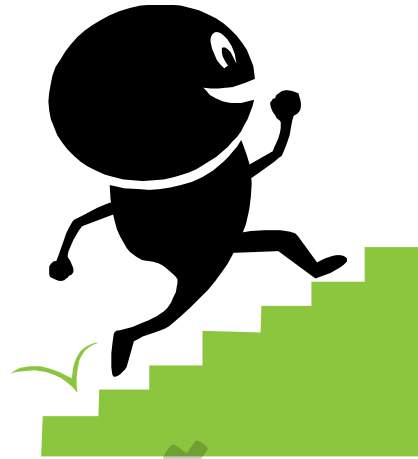


# Easy Way



***Teach yourself...***

**Microsoft Excel 2013**

(Level 2)

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

*A Cheryl Price Publication*

## Easy Way - Microsoft Excel 2013 (Level 2)

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.

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Cheryl Price  
T.Dip.WP, T.Dip.T

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# Introduction

---

Welcome to Easy Way Excel 2013 Level 2.

This book has been written using Microsoft Excel 2013 with Windows 8. (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 -

- plan and create a spreadsheet for organisational use
- apply formatting to the spreadsheets and create graphs
- use functions, macros and data integrity
- create and use a template
- produce a simple end-user document

## 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.

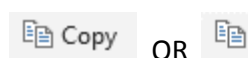
**forecast**  
= to  
calculate a  
future  
result

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.

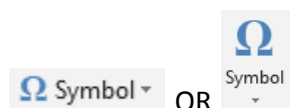
## Different Excel buttons

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.



The Symbol button can show as either -



## 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**

---

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 My Documents folder as the default folder. This means that files you open and save will be on your hard drive.



---

If you wish to open and save files to SkyDrive (ie the cloud) use instructions on the next page.

---

Use the following instructions to specify My Documents 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.
- 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\Documents\

Browse...

- 6 Click on OK.

# SkyDrive

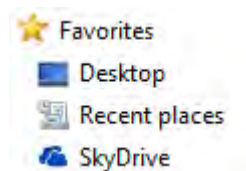
SkyDrive is a cloud storage application from Microsoft. It is one of the major online file storage options competing with Dropbox and Google Drive.



Because files are stored “in the cloud” it means that you can access those files from anywhere in the world because you will always have access to the SkyDrive application and your files. You do however need an Internet connection to be able to update those files.



## Saving to SkyDrive

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



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

## SkyDrive as the Default File Location

Use the following instructions if you wish to specify SkyDrive 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 Documents folder is displayed as the Default local file location as shown below.
- 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 **Browse...** at the right of *Default local file location:* and select  SkyDrive .

- ☒ 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\SkyDrive\

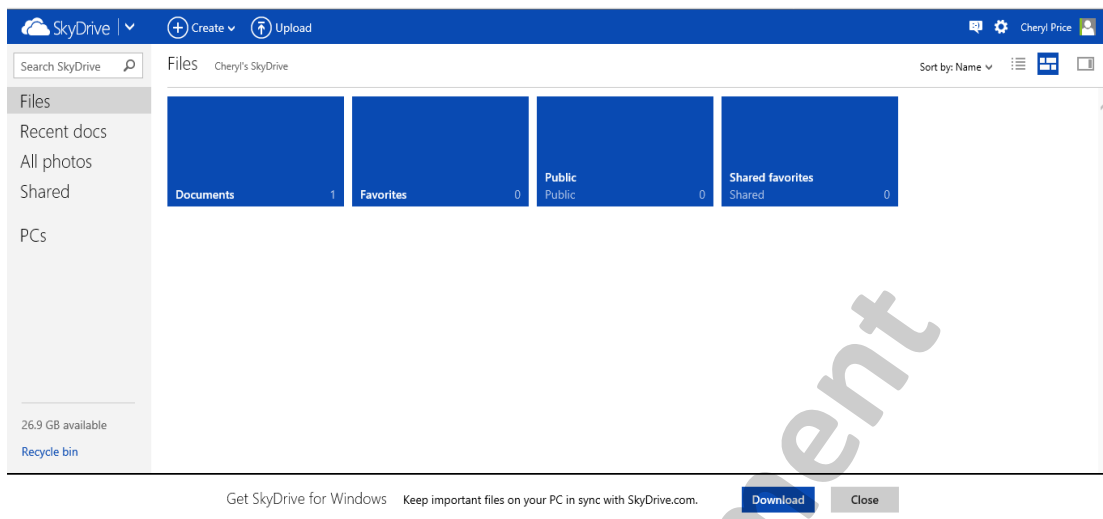
**Browse...**

- 7 Click on OK.

## SkyDrive Website

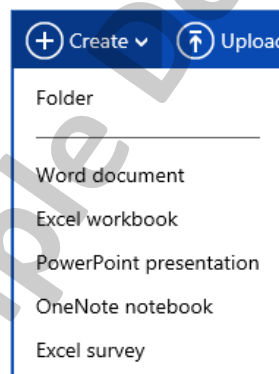
You can log in to the SkyDrive website using your web browser with your login name and password.

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



You can upload photos and use files and share files.

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



## Sharing Files

From within Excel 2013 you can save files to SkyDrive (usually to the Documents folder). You can then click on the **FILE** tab, on **Share** and invite people to share files in SkyDrive. (For further information click on the Help button **?** in the Share screen.)

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

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

## Exercise Files used in this book

---

(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))



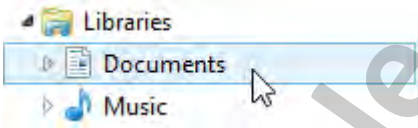
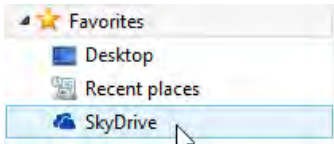
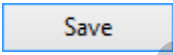

Names of files	
Active Sports	Healthy Homes Ltd
Albany Joinery for Charts	Holiday Options
Assets	Music Machine
Baxter Sports	Outdoor Life - October
Best Deals for Charts	Paradise Beach Surf Club
Box Up Supermarkets	Premier Books
Cheryl Price Invoice	Recreational Magazines
Computer Courses	Sales Ranking
Cookery and Gardening Book Sales	Series
Costello's Product Sales	Spartacus - Auckland
Cycle Stuff Sales - January	Spreadsheet Documents
Davidsons	Stock
Day Tripper	Te Kea Trading
Fiji Landing Apartments	Townsville Jan-Mar
Flash Fill	Wairau Office Equipment
Garden Soils Ltd	Walker and Grant Commission
Hats Income Statement	Workbook Security, Protection and Comments Notes

## Downloading Exercise Files

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



Exercise files can be downloaded to My Documents folder OR SkyDrive. However, for the purposes of this book we have specified My Documents as the folder for saving and opening files. If you are using SkyDrive simply use the SkyDrive folder instead.

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 2 <a href="#">Free Download</a> The File Download dialog box will display.
6	<p>a Click on  <b>Save as</b> then click on the Documents folder shown below at the left OR on SkyDrive shown below at the right.</p> <div style="display: flex; justify-content: space-around;">   </div> <p>b 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>

## Section

# 1

## Format and Edit Worksheets Sheets Calculate with Dates and Times



### Learning Outcomes

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

- ☐ Format a worksheet
- ☐ Preview and print a worksheet
- ☐ Apply currency formats to data
- ☐ Copy and move data using the Clipboard or mouse
- ☐ Insert, delete, rename, move and copy sheets
- ☐ Calculate with dates and times



*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**  
**Dynamic**  
**Formula**  
**Functions**  
**Gridlines**

**Justified**  
**Landscape Orientation**  
**Live Preview**  
**Margins**  
**Mini Toolbar**  
**Page Setup**

**Parentheses**  
**Print Preview**  
**Shortcut Menu**  
**Vertically Aligned**

## Formulas and Functions

A **formula** can include one or more **functions** which are pre-defined calculations that are part of the Excel program.

**syntax**  
= structure

The basic syntax for a function is =FUNCTION NAME(*arguments*). The **arguments** are usually references to the cells containing the values that the function will use.

Function names often give you an idea of what the function does, eg SUM adds up all the cells in a given range, while AVERAGE calculates the average amount in a given range of cells.

*Example:* =SUM(B5:D5)

The SUM function has been used to add cells from B5 to D5.

The colon (:) indicates an inclusive range of cells, in this example, B5 through D5.

### Parentheses

If a formula includes more than one operation (eg multiplication and subtraction), Excel follows a strict “order of precedence” when it carries out a calculation. Exponentiation (using the ^ operator) is done first; then multiplication (\*) and division (/); finally addition (+) and subtraction (-).

If you want to override that sequence, you must put **parentheses** (ie brackets) around that part of the formula that you want done first. Look at the following examples to see how parentheses can affect the result.

	A	B	C	D	E
1					<b>Result</b>
2	<b>Example 1</b>	6	4	2	8
3	<b>Example 2</b>	6	4	2	5

#### Example 1:

This example follows the standard sequence: the formula in cell E2 is =**B2+C2/D2**. The division is done first, and the result of that added to the value in B2.

#### Example 2:

The formula in cell E3 is =**(B2+C2)/D2**. The addition is performed first because of the parentheses around that part of the formula. The result of that is then divided by the value in D2.



### EXERCISE 1

- If you were to calculate the following sums in a worksheet taking into account the effect parentheses have on a calculation, what would the answers be?

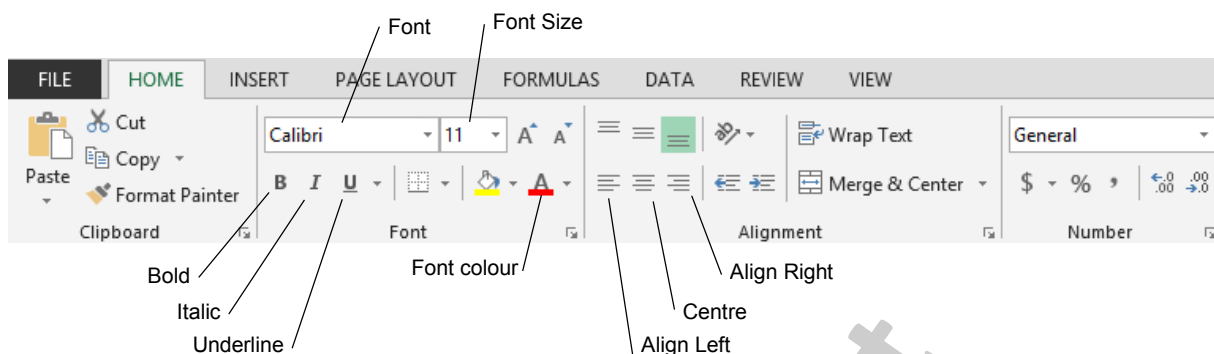
6+6+8/2 = .....

(6+6+8)/2 = .....



# Fonts

A font is an individual typeface design. Changing the font type and size allows you to emphasise areas in a worksheet.



In addition to using the formatting buttons shown above, options can be changed in the Format Cells dialog box, where formatting changes can be previewed before applying them to cells.

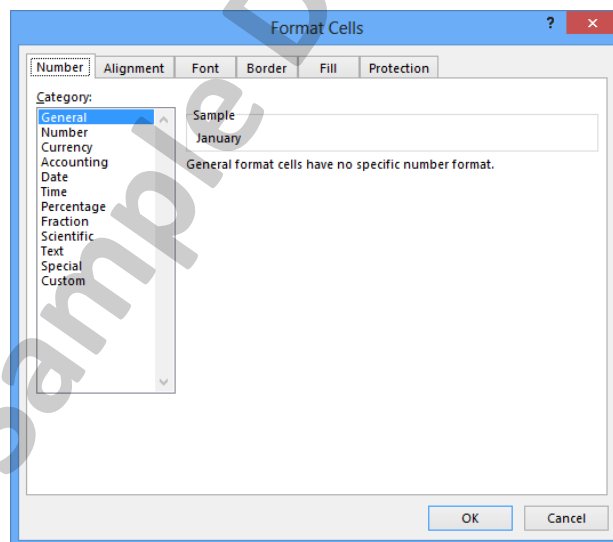
If you want to change the font and/or font size in your worksheet you should make use of the *Live Preview* feature which you will use in the next exercise.



## Format Cells, Font tab Dialog Box

a) Select the cells to be formatted.

Ctrl 1

b) Right-click on the selection and choose  **Format Cells...**. The Format Cells dialog box is displayed as shown below.



Alternatively, on the **HOME** tab you can click on  in the Cells group and choose  **Format Cells...** at the bottom of the menu.

c) Click on the Font tab.

d) Select the formatting required.

e) Click on OK.

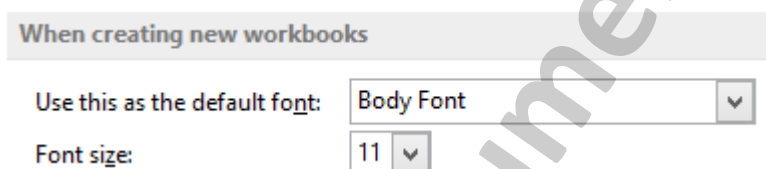
## Mini Toolbar

When you right click on selected cells, the **Mini Toolbar** will be displayed, as shown below.

Formatting options can be selected from this toolbar.



- In Excel 2013 individual words or characters in a cell can contain different formatting, eg ***Sale Prices - December 2013***
- To alter the default font for every workbook, click on the **FILE** tab, then on **Options**. Select the required font and font size in the *When creating new workbooks* section as shown below.



Click on OK.





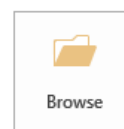
When you click on the **FILE** tab **Backstage View** is displayed. What you see depends on which of the options you select from the left margin. Initially information about the current workbook is displayed.

## Formatting a Worksheet



### EXERCISE 2

- 1 Click on the **FILE** tab, then on **Open**.
- 2 Click on  **Computer** then on  **Easy Way Excel 2013 Level 2 Exercise Files**  
My Documents » Easy Way Excel 2013 Level 2 Exercise Files

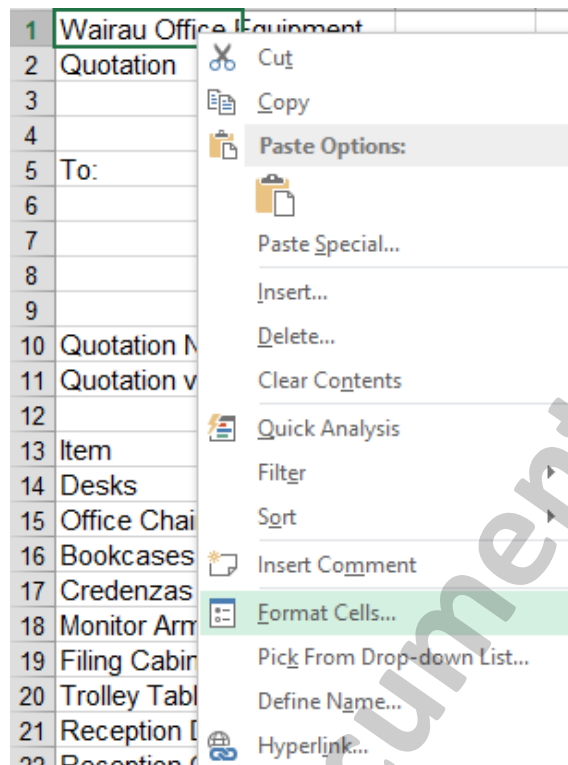


If the Easy Way Excel 2013 Level 2 Exercise Files folder is not displayed click on **Browse** and navigate to your working folder.

- 3 Double click the workbook called ***Wairau Office Equipment***

- 4 Right-click on cell A1.

A drop down menu appears as shown below.



- 5 Choose Format cells...

The Format Cells dialog box is displayed.

- 6 Click on the Font tab.

- 7 Apply the font called Impact and change the font size to 24 pt.

- 8 Click on Bold in the Font style: box.

- 9 Click on OK.

- 10 In cell A2 use the Font and Font Size buttons on the **HOME** tab to change the font for the subtitle to Franklin Gothic Book 12 pt.

As you slowly move your pointer down the list of font names or sizes, the selected cell displays a “preview” of that font or size. This is the **Live Preview** feature.

- 11 Click on cell A5.

- 12 Apply bold and italic.

- 13 Format cells A10 and A11 to italic.

14 Select cells A13 to D13 and apply bold.

15 Apply bold to cell A26.

The Formatting buttons on the ribbon are a quick and efficient method of applying fonts and formats. Features such as bold or italic can be turned on or off by clicking on the appropriate button.

Alternatively, the Mini Toolbar can be used.

16 Widen column A until all the text in cells A10 to A24 are displayed, ie position the mouse pointer between the column A and B header until the mouse pointer displays as a cross as shown below then drag to the right to widen (or to the left to decrease the width of the column). A box will indicate the width of the column.




An alternative method is to click within a column then click on **Format** on the **HOME** tab, select **Column Width...** and specify the width of the column (or selected columns). Default Width can be used to change all columns to a specified width.

	A	B	C	D
1	<b>Wairau Office Equipment</b>			
2	Quotation			
3				
4				
5	<b>To:</b>			
6				
7				
8				
9				
10	Quotation Number:			
11	Quotation valid till:			
12				
13	<b>Item</b>	<b>Quantity</b>	<b>Price</b>	<b>Total Cost</b>
14	Desks	10	300	
15	Office Chairs	15	175	
16	Bookcases	5	95	
17	Credenzas	8	195	
18	Monitor Arms	6	85	
19	Filing Cabinets	4	300	
20	Trolley Tables	2	50	
21	Reception Desk	1	1200	
22	Reception Chairs	4	75	
23	Lunchroom Table	1	350	
24	Boardroom Table	1	550	
25				
26	<b>TOTAL</b>			



17 Save the workbook.

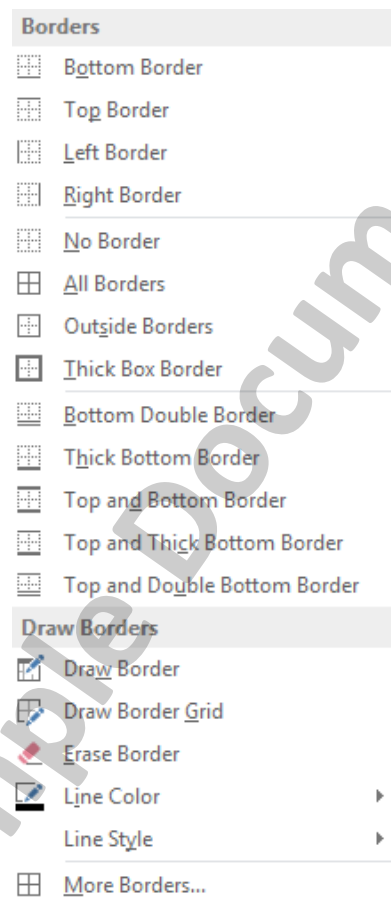
## Borders and Patterns

To add borders to a cell or a range of cells, you can use the Borders button  in the Font group on the **HOME** tab, or the Format Cells dialog box.

### Borders Button

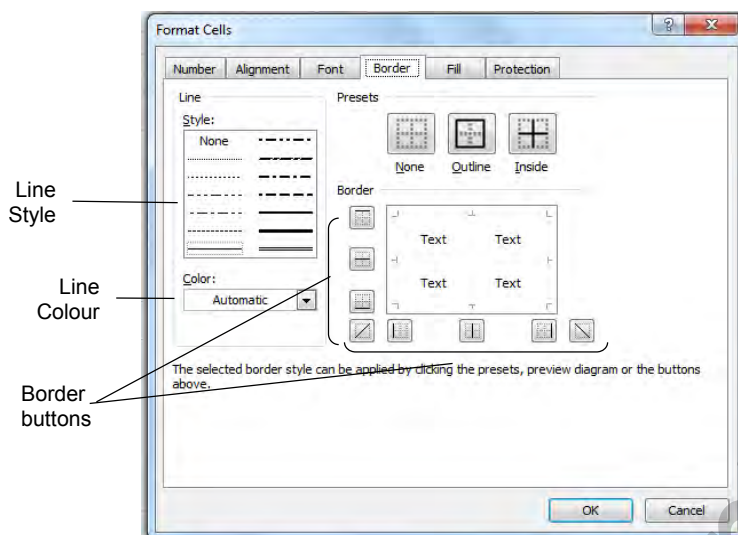
When you click directly on the Borders button, the border shown on the button is applied to the selected cell(s).


If you click on the  of the  button, you can select a different type of border from the displayed menu.



A line style and colour can also be applied using the options displayed under the Draw Borders section of the menu.



## Format Cells, Border tab Dialog Box




- Select the cells required and right-click on the selection.
- Choose  **Format Cells...** and click on the Border tab in the Format Cells dialog box.
- Select the line style and line colour required in the Line section.
- Click on a preset button OR click on a Border button to apply a border. To remove a border click on the relevant Border button to turn it off OR select None.
- Click on OK.

## Removing Borders

Borders can be removed in several ways as described here.

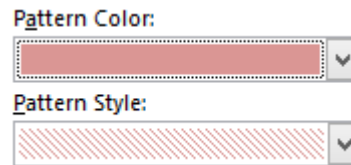
- Select the cells with the border style applied. Click on the ▼ of the  button and choose No Border.
- In the Border tab of the Format Cells dialog box click on None and click OK.
- To remove individual borders click on  **Erase Border** in the Draw Borders section of the Borders menu. This turns the mouse pointer into an eraser, so borders can be removed by clicking on them individually with the mouse. Click on Erase Border again to turn this feature off.

## Adding a Fill Colour




A colour fill can be applied to cells using the Fill Colour button  in the Font group on the **HOME** tab. Select the cells, click on the down-arrow, and select the desired colour. When you point to a colour, the Live Preview feature shows you what that colour will look like when applied to the selected cell(s).

## Adding a Pattern

Patterns can be applied to selected cells by selecting a Pattern Color and Pattern Style from the Fill tab in the Format Cells dialog box.



### EXERCISE 3

- 1 Use the Borders button  to apply border formats to the worksheet as indicated below.
- 2 Apply fill colours using the Fill Colour button .
- 3 Calculate the Total Cost for each item (Quantity x Price) in cells D14 to D24.
- 4 Use  AutoSum to calculate the Total in cell D26.
- 5 Save the workbook.

	A	B	C	D
1	<b>Wairau Office Equipment</b>			
2	Quotation			
3				
4				
5	To:			
6				
7				
8				
9				
10	Quotation Number:			
11	Quotation valid till:			
12				
13	<b>Item</b>	<b>Quantity</b>	<b>Price</b>	<b>Total Cost</b>
14	Desks	10	300	3000
15	Office Chairs	15	175	2625
16	Bookcases	5	95	475
17	Credenzas	8	195	1560
18	Monitor Arms	6	85	510
19	Filing Cabinets	4	300	1200
20	Trolley Tables	2	50	100
21	Reception Desk	1	1200	1200
22	Reception Chairs	4	75	300
23	Lunchroom Table	1	350	350
24	Boardroom Table	1	550	550
25				
26	<b>TOTAL</b>			<b>11870</b>

Apply a bright yellow fill colour

To apply the fancy border use the Format Cells dialog box, Border tab

Top and Bottom Borders applied to cells

Calculate the Total Cost column

Top and Double Bottom Border applied to cells

Calculate using the AutoSum button

# Alignment

## Aligning Data in a Cell

Text entries are automatically aligned at the left of a cell, and number and formula entries at the right. The alignment options shown below can be applied from the Alignment group on the **HOME** tab.



Align Left



Center



Align Right

The following diagram shows text to the left, centre, right and centred across merged cells.

Left	Center	Right
Merge and Center		

## Aligning Across a Selection

If you want text (eg a worksheet title) centred across the width of the data, select the appropriate cells and click on **Merge & Center**. To undo the merge, select the merged cell and click on **Merge & Center** or you can click on the and select Unmerge Cells.

## Wrap Text

The Wrap text option allows text to be wrapped onto two or more lines within a cell. Select the cells required and click on **Wrap Text**.

Unit Standard books
------------------------



To wrap text within a cell as you type, press Alt Enter where you want a new line to start.

## Indenting Text in a Cell

**indented**  
= move  
data to the  
right from  
the left cell  
border

Text in a cell can be indented. An example is shown below.

Indented data

22	Fixed Assets	
23	Shares	1,250,000
24	Investments	1,450,000
25		
26	Current Assets	
27	Cash	915,712
28	Debtors	45,876
29		
30	Net Assets	

Indenting can be applied or removed using the Decrease Indent and Increase Indent buttons in the Alignment group on the **HOME** tab.

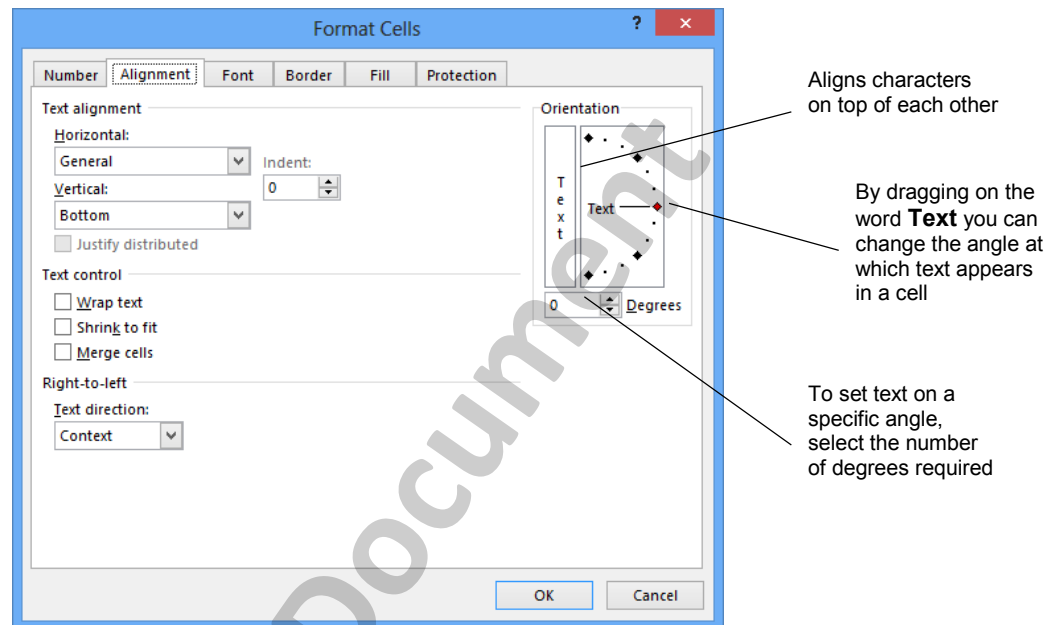


## Vertical Alignment and Orientation

Text can be **vertically aligned** at the top, bottom, centre, or **justified** in a cell. Data can be displayed vertically or on an angle. The diagram below shows the options available.

Top	Center	Bottom	Justify

Different types of alignment and orientation can be applied from the Alignment tab of the Format Cells dialog box.



The **Shrink to Fit** option in the Alignment tab shrinks the font size of text so all the text is visible in a cell.



### EXERCISE 4

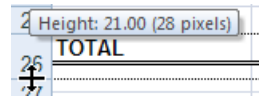
- 1 Merge & Center cells A1 to D1.
- 2 Select cells A2 to D2 and press F4 (Repeat key) to repeat your last action.



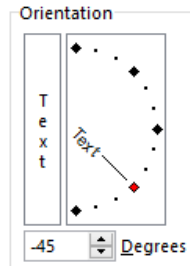
If cells A1 to D2 were selected, the cells would merge but the data in cell A2 would be lost, because only data in the first of the selected rows is retained.

- 3 Right align the headings in cells B13 to D13.
- 4 Select cells A13 to D13.
- 5 Apply wrap text and vertical centre options using the Alignment tab in the Format Cells dialog box.
- 6 In cell C13 change *Price* to *Unit Price*.
- 7 Position the mouse pointer on the row header between rows 26 and 27. The mouse pointer will change to a black cross.

- 8 Click and drag downwards to the height of 21.00, as shown below.



- 9 If necessary, select cells A26 to D26 and change the vertical alignment to centre.
- 10 In cell A29 type: *Thank you* and press Ctrl Enter.
- 11 In the Format Cells, Alignment tab dialog box, click and drag the word *Text* downwards in the Orientation box as shown below (-45 degrees).



- 12 Click on OK. The text is now on an angle in the cell.
- 13 Set the alignment of the text back to horizontal, by dragging the word *Text* up to 0 degrees.
- 14 Click on OK.
- 15 Make the amendments shown below.

If text is not wrapped on the Unit Price heading, select cell C13, click at the end of the word *Unit* in the Formula bar, and press Alt Enter.

	A	B	C	D
1	<b>Wairau Office Equipment</b>			
2	Quotation			
3				
4				
5	To:	Nixon Group		
6		18 Stallard Place		
7		Glen Eden		
8		Auckland 1007		
9				
10	Quotation Number:	4587		
11	Quotation valid till:			
12				
13	<b>Item</b>	<b>Quantity</b>	<b>Unit Price</b>	<b>Total Cost</b>
14	Desks	10	\$300	\$3,000
15	Office Chairs	15	\$175	\$2,625
16	Bookcases	5	\$95	\$475
17	Credenzas	8	\$195	\$1,560
18	Monitor Arms	6	\$85	\$510
19	Filing Cabinets	4	\$300	\$1,200
20	Trolley Tables	2	\$50	\$100
21	Reception Desk	1	\$1,200	\$1,200
22	Reception Chairs	4	\$75	\$300
23	Lunchroom Table	1	\$350	\$350
24	Boardroom Table	1	\$550	\$550
25				
26	<b>TOTAL</b>			<b>\$11,870</b>

Merge cells and align the text at the top of the merged cell. Apply a border.

Type the address by pressing Alt Enter to move to a new line.

Type the Quotation Number.

- 16 Save the workbook.