



Microsoft Excel

Basic to Advanced

[Your Company Name]

CustomGuide

EVALUATION ONLY

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Contents

Excel Fundamentals	17
Understand the Screen	18
Create Workbooks	21
Create a Blank Workbook	21
Create a Workbook from a Template	22
Navigate Worksheets	24
Select a Cell	24
Jump to a Cell	25
Go To Dialog Box	25
Navigation Shortcuts	26
Open Workbooks	27
Open a Workbook	27
Open a Different File Format	28
File Types Commonly Opened in Excel	30
Save Workbooks	31
Save a Workbook	31
AutoSave Workbooks	32
Save Progress	32
Save As a New File and/or Location	33
Save to Different File Formats	34
File Types Commonly Saved to From Excel	35
AutoRecover	36
Recover a Workbook	36
AutoRecovery Settings	38
The Quick Access Toolbar	39
Add a Button to the Quick Access Toolbar	39
Customize the Quick Access Toolbar	40
Remove a Button from the Quick Access Toolbar	41
Print	42
Preview and Print a Worksheet	42
Specify Printing Options	43
Customizable Print Options	44
Help	45

The Tell Me Field	45
The Help Pane.....	46
Close and Exit	47
Close a Workbook.....	47
Close Excel	48
Edit a Workbook	49
Select Cells and Ranges	50
Select a Cell.....	50
Select Rows.....	50
Select Columns	51
Select a Cell Range.....	51
Select the Entire Worksheet.....	52
Select Non-Adjacent Cells.....	52
Edit Cell Data	53
Enter Cell Data	53
Replace Cell Data	53
Delete Cell Data	54
Edit Cell Data	54
Cut, Copy, and Paste.....	55
Copy and Paste	55
Cut and Paste.....	56
Move Using Drag and Drop	56
Undo, Redo, and Repeat.....	57
Undo	57
Undo Multiple Actions.....	58
Redo.....	58
Repeat	59
More Pasting Options.....	60
Transpose Data	60
Paste Values.....	61
Paste Formats	62
Advanced Paste Special Commands	62
Paste Special Options	63
Insert and Move Cells	64
Insert Cells	64
Insert Rows or Columns.....	65
Move Cells	65

Delete Cells	66
Delete Cells	66
Delete Rows and Columns	67
Check Spelling	68
Find and Replace Text	69
Find Text.....	69
Replace Text.....	70
Advanced Find and Replace	72
Advanced Find and Replace Options	73
Hide Columns and Rows	74
Hide Rows or Columns	74
Unhide Rows or Columns.....	74
Document Properties.....	75
View Document Properties	75
Edit Document Properties.....	76
Add an Author.....	77
Advanced Properties.....	78
Basic Formulas	79
Formula Basics	80
Create a Formula.....	80
Automatic Recalculation	81
Edit a Formula	82
The Formulas Tab.....	82
Auto Fill	83
Copy Data Using Auto Fill.....	83
Enter a Series of Values with Auto Fill	84
Auto Fill Options	85
Sums and Averages	86
Create a Sum Formula.....	86
Create an Average Formula	87
MIN and MAX Functions	88
Create a MAX Formula.....	88
Create a MIN Formula.....	89
COUNT Function.....	90
Create a Count Formula	90
Basic Formatting	93

Format Text	94
Change Fonts	94
Apply Bold, Italic, or an Underline.....	95
Change Font Size	95
Change Font Color	96
Format a Part of a Cell	97
Align and Merge Cells	98
Change Cell Alignment	98
Indent a Cell's Contents.....	99
Wrap Text in a Cell.....	99
Merge Cells.....	100
Split Merged Cells.....	101
Format Numbers and Dates	102
Format a Number or Date	102
Advanced Number Formats.....	103
Create a Custom Number Format	104
Borders and Background Colors	105
Add a Cell Border.....	105
Advanced Border Options	105
Add a Cell Shading	106
Copy Formatting.....	107
Copy Cell Formatting.....	107
Row Heights and Column Widths.....	108
Adjust Column Width	108
Adjust Row Height	108
AutoFit Columns or Rows	109
Set a Row or Column Value	109
Insert Objects.....	111
Insert Images	112
Insert an Image.....	112
Insert Shapes	113
Insert a Shape	113
Format a Shape.....	114
Insert Hyperlinks.....	115
Insert a Hyperlink	115
Object Properties and Alt Text	116
Object Properties.....	116

Alt Text	117
View and Manage Worksheets.....	119
View Worksheets	120
Change Worksheet Views	120
Use Zoom	121
Custom Views.....	122
Create a Custom View.....	122
Multiple Windows.....	123
Switch Between Windows from the Taskbar	123
Switch Between Windows from Excel	123
Arrange Windows	124
Move and Copy Worksheets	125
Move or Copy a Worksheet	125
Insert, Rename, and Delete Worksheets	126
Insert a Worksheet.....	126
Rename a Worksheet.....	127
Change Tab Color	127
Delete a Worksheet	128
Freeze Rows and Columns	129
Freeze Rows	129
Freeze the First Row or Column.....	130
Unfreeze Panes	130
Hide Worksheets and Gridlines	131
Hide a Worksheet	131
Unhide a Worksheet	131
Hide or Display Worksheet Elements	132
Charts	133
Create Charts	134
Choose the Right Chart	134
Create a Chart	135
Create a Recommended Chart.....	136
Move and Resize	137
Move a Chart.....	137
Move Charts to a Chart Sheet.....	137
Resize a Chart.....	138
Chart Types	139

Change the Chart Type	139
Switch Row/Column Data.....	140
Layout and Style	141
Apply a Chart Layout	141
Apply a Chart Style	142
Change Colors.....	142
Titles and Legends	143
Change the Chart Title.....	143
Add Axis Titles.....	144
Position the Chart Legend	144
Chart Elements	145
Gridlines, Labels, and Data Tables.....	146
Show Chart Gridlines	146
Add Data Labels	146
Display a Data Table	147
Emphasize Chart Data	148
Change the Color of a Data Series.....	148
Format Other Chart Areas	149
Modify Chart Data	150
Add a Data Series.....	150
Rename a Data Series.....	151
Reorder a Data Series.....	153
Filter Charts	154
Filter a Chart	154
Remove a Filter.....	154
Trendlines	155
Choose a Trendline.....	155
Add a Trendline	156
Edit a Trendline.....	157
Dual Axis Charts.....	158
Create a Dual Axis Chart	158
Add Secondary Axis Titles.....	159
Chart Templates	160
Save a Chart as a Template	160
Create a New Chart from a Template.....	161
Sparklines	162
Insert Sparklines	162

Print and Distribute	163
Page Size and Scale	164
Change Page Size	164
Change Print Scale	165
Print Area	166
Set the Print Area	166
Remove a Print Area	166
Page Breaks	167
Adjust Page Breaks	167
Print Titles, Gridlines, and Headings	168
Print Row or Column Titles	168
Print Gridlines and Headings	169
Headers and Footers	170
Add a Header or Footer	170
Header & Footer Elements Group Options	171
Adjust the Header and Footer Height	172
Margins and Orientation	173
Set Print Margins	173
Set Page Orientation	173
Inspect for Issues	174
Inspect a Workbook	174
Accessibility Issues	176
Compatibility Issues	177
Intermediate Formulas	179
Reference External Worksheets	180
Reference Another Worksheet	180
Reference Another Workbook	181
Absolute and Relative References	182
Relative References	182
Absolute References	184
Order of Operations	185
How Excel Performs the Order of Operations	185
Cell and Range Names	186
Create a Name	186
Use a Cell or Range Name in a Formula	186
Go to a Name	187
Edit and Delete Cell or Range Names	187

Insert Functions	189
CONCAT Function	190
Concatenate Text.....	190
PMT Function.....	191
PMT Function.....	191
Display Formulas	193
Show/Hide Formulas	193
Highlight Formulas.....	194
Date Formulas	195
Common Date Functions	195
TODAY() Function	196
Date Calculations in Formulas	197
Manage Data	199
Quick Analysis.....	200
Use the Quick Analysis Button	200
Outline and Subtotal	201
Add Subtotals	201
Outline Options	204
Remove Outlines and Subtotals	204
Data Validation	205
Create a Validation Rule	205
Add Input and Error Messages	207
Flash Fill	209
Use Flash Fill	209
Import and Export Data	210
Export Data.....	210
Import Data	211
Tables	213
Insert a Table	214
Create a Table.....	214
Apply a Table Style	215
Convert to a Range	215
Sort Data.....	216
Sort by One Column	216
Sort by Multiple Columns	216
Filter Data	218

Filter	218
Clear a Filter	218
Add Rows and Columns	219
Insert a Row or Column Adjacent to the Table	219
Insert a Row or Column within a Table	220
Delete Rows and Columns	220
Table Styles	221
Table Style Options	221
Remove Duplicates	222
Remove Duplicate Values	222
Slicers	223
Insert a Slicer	223
Filter with a Slicer	224
Clear and Remove a Slicer	224
Structured References	225
Name a Table	225
Enter a Structured Reference	226
Intermediate Formatting	227
Apply and Manage Conditional Formatting	228
Apply Conditional Formatting	228
Manage Conditional Formatting Rules	229
Remove Conditional Formatting	230
Apply and Remove Cell Styles	231
Apply a Cell Style	231
Remove a Cell Style	231
Create and Modify Cell Styles	232
Create a New Style	232
Modify a Style	233
Find and Replace Formatting	235
Using Find and Replace Formatting	235
Apply a Theme	238
Apply a Workbook Theme	238
Customize a Document Theme	239
Collaborate with Excel	241
Cell Comments	242
Add a Comment	242

View a Comment	243
Edit a Comment	244
Delete a Comment.....	245
Share Workbooks	246
Invite People to Collaborate.....	246
Co-author Workbooks	248
Simultaneously Edit	248
Version History	249
Modify Recovery Settings.....	249
Recover Unsaved Workbook Versions	250
Online Version History.....	251
Protect a Worksheet.....	253
Lock or Unlock Cells.....	253
Hide Formulas.....	254
Protect a Worksheet.....	255
Protect Workbook Structure	256
Protect Workbook Structure	256
Turn Off Workbook Protection.....	257
Password Protection.....	258
Add Password Protection	258
PivotTables	261
Create PivotTables.....	262
Create a PivotTable	262
Add PivotTable Fields	263
Add Multiple PivotTable Fields.....	264
Add an Additional Row or Column Field.....	264
Expand or Collapse a Heading	265
Add an Additional Value Field	265
Change a PivotTable's Calculation.....	266
Change PivotTable Calculations	266
Add Calculated Fields	267
Create a Calculated Field	267
Remove a Calculated Field	268
The GETPIVOTDATA Function.....	269
Use the GETPIVOTDATA Function	269
Filter PivotTables	270
Add a Filter Field.....	270

Clear a Filter	271
Remove a Filter	271
Timelines	272
Insert a Timeline	272
Clear a Timeline	273
Remove a Timeline.....	273
PivotTable Layout.....	274
PivotTable Layout Options	274
Group Values.....	275
Group PivotTable Values.....	275
Ungroup PivotTable Values.....	276
Refresh a PivotTable	277
Manually Update a PivotTable.....	277
Automatically Update a PivotTable	278
Format a PivotTable	279
Work with Style Options	279
Apply a Built-In Style	280
PivotCharts	281
Create PivotCharts	282
Insert a PivotChart	282
Modify a PivotChart	283
PivotChart Options.....	284
Refresh a PivotChart	284
Use the Field Buttons.....	284
Change Chart Layout.....	285
Use Quick Layouts.....	285
PivotChart Styles	286
Apply a PivotChart Style.....	286
Change Chart Colors.....	287
Drill Down Data	288
Use Drill Down Buttons	288
Drill Down into Specific Chart Data.....	289
Troubleshoot Formulas	291
Formula Errors	292
#### Error	292
#NAME? Error	293

#VALUE! Error	294
#DIV/0! Error	295
#REF! Error	295
The Watch Window	296
Add Cells to the Watch Window	296
Evaluate Formulas	298
Evaluate a Formula	298
Advanced Formatting.....	299
Customize Conditional Formatting.....	300
Create a Custom Conditional Formatting Rule.....	300
Conditional Formatting with Formulas.....	301
Use Formulas with Conditional Formatting.....	301
Manage Conditional Formatting	302
Edit a Conditional Formatting Rule	302
Change the Order of Conditional Formatting Rules	304
International Currency and Formats	305
Change the Windows Regional Format Settings	305
Apply an International Currency Format.....	307
Display a Date or Time in a Different International Format.....	307
Body and Heading Options	309
Apply a Theme Font Set.....	309
Create a Custom Font Set.....	310
Color Formats	311
Apply a Color Scheme	311
Create a Custom Color Scheme	312
Custom Themes	313
Apply Theme Elements.....	313
Create a Custom Theme	314
Form Controls.....	315
Turn on the Developer Tab.....	315
Insert a Form Control	317
Save Form Templates	319
Save a Form as a Template.....	319
Open a Form Template.....	320
Advanced Formulas.....	321
IF Function	322

Insert an IF Function	322
Nested Functions	323
Insert a Nested Function	323
AND, OR, and NOT Functions	324
Insert an AND, OR, or NOT Function	324
SUMIF, AVERAGEIF, and COUNTIF Functions	325
Create a SUMIF Formula	325
VLOOKUP	327
Insert a VLOOKUP Function	327
HLOOKUP	330
Insert an HLOOKUP Function	330
INDEX and MATCH	333
The INDEX Function	333
The MATCH Function	335
Combine the INDEX and MATCH Functions	336
UPPER, LOWER, and PROPER	338
UPPER Functions	338
LOWER Function	339
PROPER Function	340
RIGHT, LEFT, and MID	341
The LEFT Function	341
The RIGHT Function	342
The MID Function	343
Formula Calculation Options	344
Change the Formula Calculation Options	344
Analyze Data	345
Goal Seek	346
Use Goal Seek	346
Scenario Manager	348
Use Scenario Manager	348
View a Scenario Summary	350
Consolidate Data	351
Consolidate Data	351
Macros	355
Enable Macros	356
Enable Macros in a Single File	356

Set Trusted Locations	357
Macro Settings.....	360
Create Macros	361
Record a Macro	361
Run a Macro	363
Modify Macros	364
Unhide the Personal Workbook	364
Edit a Macro	365
Test an Edited Macro.....	366
Copy Macros.....	367
Copy Macros from Another Workbook	367
Test a Copied Macro.....	368

Excel Fundamentals

Microsoft Excel is a powerful spreadsheet application that provides quick and accurate numerical calculations and helps make data look sharp and professional. The uses for Excel are limitless: businesses use Excel for creating financial reports; scientists use Excel for statistical analysis; and families use Excel to help manage their investment portfolios.

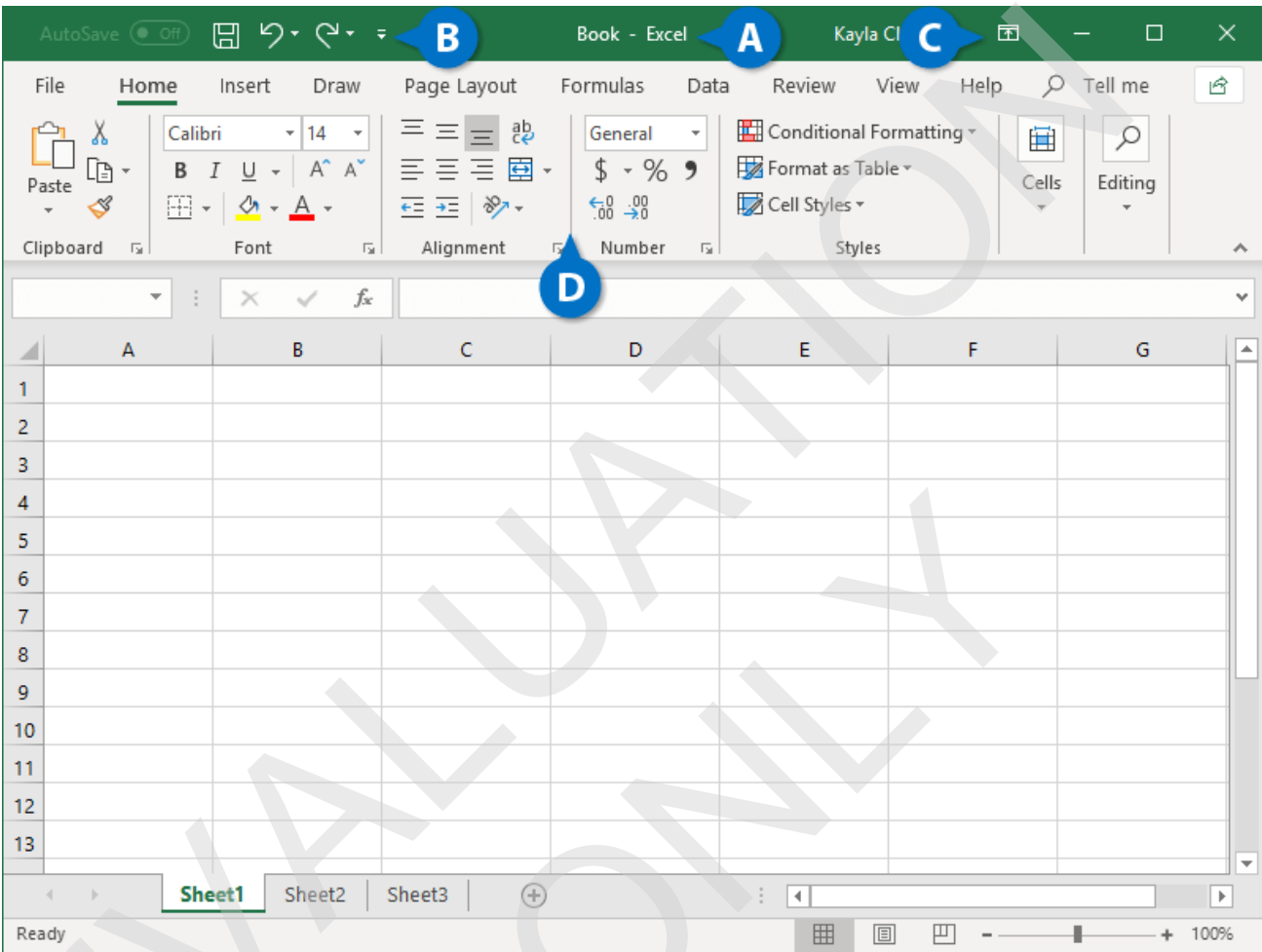
This module will help you get started with Excel. Learn how to create a new workbook, navigate a worksheet and save your work so nothing is lost.

Objectives

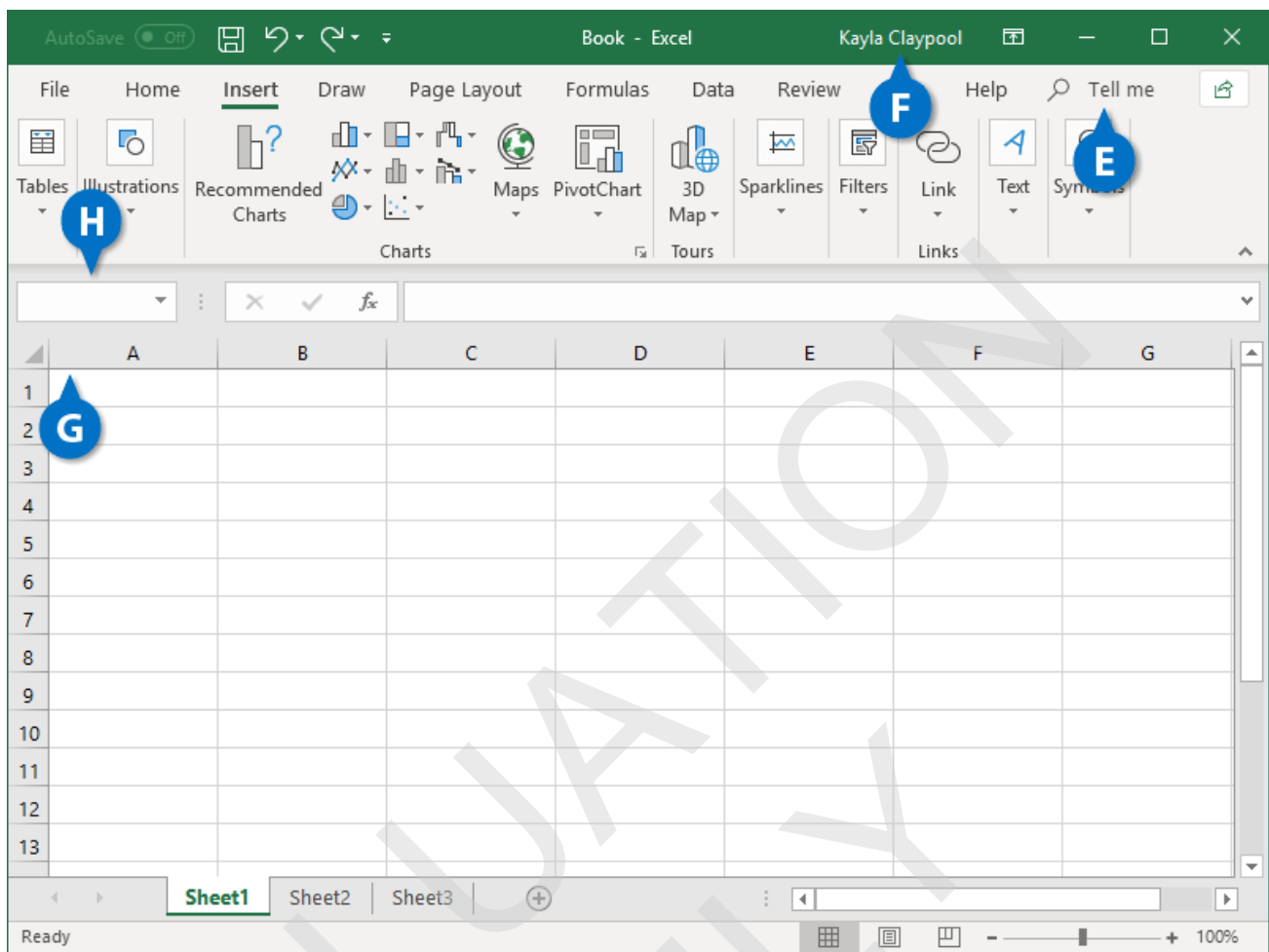
- Understand the Screen
- Create Workbooks
- Navigate Worksheets
- Open Workbooks
- Save Workbooks
- AutoRecover
- The Quick Access Toolbar
- Print
- Help
- Close and Exit

Understand the Screen

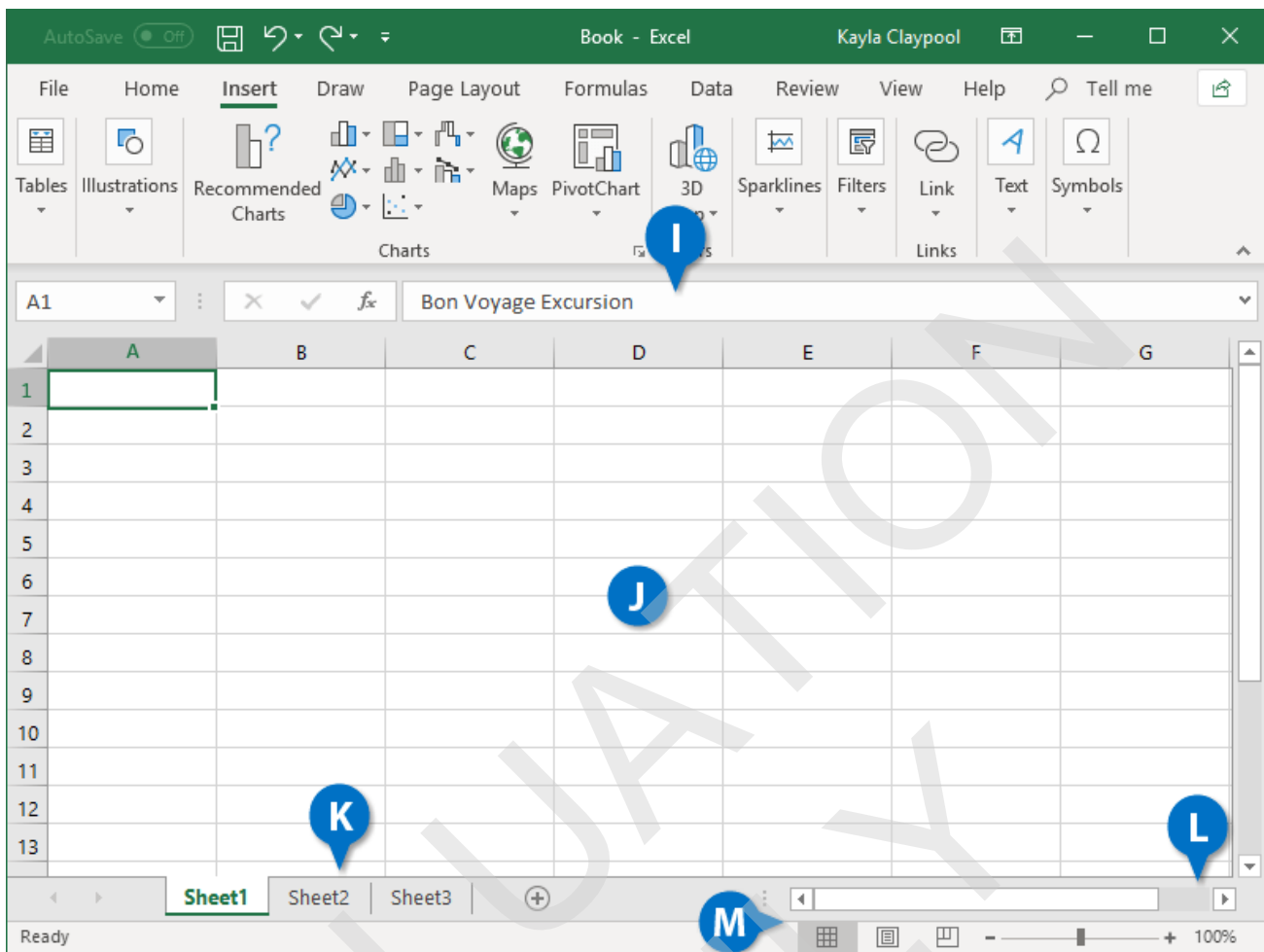
There is a lot going on with the Excel program screen, so this lesson will help you become more familiar with it. Review the labeled items in the images below, then refer to the tables to see what everything does.



A	Title Bar: Displays the name of the current file.	C	Display Options: Here you can change how much of the ribbon is displayed, minimize, maximize or restore the screen, or close Excel altogether.
B	Quick Access Toolbar: This is a fast way to access the most used features.	D	The Ribbon: This is where you'll find all the options you need to make a spreadsheet. The options are grouped into tabs.



E	The Tell Me Field: Allows you to find a command by typing it out. This way you can skip searching through the ribbon tabs for a command.	G	Row and Column Headings: Each column is labeled with a letter, and each row is labeled with a number; giving each cell a unique name.
F	Microsoft Account User Info: When you log in with your Microsoft account, your name and picture appear here.	H	Name Box: Shows which cell is currently selected.



I	Formula Bar: Displays the information or formula in the selected cell.	L	Scroll Bars: Use the scroll bars to move up and down, or left and right in a worksheet.
J	Worksheet: All the cells make up a single worksheet.	M	Status Bar and Views: The status bar at the bottom will let you know if the document is currently saving or if it is ready to be worked on. Next to it, you can change the view of the spreadsheet by zooming in or out.
K	Workbook: Multiple worksheets make up the workbook, or the file.		

Create Workbooks

Creating a new workbook is one of the most basic commands you need to know in Excel. You can create a new, blank workbook or create a new workbook based on a variety of pre-designed templates.

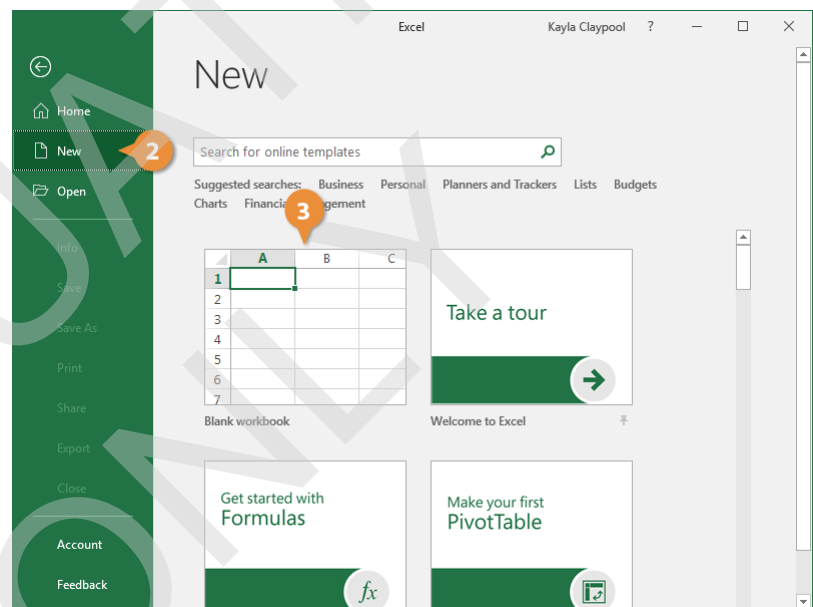
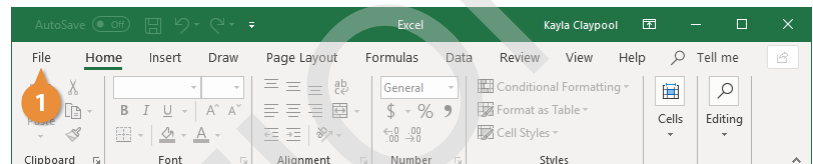
Create a Blank Workbook

Most of the time you'll want to create a blank workbook.

- 1 Click the **File** tab.
- 2 Click **New**.
- 3 Select **Blank workbook**.

Shortcut: Press **Ctrl + N** to quickly create a new blank workbook.

A new, blank workbook is created, and you can start entering data.

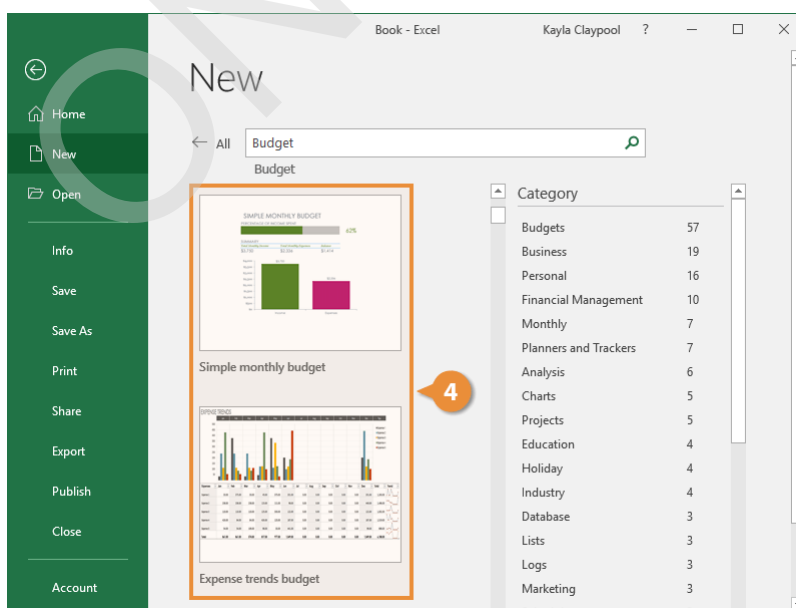
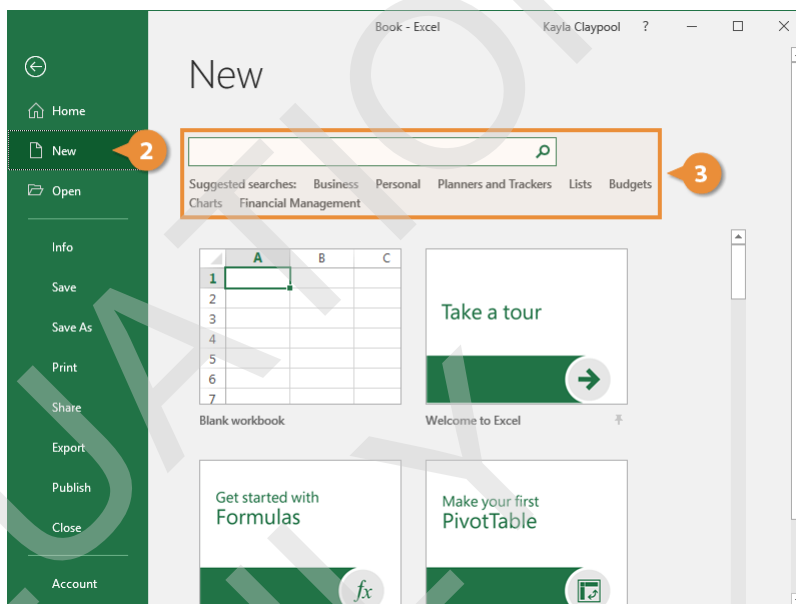
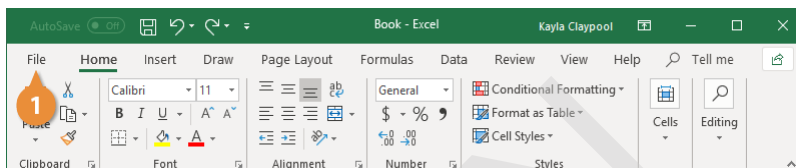


Create a Workbook from a Template

If you need help getting started with a common document, such as an invoice, expense report, or calendar, you can use one of Excel's templates instead of starting from scratch.

- 1 Click the **File** tab.
- 2 Click **New**.
- 3 Find the template you want by:
 - Searching for the type of template you want, using keywords that describe it, such as "calendar" or "invoice".
 - Clicking a suggested search, located below the search field.
 - Selecting the template you want, if it already appears on the page.
- 4 Select a template style.

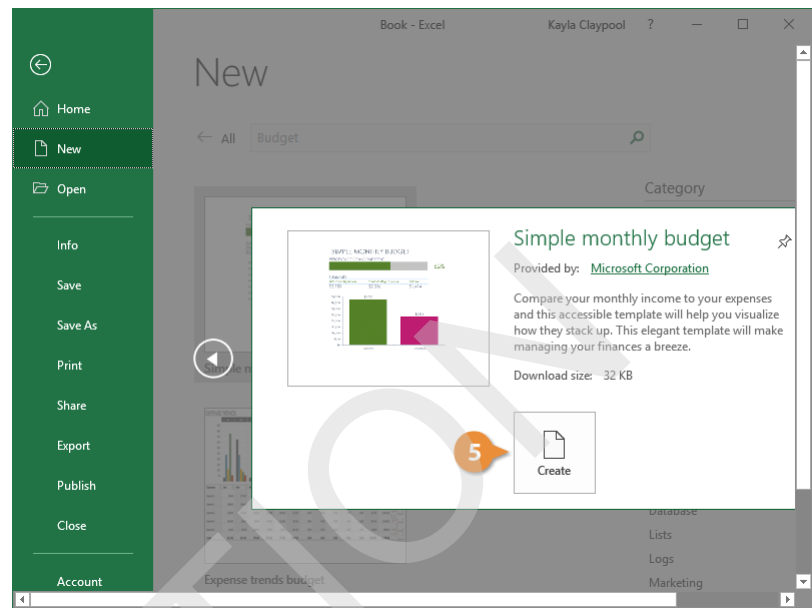
Excel will create a new workbook, based on the template you select.



5

Click **Create**.

A new workbook is created from the template, and you can start populating it with your own data.



Navigate Worksheets

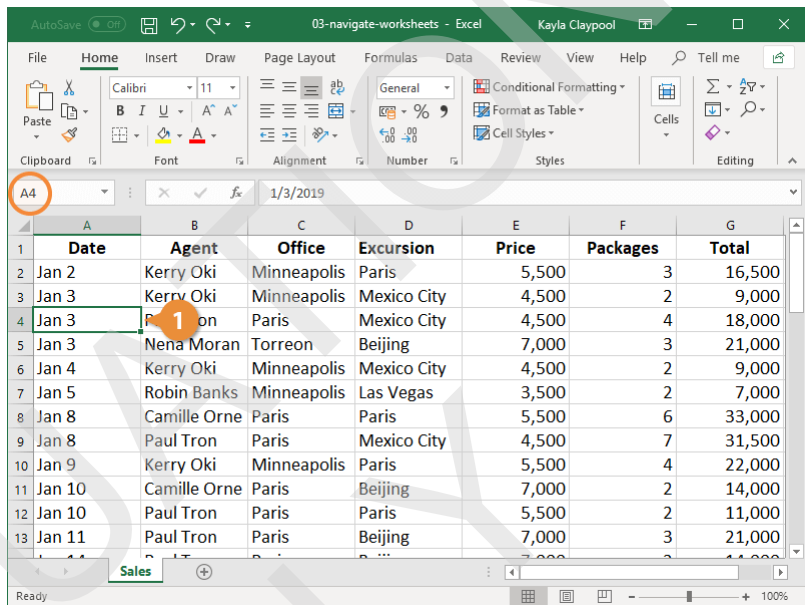
An Excel worksheet can span 16,384 columns and 1,048,576 rows; fortunately, very few worksheets get this big, but knowing how to navigate through a worksheet is another critical Excel topic you'll need to know before you can master Excel. This lesson explains the most common ways to navigate an Excel worksheet.

Select a Cell

1 Select a single cell by using:

- **The Mouse:** Click any cell with the cross pointer.
- **The Keyboard:** Move the cell pointer using your keyboard's arrow keys.

To help you know where you are in a worksheet, Excel displays row headings, identified by numbers, on the left side of the worksheet, and column headings, identified by letters, at the top of the worksheet. Each cell in a worksheet has its own cell address made from its column letter and row number—such as cell A1, A2, B1, B2, etc. You can immediately find the address of a cell by looking at the Name Box, which shows the current cell address.

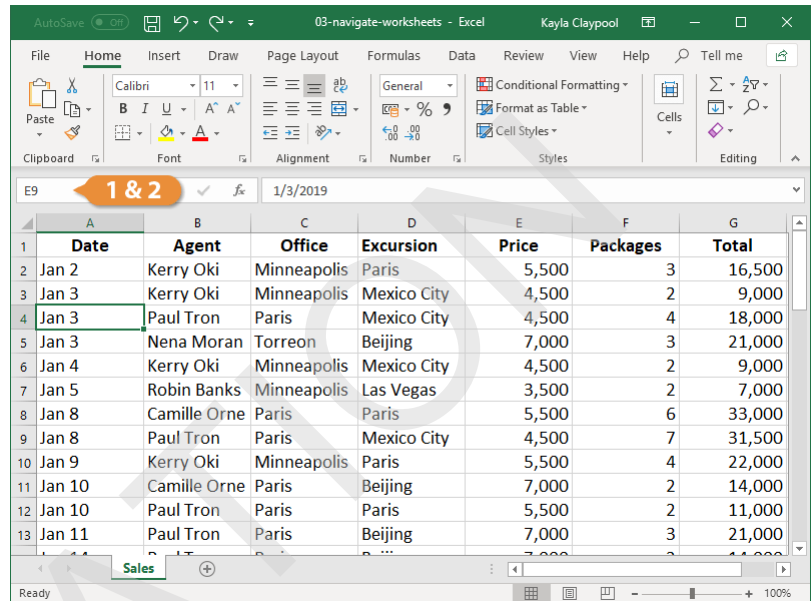


Jump to a Cell

The Name Box is an easy way to get to the cell you want.

- 1 Click the **Name Box**.
- 2 Type the cell reference you want to go to.

For example, if you want to go to cell D4, type D4.
- 3 Press **Enter**.



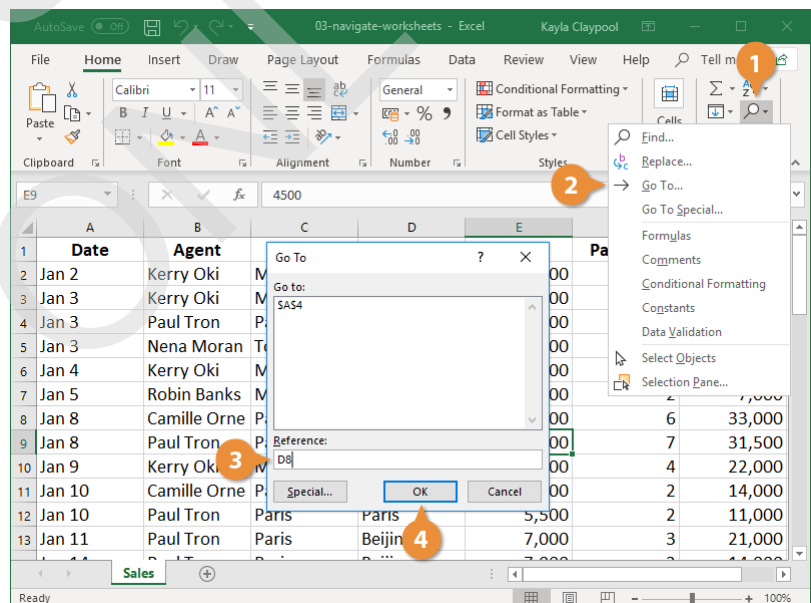
Go To Dialog Box

The Go To dialog box can be helpful when worksheets start getting very large. Here's how to use it:

- 1 Click the **Find & Select** button on the Home tab.
- 2 Select **Go To**.
- 3 Enter or select the cell reference you want to go to.
- 4 Click **OK**.

Shortcut: Press **Ctrl + G** to open the Go To dialog box.

Excel jumps to the specified cell.



Navigation Shortcuts

Excel has several shortcuts that make it fast to get around your worksheets; they're included in this table:

Press	To Move
↓ or Enter	Down one row
↑ or Shift + Enter	Up one row
→ or Tab	Right one column
← or Shift + Tab	Left one column
Home	To column A in the current row
Ctrl + Home	To the first cell (A1) in the worksheet
Ctrl + End	To the last cell with data in the worksheet
Page Up	Up one screen
Page Down	Down one screen
Ctrl + G	Opens the Go To dialog box where you can go to a specific cell address

Open Workbooks

Opening a workbook lets you use a workbook that you or someone else has previously created and then saved. This lesson explains how to open a saved workbook, as well as non-Excel files.

Open a Workbook

You can locate a workbook on your computer and simply double-click it to open it, but you can also open a workbook from within the Excel program.

1 Click the **File** tab.

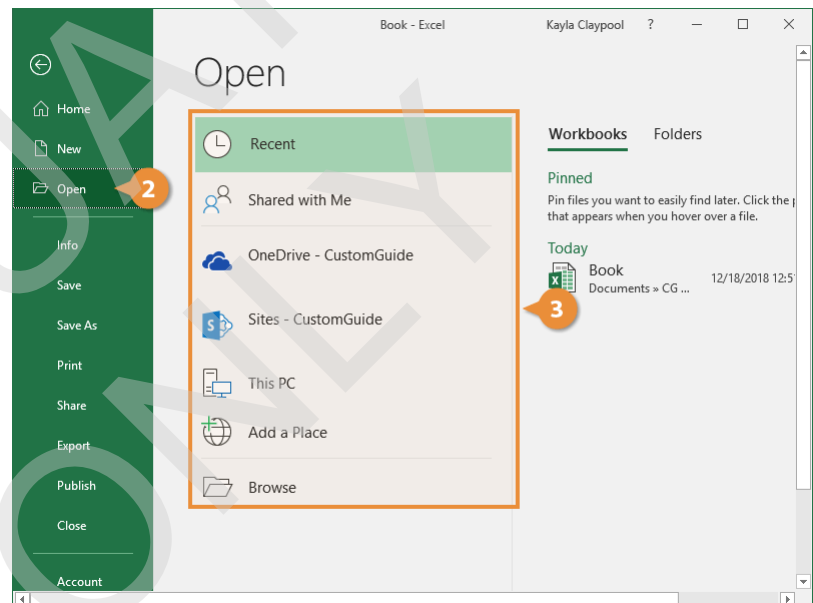
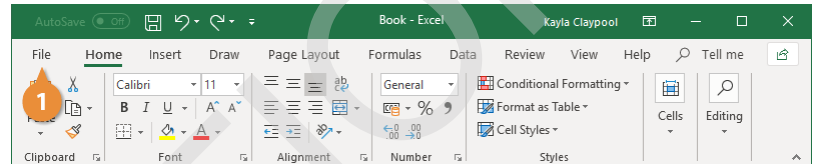
2 Click **Open**.

Shortcut: Press **Ctrl + O** to quickly display the Open tab of the Backstage view.

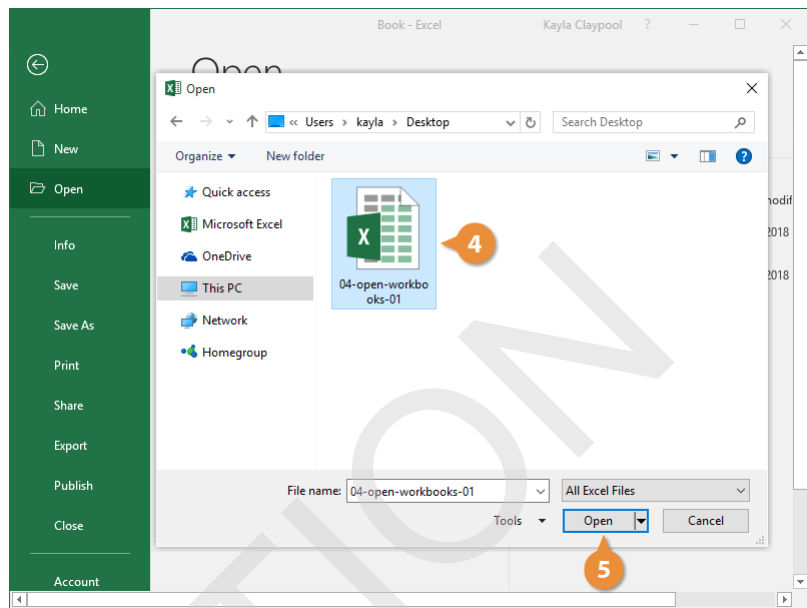
3 Select the location where the file is saved.

You can choose from:

- **Recent:** Recent files you've worked on.
- **Shared with Me:** Files others have shared with you on OneDrive or SharePoint Online.
- **OneDrive:** Microsoft's cloud-based storage.
- **This PC:** Browse files on your local computer.
- **Browse:** Opens a dialog box where you can browse through your computer's folders, drives, and network shares.



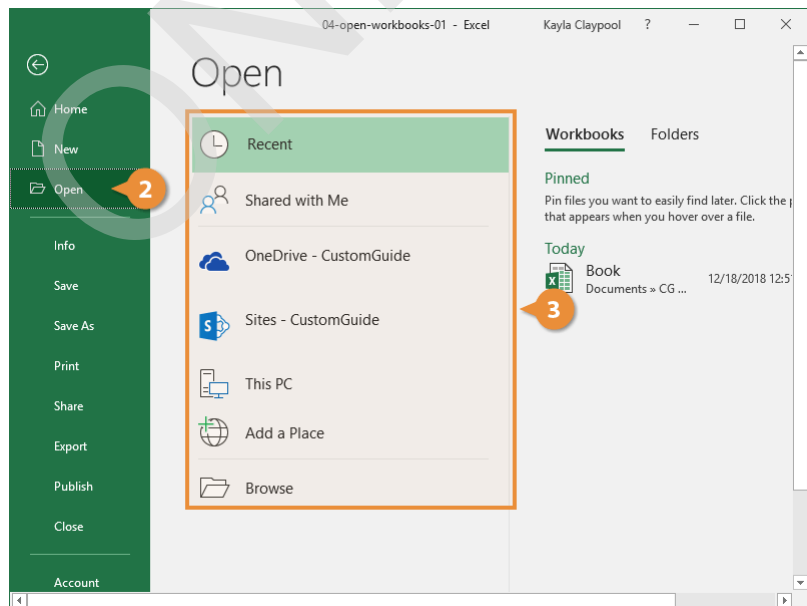
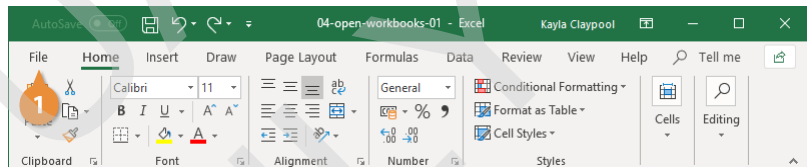
- 4 Select the file you want to open.
- 5 Click **Open**.



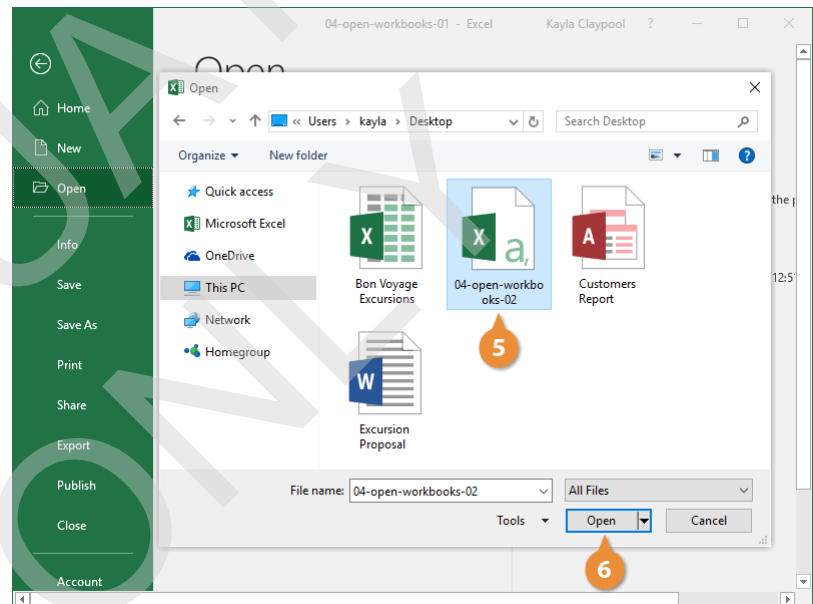
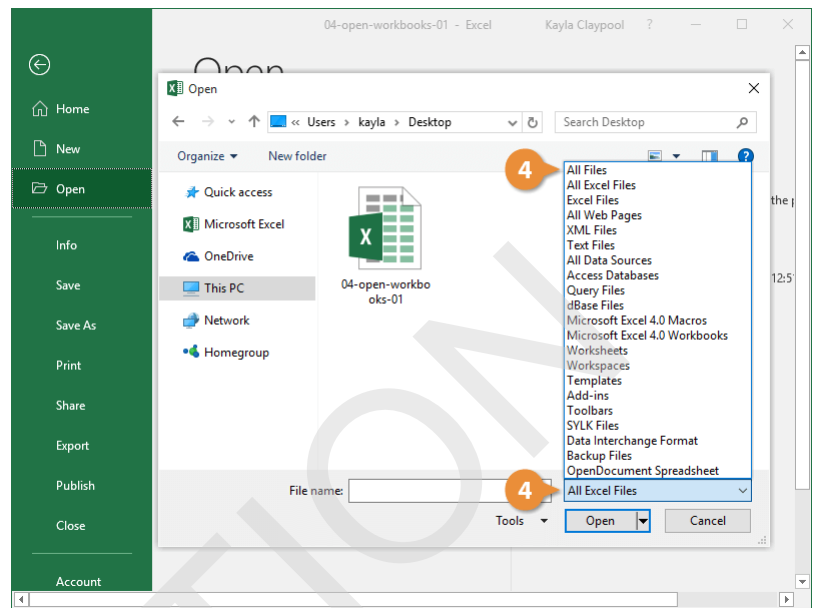
Open a Different File Format

You can also use Excel to open data files created in other programs, like Comma Separated Values or CSV files.

- 1 Click the **File** tab.
- 2 Click **Open**.
- 3 Select the location where the file is saved.



- 4 Click the **file type** list arrow and select **All Files**.
- 5 Select the file you want to open.
- 6 Click **Open**.
- 7 If prompted, complete the steps in the Text Import Wizard.



File Types Commonly Opened in Excel

Common File Types	File Extensions	Description
All Files	(Any)	Displays all file types (although Excel might not be able to open all of them).
All Excel Files	.xls and related	Displays Excel workbooks, templates, and macro-enabled files.
All Web Pages	.htm and related	Displays web pages, including supporting files such as images.
Text Files	.txt and .csv	Displays comma and tab delimited text files, often used to import / export data.
All Data Sources	(Varies)	Displays databases (e.g. Microsoft Access) and queries.
Templates	.xlt and related	Displays Excel template files.

Save Workbooks

After you've created a workbook, you need to save it if you want to use it again. Also, if you make changes to a workbook you'll want to save it. You can even save a copy of an existing workbook with a new name, to a different location, or using a different file type.

Save a Workbook

Once you've created a new workbook, you'll need to save it if you want to use it again.

1 Click the **Save** button.

Shortcut: Press **Ctrl + S** to quickly save a workbook.

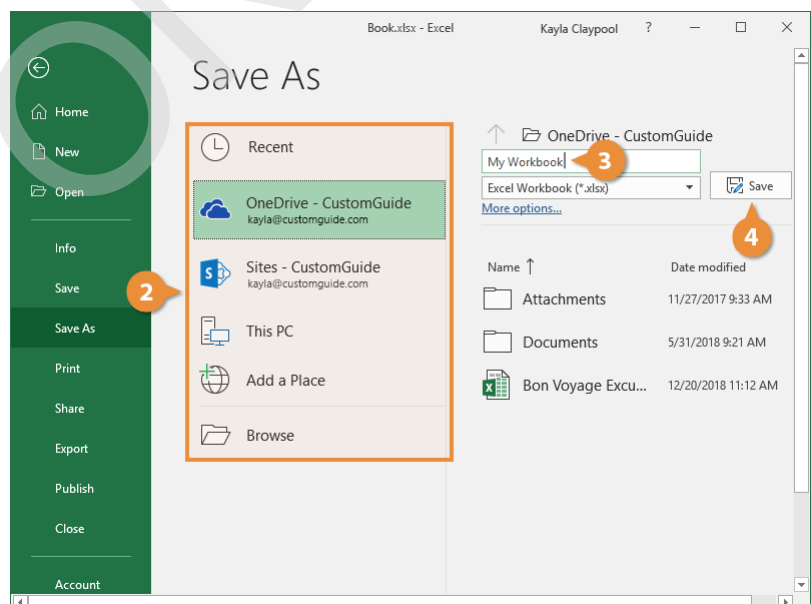
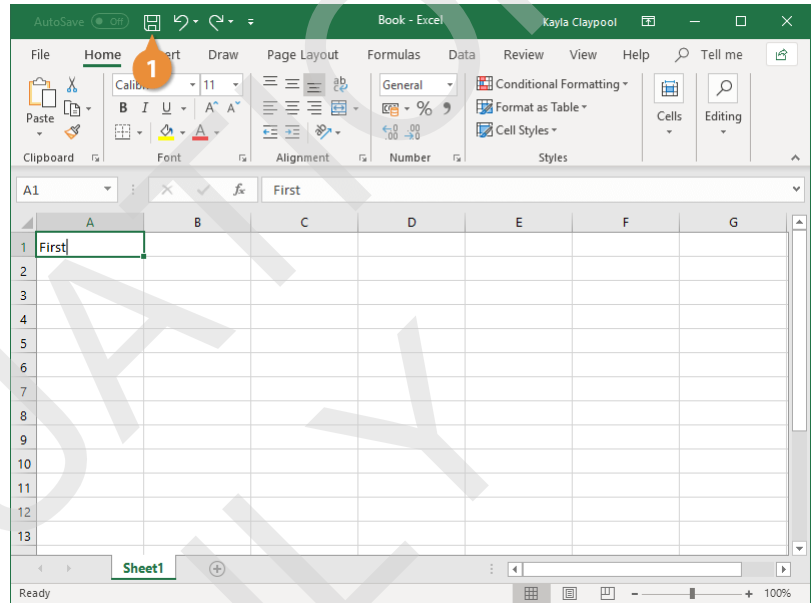
If this is the first time you've saved the workbook, the Save As screen will appear.

2 Choose where you want to save your file:

- **OneDrive:** Save to Microsoft's cloud-based storage so you can open the worksheet on another computer.
- **SharePoint:** Save the workbook to a connected SharePoint server.
- **This PC:** Save to the local storage on your computer.
- **Browse:** Opens a dialog box, where you can browse through your computer's folders, drives, and network shares.

3 Enter a file name.

4 Click **Save**.

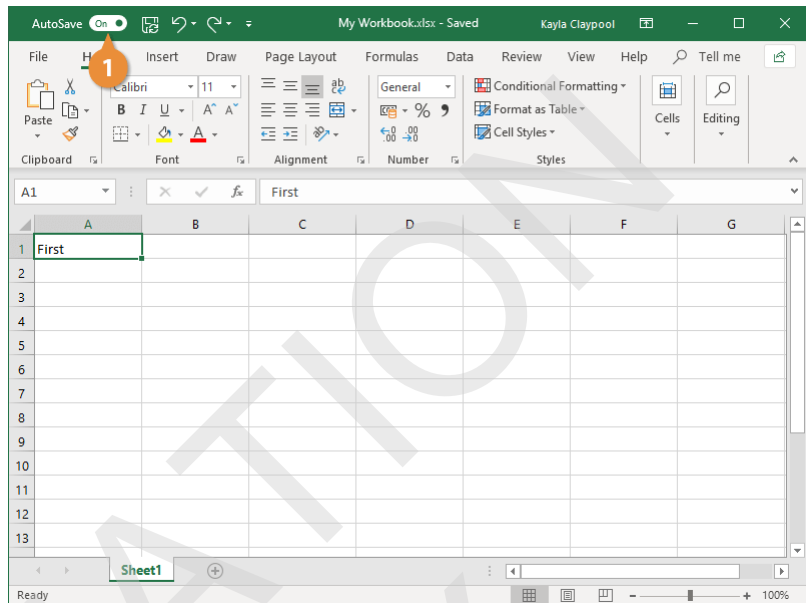


AutoSave Workbooks

If an Excel file is saved online, the AutoSave feature in the top-left is automatically turned on. However, this can be changed as needed.

1

Click the AutoSave toggle button to turn the feature on or off.



Save Progress

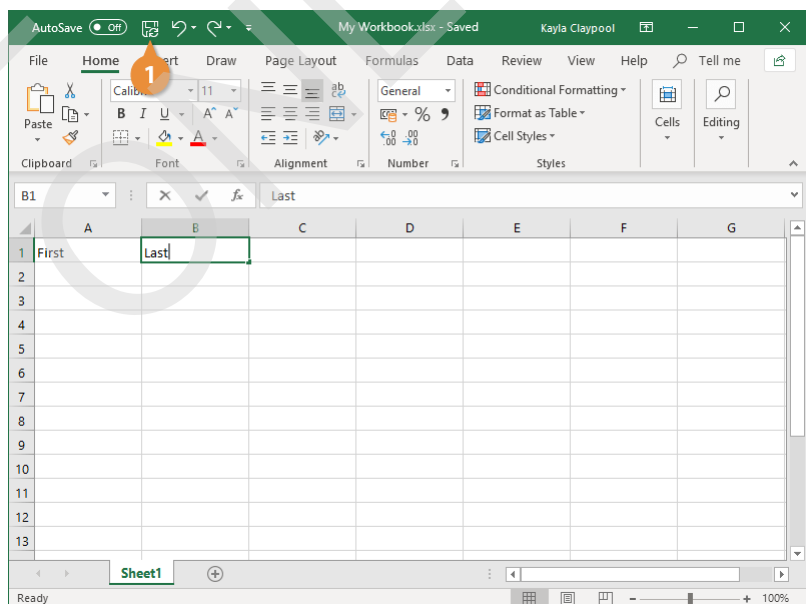
As you continue to work in Excel, you'll want to save any changes you make from time to time.

1

Click the **Save** button.

Shortcut: Press **Ctrl + S** to quickly save a workbook.

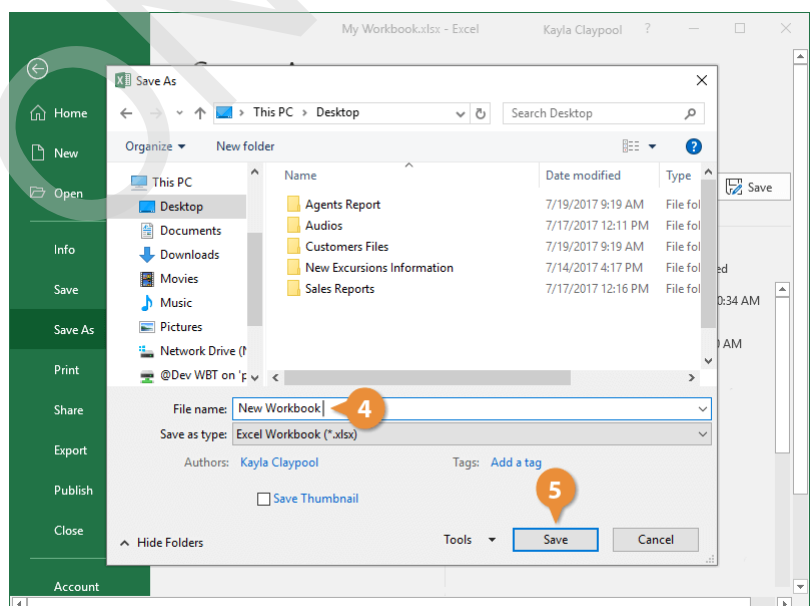
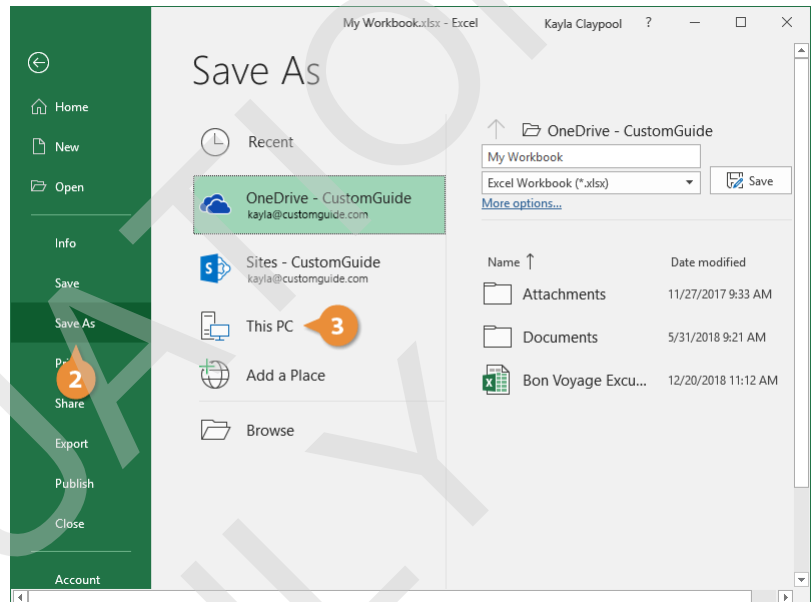
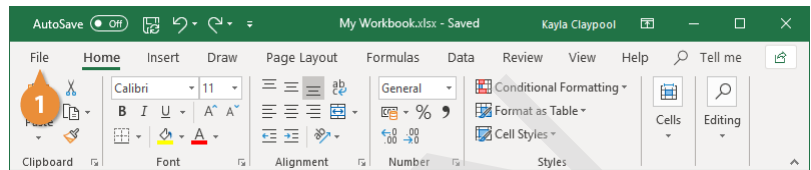
Tip: Try to save your progress every 10 minutes; that way you won't lose any important changes if disaster strikes.



Save As a New File and/or Location

Sometimes you may want to make a copy of an existing workbook and save it with a new name. Using and modifying the content in an existing workbook can often save you a lot of time.

- 1 Click the **File** tab.
- 2 Click **Save As**.
- 3 Click **This PC** to navigate to the folder you want to save your file.
- 4 Enter a **File name**.
- 5 Click **Save**.



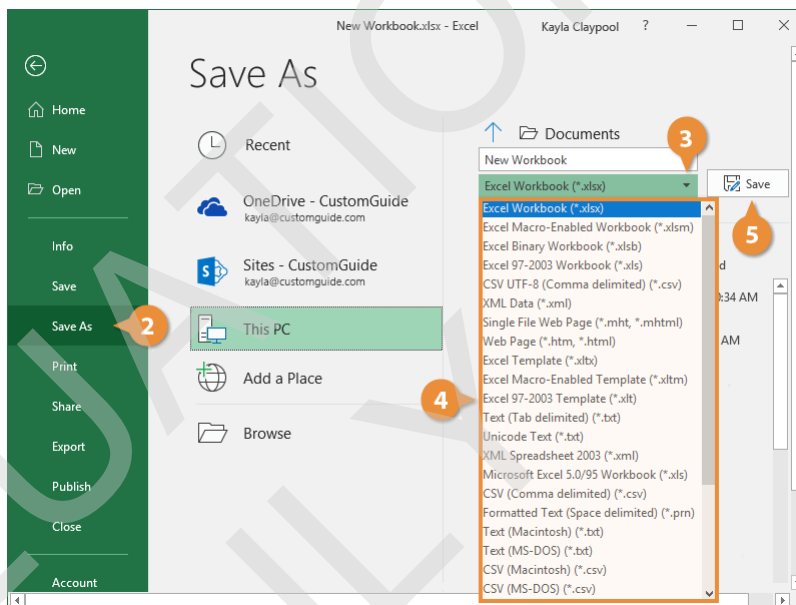
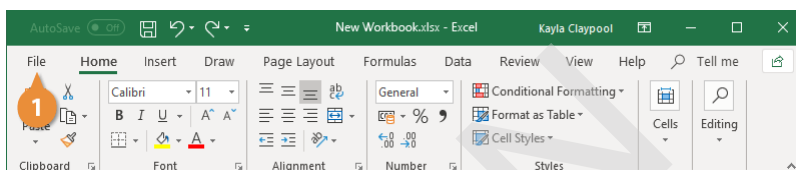
Save to Different File Formats

Excel normally saves its files as Excel workbooks, but you can save information to other file formats as well. For example, sometimes you may want to save your data as a Comma Separated Values or CSV file, so you can import it into another program.

- 1 Click the **File** tab.
- 2 Click **Save As**.
- 3 Click the **Save as type** list arrow.

The default file type is an XLSX Excel file, but you can choose from plenty of other file formats in this menu.

- 4 Select the desired file format.
- 5 Click **Save**.



File Types Commonly Saved to From Excel

File Type	Extension	Description
CSV	.csv	Comma delimited text file, often used to import/export data.
Excel Workbook	.xlsx	The default XLM-based file format for Excel, in use since Excel 2007.
Excel 97-2003 Workbook	.xls	Excel files from Excel 2003 and older.
Excel Macro-Enabled Template	.xlsm	Excel template that contains macros.
Excel Template	.xltx	Excel template files.
PDF	.pdf	Portable Document Format, a format that preserves document formatting and allows file sharing.
Web Page	.html	A web page that is saved as a folder and contains an .htm file and supporting files, such as images.

AutoRecover

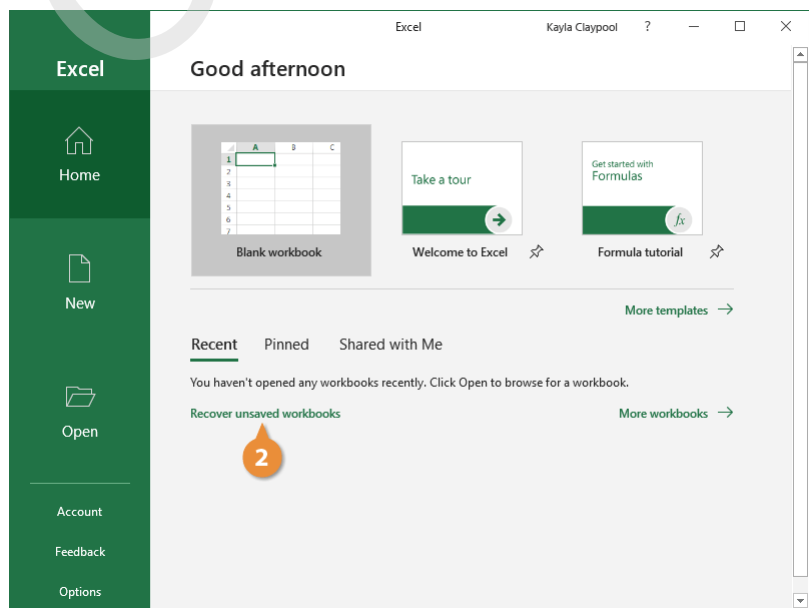
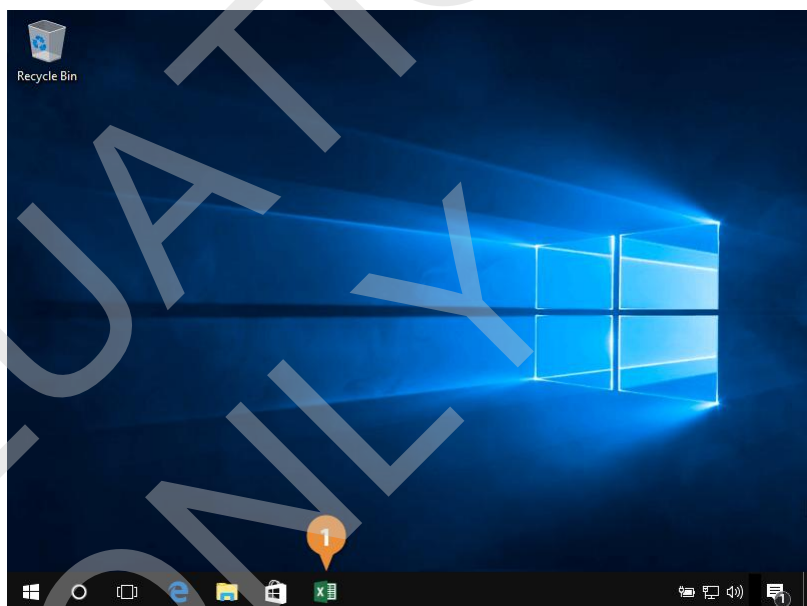
Computers don't always work the way they're supposed to. Nothing is more frustrating than when a program locks up and stops responding, or worse, completely crashes—especially if you lose progress on an important spreadsheet that you're working on.

Fortunately, Microsoft realizes that people might want to recover their workbooks when something catastrophic happens. If Excel 2019 encounters a problem and stops responding, you can restart Excel or your computer and try to recover your lost workbook.

Recover a Workbook

If Excel crashes, it will display the Document Recovery Pane the first time you open Excel again.

- 1** Restart Microsoft Excel.
If an unsaved workbook can be recovered, a Recover unsaved workbooks heading will appear on the Welcome screen.
- 2** Click **Recover unsaved workbooks**.
The Recovery pane appears, listing all recovered workbooks that were found.



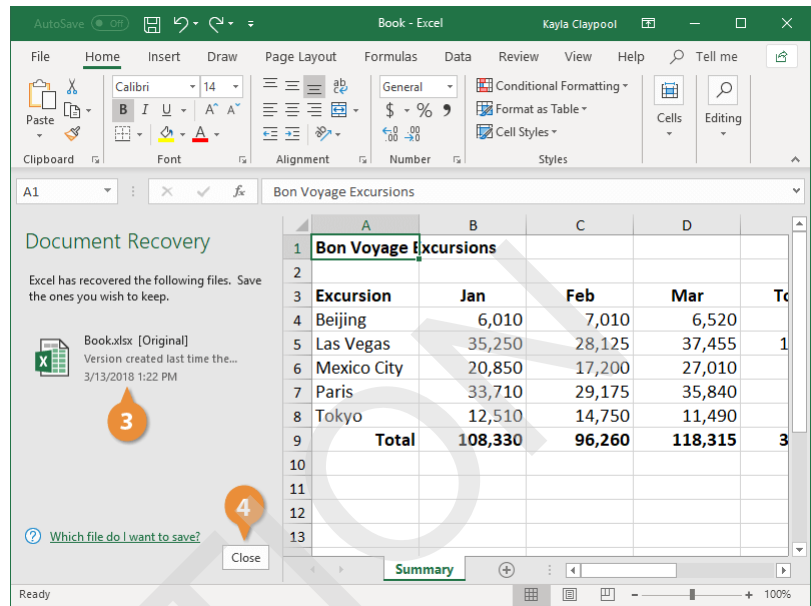
3

Select the workbook from the Document Recovery pane.

The last AutoSaved version of that workbook opens.

4

Click **Close**.



AutoRecovery Settings

If the workbook that you were hoping to recover doesn't appear, it's probably because the AutoRecovery settings didn't catch it. Excel periodically saves a copy of your file. By default, this setting is every 10 minutes, but you can easily change it so that it's a bit more diligent about auto-saving your workbooks.

1 Click the **File** tab.

2 Click **Options**.

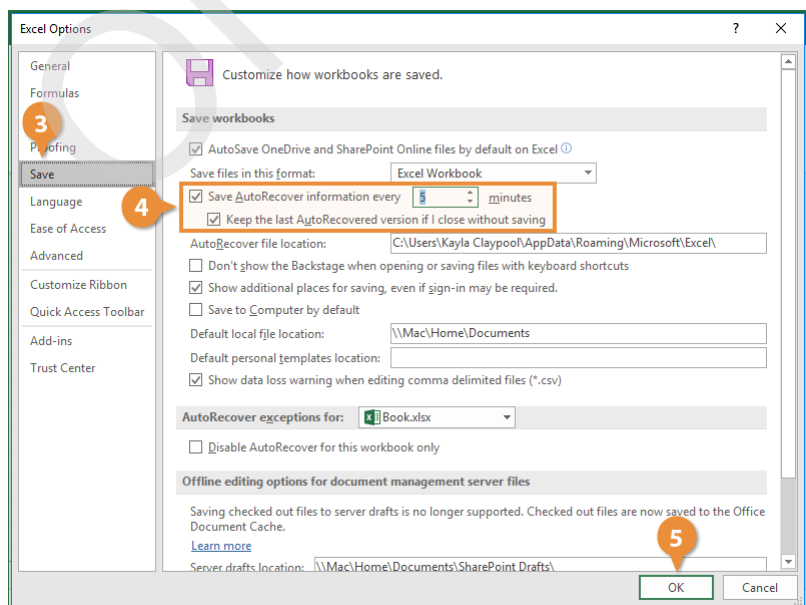
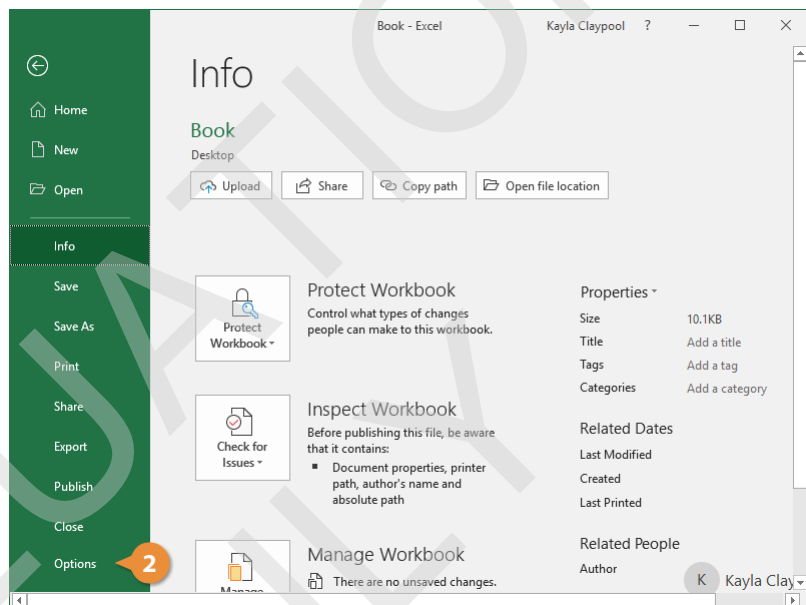
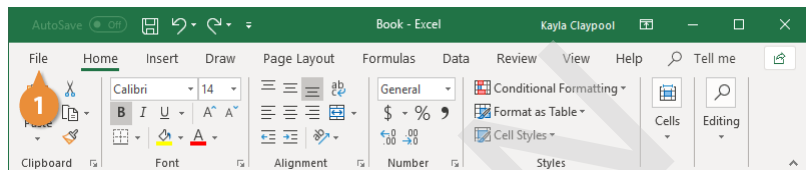
3 Click **Save**.

The AutoRecovery settings are here. Make sure that the proper checkboxes are checked.

4 Make sure **Save AutoRecover information** checkbox is checked and adjust the time interval.

Tip: You can't specify the interval if the checkbox is not selected.

5 Click **OK**.



The Quick Access Toolbar

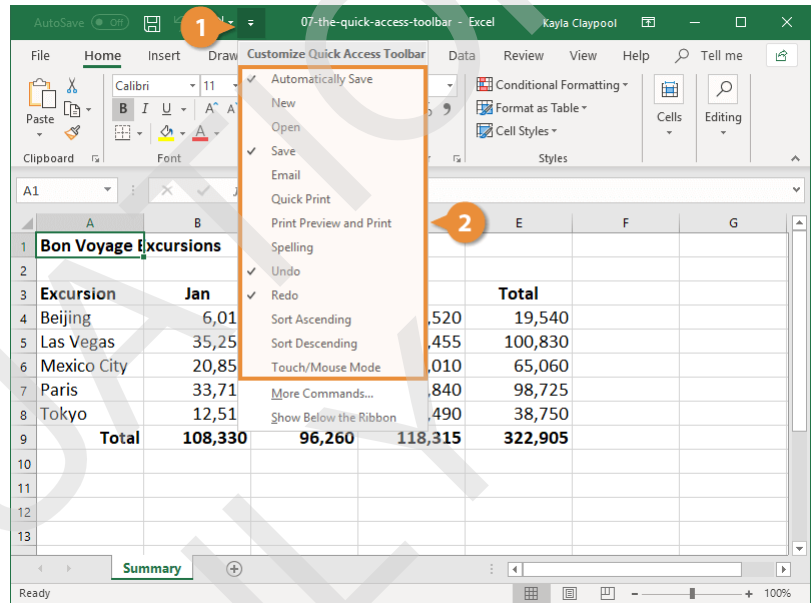
The Quick Access Toolbar is located above the ribbon and contains buttons for commands that you'll use often, such as save and undo. You can also add your own frequently-used commands to the Quick Access Toolbar.

Add a Button to the Quick Access Toolbar

You can add frequently used commands to the Quick Access Toolbar.

- 1 Click the **Customize Quick Access Toolbar** button.
- 2 Select a command to add.

The command is added to the Quick Access toolbar.

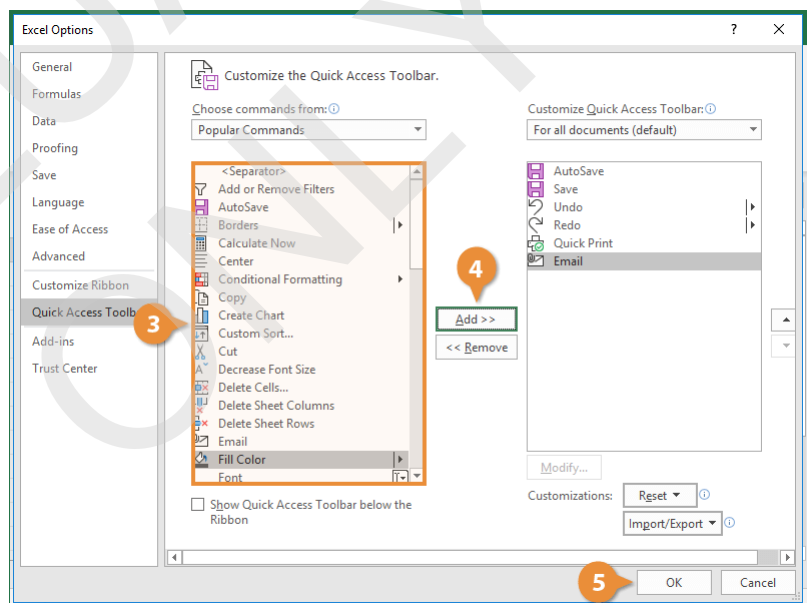
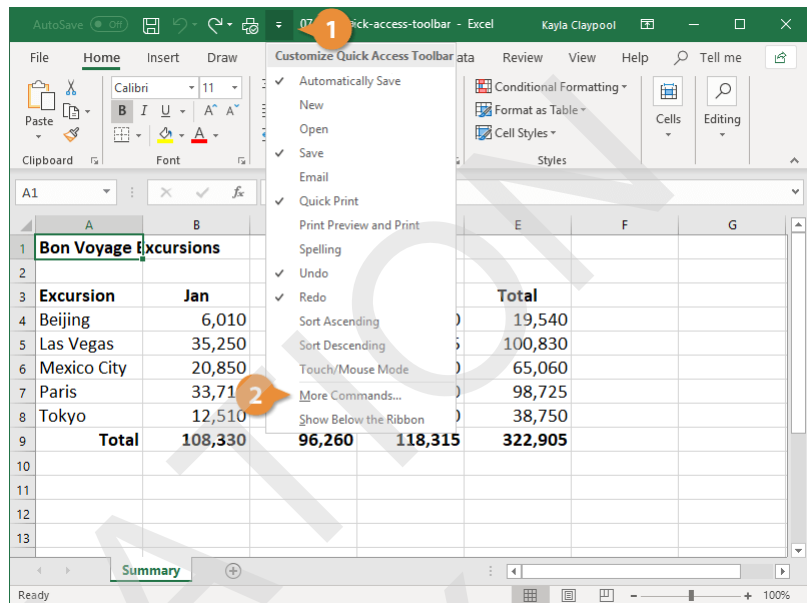


Customize the Quick Access Toolbar

If you don't see the command you want to add to the Quick Access Toolbar in the list, you can select More Commands to find it.

- 1 Click the **Customize Quick Access Toolbar** button.
- 2 Click **More Commands**.
- 3 Select the command you want to add.
- 4 Click **Add**.
- 5 Click **OK**.

The command is added to the Quick Access Toolbar.

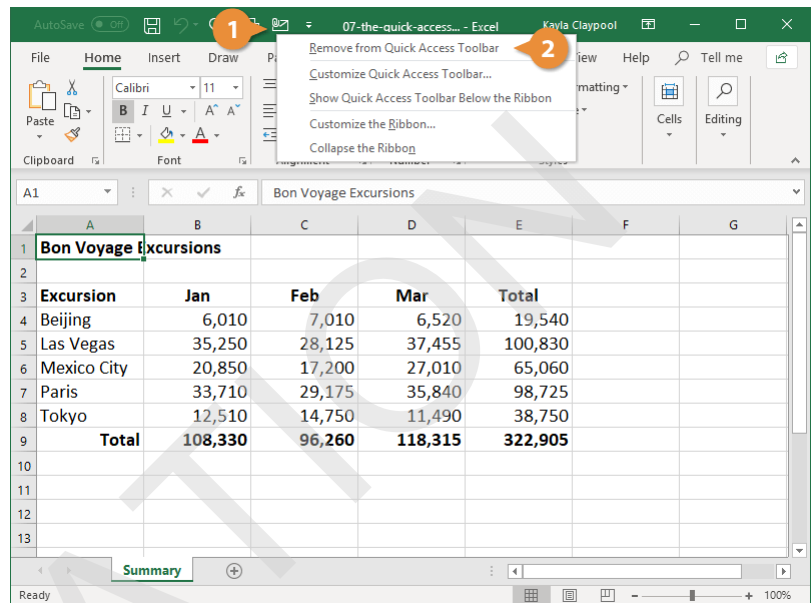


Remove a Button from the Quick Access Toolbar

It's easy to remove a button from the Quick Access Toolbar.

- 1 Right-click the button you want to remove.
- 2 Select **Remove from Quick Access Toolbar**.

The command is deleted from the Quick Access Toolbar.



Print

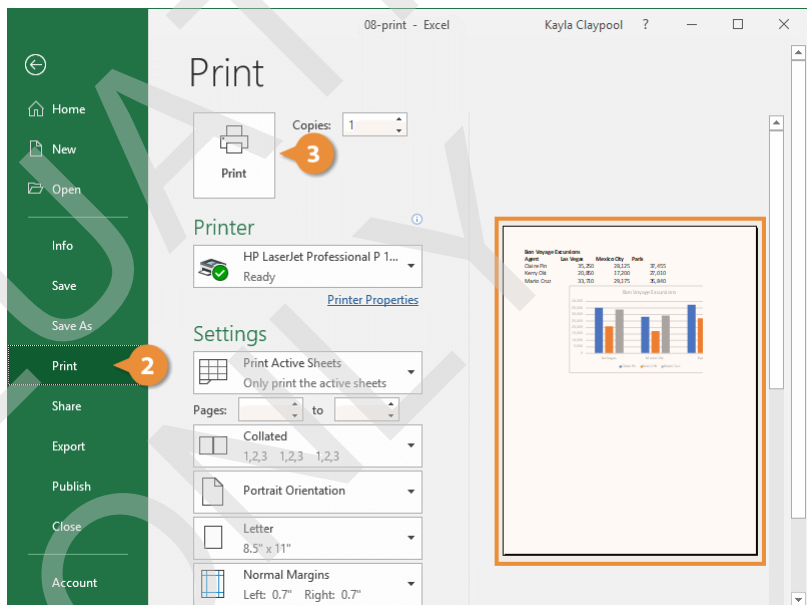
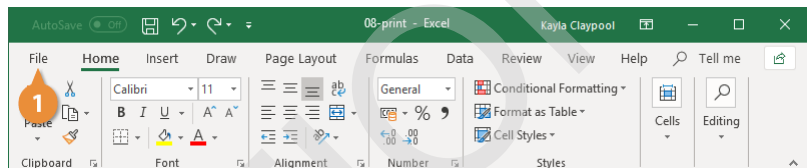
Once you've created a worksheet, and your computer is connected to a printer, you can print a copy. Before you do this, it's a good idea to preview how it's going to look.

Preview and Print a Worksheet

You can preview and then print a worksheet as part of the same operation.

- 1 Click the **File** tab.
- 2 Select **Print**.
The Print tab is where you'll find the print preview.
- 3 Click **Print**.

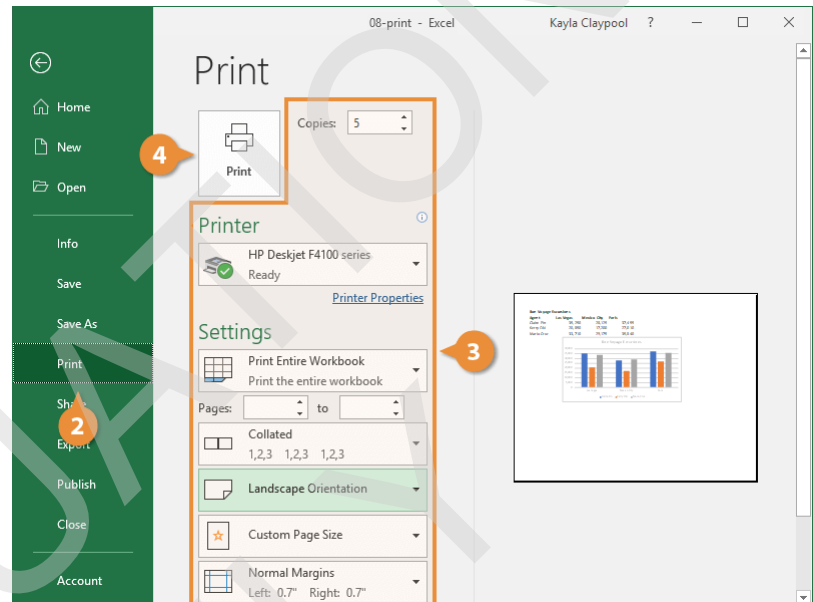
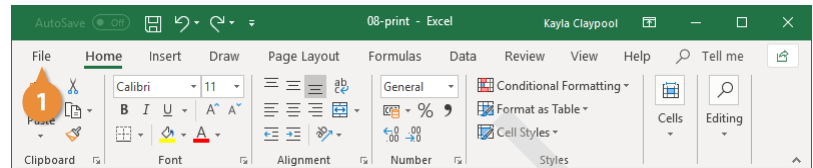
Shortcut: Press **Ctrl + P** to quickly print a worksheet.



Specify Printing Options

Sometimes you will want to specify more printing options, such as the number of copies to print.

- 1 Click the **File** tab.
- 2 Select **Print**.
- 3 Select the desired print options:
 - Number of **Copies** you want to print.
 - **Printer** where you want to send the worksheet.
 - **Print Area** you want to print.
 - **Page Orientation**.
- 4 Click **Print**.



Customizable Print Options

Print Option	Description
Copies: 1	Specify the number of copies you want to print.
 HP LaserJet Professional P 1... Ready	Select the printer you want to use (if you have more than one).
 Print Active Sheets Only print the active she...	Print the active worksheet, the entire workbook, or a selection of cells.
 Collated 1,2,3 1,2,3 1,2,3	If you are printing multiple copies, you can select collation options.
 Portrait Orientation	Select between portrait or landscape orientations.
 Letter 21.59 cm x 27.94 cm	Select the paper size you want to print on.
 Normal Margins Left: 1.78 cm Right: 1....	Adjust page margins.
 No Scaling 100 Print sheets at their actu...	Reduce the print scale, to include more text on the printout.

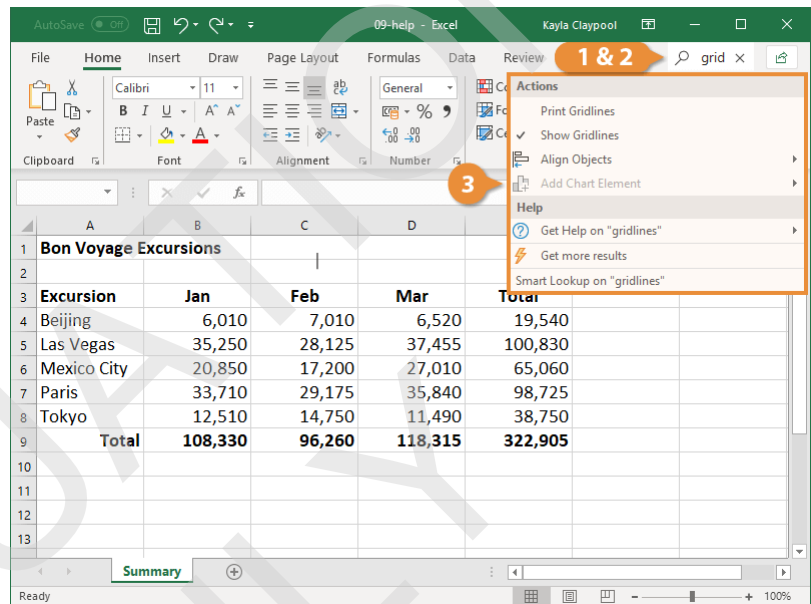
Help

The Excel Help feature can answer questions and offer tips to help you get the most out of Excel's tools.

The Tell Me Field

If you look at the ribbon, you'll notice a field that says **Tell me what you want to do**. You can use this field to enter keywords and phrases about what you want to do, and get help with that.

- 1 Click in the **Tell Me** field.
- 2 Type what you want to do.
Commands related to your search, from all the different ribbons, are grouped into this menu.
- 3 Select the command you are looking for.

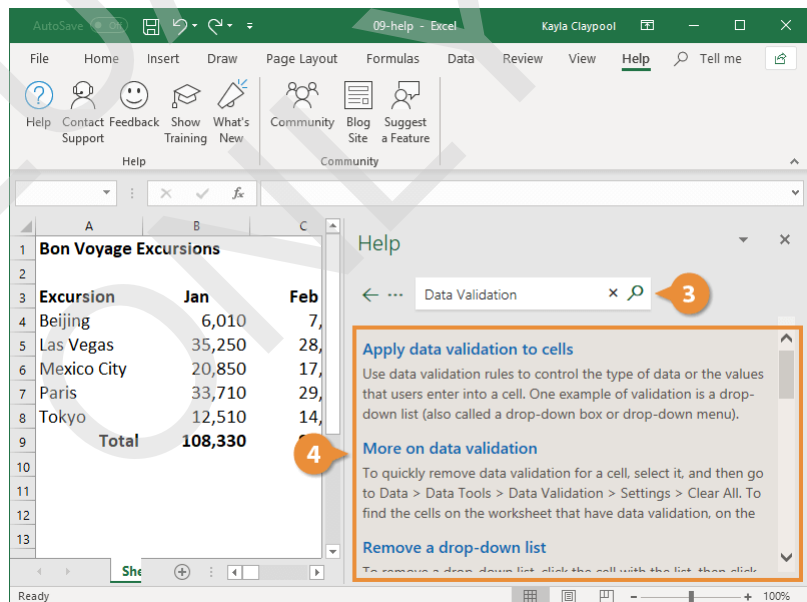
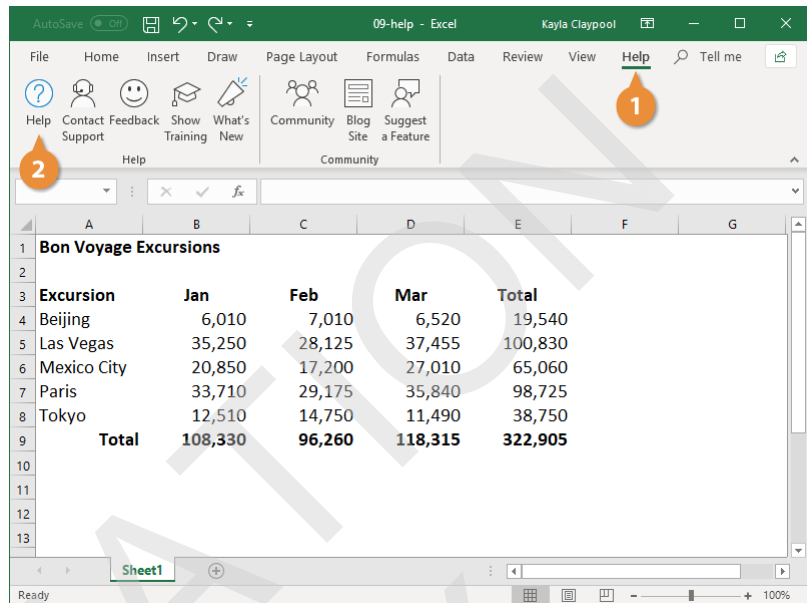


The Help Pane

When you don't know how to do something in Excel, look up your question in the Excel Help files. The Excel Help articles can answer your questions, offer tips, and provide help for all of Excel's features.

- 1 Click the **Help** tab.
- 2 Click the **Help** button.
Shortcut: Press **F1**.
A pane opens with help topics.
- 3 Type a help topic and click the **Search** button.
- 4 Select a topic.

Note: Help in Office is online and requires a connection to the Internet.



Close and Exit

When you're done working with a file, it's a good idea to close it so you don't bog down your computer with unused programs.

Close a Workbook

Each spreadsheet window must be closed individually. When you have only one spreadsheet open and want Excel to stay running:

- 1 Click the **File** tab.
- 2 Click the **Close** button.

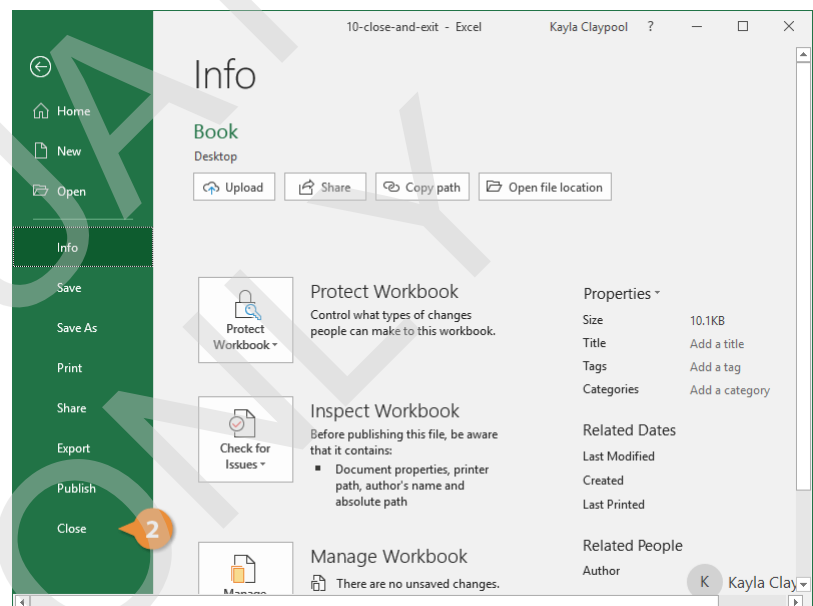
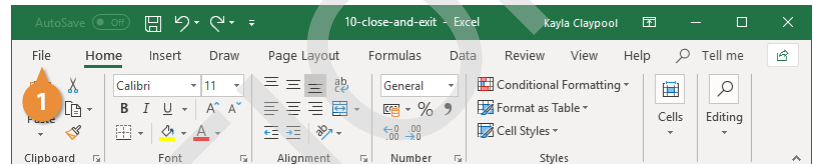
Shortcut: Press **Ctrl + W** to close a workbook.

Tip: You can close all open workbooks by holding down the **Shift** key as you click the **Close** button.

If you have multiple worksheets open, you'll need to close each of them individually.

The file is closed but Excel is still running.

- 3 If prompted, select from one of the following options:
 - **Save:** Save your changes.
 - **Don't Save:** Discard any changes you've made.
 - **Cancel:** Don't close the workbook.



Close Excel

If you click the Close button on the title bar when you have only one Excel file open, the workbook will close and you will exit the Excel program.

- 1 Click the **Close** button.

Excel closes.

