

# Easy Steps



***Teach yourself...***

**Microsoft Excel 2013**

(Level 1)

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Written in plain English

*A Cheryl Price Publication*

## Easy Way - Microsoft Excel 2013 (Level 1)

This book is designed to teach beginner topics for learning Microsoft Excel 2013. It contains simple step-by-step exercises to guide you through the learning process.

There are dozens of exercises including consolidation exercises, both theory and practical at the end of each section.

The process of consolidation and accumulation of learning is unique to the Cheryl Price books.

**Retrievable exercise files** are used with this book and listed on page xi. These are available as a free download from our web site at [www.cherylprice.co.nz](http://www.cherylprice.co.nz). Instructions for downloading the exercises are included on page xii.

**Free Resource:** A free resource "What is a Spreadsheet" (with manual exercises) is available on our Download page at [www.cherylprice.co.nz](http://www.cherylprice.co.nz). This is an excellent resource for total beginners to spreadsheets or for those students who have difficulty understanding spreadsheet concepts.

This book has been written using Microsoft Excel 2013 with Windows 8.1.

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# Introduction

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Welcome to Easy Way Excel 2013 Level 1.

This book has been written using Microsoft Excel 2013 with Windows 8.1. (The Windows 7 operating system can be used. However screen shots will differ slightly from those shown in this book.)

## Retrievable Exercise Files

Some exercise files have been created for you to prevent time in keying in many exercises. You can then open these files and use the features of Excel to manipulate and format text.

A list of these files is shown on page xi and instructions for downloading these files from our web site are included on page xii.

## What you will learn

In this course you will learn how to -

Create and use a computer spreadsheet to solve a problem:

- Plan a spreadsheet to solve a problem using a supplied brief
- Create a spreadsheet to solve a problem using a supplied brief
- Use the spreadsheet to provide a solution to the problem

## How you will learn

This book is divided into sections. Each section page lists the learning outcomes for that section. You will work through each section and do all exercises.

Revision theory is included at the end of the section followed by a Consolidation Exercise. Our books include accumulation and consolidation of learning which carries across each section.

## Word meaning boxes

Sometimes you will see a box at the left side of the page of a line that has dotted underlining. This box will contain information to help you understand the meaning of the underlined word (or how that word is formed). An example is shown below.

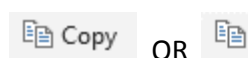
forecast  
= to  
calculate a  
future  
result

Data can therefore be altered to re-calculate budgets and to forecast results using different sales figures. Worksheets can be saved, opened and printed as required.

## Different Excel buttons

Depending on the size of your Excel screen, buttons on the ribbon may vary to those shown in this book. The icon with the word of that feature may show, or the icon only.

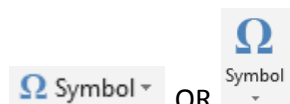
For example, the Copy button in the Clipboard group on the Home tab may be displayed in either of the following ways.



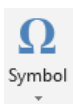
OR



The Symbol button can show as either -



OR



## Shortcut keys

Shortcut keys are indicated in the left margin, usually the first time they are used. An example follows.

- Ctrl S    1    Click on the Save button  on the Quick Access Toolbar  .
- 2    Type a file name for your document then click on Save.

## Glossary

Generally when a word(s) is first used that is a technical term or a word that you may not know that relates to an exercise, or a particular Excel 2013 feature, a description is given. You will also see that such words are in **bold**.

These terms are listed on each section page, an example is shown below. Explanations are also included in the Glossary at the end of the book.



*In this section you will come across the following words highlighted in bold. This indicates that the word is included in the Glossary at the end of the book together with a description of that word.*

**Arguments**

**Backstage View**

**Cell reference**

**Cells**

**Charts**

**Data**

**Default**

**Dynamic**

**Exponential format**

**Fill handle**

**Formula**

**Functions**

**Gridlines**



## Icons used in this book

---

This book contains icons to help guide you in your learning.

The following list shows the icon and its meaning.



### **Learning Outcomes**

Learning Outcomes are displayed on the section page and describe what you will learn in that section.



### **EXERCISE 1**

These are the exercises that you are required to do. Often there will be an introduction sentence to tell you what you will be doing in that exercise.



These are notes for your information.



### **Revision**

---

This appears at the end of each section and contains theory revision questions relating to features learnt in that section.



### **Consolidation Exercise**

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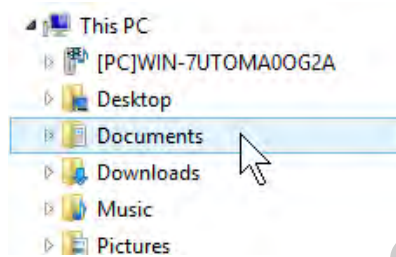
Each consolidation exercise covers a review of topics learnt in that section and provides additional practice.

## Save Options

---

When a document is saved you will be requested to select the location, ie Computer then click on the Browse button and select the folder required. You can eliminate this procedure by selecting the location and saving directly to the Save dialog box and therefore bypass Backstage view.

For the purposes of this book we have used the Documents folder within This PC as the default folder. This folder is shown below which is the shortcut for the actual path name of C:\Users\User Name\Documents. This means that files you open and save will be on your hard drive.



Use the following instructions to specify the Documents folder as the default file location:

- 1 Click on the **FILE** tab then click on **Options**.
- 2 Click on **Save** at the left.
- 3 Ensure that the Documents folder is displayed as the Default local file location as shown below.

- ☒ Don't show the Backstage when opening or saving files
- ☐ Show additional places for saving, even if sign-in may be required.
- ☐ Save to Computer by default

Default local file location:

- 4 Also ensure that *Don't show the Backstage when opening or saving files* option displays a tick.
- 5 Remove the tick from the next option *Show additional places for saving, even if sign-in may be required.*
- 6 Click on OK.



If you wish to open and save files to OneDrive (ie the cloud) use instructions on the next page. If you have Windows 8, or have updated to Windows 8.1 from Windows 8, SkyDrive may be displayed instead of OneDrive but is essentially the same.

---

# OneDrive

---

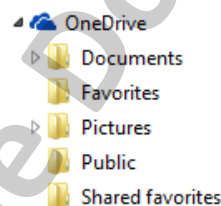
OneDrive is a cloud storage application from Microsoft. It is one of the major online file storage options competing with Dropbox and Google Drive.



Because files are stored “in the cloud” (in addition to your hard drive) it means that you can access those files from anywhere in the world because you will always have access to the OneDrive application and your files. You do however need an Internet connection for the files to be updated from your hard drive to OneDrive.



## Saving to OneDrive

OneDrive is automatically set up when Microsoft Office 2013 (ie Office 365) is installed on your computer. A OneDrive folder will be displayed on the Navigation Pane in Windows Explorer as below.



Files can be saved manually by clicking on the Save button  on the Quick Access Toolbar, specifying a name for your file then clicking on the  OneDrive icon (you may wish to double click on Documents and save to that folder).

## OneDrive as the Default File Location

Use the following instructions if you wish to specify OneDrive as your default file location.

- 1 Click on the **FILE** tab then click on **Options**.
- 2 Click on **Save** at the left.
- 3 Ensure that the C:\Users\User Name\OneDrive\Documents folder is displayed as the Default local file location as shown on the next page. (You may need to retype the location)
- 4 Also ensure that *Don't show the Backstage when opening or saving files* option displays a tick.

5 Remove the tick from the next option *Show additional places for saving, even if sign-in may be required.*

- ☒ Don't show the Backstage when opening or saving files
- ☐ Show additional places for saving, even if sign-in may be required.
- ☐ Save to Computer by default

Default local file location:

C:\Users\Cheryl\OneDrive\Documents

Browse...

6 Click on OK.

## OneDrive Website

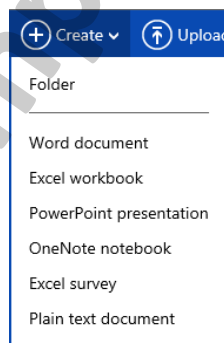
You can log in to the OneDrive website using your web browser with your login name and password.

The website is [www.OneDrive.live.com](http://www.OneDrive.live.com).



You can upload photos and use files and share files.

New files can be created through OneDrive by clicking on **Create** and selecting the program you wish to use, eg Excel (web applications in OneDrive are slightly cut-down versions of Office 2013 programs).



## Sharing Files

From within Excel 2013 you can save files to OneDrive (usually to the Documents folder) and then share those files. You can then click on the **FILE** tab, on **Share** and invite people to share files in OneDrive.

Alternatively, you can right click on a file in the OneDrive website (see above) and select Sharing.

Use Google in your web browser to search for additional information on OneDrive.

## Exercise Files used in this book

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(Instructions are included on the following page for downloading retrievable files from our web site at [www.cherylprice.co.nz](http://www.cherylprice.co.nz))



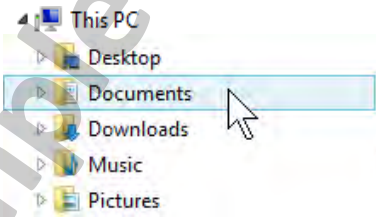

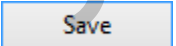

Names of files	
Atrium	Lifestyle Books
Balance Sheet	Peter Hamilton Transport
Brighton Winery	Play Time Daycare
Chatswood	Premier Books
Costello's Product Sales	Quotation
Creative Caps	Retirement Scheme
Delphine's Cooking School	Sales Commission
Eats and Treats	Spreadsheet Plan
Enrolments – 2015	Sunshine Flowers
Fashion House	Tracey's Budget
Fashion Xpress	Trade Supplies
Fiji Landing Apartments	Wilson Markers
Housekeeping Services	

## Downloading Exercise Files

The exercise files listed on the previous page can be downloaded from the Cheryl Price web site using the instructions below.



For the purposes of this book we have specified Exercise files to be downloaded to the Documents folder within This PC which is the shortcut for the actual pathname of C:\Users\User Name\Documents. This is where files will be opened from and saved to.

1	In the address bar of Internet Explorer, type: <b>www.cherylprice.co.nz</b>
2	Press Enter on the keyboard to display the Cheryl Price website.
3	Click in the Resources tab as shown at the right. 
4	Click on <u>Easy Way – Microsoft Excel 2013</u>
5	Under the <b>Exercise Files</b> heading click on the underlined blue hyperlink, ie Excel 2013, Level 1 <a href="#">Free Download</a> The File Download dialog box will display.
6	<p>a Click on  <b>Save as</b> then</p> <p>b Change file name to <i>Easy Way Excel 2013 Level 1 Exercise Files</i>.</p> <p>c Click on the Documents folder shown below.</p>  <p> The Documents folder under This PC is the shortcut for C:\Users\User Name\Documents</p> <p>d Click on .</p>
7	<p>a Click on .</p> <p>b Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files.</p> <p>c Delete the Compressed (zipped) Folder.</p>

# Spreadsheet Theory

## The Excel Screen

### Opening and Exploring a Workbook

### Creating a New Workbook



## Learning Outcomes

*At the end of this section you should be able to -*

- ☐ Understand what a spreadsheet is
- ☐ Start and exit Excel 2013
- ☐ Understand the Excel 2013 screen
- ☐ Open and explore an existing workbook
- ☐ Create and save a new workbook
- ☐ Enter text, numbers and formulas into a worksheet
- ☐ Apply basic formatting to a worksheet
- ☐ Print a worksheet



*In this section you will come across the following words highlighted in bold. This indicates that the word is included in the Glossary at the end of the book together with a description of that word.*

<b>Active Cell</b>	<b>Formula Bar</b>	<b>Ribbon Groups</b>
<b>AutoCalculate</b>	<b>Function</b>	<b>Row Headings</b>
<b>AutoFit</b>	<b>Horizontal Scroll Bar</b>	<b>Rows</b>
<b>AutoSum</b>	<b>Increment</b>	<b>Screen Tip</b>
<b>Backstage View</b>	<b>Insertion Point</b>	<b>Scroll Box</b>
<b>Cell Reference</b>	<b>Key Tips</b>	<b>Sheet Tabs</b>
<b>Charts</b>	<b>Labels</b>	<b>Shortcut Key</b>
<b>Column Header Boundary</b>	<b>Mouse Pointer</b>	<b>Shortcut Menu</b>
<b>Column Headings</b>	<b>Name Box</b>	<b>Spreadsheet</b>
<b>Columns</b>	<b>Navigation Pane</b>	<b>Status Bar</b>
<b>Default</b>	<b>Non-Adjacent Cells</b>	<b>Tabs</b>
<b>Dialog Box</b>	<b>Operator Symbols</b>	<b>Title</b>
<b>Dialog Box Launcher</b>	<b>OneDrive</b>	<b>Values</b>
<b>Editing</b>	<b>Protected View</b>	<b>Vertical Scroll Bar</b>
<b>Fill Handle</b>	<b>Quick Access Toolbar</b>	<b>Workbook</b>
<b>Formatting</b>	<b>Range</b>	<b>Worksheet</b>
<b>Formula</b>	<b>Ribbon</b>	

# Spreadsheets

A **spreadsheet** is essentially a large working area composed of **rows** and **columns** (see next page). The intersection of a row and column is called a cell ie where the row and column meet (Day Trippers on the next page is cell A1). Text and numbers are entered into these cells and formulas are used to calculate the data to provide information required.

Microsoft Excel 2013 (or any spreadsheet program) makes calculations easy - it replaces your pencil, paper and calculator. If you change data in a **worksheet**, every **formula** used with that data will automatically recalculate.

**forecast**  
= to  
calculate a  
future  
result

Data can therefore be altered to re-calculate budgets and to forecast results using different sales figures. Worksheets can be saved, opened and printed as required.



In this book Microsoft Excel 2013 will be referred to as Excel 2013.

Spreadsheets are widely used -

- 1 **In industry and commerce for**
  - financial accounts
  - forecasting and projection results
  - recording and comparing data
  - personnel details
- 2 **At home for**
  - budgeting
  - calculations for quantities, eg when painting, wallpapering
  - savings and travelling expenses
- 3 **At schools for**
  - test and examination results
  - timetables
  - school rolls
- 4 **At clubs for**
  - membership fees
  - sports results
  - sponsorship details

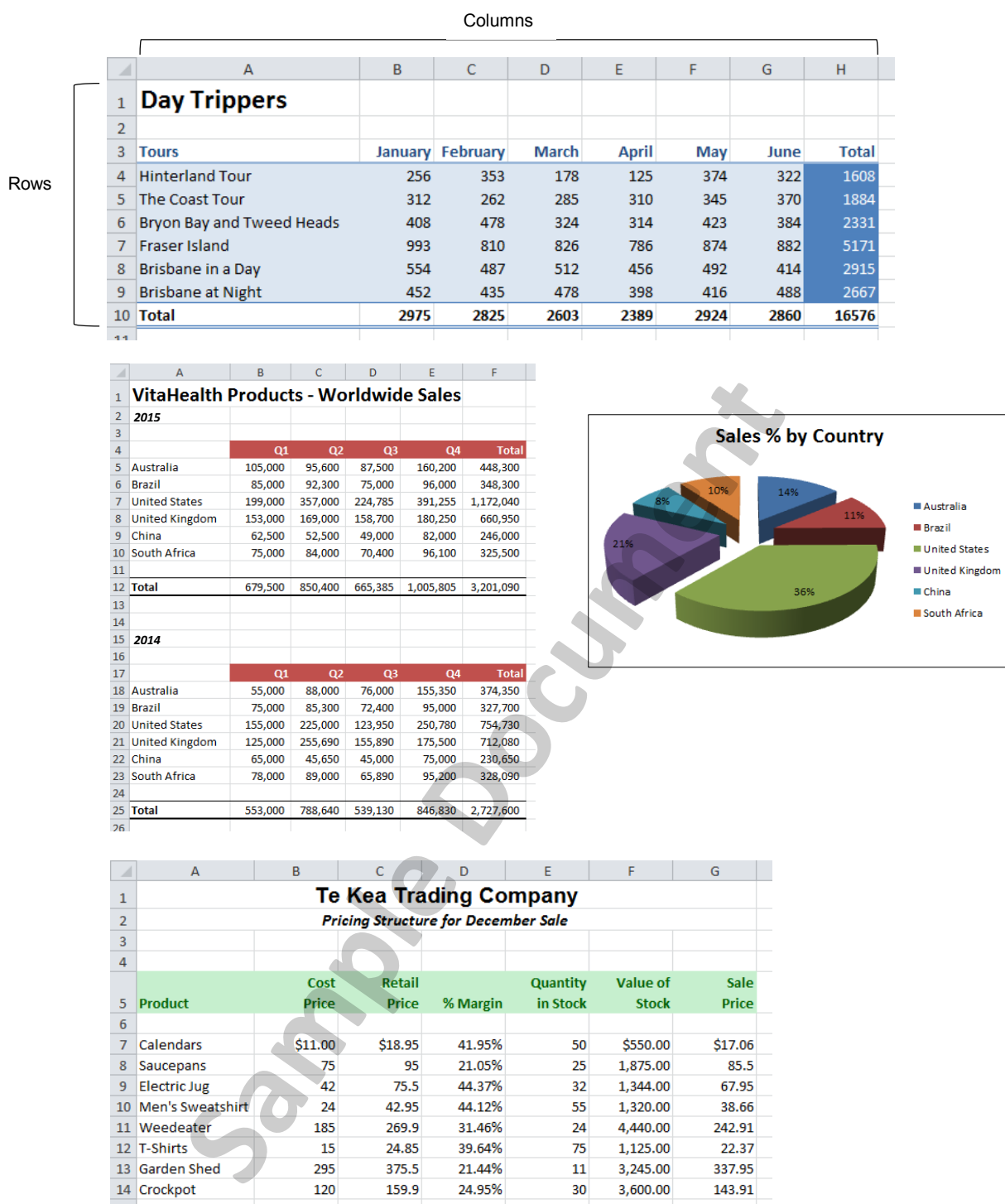
Examples of other spreadsheet programs include Lotus 1-2-3, Corel Quattro Pro and OpenOffice Calc (the last of which can be freely downloaded from the Internet).

## Spreadsheet/Worksheet

The word spreadsheet is a general term for any document created by a spreadsheet program; a spreadsheet is referred to in Excel 2013 as a worksheet. Both of these terms are used throughout this book but they refer to the same thing.



## Samples of Spreadsheets




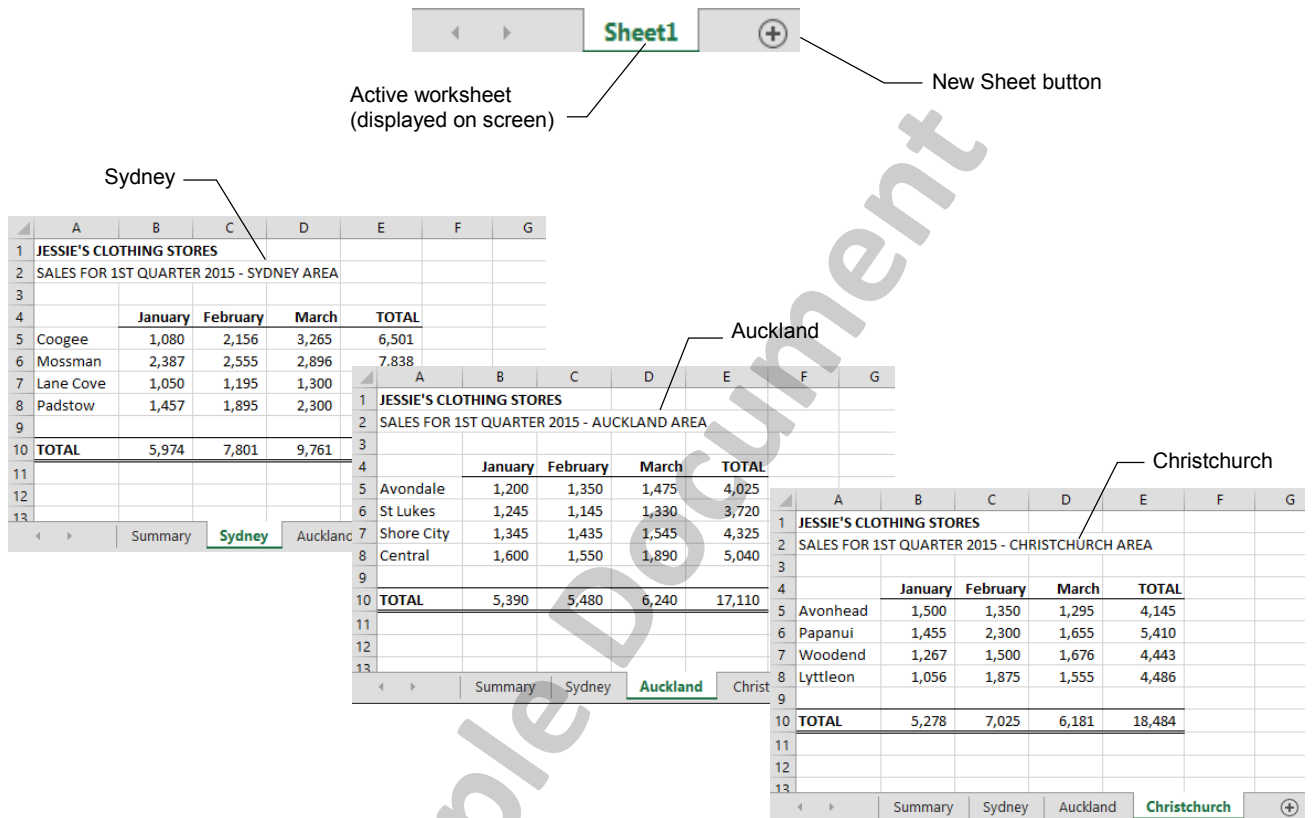
## Advantages of Spreadsheets

- Calculations can be performed quickly and easily.
- If data is altered, the calculations automatically adjust.
- **Charts** can be used to visually display data, eg bar, column, pie, line.
- Data can be calculated, grouped and sorted into a specific order for lists, databases, etc. Data within a spreadsheet can then be quickly located.

# The Workbook

A **workbook** is a single Excel file. Each new workbook contains one worksheet which is named as *Sheet1*. Worksheets are designed to display different data, eg a company might use a worksheet for each sales branch, then a final worksheet which totals all sales figures from each branch and displays a summary (eg the totals from each worksheet).

**Sheet tabs** are displayed at the bottom of the screen. You can move from worksheet to worksheet by clicking on a sheet tab, as shown below. (Additional sheets can be added by clicking on the New sheet button .)



Active worksheet (displayed on screen)

New Sheet button

Sydney

Auckland

Christchurch

Each sheet tab can contain different areas/costings, etc within a workbook. A summary of the sheet tabs is often displayed on the first or last sheet tab.


	A	B	C	D	E	F	G
1	JESSIE'S CLOTHING STORES						
2	SALES FOR 1ST QUARTER 2015 - SUMMARY						
3							
4		January	February	March	TOTAL		
5	Sydney	5,974	7,801	9,761	23,536		
6	Auckland	5,390	5,480	6,240	17,110		
7	Christchurch	5,278	7,025	6,181	18,484		
8							
9	TOTAL	16,642	20,306	22,182	59,130		
10							
11							
12							
13							

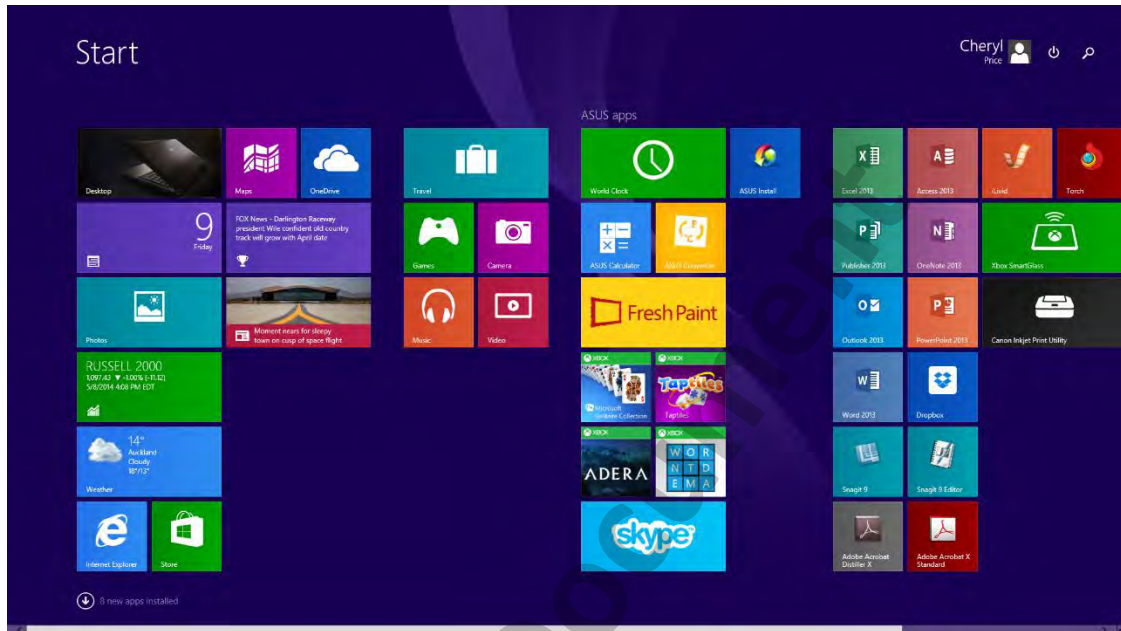
Summary

# Starting Excel 2013




## EXERCISE 1

- 1 If the Start screen shown below is not displayed click on the Windows key  on your keyboard OR move your mouse pointer to the very bottom left of the window where the Start button shown at the right is displayed.



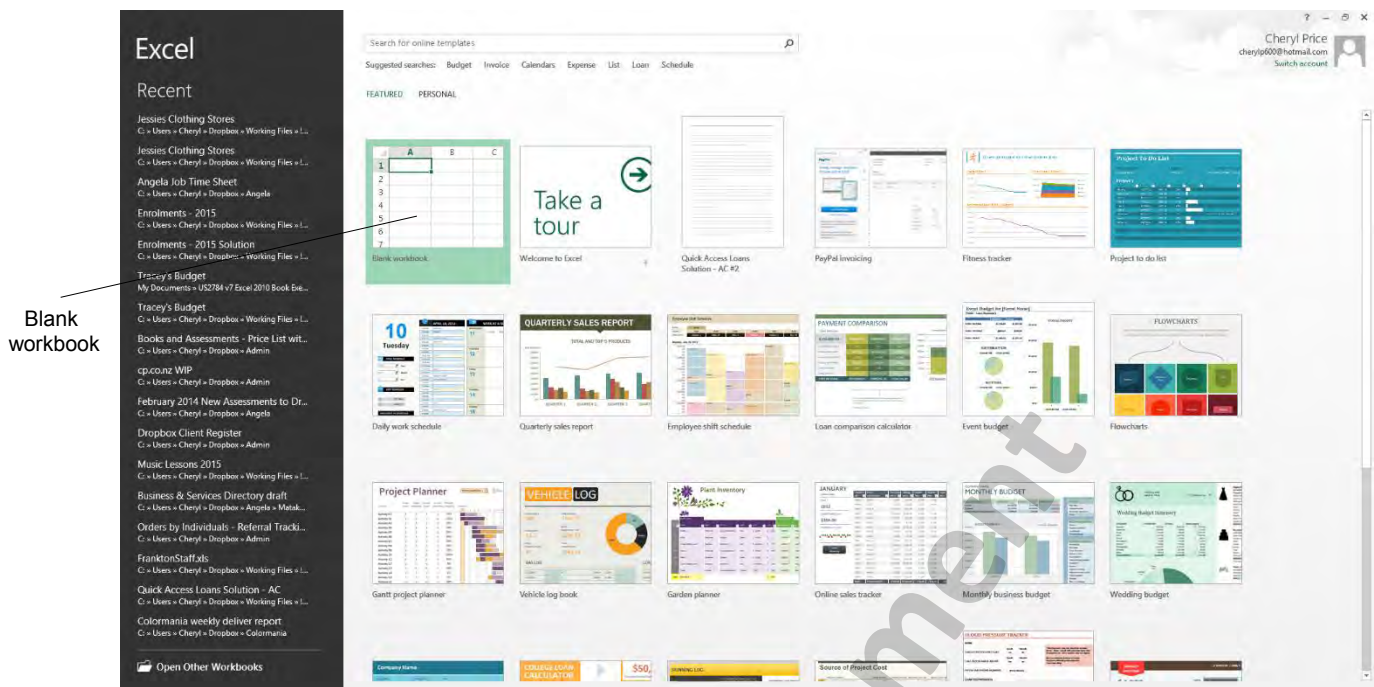
Click here to display the Start button

Click here to scroll across the screen

- 2 Click on  at the bottom right of the screen to scroll across and view further icons. (Yours will be slightly different and may have more, or less programs displayed.)

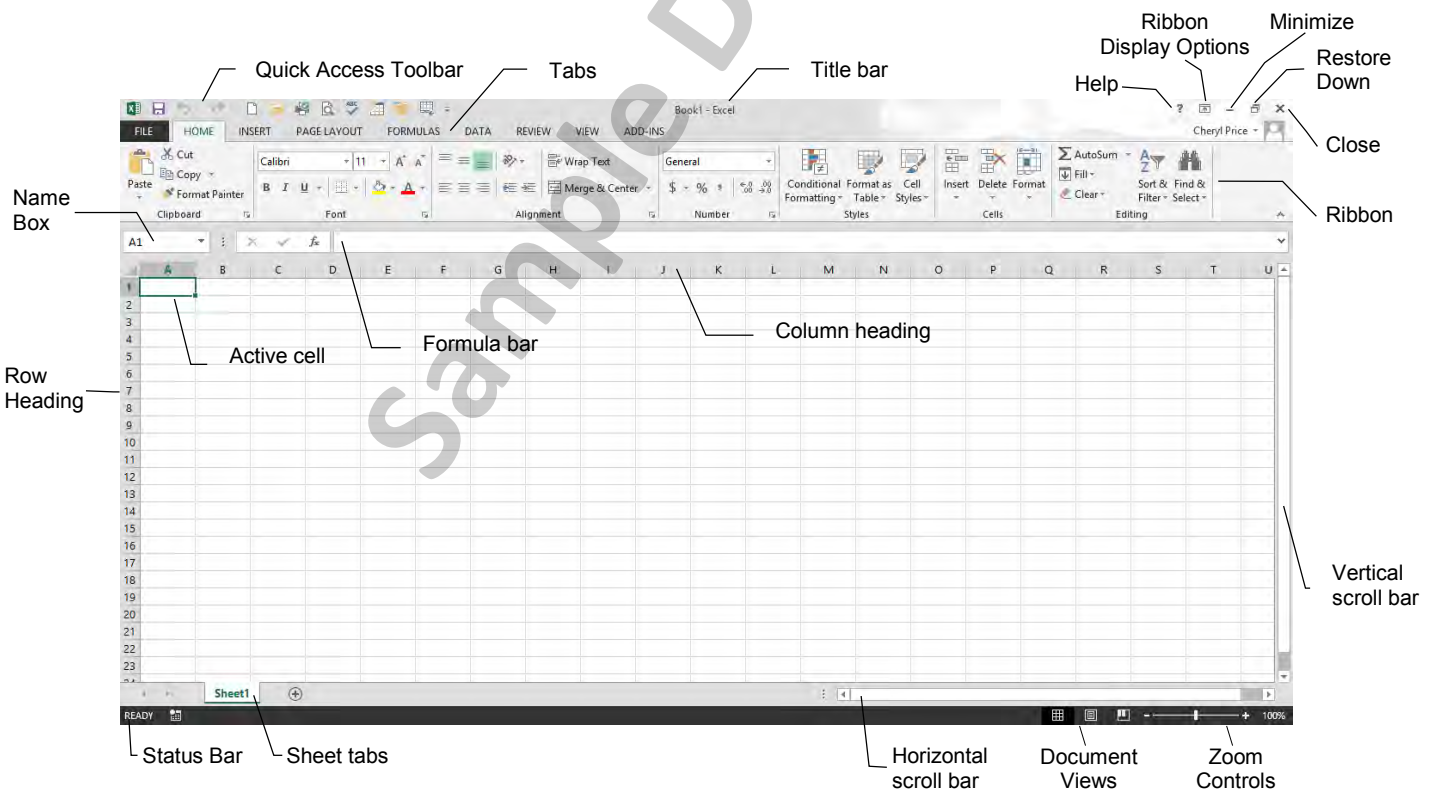
- 3 Click on the Excel 2013 program icon .

Microsoft Excel will open. If Excel 2013 has been used previously then Backstage View will be displayed as shown below. (Recent documents will be shown at the left.)



4 Click on Blank workbook as indicated above.

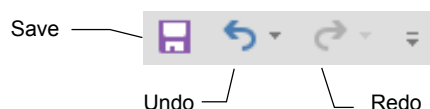
## The Excel Screen



The **FILE** tab contains all basic tasks such as opening, saving and printing a spreadsheet.

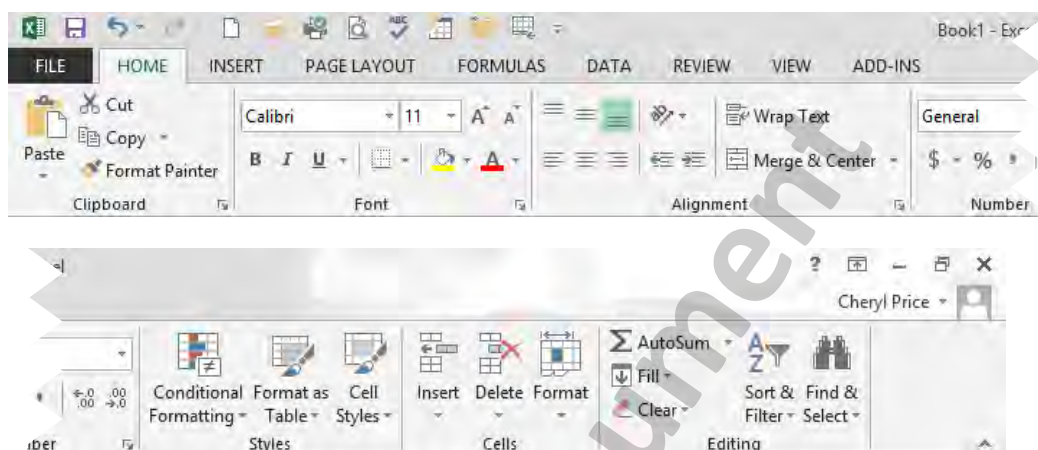
## Quick Access Toolbar

The **Quick Access Toolbar** contains commands to Save, Undo and Redo. Frequently used commands can be added to this menu (and may have already been added).



## The Ribbon

The **ribbon** provides access to all the tools required for working with a spreadsheet.



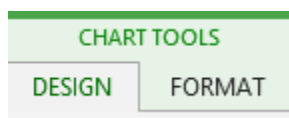
## Tabs

**Tabs** are displayed above the ribbon. The **FILE** tab displays a menu but the other tabs are specific to the ribbon; click on the tab to display the ribbon required.

There are nine **default tabs**:



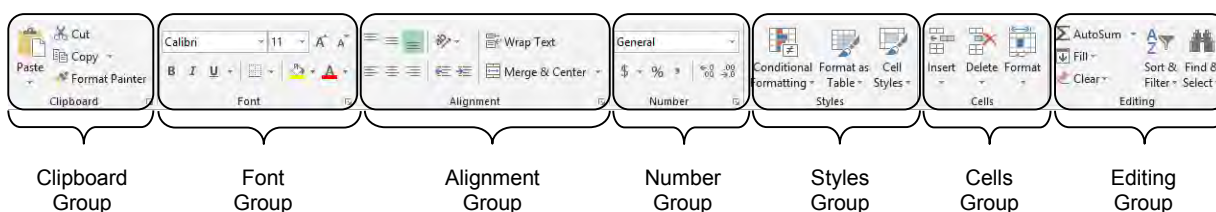
There are also hidden tabs that appear when appropriate, such as the Chart Tools. These are displayed, for example, when you are working on a chart and disappear again when you have finished.



## Ribbon Groups

Ribbons are split into **ribbon groups**, (eg the Font Group).

Each group contains command buttons appropriate to a particular action; the font **formatting** tools are located in the Font Group.

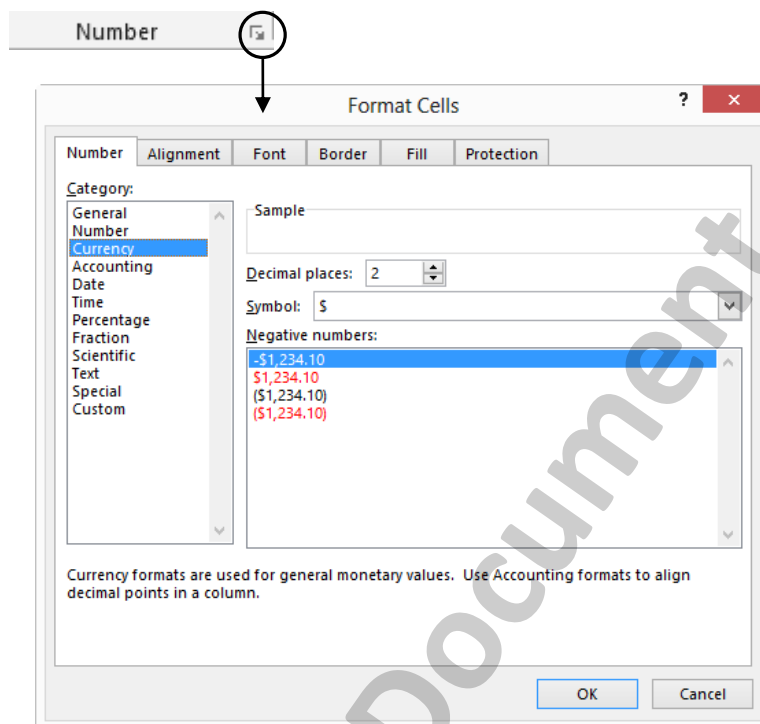




## Dialog Box Launcher

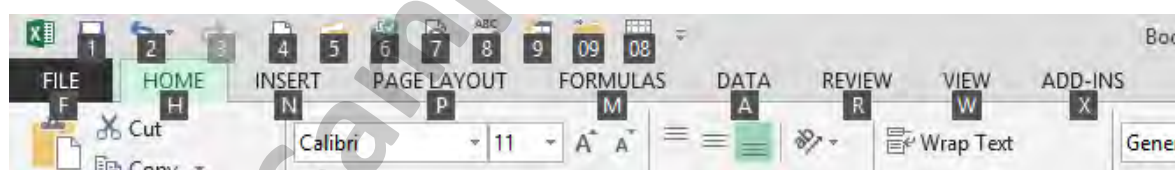
The **Dialog Box Launcher** is the small diagonal arrow in the bottom right corner of some groups. When you click on this button, it displays an associated dialog box.

A **dialog box** usually contains more settings or advanced features. For example, the Number dialog box allows you to make formatting changes to the contents of the current cell ie to change figures to two decimal places.



## Key Tips

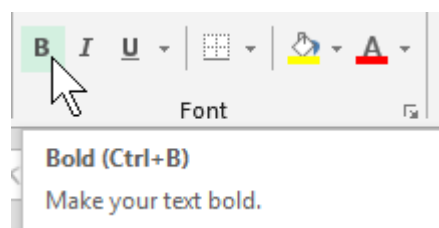
The keyboard can be used to select tabs on the ribbon and buttons on the Quick Access Toolbar. If you press Alt, **Key Tips** become active.



These small badges (ie Key Tips are labelled with various letters and numbers, that when pressed on the keyboard, will trigger the associated command or function). For example, to save the workbook press Alt and then 1.

## ScreenTips

When you rest the **mouse pointer** over a button or command, a **screen tip** appears. This is a small window with a description of that command and any **shortcut key** it may have, eg Ctrl B is a quick way of applying the Bold command.



# Opening a Workbook



## EXERCISE 2

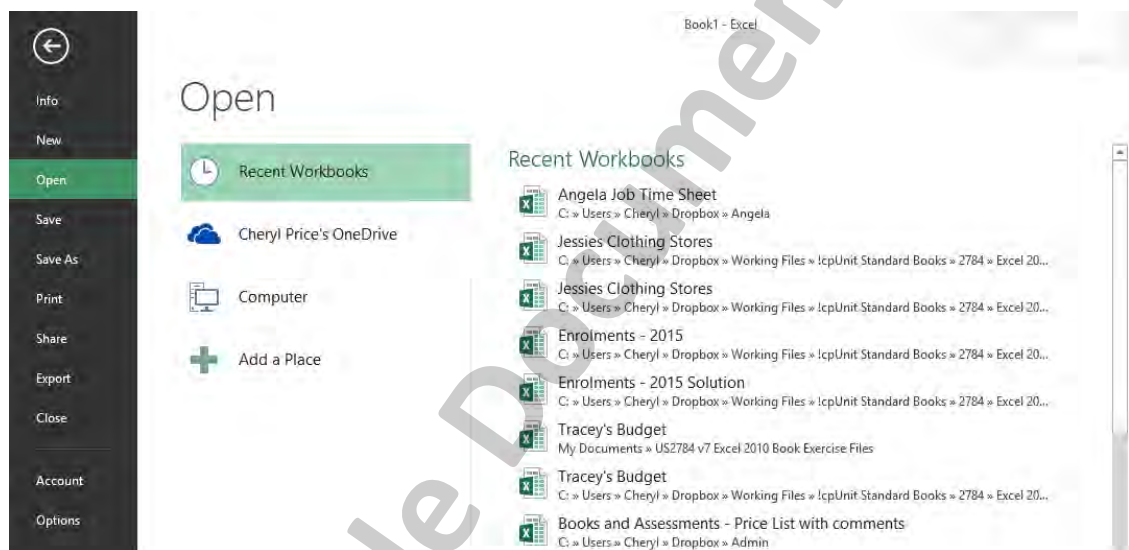
In this exercise you will open a workbook and look at cell contents which can include labels, values and formulas.

- 1 Click on the **FILE** tab at the far left of the ribbon.

**Backstage view** will appear which allows you to create, open, print and save a workbook. Excel options, accessing help as well as exiting Excel are also available.

- Ctrl O
- 2 Click on **Open** to display the Open dialog box.

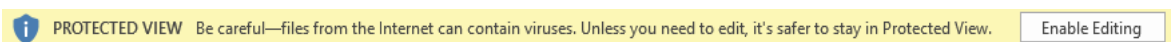
A list of Recent documents is displayed in Backstage view as shown below. (Your files will differ from mine.)



- 3 Click on **Computer**
- 4 Click on **Browse**
- 5 In your Documents Folder (under This PC), double click on the *Easy Way Excel 2013 Level 1 Exercise Files* folder, ie **Easy Way Excel 2013 Level 1 Exercise Files**.
- 6 Double click on **Fashion House** or select Fashion House and click on **Open**.



If **Protected View** is turned on the following may appear.



Click on **Enable Editing**.

## Cell Contents

Microsoft Excel allows you to enter data into any cell in a worksheet. Data may consist of text, numbers or a formula based on selected cells.

Various parts of a worksheet are shown below.

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D
1	<b>The Fashion House - Conference Budget</b>			
2				
3		<b>Australia</b>	<b>America</b>	<b>Britain</b>
4	<b>Air Fares</b>	897.00	1,586.95	2,425.28
5	<b>Accommodation</b>	1,200.00	1,800.50	2,000.00
6	<b>Meals</b>	950.00	1,060.96	1,250.25
7	<b>Car Rental</b>	660.50	501.23	680.25
8	<b>Travel Insurance</b>	80.00	100.00	95.00
9	<b>Total</b>	<b>\$3,787.50</b>	<b>\$5,049.64</b>	<b>\$6,450.78</b>

Annotations in the image:

- Labels:** Points to the row and column headers (e.g., 'The Fashion House - Conference Budget', 'Australia', 'America', 'Britain').
- Values:** Points to the numerical data cells (e.g., 897.00, 1,586.95, 2,425.28).
- Formula:** Points to the formula bar showing `=SUM(C4:C8)` and the corresponding 'Total' row in column C.
- Cell Reference (D3):** Points to the cell containing 'Britain'.

(ie adds the values in cells C4 to C8)

### Cell Reference

The intersection of each column and row (ie where they meet) eg cell D3, is referred to as the **cell reference** and shows Britain in the spreadsheet above.

### Labels

Text/numbers that are not used in a mathematical formula or equation are called **labels**. They help the reader understand different parts of a worksheet, ie **column headings**, **row headings**, **title** of a worksheet, etc.

### Values

**Values** refer to data that is used to calculate results or the end result of a calculation.

### Formulas

A **formula** is a mathematical equation using cell references to produce a result. The result of a formula is seen in the worksheet; clicking on a cell will display the formula itself in the **Formula bar**. A formula starts with = as shown below.

The screenshot shows the Excel interface with the following details:

- Formula bar:** Displays the formula `=SUM(C4:C8)`.
- Worksheet:** Shows columns B, C, and D. The title 'House - Conference Budget' is visible. The data for columns B, C, and D is: Australia (897.00), America (1,586.95), and Britain (2,425.28).



When values change, the result of the formula will be updated automatically in the worksheet.



In the following exercise you will add frequently used commands to the Quick Access Toolbar.



### EXERCISE 3

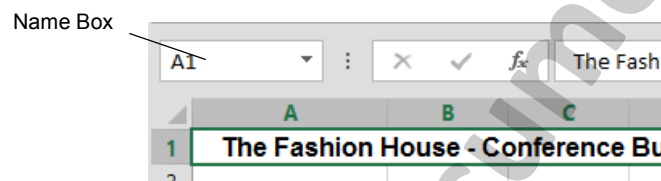
- 1 Click on the Customize Quick Access Toolbar .
- 2 Click on Open.
- 3 Repeat to add *New*, *Quick Print* and *Print Preview and Print* to the Quick Access Toolbar:
- 4 If the Quick Access Toolbar is displayed above the ribbon click again on the Customize Quick Access Toolbar  and select Show Below the ribbon.



### EXERCISE 4

In the following exercise you will move to a specific cell in the worksheet using the **Name Box** (which currently displays the active cell) and display the data range.

- 1 Click in the Name Box at the top left of the worksheet.



- 2 Type: **C9**

- 3 Press Enter.

The cursor will move to cell C9 within the current worksheet.

The Formula bar displays the formula that has been used to calculate the total for the America column.

- 4 Double click on the selected cell (C9) to display the data range.

The data range displays cells that are included in the formula.

	A	B	C	D	E
1	<b>The Fashion House - Conference Budget</b>				
2					
3		<b>Australia</b>	<b>America</b>	<b>Britain</b>	
4	Air Fares	897.00	1,586.95	2,425.28	
5	Accommodation	1,200.00	1,800.50	2,000.00	
6	Meals	950.00	1,060.96	1,250.25	
7	Car Rental	660.50	501.23	680.25	
8	Travel Insurance	80.00	100.00	95.00	
9	<b>Total</b>	\$3,787.50	=SUM(C4:C8)		
10			SUM(number1, [number2], ...)		
11					

Data Range

- 5 Press Esc to turn off.

Ctrl W

- 6 Click on **FILE** and click on **Close**.

- 7 If asked to save changes click on Don't Save.

The formula used to add the total for the America column can be broken down as follows.

$$= \text{SUM}(\text{C4:C8})$$

Equal to      Function      Range

## Equal to

= (equal to) is placed at the beginning of a *formula* (equation).

## Function

A **function** is a built-in formula designed for ease of use. The SUM function will add together the contents of selected cells, ie cells C4 to C8.

Functions can perform tasks such as addition, calculating the average of a group of values, inserting the date, calculating angles, calculating the value of an investment over a period, etc.

## Range

The term **range** refers to a group of cells containing values, C4:C8 (ie from cell C4 to cell C8). The range is used instead of typing =C4+C5+C6+C7+C8. The SUM function is used to add these cells together.



### EXERCISE 5

- 1 In this exercise indicate in the boxes which is a label, a value and a formula.



	A	B	C	D	E	F
1	<b>The Music Box</b>					
2						
3		<b>January</b>	<b>February</b>	<b>March</b>	<b>April</b>	<b>Total</b>
4	Nelson	18,750	19,250	16,000	16,750	70,750
5	Douglas	12,580	11,500	11,250	12,750	48,080
6	Bayswater	15,800	16,200	17,750	15,200	64,950
7	Gisborne	19,750	18,250	19,000	17,750	74,750
8		66,880	65,200	64,000	62,450	258,530
9						

- 2 Which other cell contains a *label*? .....
- 3 Which other cell contains a *value*? .....
- 4 Which other cell contains a *formula*? .....
- 5 Which *range* of cells is used to total cell F8? .....
- 6 Complete the following sentence.

=SUM(C4:C8) is the ..... used in cell F8. SUM is the ..... that will add cells.....