Excel
Basic

[Your Company Name]

CustomGuide

Contents

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.

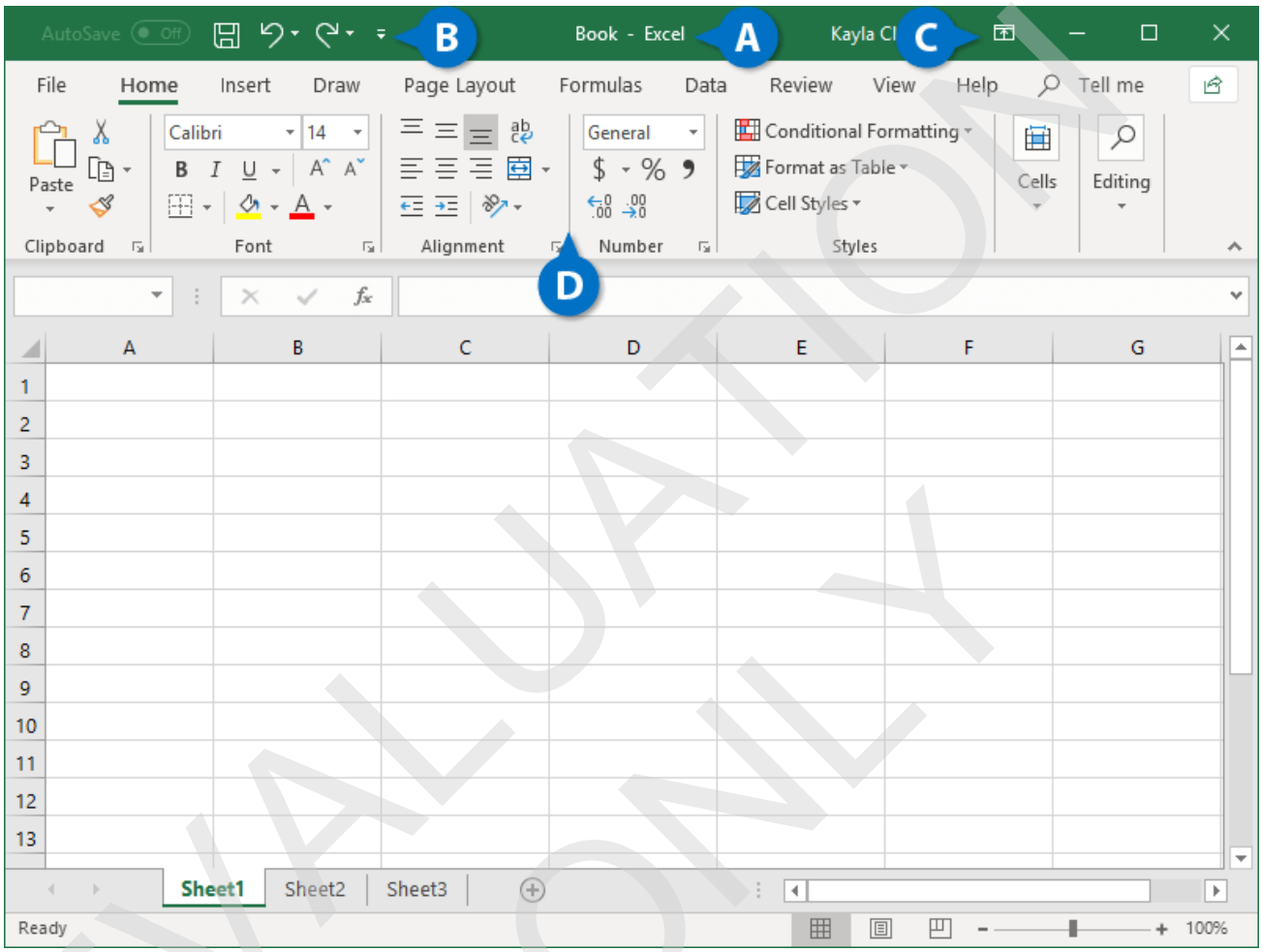
This module will help you get started with Excel. Learn how to create a new workbook, navigate a worksheet and save your work so nothing is lost.

Objectives

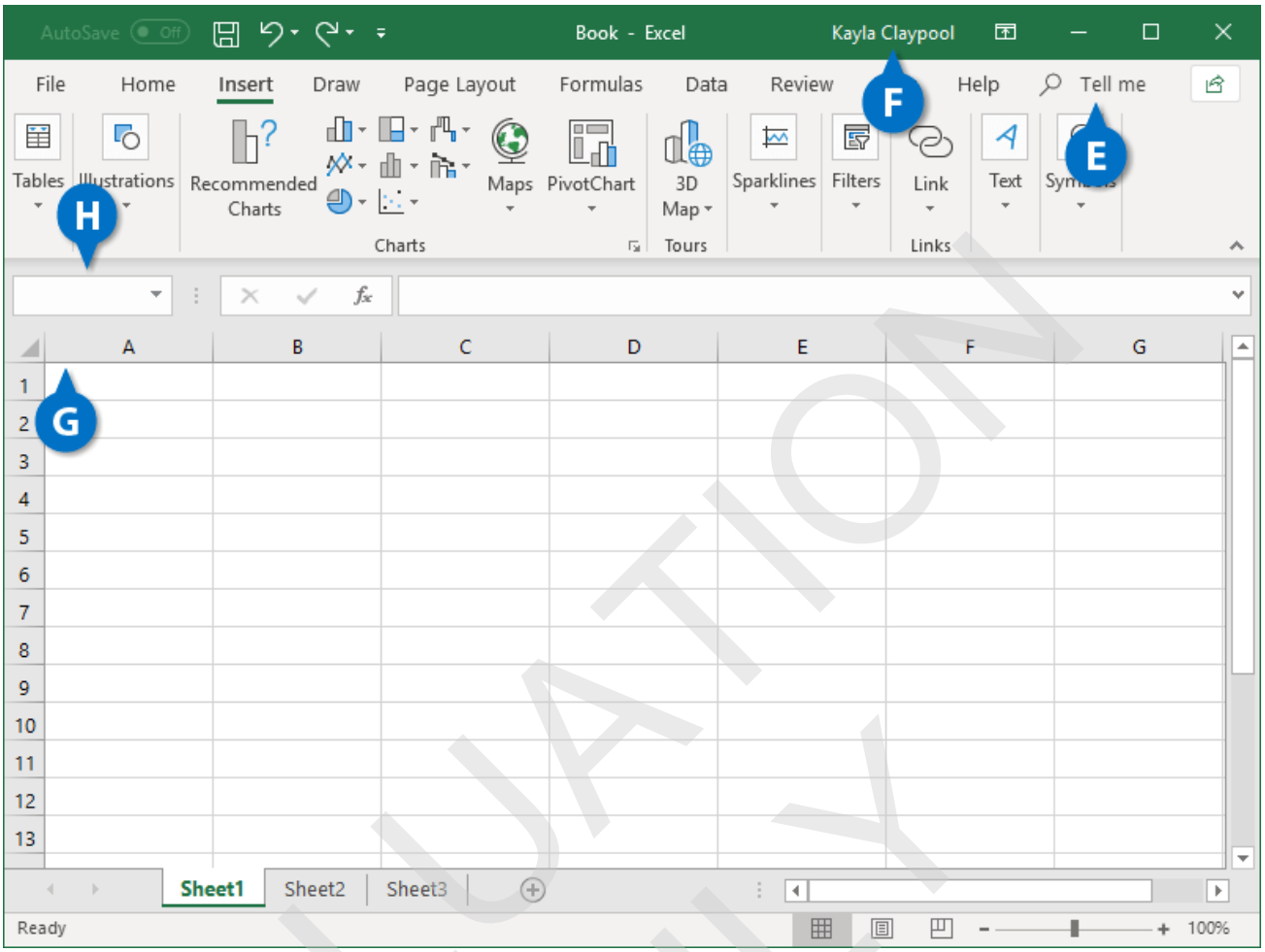
- Understand the Screen
- Create Workbooks
- Navigate Worksheets
- Open Workbooks
- Save Workbooks
- AutoRecover
- The Quick Access Toolbar
- Print
- Help
- Close and Exit

Understand the Screen

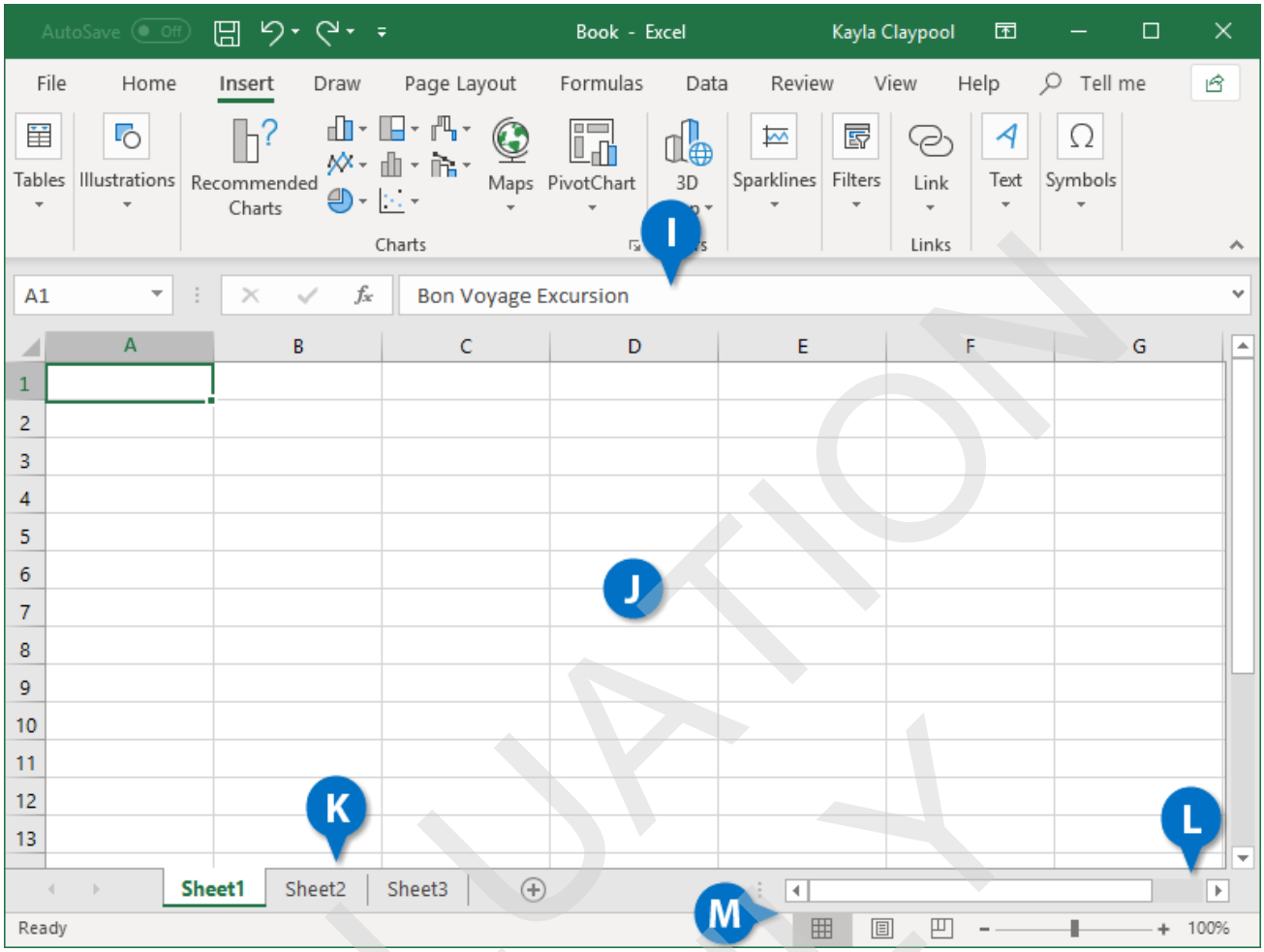
There is a lot going on with the Excel program screen, so this lesson will help you become more familiar with it. Review the labeled items in the images below, then refer to the tables to see what everything does.



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.		

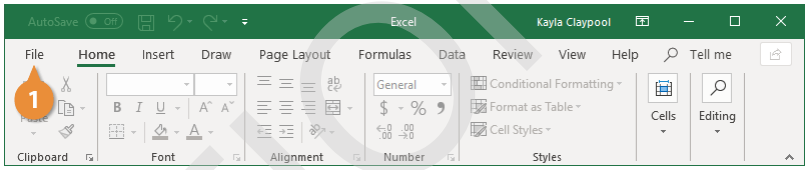
Create Workbooks

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

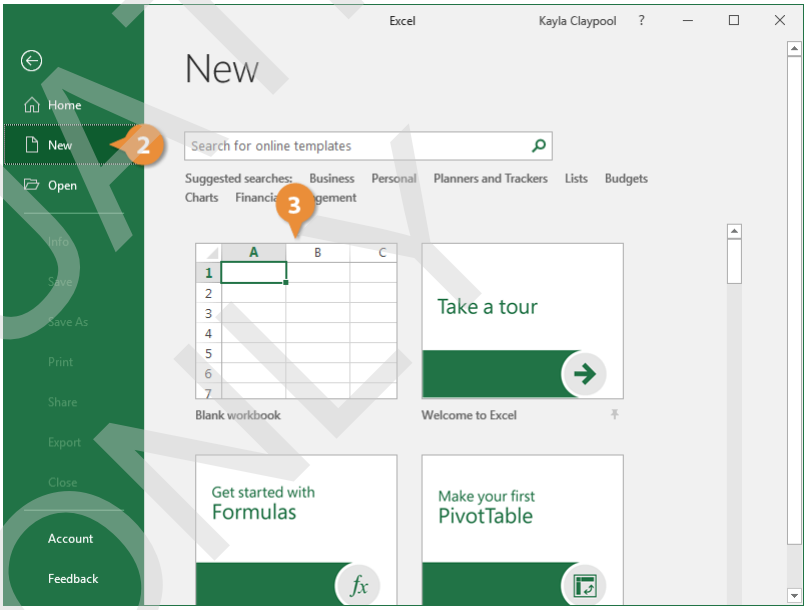
Most of the time you'll want to create a blank workbook.

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.

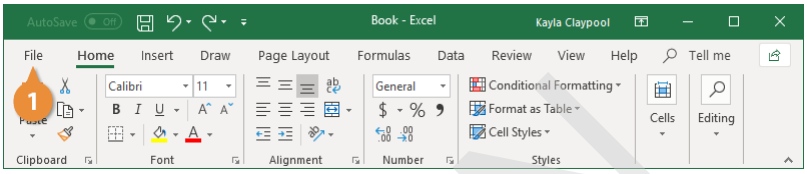


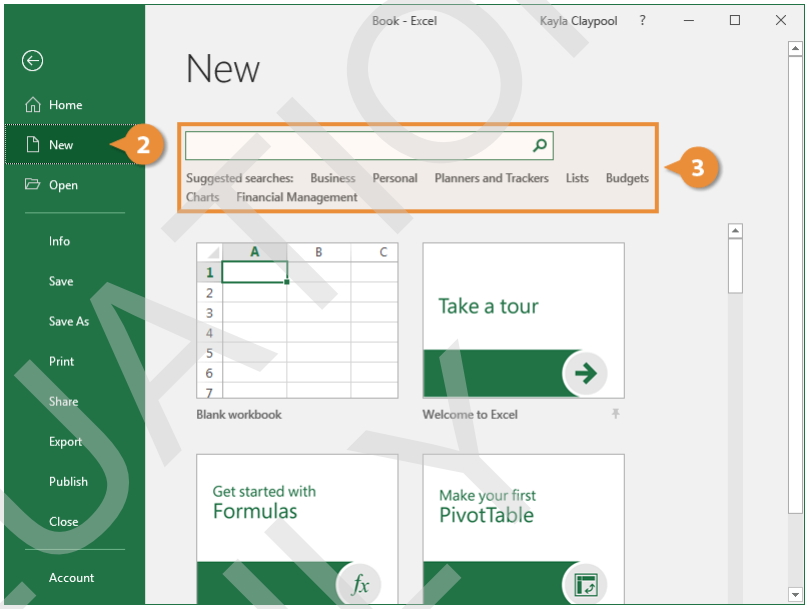
Create a Workbook from a Template

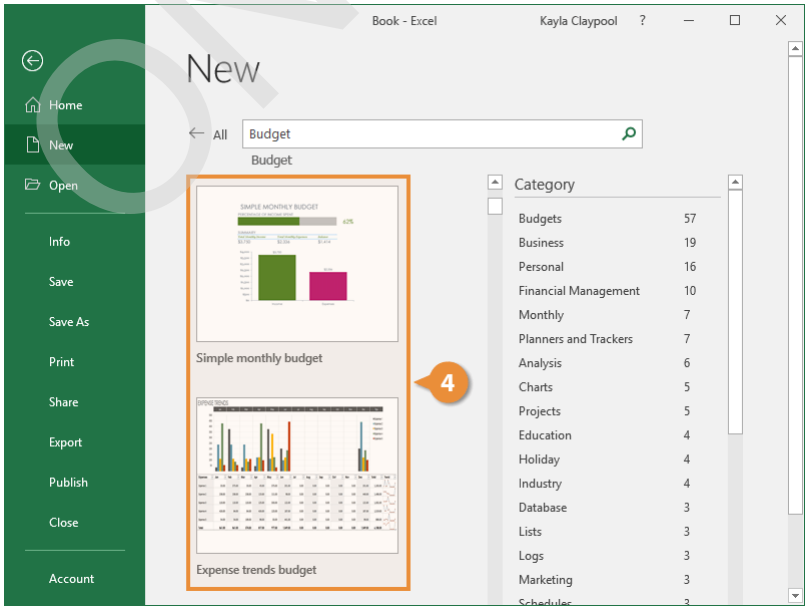
If you need help getting started with a common document, such as an invoice, expense report, or calendar, you can use one of Excel's templates instead of starting from scratch.

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.

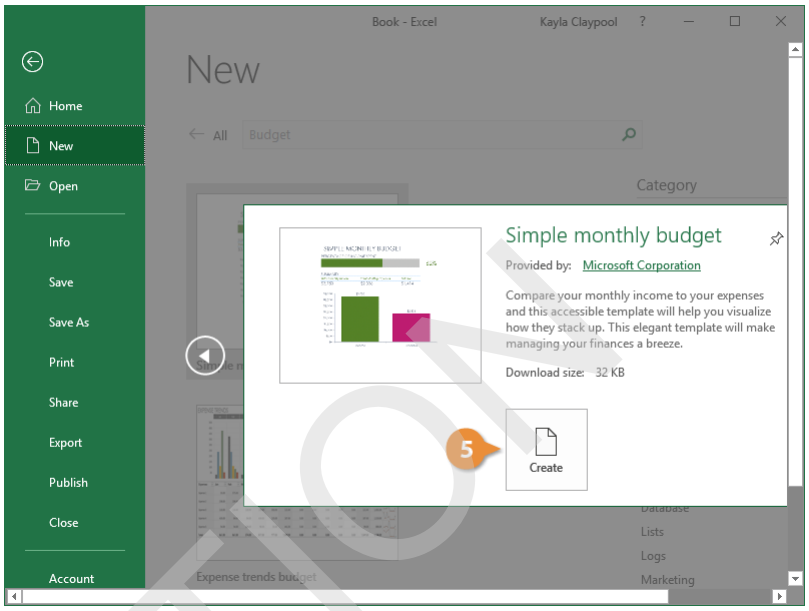






5 Click **Create**.

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

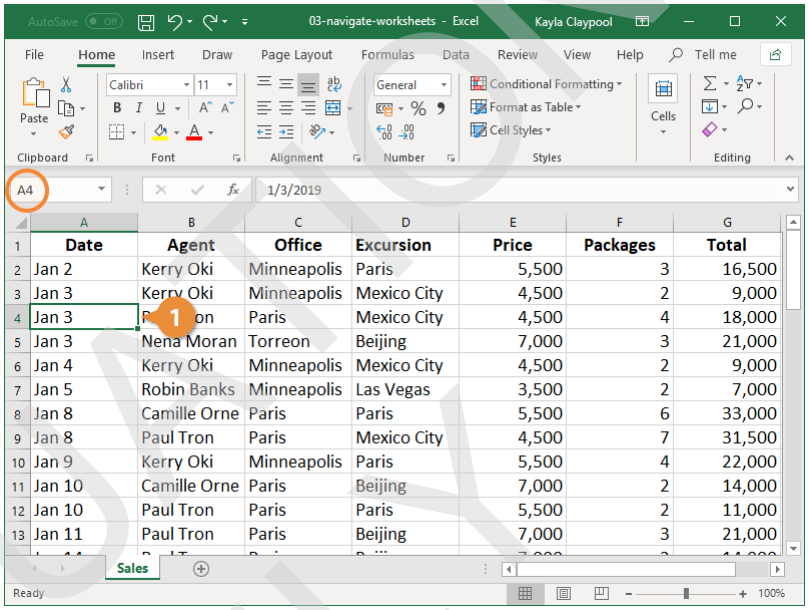


Navigate Worksheets

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.



	A	B	C	D	E	F	G
1	Date	Agent	Office	Excursion	Price	Packages	Total
2	Jan 2	Kerry Oki	Minneapolis	Paris	5,500	3	16,500
3	Jan 3	Kerry Oki	Minneapolis	Mexico City	4,500	2	9,000
4	Jan 3	[illegible]	Paris	Mexico City	4,500	4	18,000
5	Jan 3	Nena Moran	Torreon	Beijing	7,000	3	21,000
6	Jan 4	Kerry Oki	Minneapolis	Mexico City	4,500	2	9,000
7	Jan 5	Robin Banks	Minneapolis	Las Vegas	3,500	2	7,000
8	Jan 8	Camille Orne	Paris	Paris	5,500	6	33,000
9	Jan 8	Paul Tron	Paris	Mexico City	4,500	7	31,500
10	Jan 9	Kerry Oki	Minneapolis	Paris	5,500	4	22,000
11	Jan 10	Camille Orne	Paris	Beijing	7,000	2	14,000
12	Jan 10	Paul Tron	Paris	Paris	5,500	2	11,000
13	Jan 11	Paul Tron	Paris	Beijing	7,000	3	21,000

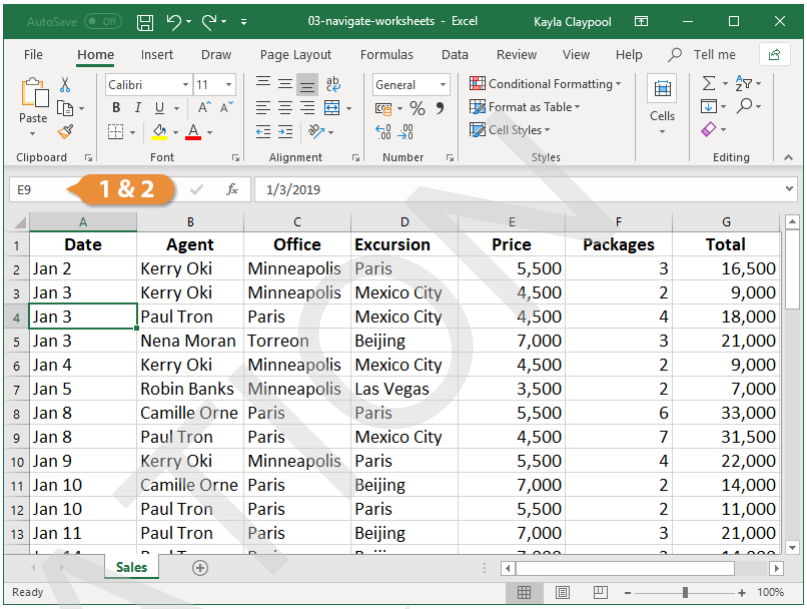
To help you know where you are in a worksheet, Excel displays row headings, identified by numbers, on the left side of the worksheet, and column headings, identified by letters, at the top of the worksheet. Each cell in a worksheet has its own cell address made from its column letter and row number—such 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**.



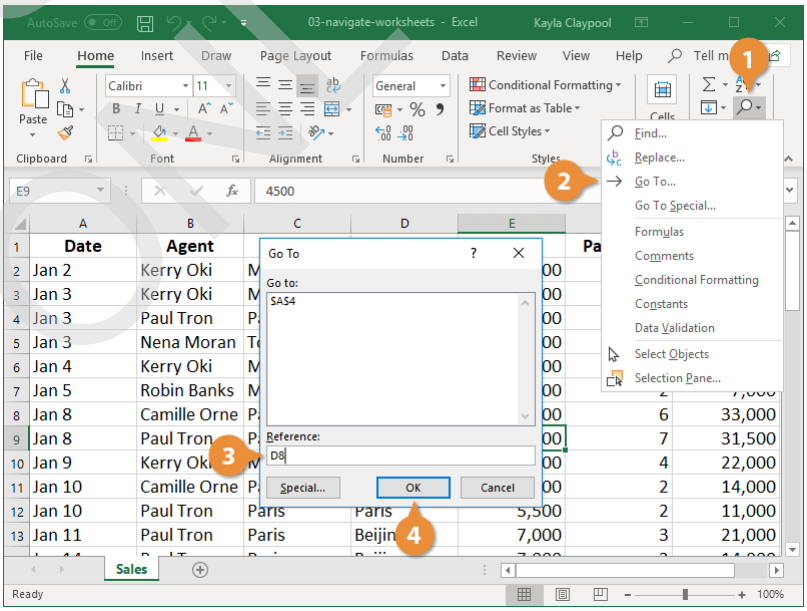
Go To Dialog Box

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

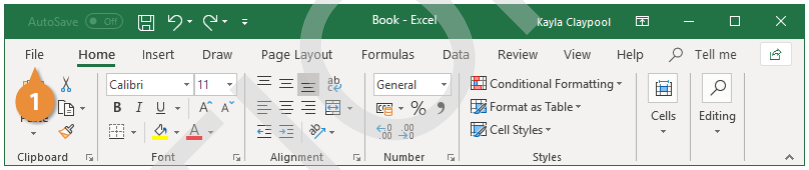
Opening a workbook lets you use a workbook that you or someone else has previously created and then saved. This lesson explains how to open a saved workbook, as well as non-Excel files.

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**.

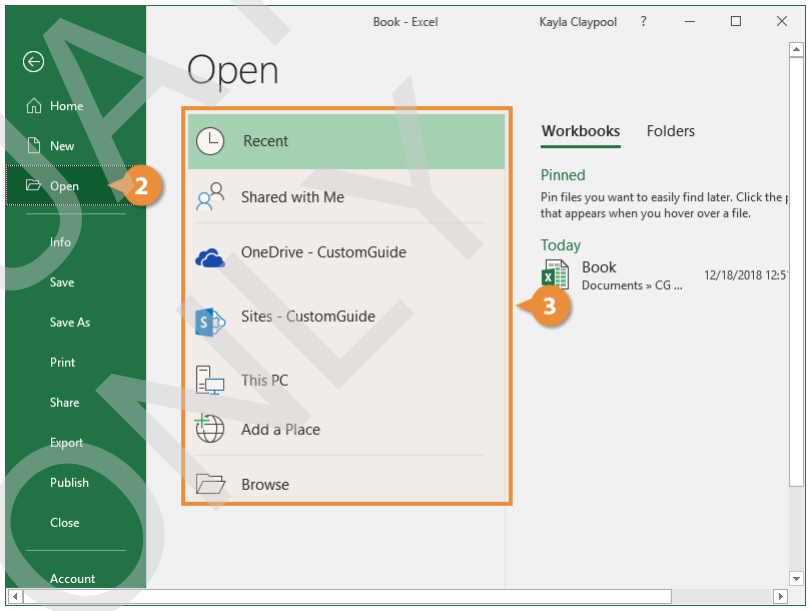
   Shortcut: Press **Ctrl** + **O** to quickly display the Open tab of the Backstage view.



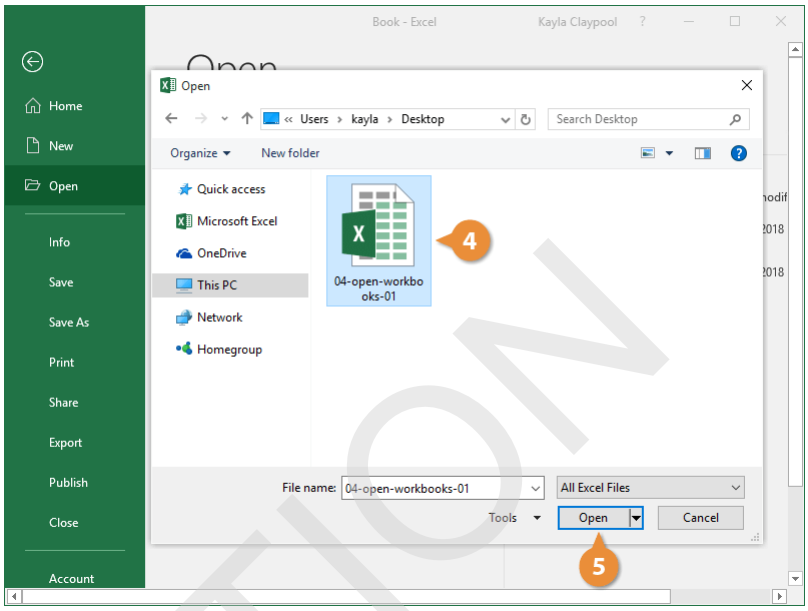
3. Select the location where the file is saved.

   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.



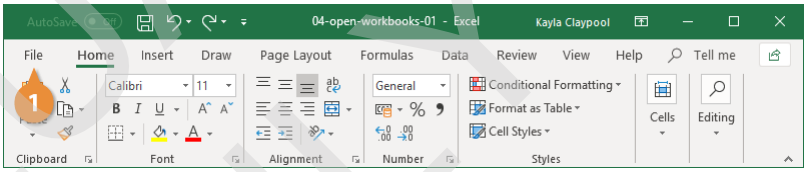
4. Select the file you want to open.
5. Click **Open**.

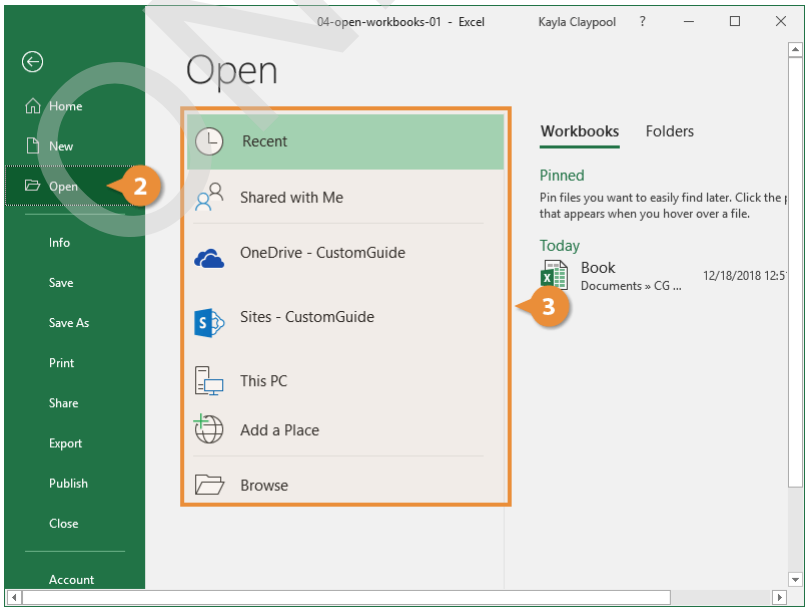


Open a Different File Format

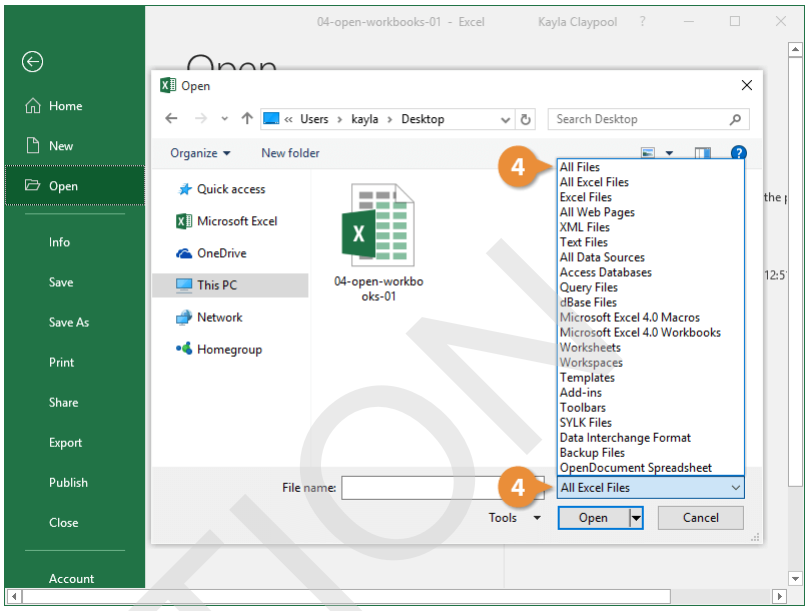
You can also use Excel to open data files created in other programs, like Comma Separated Values or CSV files.

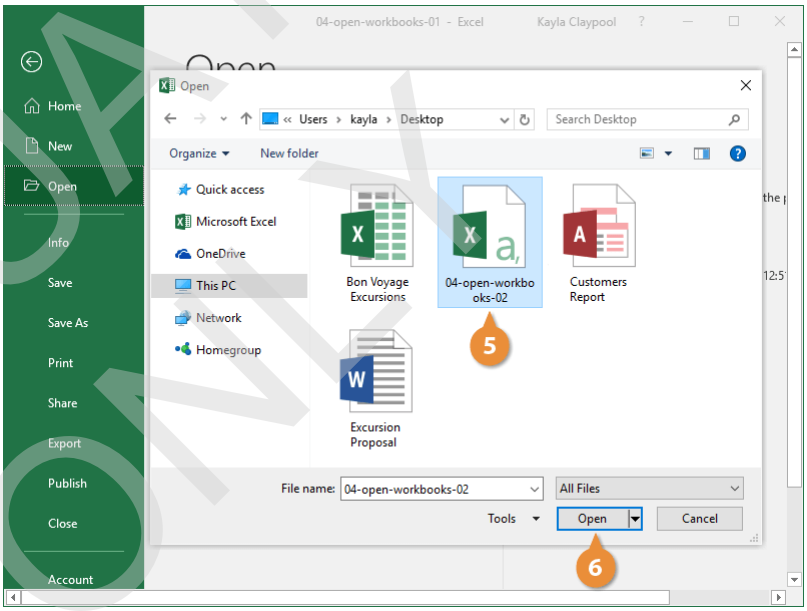
1. Click the **File** tab.
2. Click **Open**.
3. Select the location where the file is saved.





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.

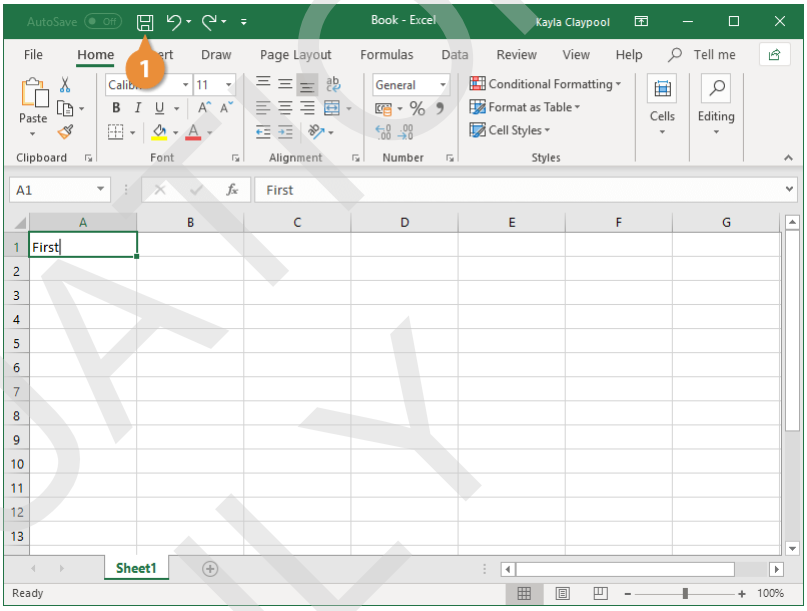
Save a Workbook

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.

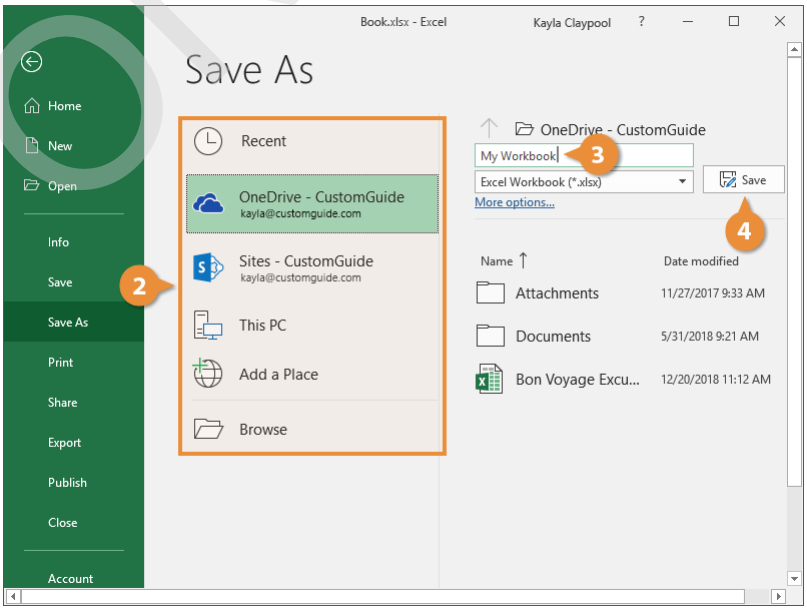
   If this is the first time you've saved the workbook, the Save As screen will appear.



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.

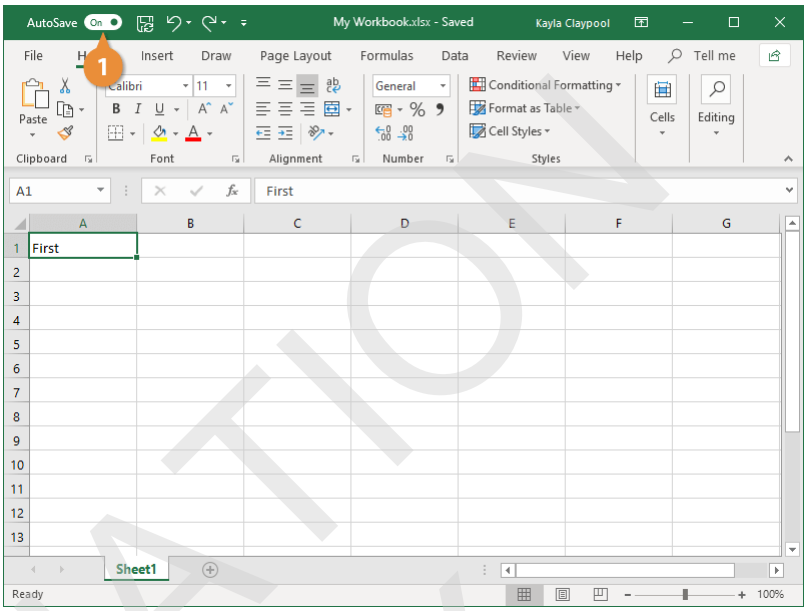
3. Enter a file name.
4. Click **Save**.



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.



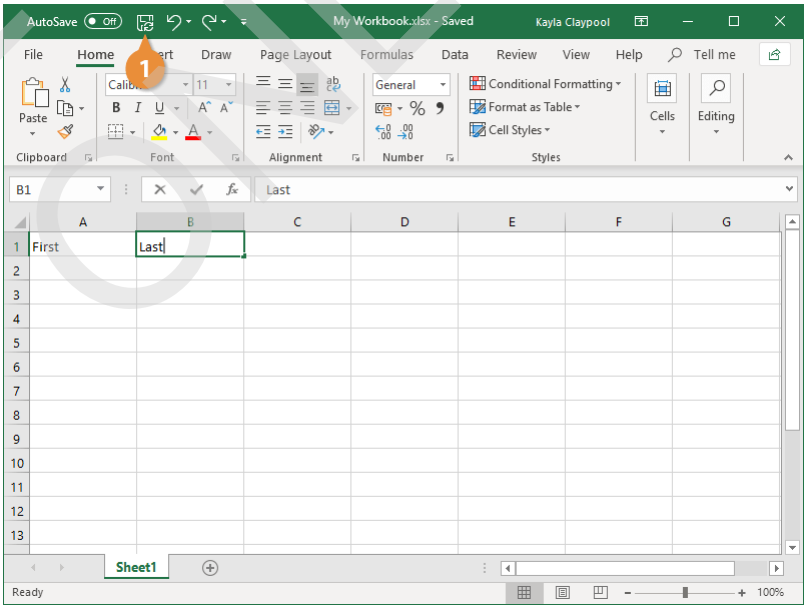
Save Progress

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.

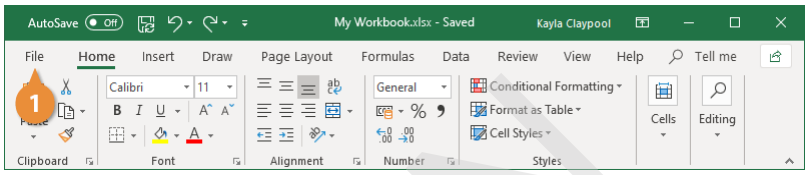
Tip: Try to save your progress every 10 minutes; that way you won't lose any important changes if disaster strikes.

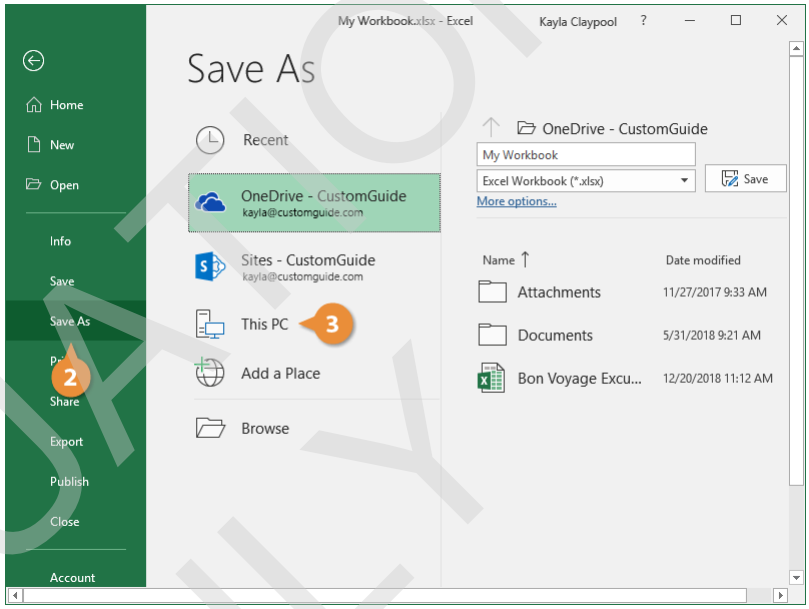


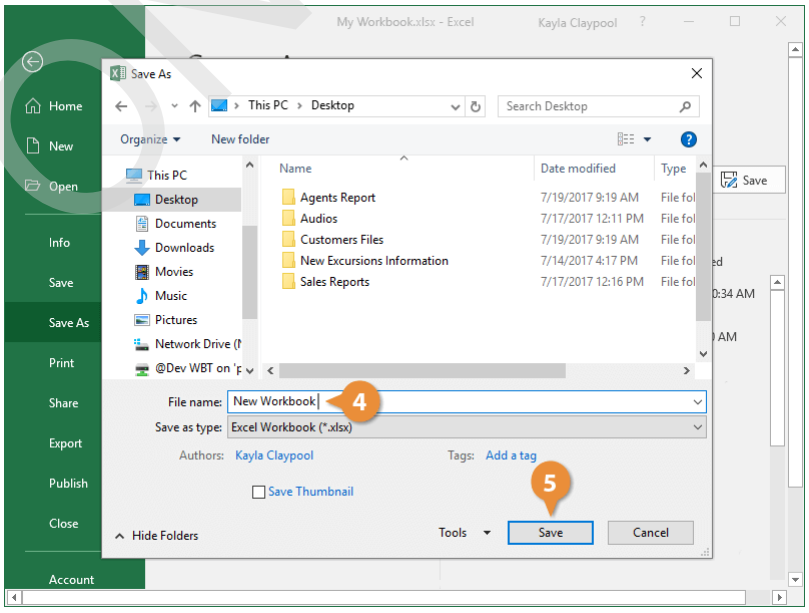
Save As a New File and/or Location

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**.





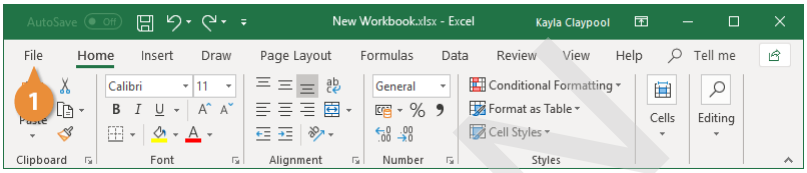


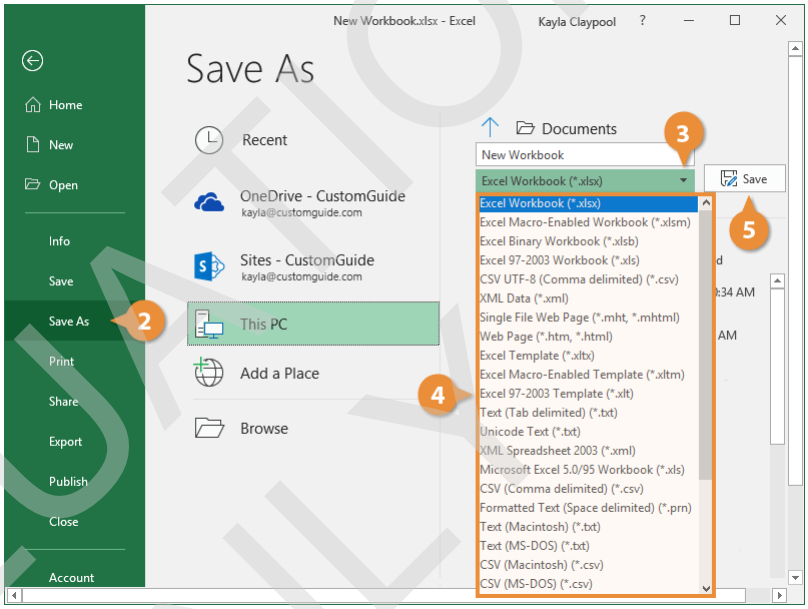
Save to Different File Formats

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

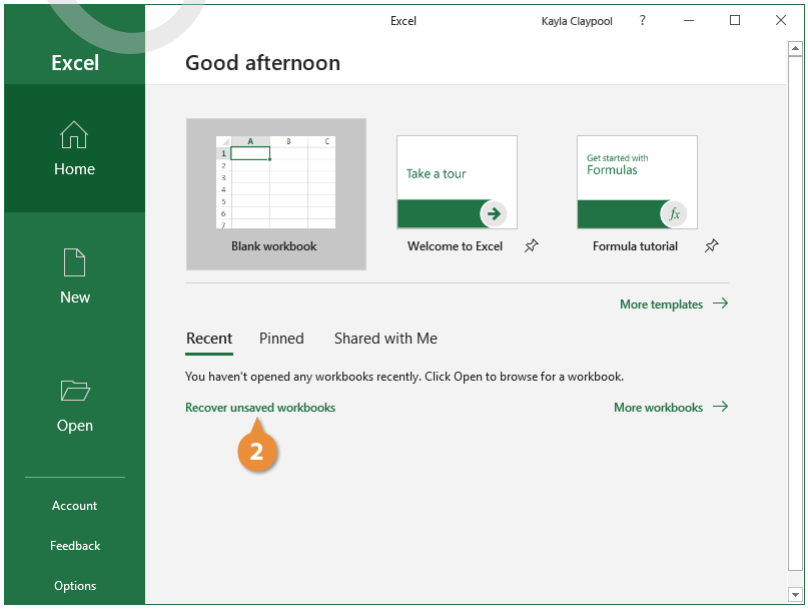
If Excel crashes, it will display the Document Recovery Pane the first time you open Excel again.

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**.

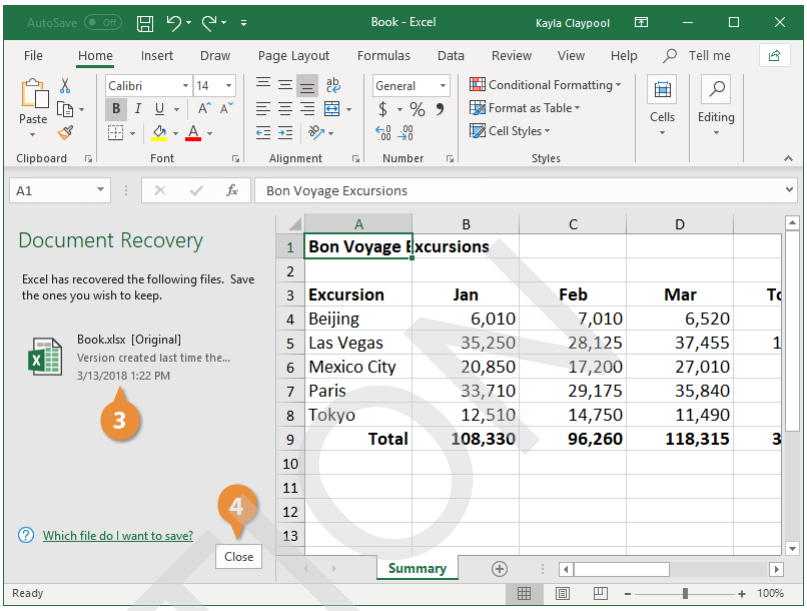
   The Recovery pane appears, listing all recovered workbooks that were found.



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.

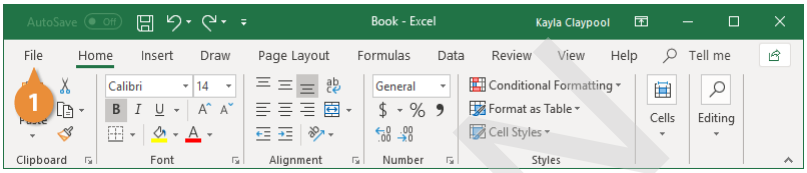
1. Click the **File** tab.
2. Click **Options**.
3. Click **Save**.

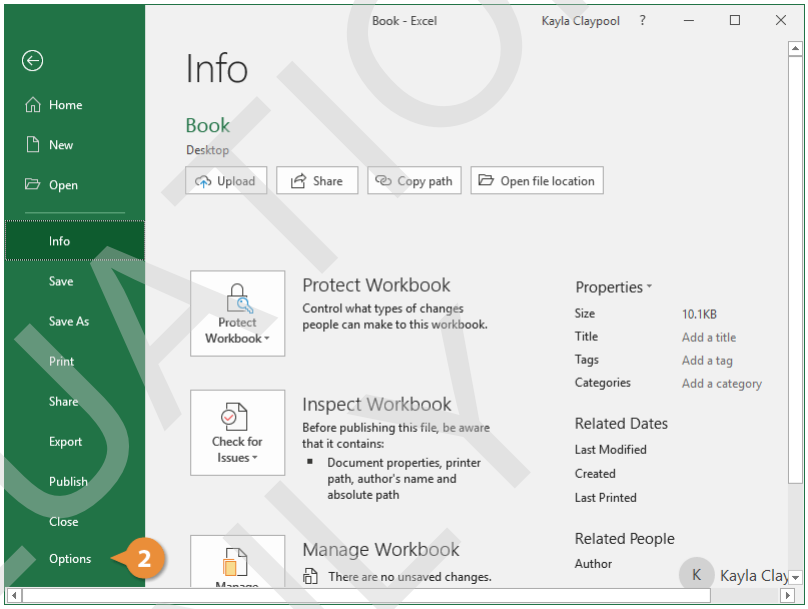
   The AutoRecovery settings are here. Make sure that the proper checkboxes are checked.

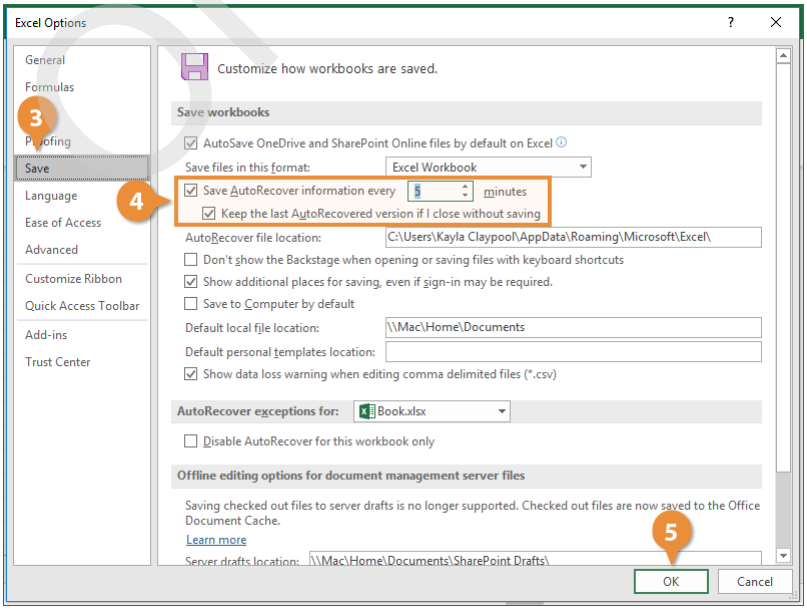
4. Make sure **Save AutoRecover information** checkbox is checked and adjust the time interval.

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

5. Click **OK**.







The Quick Access Toolbar

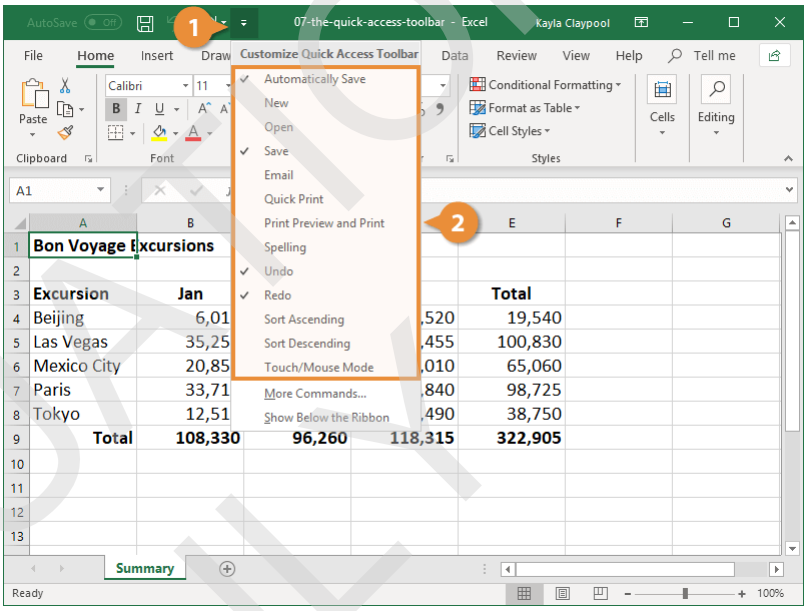
The Quick Access Toolbar is located above the ribbon and contains buttons for commands that you'll use often, such as save and undo. You can also add your own frequently-used commands to the Quick Access Toolbar.

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.

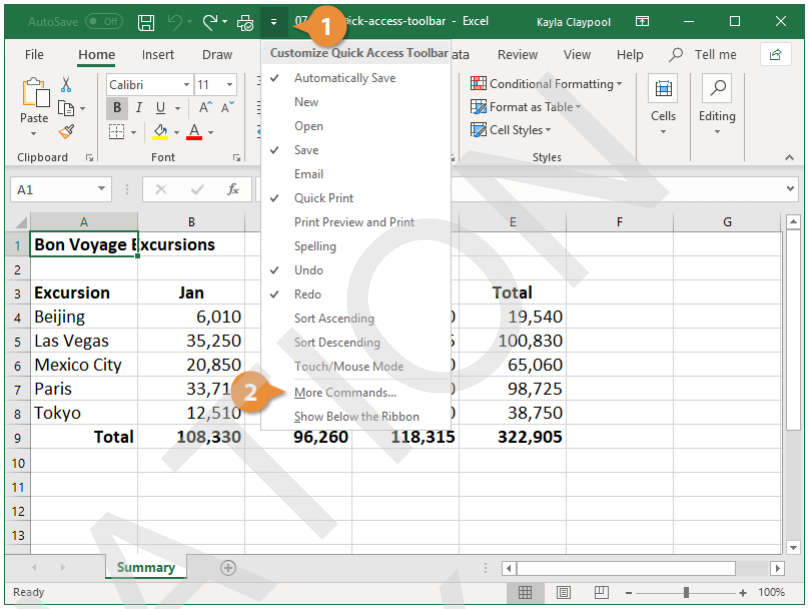


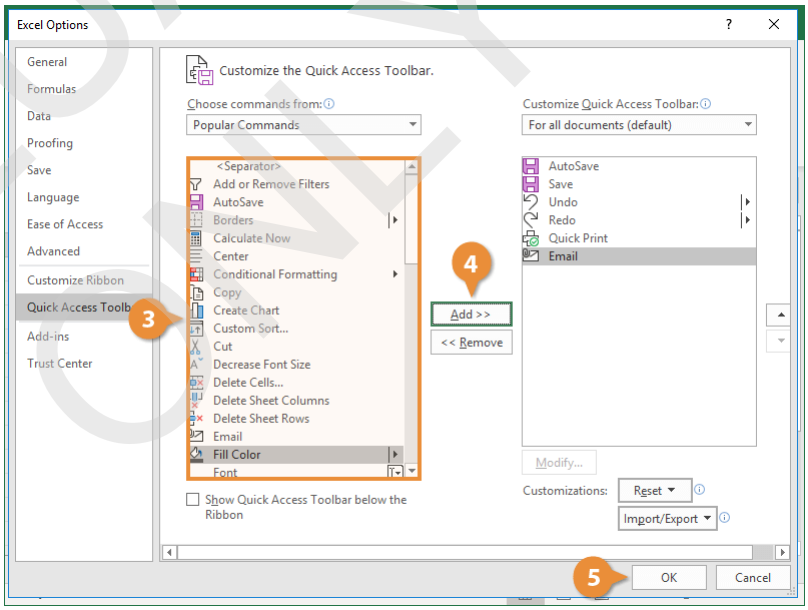
Customize the Quick Access Toolbar

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.



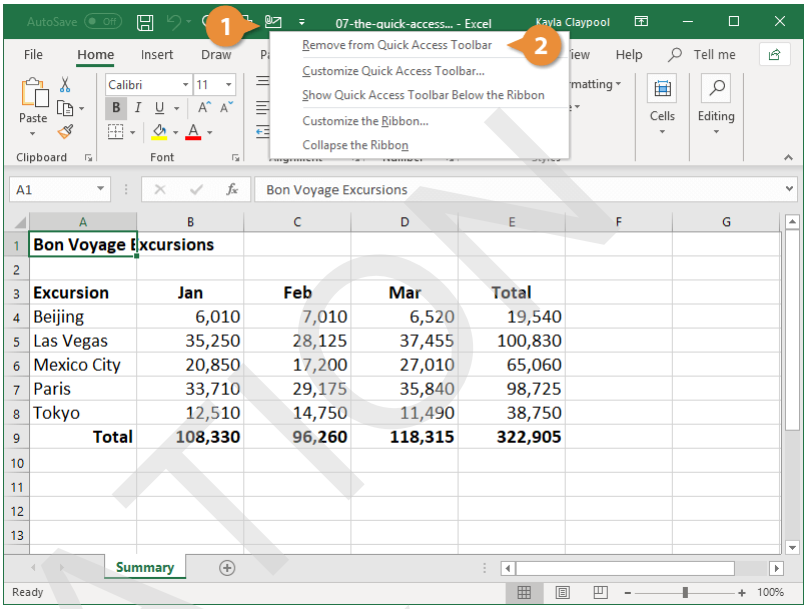


Remove a Button from the Quick Access Toolbar

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.

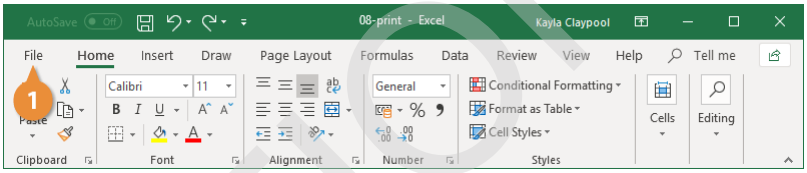
Preview and Print a Worksheet

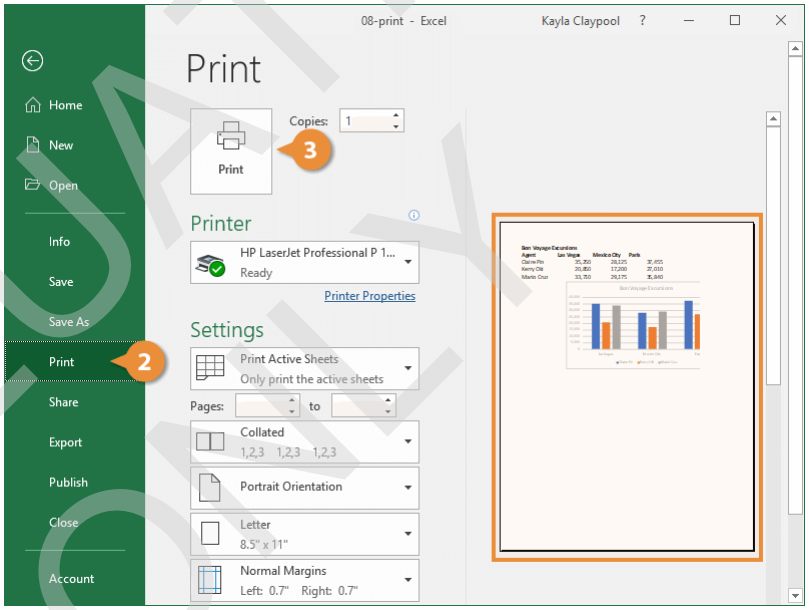
You can preview and then print a worksheet as part of the same operation.

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.

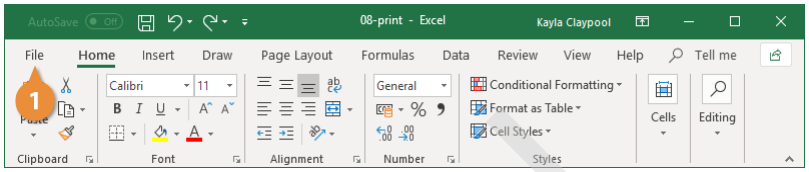


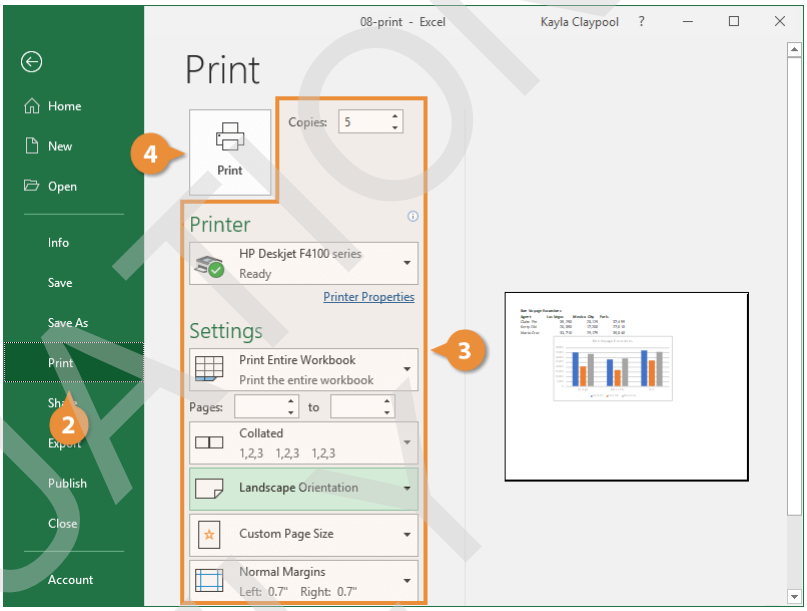


Specify Printing Options

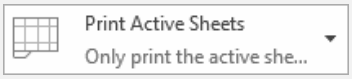
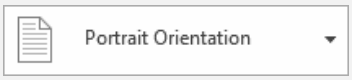
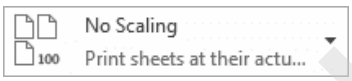
Sometimes you will want to specify more printing options, such as the number of copies to print.

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
	Specify the number of copies you want to print.
	Select the printer you want to use (if you have more than one).
	Print the active worksheet, the entire workbook, or a selection of cells.
	If you are printing multiple copies, you can select collation options.
	Select between portrait or landscape orientations.
	Select the paper size you want to print on.
	Adjust page margins.
	Reduce the print scale, to include more text on the printout.

Help

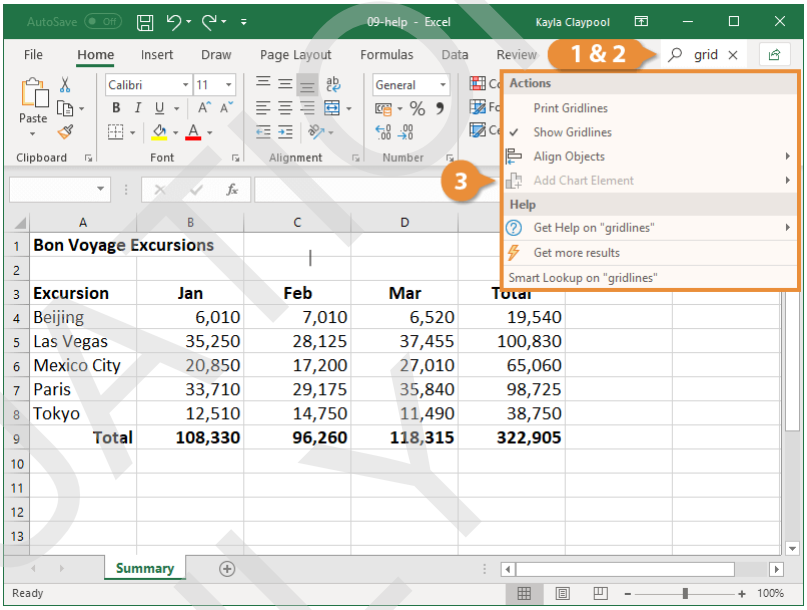
The Excel Help feature can answer questions and offer tips to help you get the most out of Excel's tools.

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

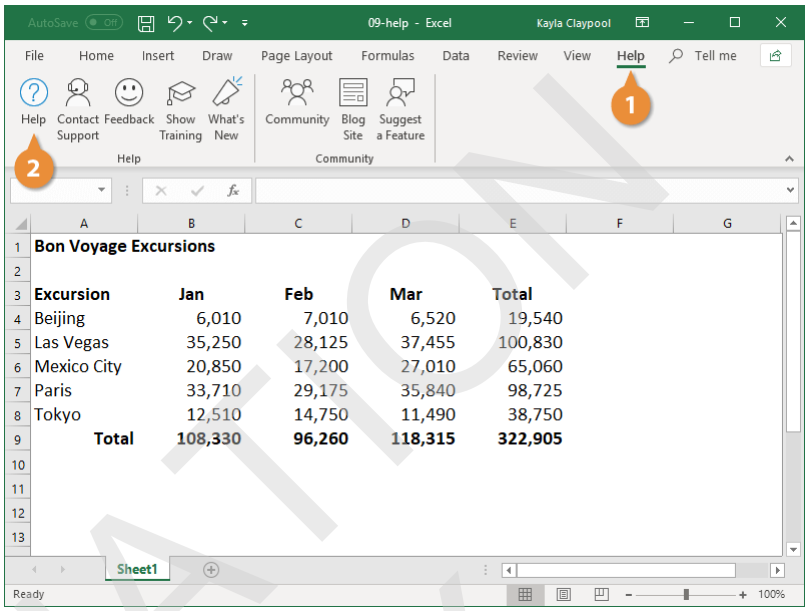
When you don't know how to do something in Excel, look up your question in the Excel Help files. The Excel Help articles can answer your questions, offer tips, and provide help for all of Excel's features.

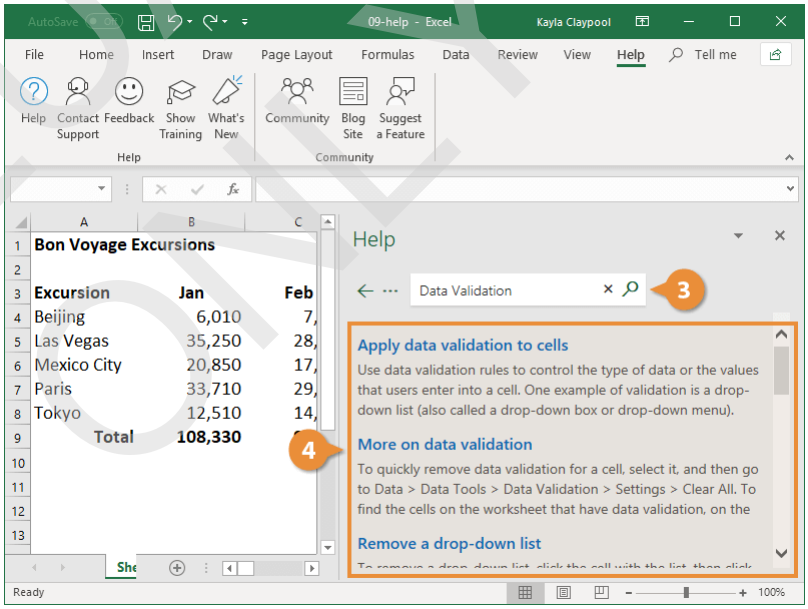
1. Click the **Help** tab.
2. Click the **Help** button.

   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.





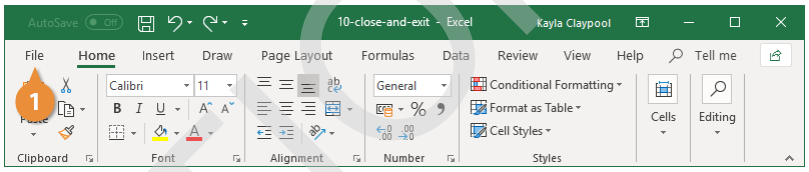
Close and Exit

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.

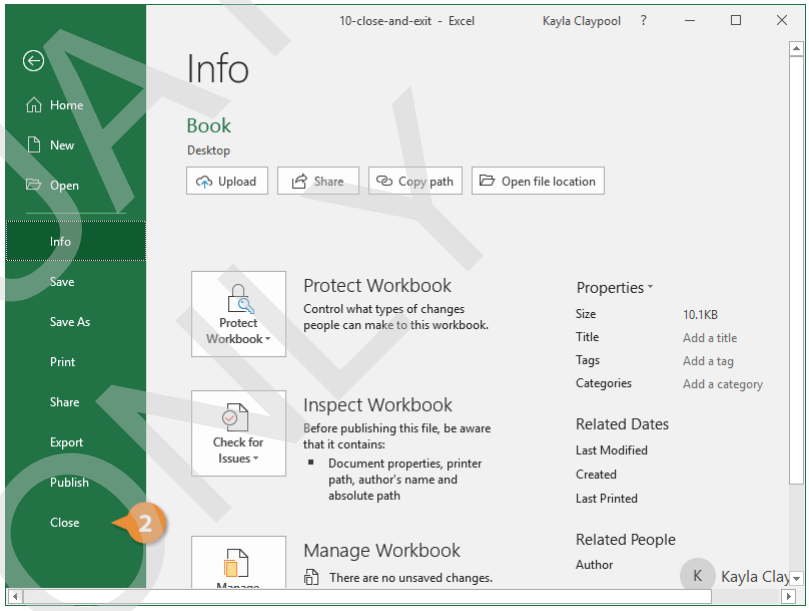


Shortcut: Press **Ctrl** + **W** to close a workbook.

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.

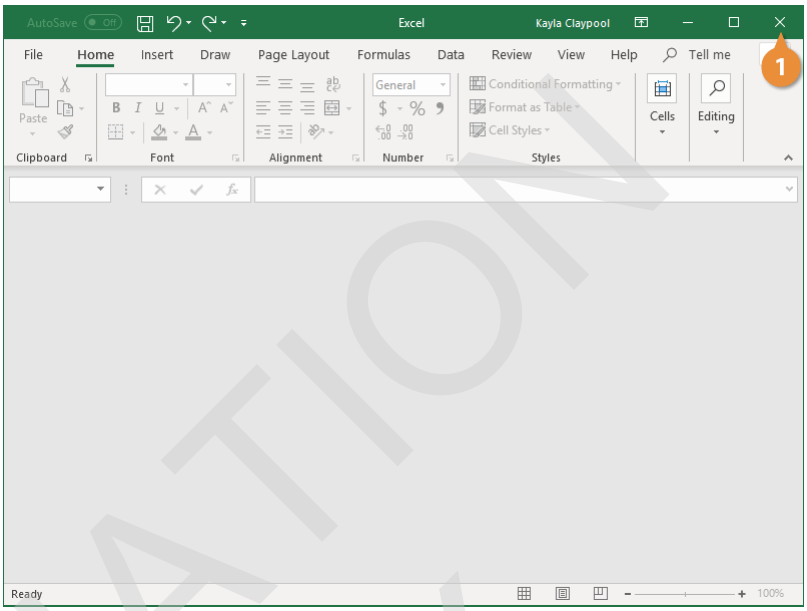


3. If prompted, select from one of the following options:
   - **Save:** Save your changes.
   - **Don't Save:** Discard any changes you've made.
   - **Cancel:** Don't close the workbook.

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.