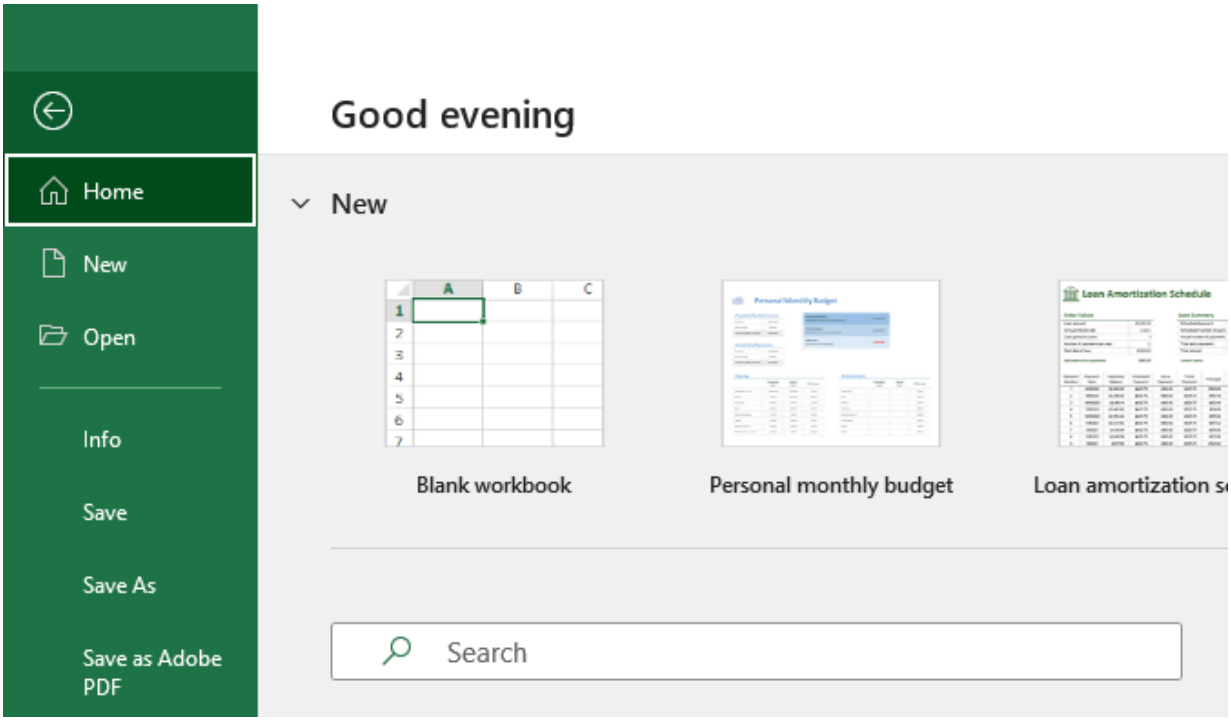


Figure 38.3

- The **Home** tab has basic document tools, such as access to your clipboard, formatting fonts, text alignment, number formatting, styles, cell structure, editing tools, and analysis.

Figure 38.4

- The **Insert** Tab has tools you can use to insert tables, illustrations, add-ins, charts, tours, sparklines, filters, links, comments, text boxes, and symbols.

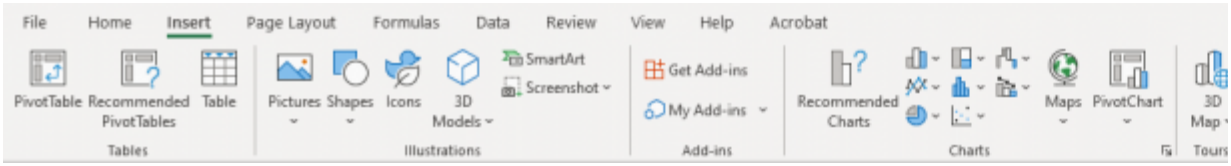


Figure 38.5

- The **Page Layout** tab has tools regarding page themes, setup, scale, sheet options, and arrangements.

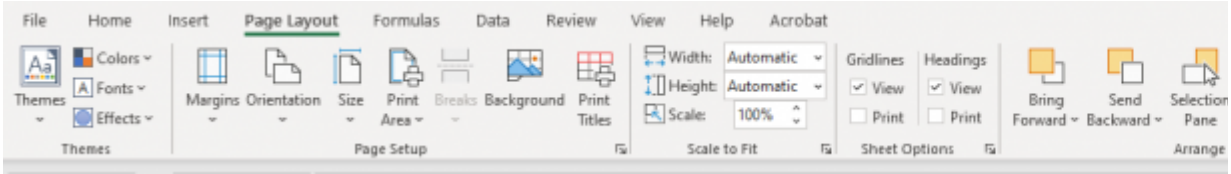


Figure 38.6

- The **Formulas** tab has tools like the function library, defined names, formula auditing, and calculation.

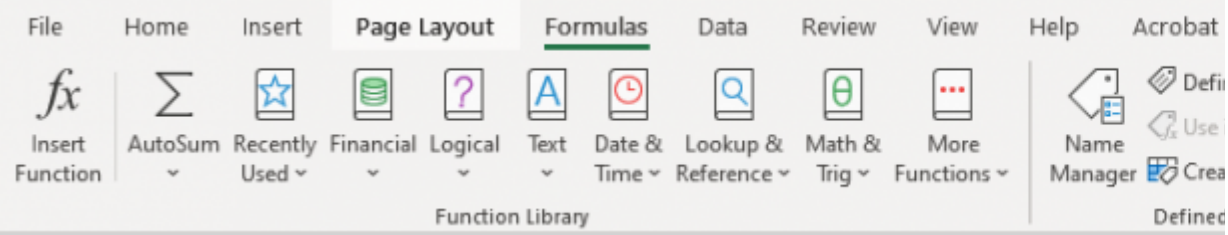


Figure 38.7

- The **Data** tab has tools for getting and receiving data, queries, data types, sorting and filtering data, data tools, forecasting, and outlining tools.

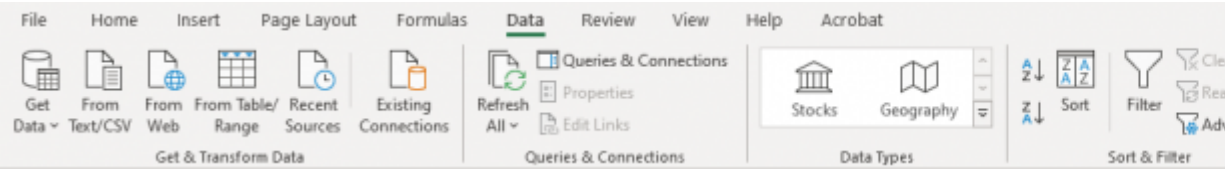


Figure 38.8

- The **Review** tab has tools for proofing, accessibility checks, insights, languages, comments, notes, protections, and ink.

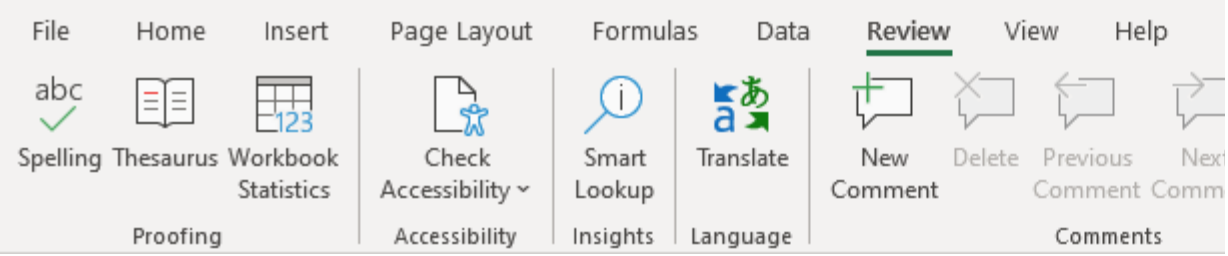


Figure 38.9

- The **View** tab has options for how to view your workbook, what to show in your worksheet, zooming options, and window arrangement.

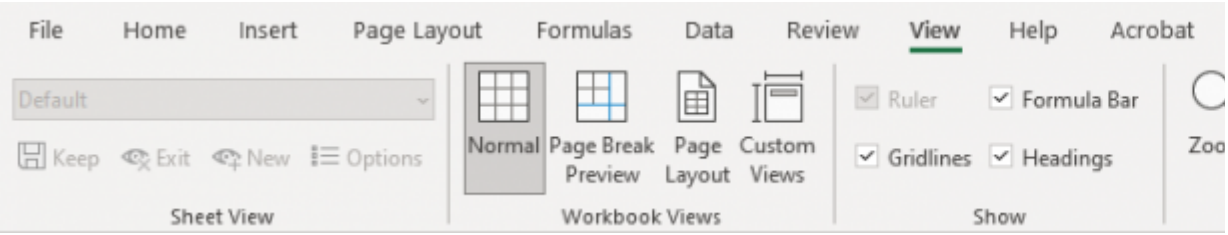


Figure 38.10

- The **Help** tab has basic support options.

Figure 38.11

- The **Acrobat** tab has tools for creating, sharing, reviewing, and running actions in your workbook as a PDF.

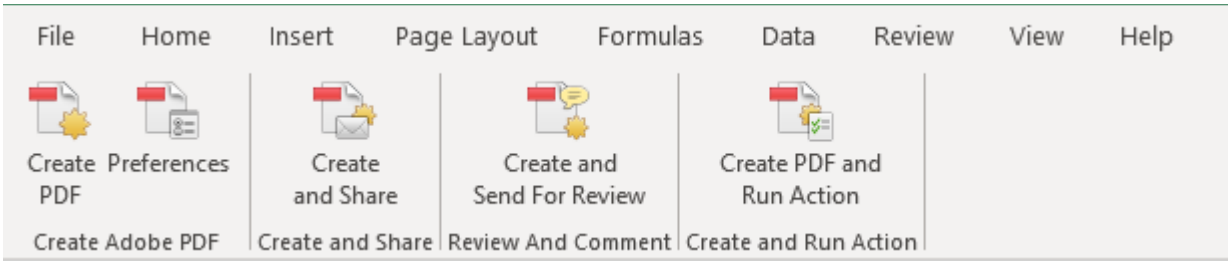


Figure 38.12

Name Box

The **Name Box** indicates what cell is selected.

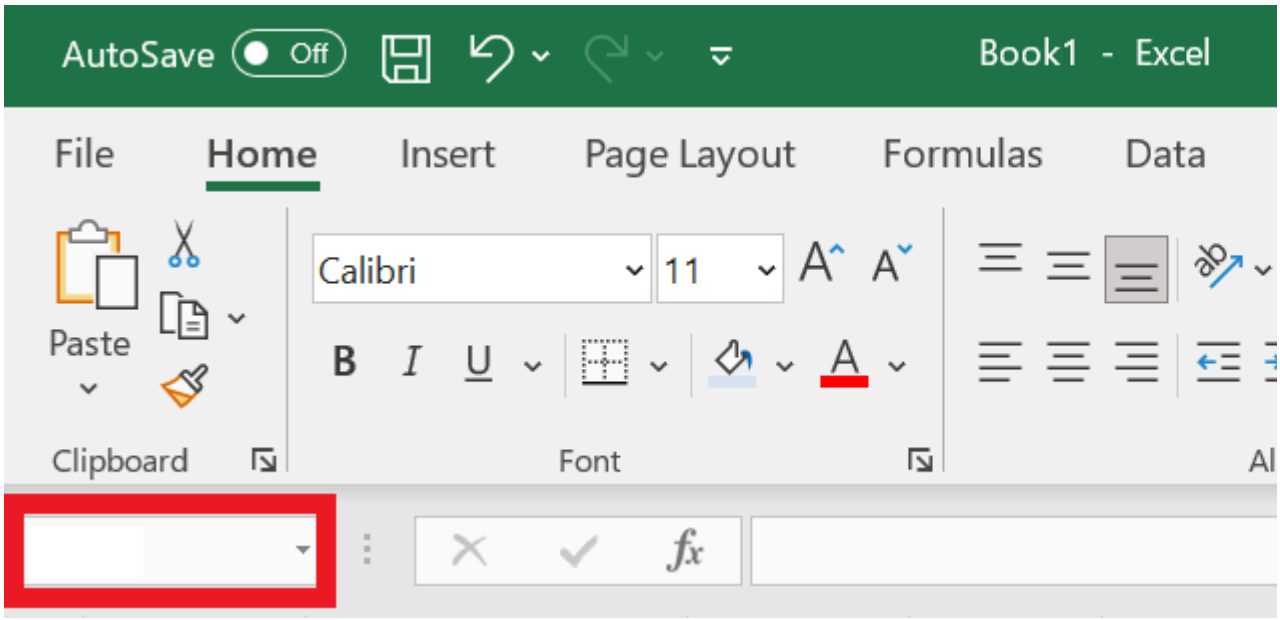


Figure 38.13

Formula Box

The **Formula Box** is where you can see or type in the information for selected cell(s).

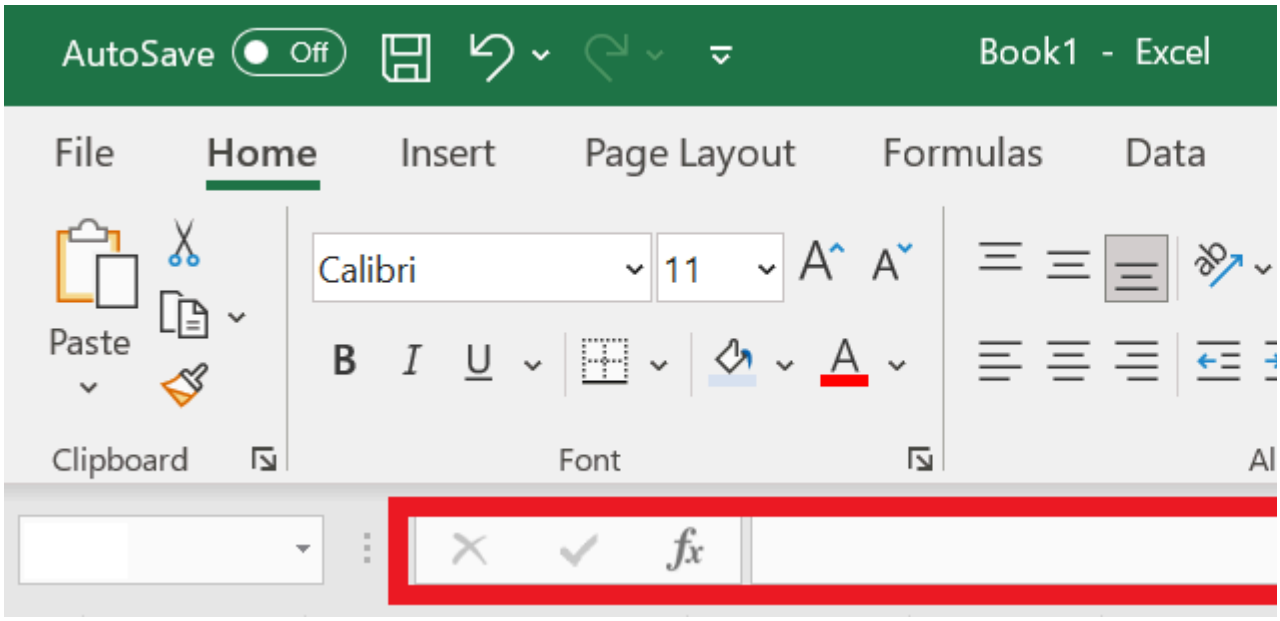


Figure 38.14

Rows

A **row** is the horizontal selection of cells, indicated by numbers on the left side of the worksheet.

Columns

A **column** is the vertical selection of cells, indicated by letters at the top of the worksheet.

Cells

Cells are the individual boxes within the grids. A single cell is indicated by the column letter and row number (for example, **A1** or **F26**).

Objects

Objects are images, illustrations, charts etc. that float above the cells rather than rest inside of a specific cell.

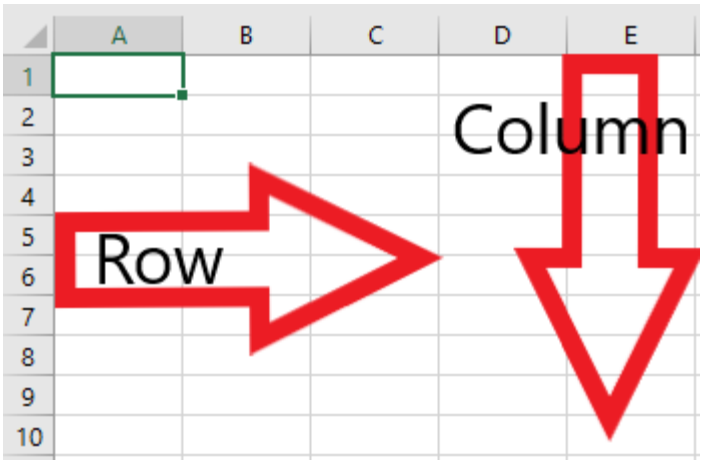


Figure 38.15

Worksheets

A **worksheet** is a spreadsheet within a workbook. Multiple worksheets can exist in a workbook. They can be added by selecting the **Plus** sign (**+**) next to the most recent worksheet. Worksheets can be renamed by double-clicking the current title.

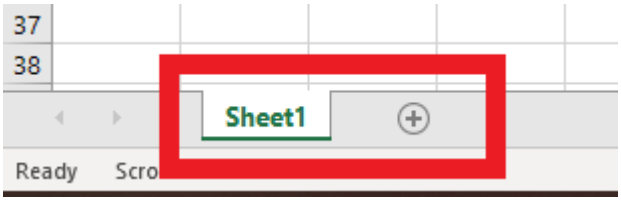


Figure 38.16

Navigating Your Workbook

There are three essential data types in Excel: **Text**, **Numbers**, and **Functions**.

Text

Text is just letters or words. If you type a word into a cell and it's recognized as text, Excel defaults to align the text to the left of the cell. You can use text to organize elements of your worksheet by labeling rows or columns according to the data you add.

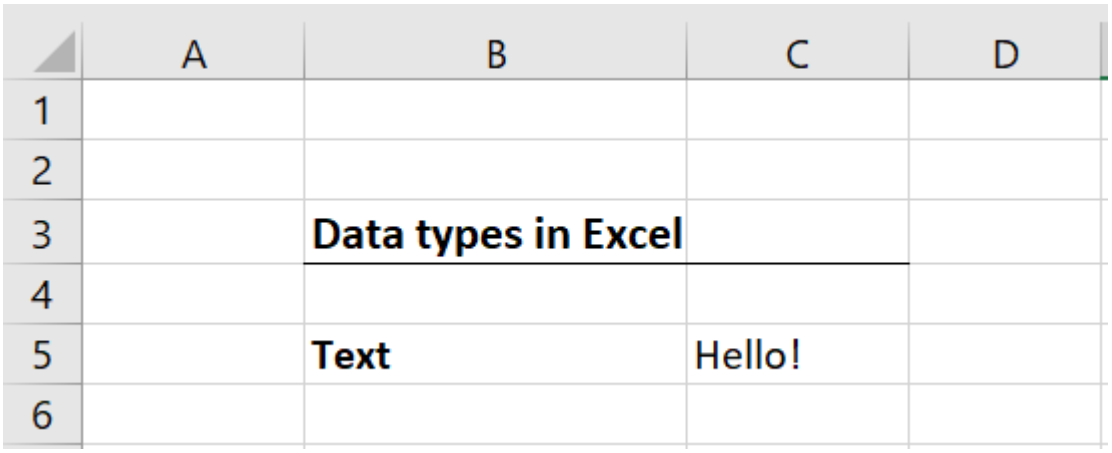


Figure 38.17

Numbers

Numbers come in multiple formats, including general data. Numbers are automatically aligned to the right of a cell. The special type of numbers you'll encounter frequently are **Date** or **Time**.

Date

You can format dates in Excel. You can use long-form dates (January 1, 2000) or short-form dates (1/1/2000). You can also represent a date as a serial number by using the **General** format.

If you type in a serial number and then change the format from **General** to **Date**, it will change the serial number to its respective date. For example, if you type in the number **1** in a General format and change the format to **Date**, the date will show you 1/1/1900, which is the first date available in Excel.

You can change the format of the date by going to the **Home** tab and selecting the drop-down menu in **Number**. (See **Figure 38.18**)

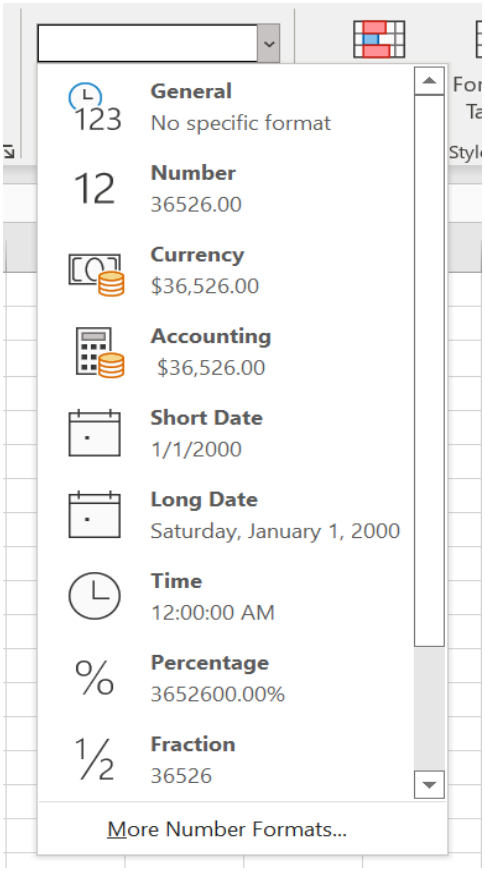


Figure 38.18

Time

Times are similar to dates in the fact that they use serial numbers as well. For example, if we type **1.8** into a cell and change the format to **Time**, it will show us **7:12:00 PM** in the cell. In the formula bar, it will read, **1/1/1900 7:12:00 PM** because the serial number is attributed to that day, at that time. (See **Figures 38.19** and **38.20**)

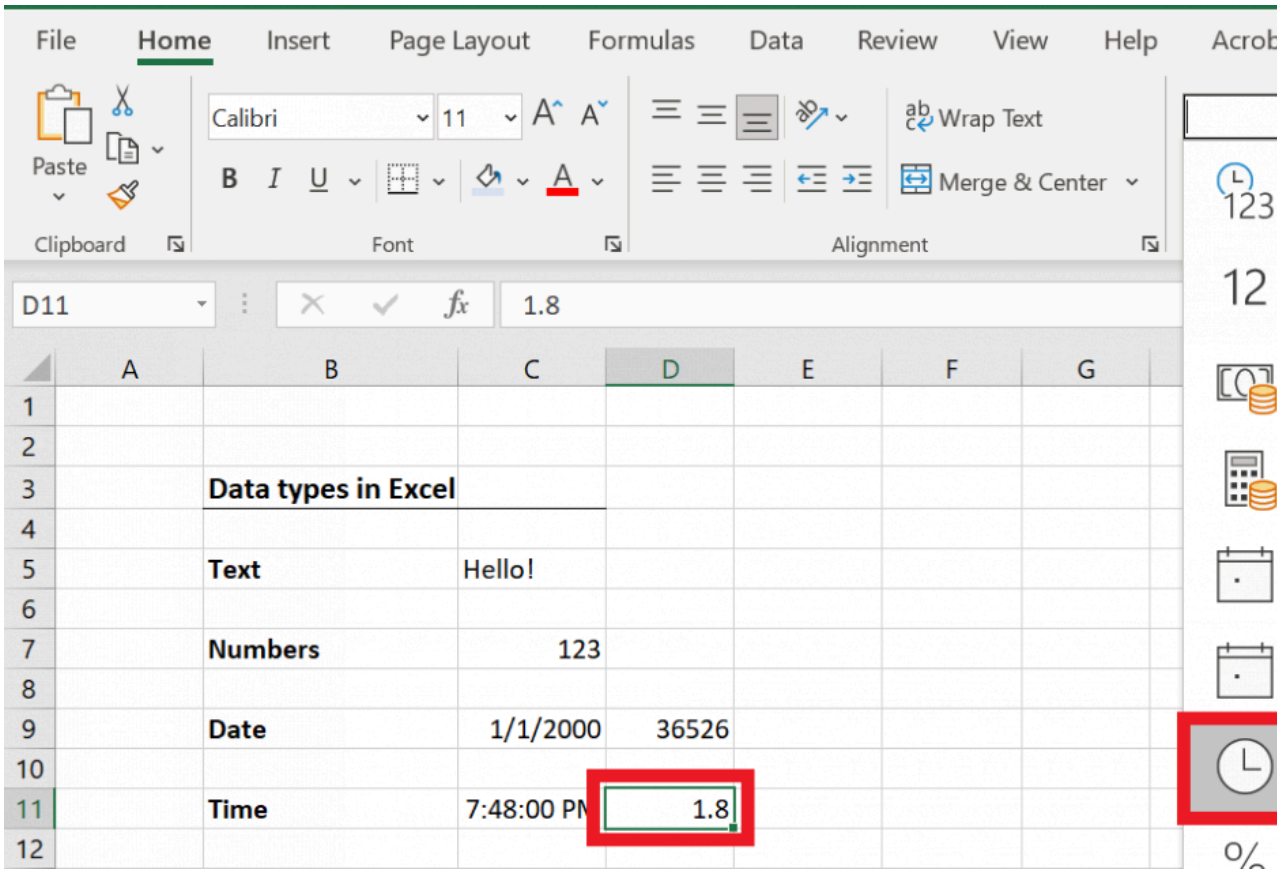

File
Home
Insert
Page Layout
Formulas
Data
Review
View
Help
Paste
Calibri
11
Wrap Text
Merge & Center
Clipboard
Font
Alignment
D11
1.8
Data types in Excel
Text
Hello!
Numbers
123
Date
1/1/2000
36526
Time
7:48:00 PM
1.8

Figure 38.19

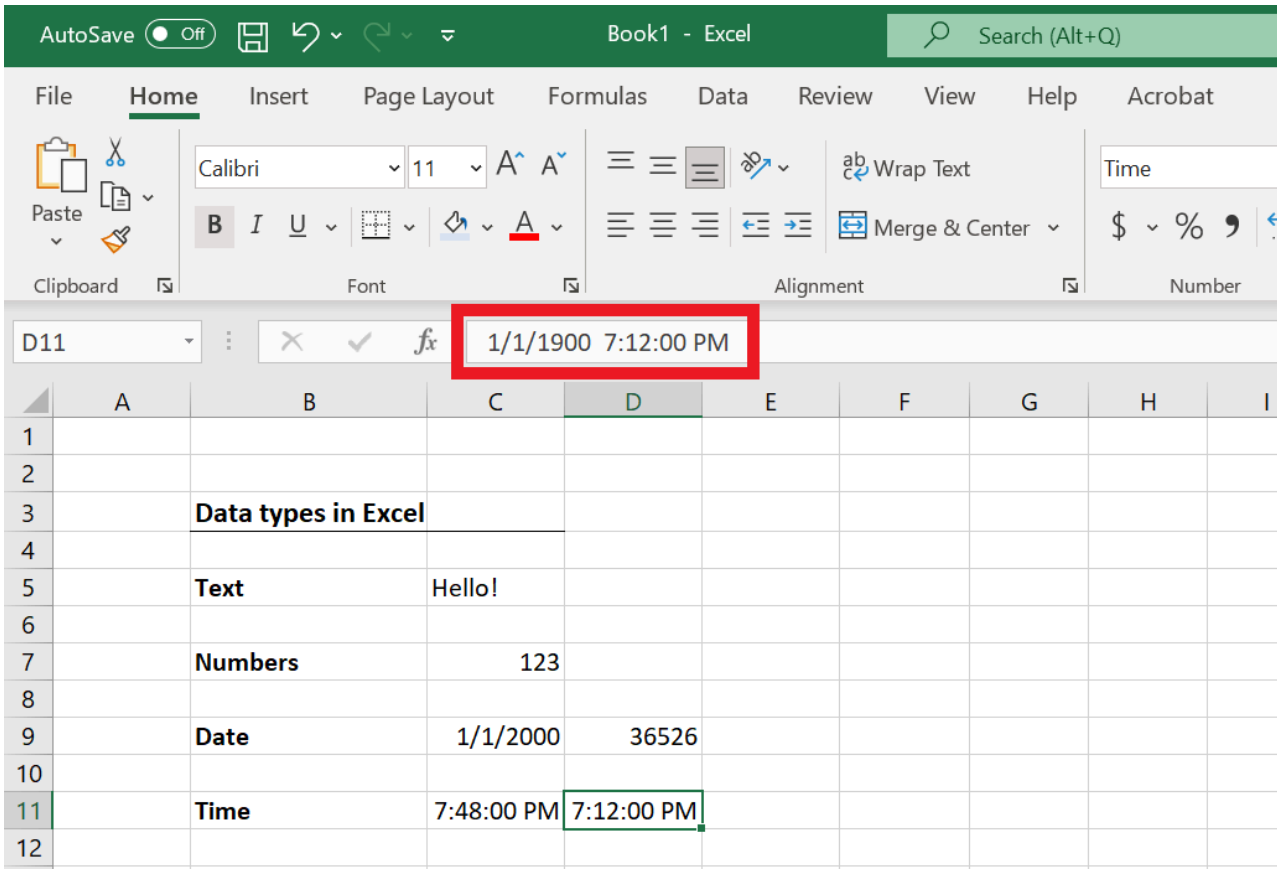


Figure 38.20

You won't need to memorize serial numbers of dates or times; this is only important to know because it makes it easier to add or subtract days or time. Let's test out how you can add days to a date in Excel:

1. In E9, type the number **1**.
2. Change the formatting to **Short Date**.
    a. The date should change to 1/1/1900. (See **Figure 38.21**)

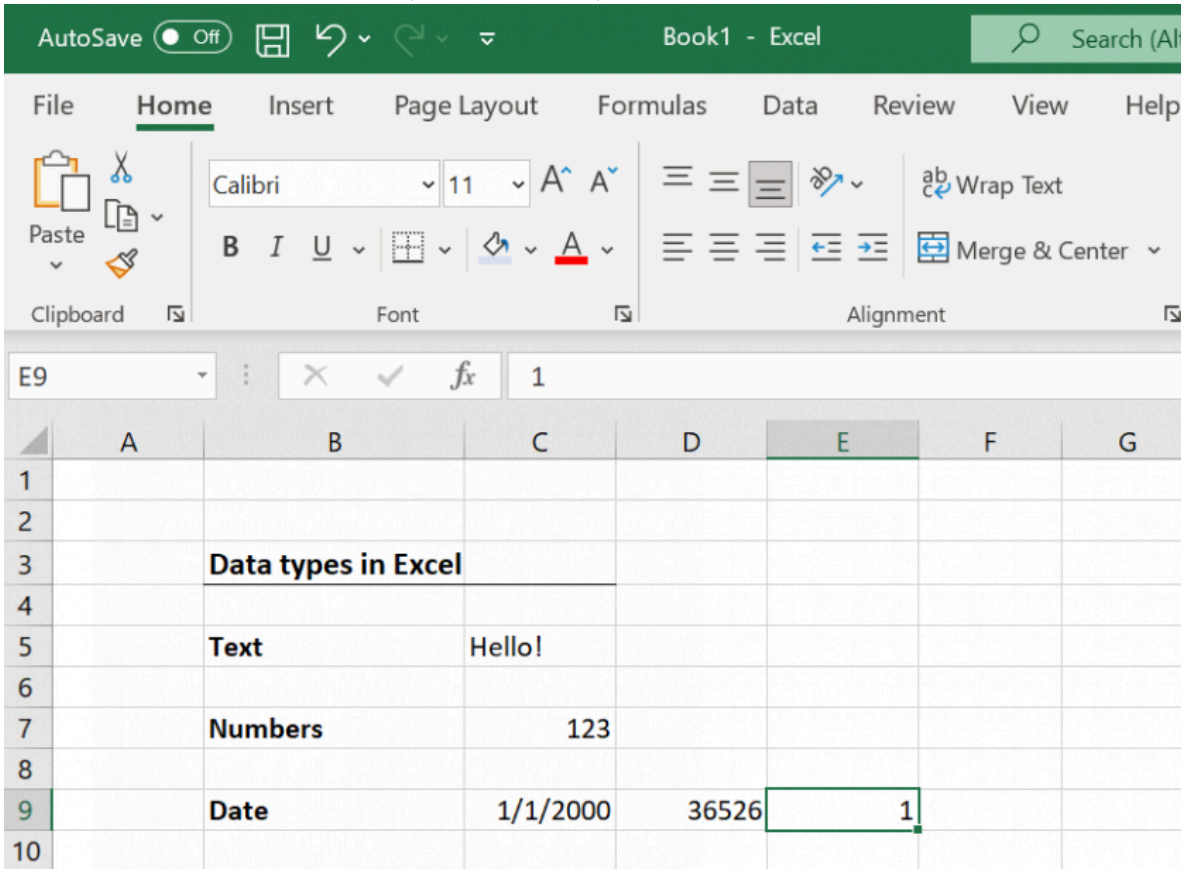
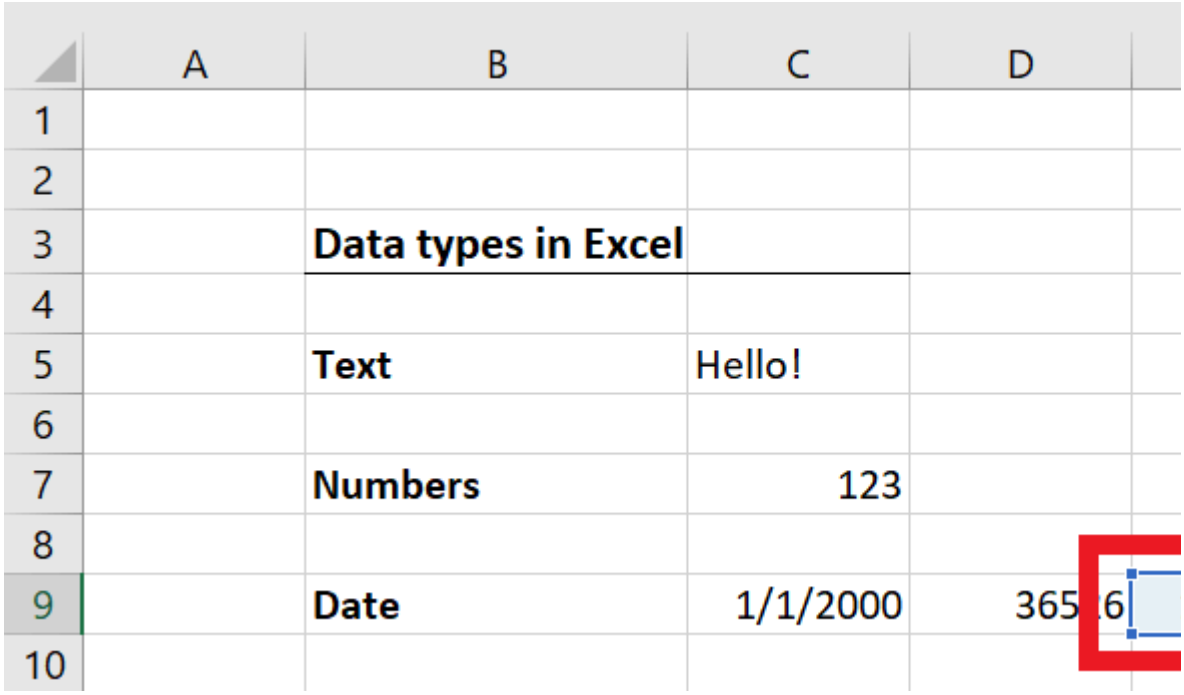


Figure 38.21

3. In F9, type in an equation to add 50 days to the date.

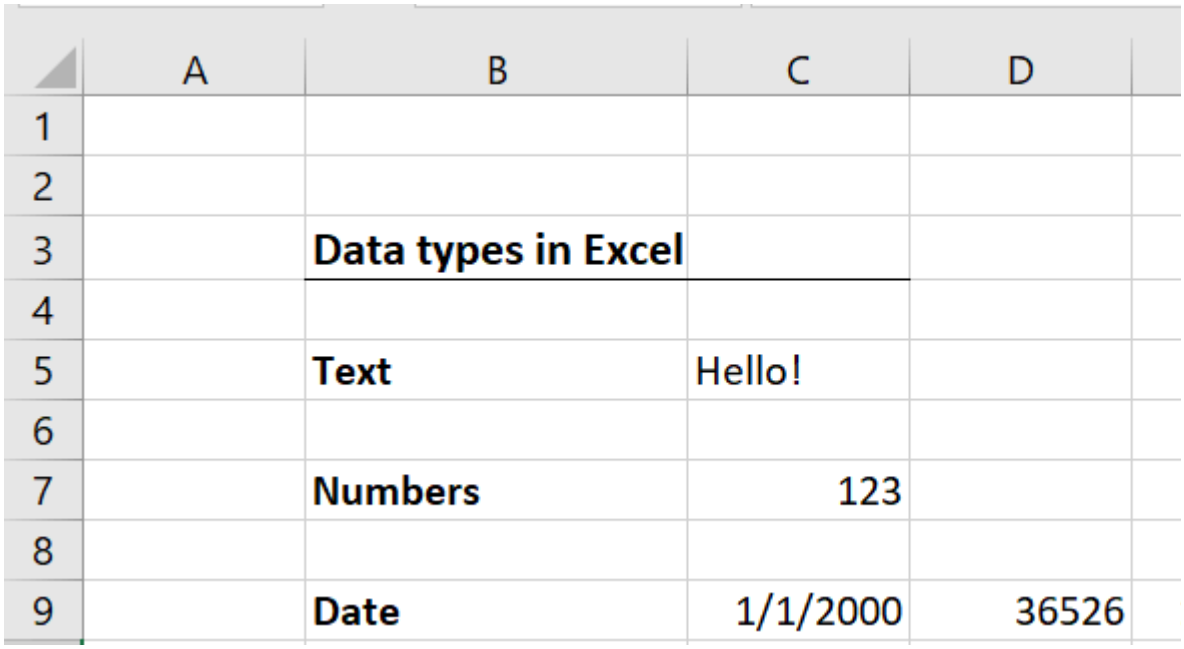
a. Your equation should be **=E9+50**. (See **Figure 38.22**)



	A	B	C	D
1				
2				
3		**Data types in Excel**		
4				
5		**Text**	Hello!	
6				
7		**Numbers**	123	
8				
9		**Date**	1/1/2000	365 6
10				

Figure 38.22

4. Press the **Enter** key.
   a. F9 should now be a date: **2/20/1900**, or 50 days past 1/1/1900. (See **Figure 38.23**)



	A	B	C	D
1				
2				
3		**Data types in Excel**		
4				
5		**Text**	Hello!	
6				
7		**Numbers**	123	
8				
9		**Date**	1/1/2000	36526

Figure 38.23

Functions

Functions are predefined formulas that perform calculations using specific values in a particular order. Excel has dozens of functions available for your use. Functions are viewable in the formula bar, and vary from adding, multiplying, subtracting, and sorting data. This section will teach you how to insert a basic function:

In **Figure 38.25**, you can see there are numbers in cells C13, C14, and C15. Use a SUM function in C16 to add them all together.

1. In C16, use the **equal** sign (**=**) to start the function.
2. Type **SUM** after the equal sign to indicate you want to **add** numbers together.
3. Open the equation with a parenthesis (**(**).
4. Select C13 and drag down to C15 and then close the parenthesis (**)**).
    a. The equation should read **=SUM(C13:C15)**. (See **Figure 38.24**)

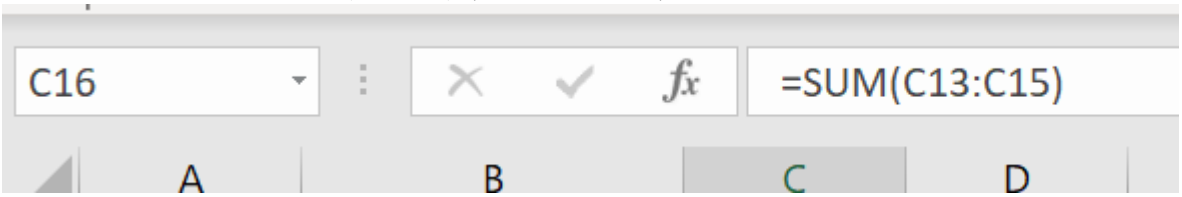


Figure 38.24

5. Press the **Enter** key.
    a. C16 should have the sum of the three numbers: **6**. (See **Figure 38.25**)

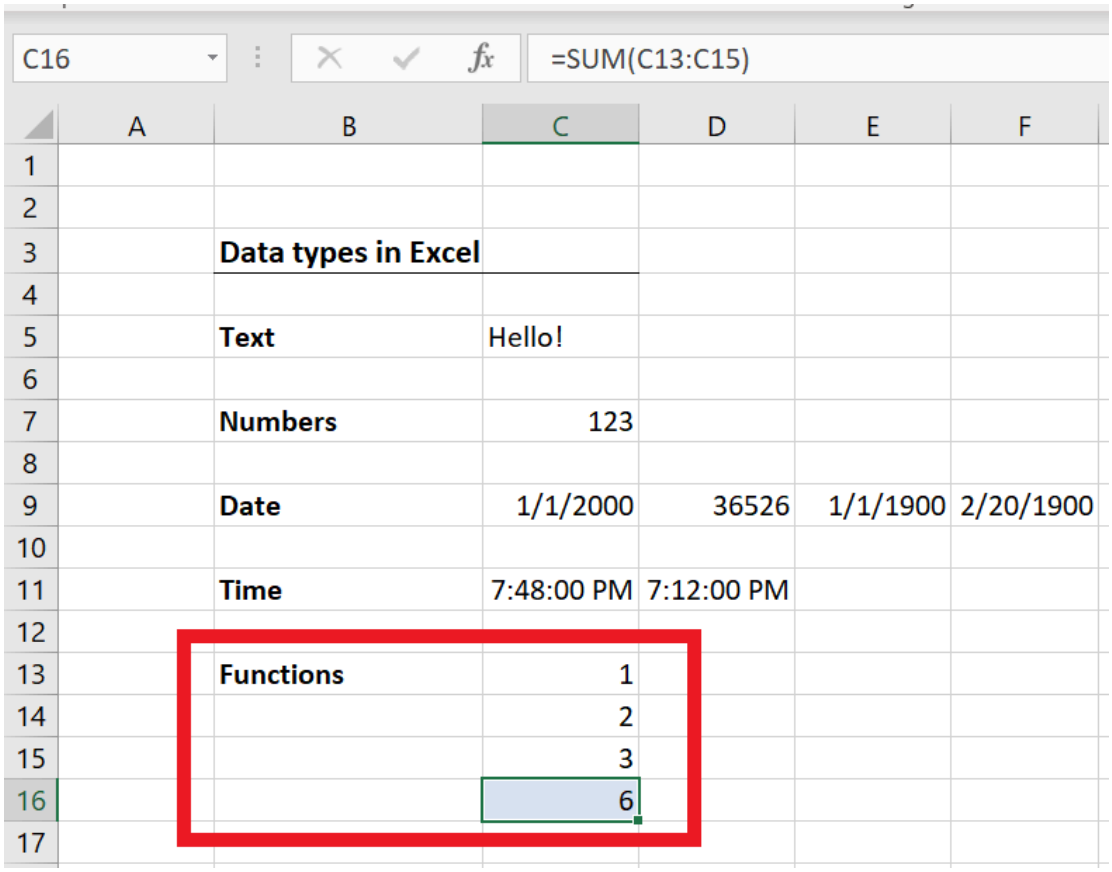


Figure 38.25

Functions are helpful because if you change one of the numbers from the selection, it will change the answer in the cell with the function. For example, if you change the number **1** in **C13** to **5**, the number in C16 will change to **10**. (See **Figure 38.26**)

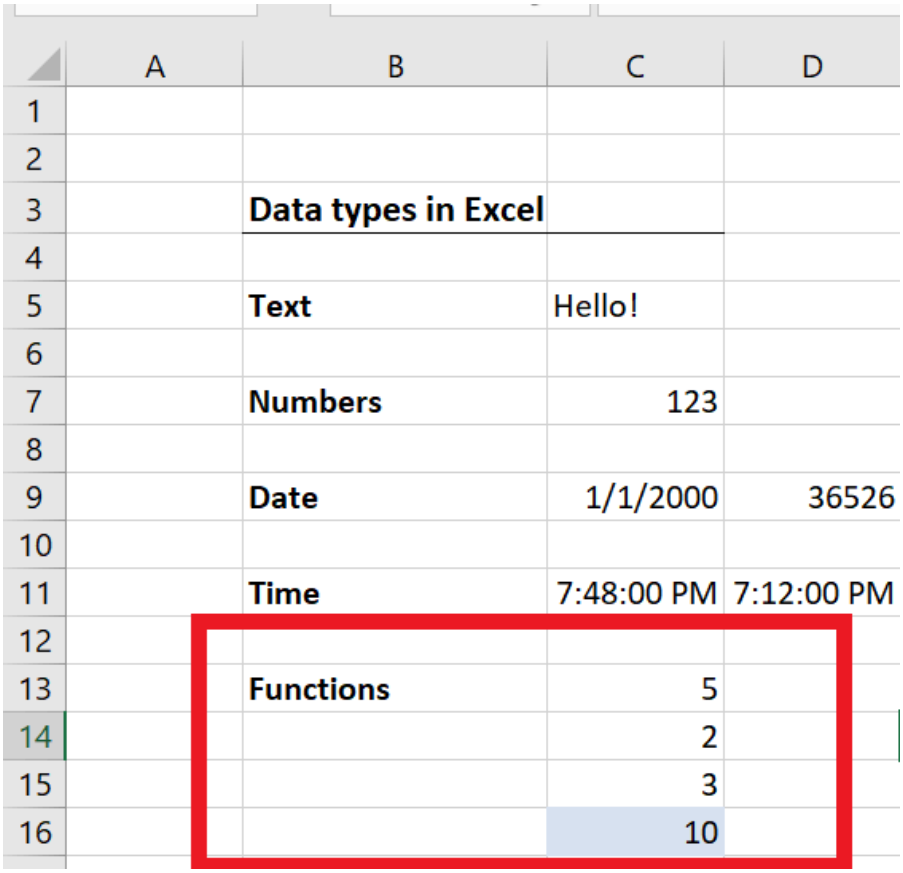


Figure 38.26

Note: If you have text **and** numbers in a cell together, Excel will recognize the cell as text-based as shown in **Figure 38.27**. If you ever need to label a row or column, separate it from the data to ensure you can use the appropriate functions.

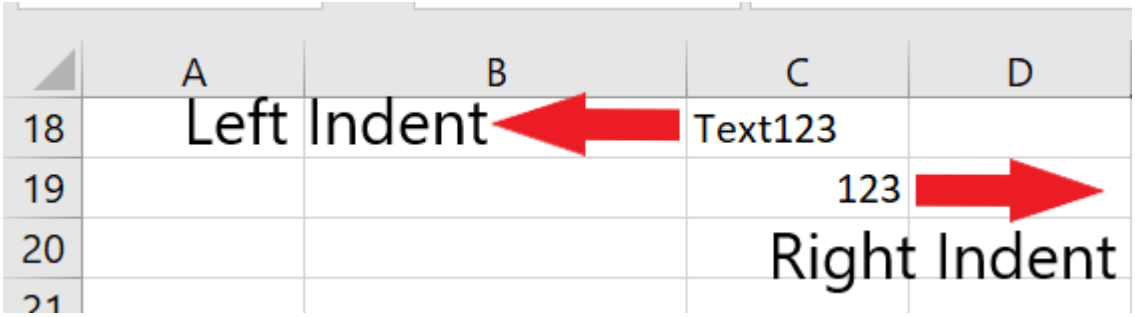


Figure 38.27

Change Text Format

You can change how the text or numbers in a cell appears. You can change it to bold, italic, or underline.

For example, you can change the text in a cell to bold:

1. Click on the cell with the text you want to change.
2. Go to the **Home** tab.
3. Click on **B** for Bold. (See **Figure 38.28**)

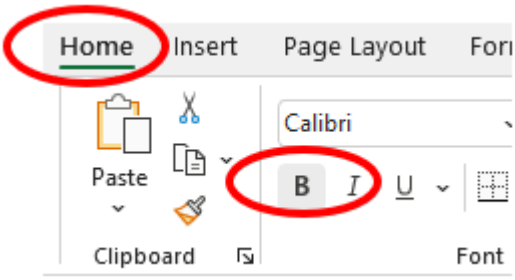


Figure 38.28

Change Text Alignment

Changing the position of the text within a cell is text alignment. The text can be centered, and aligned right or left. (See **Figure 38.29**)

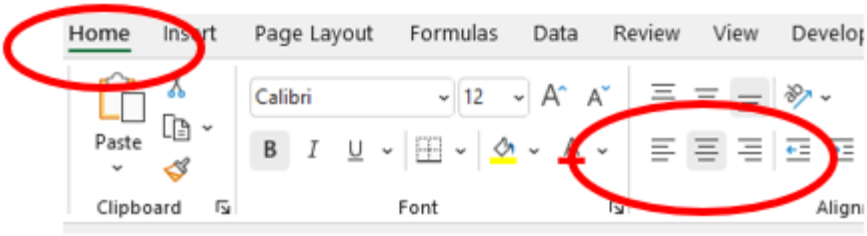


Figure 38.29

You can use the **Wrap Text** if the text is too long.

To use Wrap Text:

1. Click on the cell you want to use Wrap Text.
2. Go to the **Home tab** then under the **Alignment** section.
3. Click on **Wrap Text**. (See **Figure 38.30**)

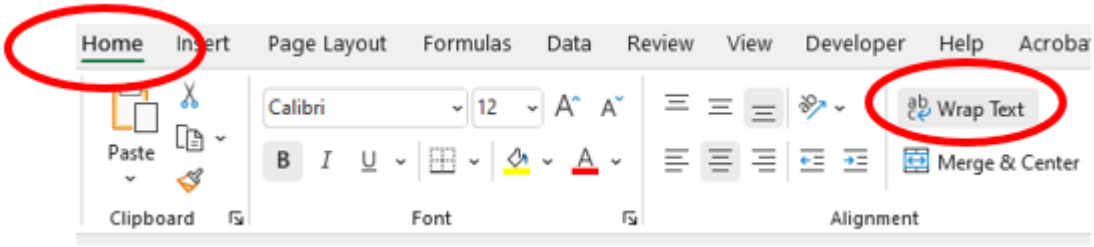


Figure 38.30

Applying Borders

You can add borders to a cell or multiple cells. There is a variety of types of borders you can select.

For example, you can apply **All Borders** to a particular range like B2:D5.

1. Highlight the range of cells B2:D5. (See **Figure 38.31**)

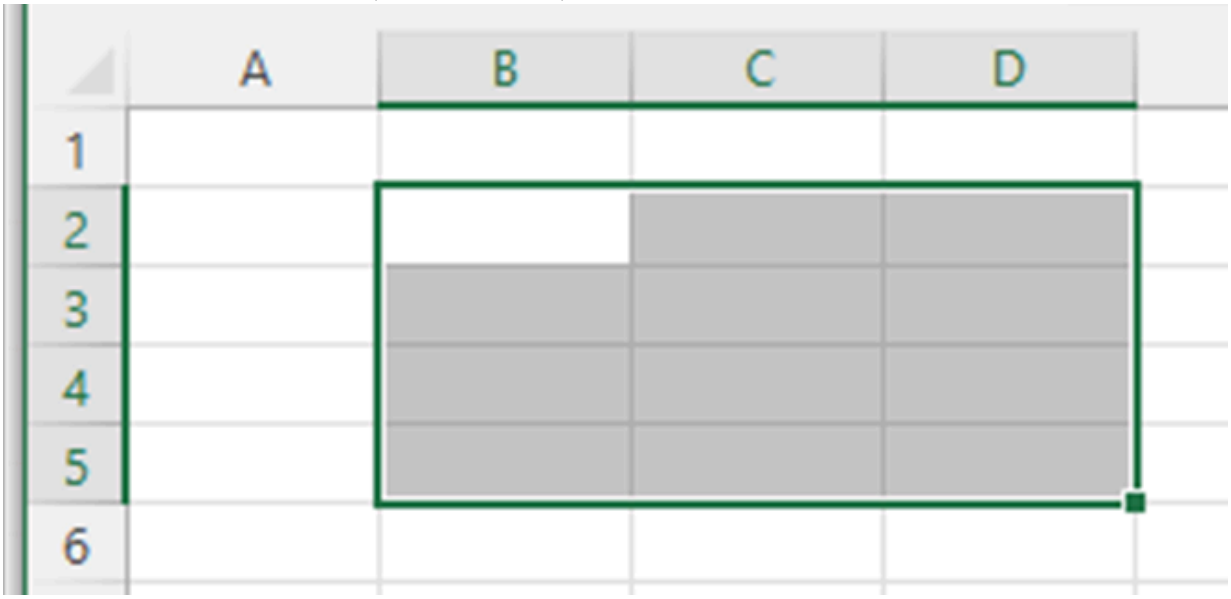


Figure 38.31

2. Go to the **Home** tab.
3. Click on the **Borders icon.**
4. Select **All Borders**. (See **Figure 38.32**)

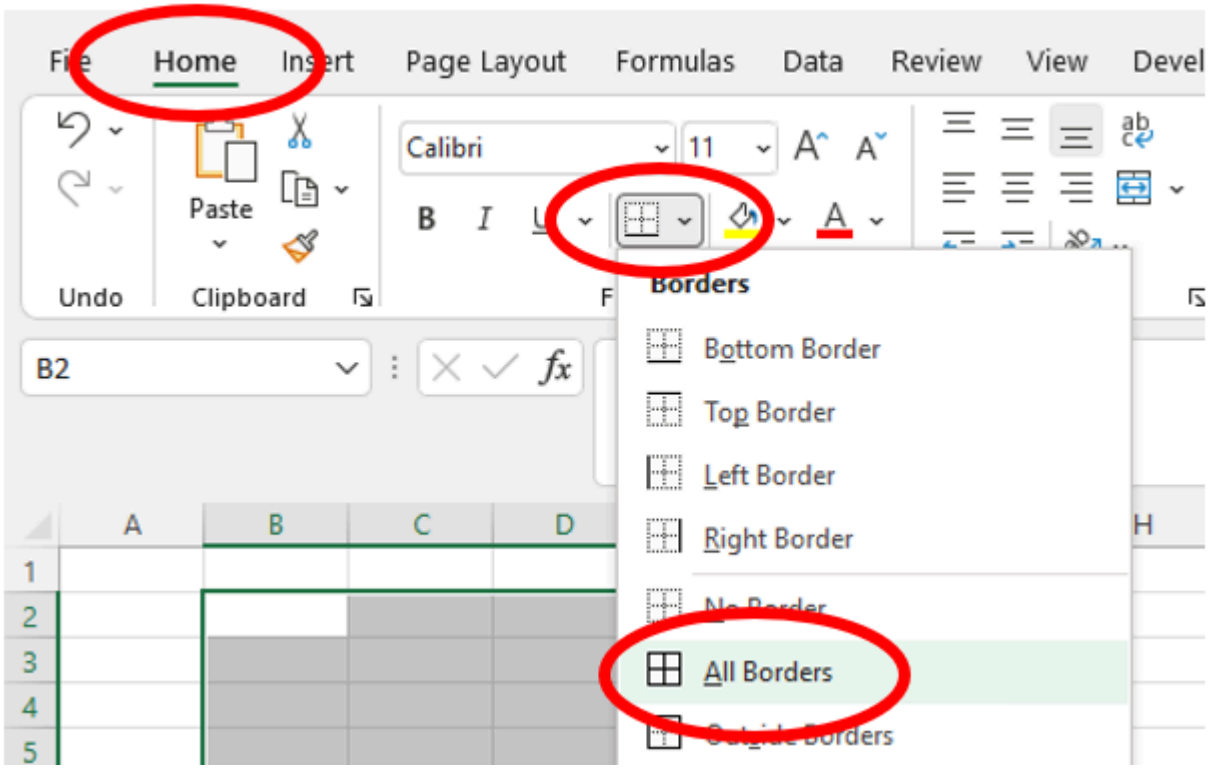


Figure 38.32

Applying Printing Setup

Many times, you want to make sure your spreadsheet prints properly. You can adjust how many pages a spreadsheet prints on.

1. Go to the **Page Layout** tab then under the **Scale to Fit** section (See **Figure 38.33**).
2. Adjust the **Width** to **1 page** (or your desired width)
3. Adjust the **Height** to **1 page** (or your desired length)

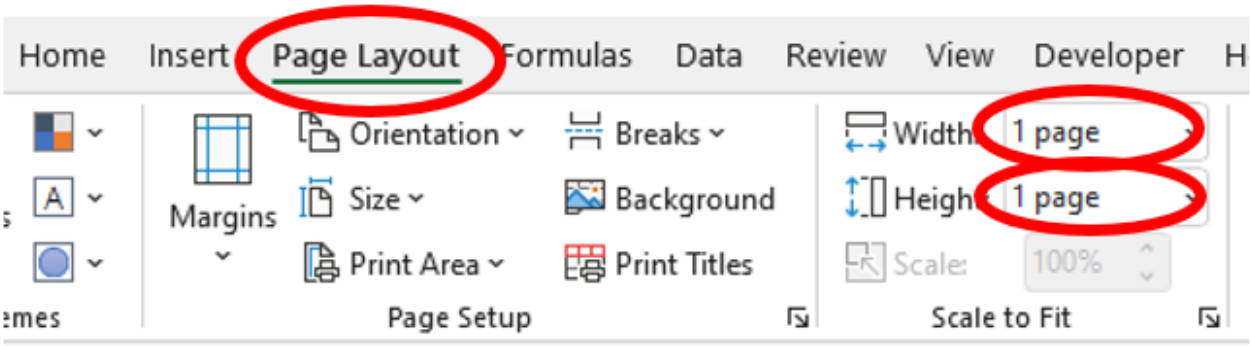


Figure 38.33

Saving Your Workbook

Saving an Excel workbook is easy.

1. Go to the **Ribbon**.
2. Select the **File** tab.
3. Select the **Save** option if it's a new workbook. If it's a workbook that you've downloaded from the files in this class, you will use the **Save As** option instead. (See **Figure 38.34**)

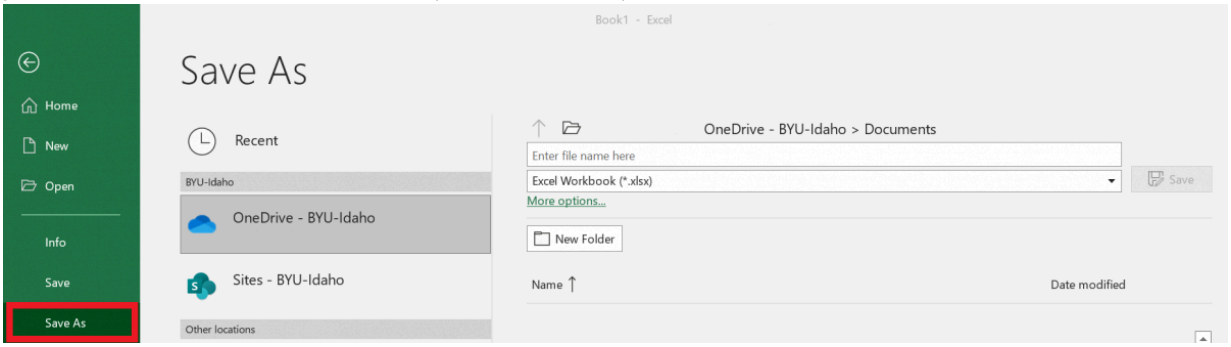


Figure 38.34

4. Select where you would like to save it on your computer (for example, OneDrive, as shown in **Figure 38.35**).

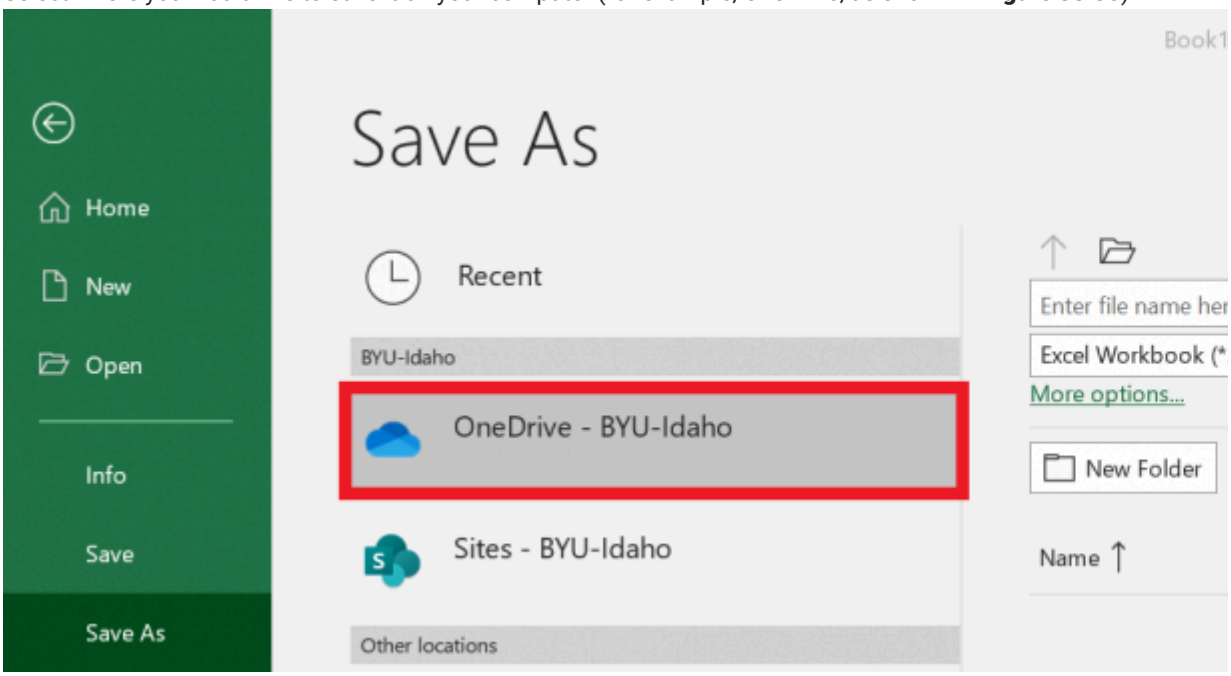


Figure 38.35

   a. A secondary window will open showing the *path* of where you can save your workbook on your device, as well as the kind of file you'll save it as.
5. The first textbox is where you put the title of the workbook.

a. In this class, save the workbook with a title **and your last name**. (See **Figure 38.36**)

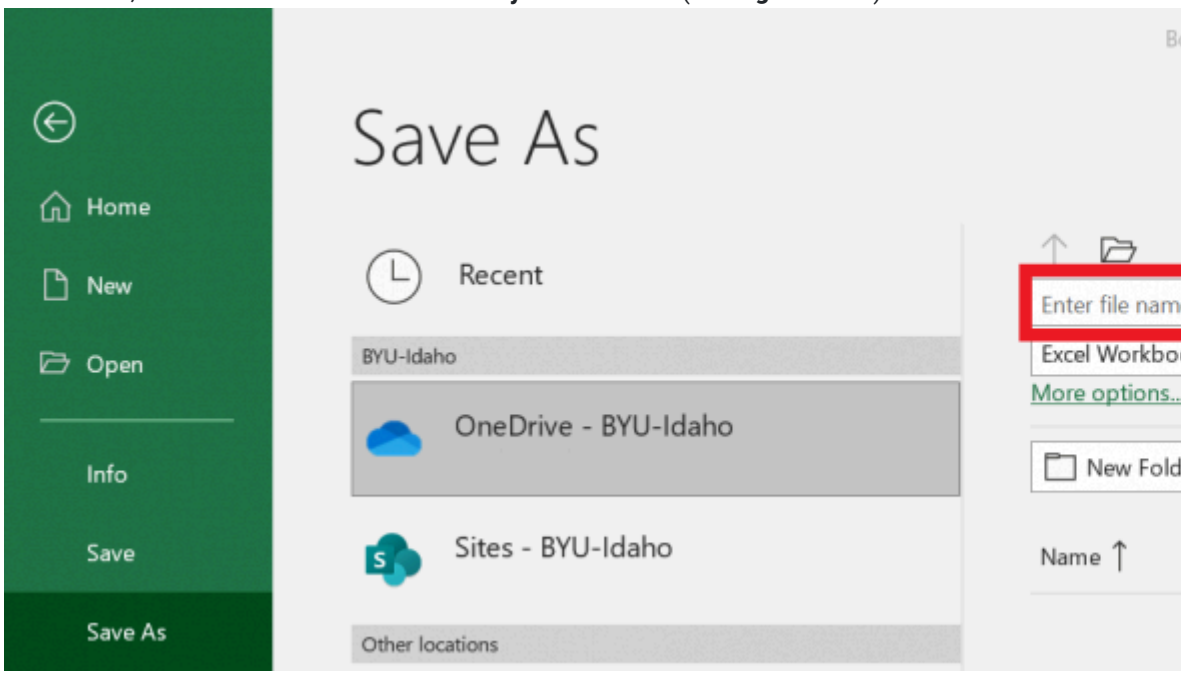


Figure 38.36

6. The second textbox is the file type. (See **Figure 38.37**)
   a. It defaults to be an Excel workbook; we recommend you leave it on its default.

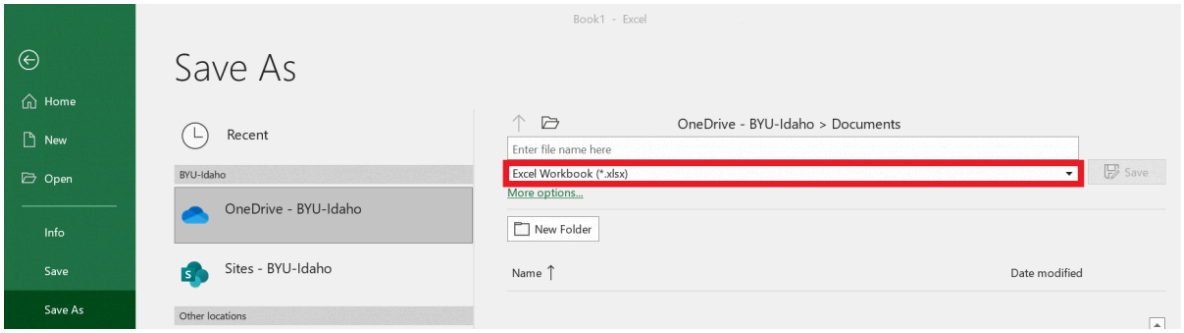


Figure 38.37

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