CHAPTER 1

Getting Started with Excel

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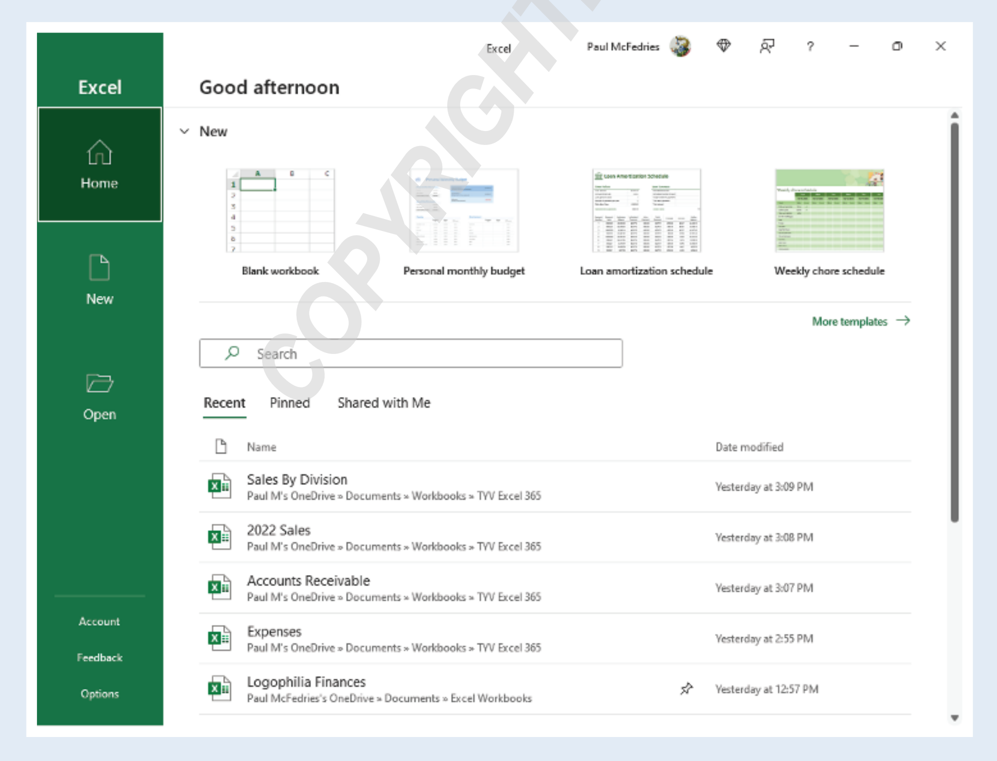
You use Microsoft Excel to create *spreadsheets*, which are documents that enable you to manipulate numbers and formulas to quickly create powerful mathematical, financial, and statistical models. In this chapter you get some background about Excel, learn how to access the desktop and online versions of the program, and take a tour of the program's features.


Excel
Paul McFedries
?
Excel
Good afternoon
Home
New
Open
Account
Feedback
Options
New
Blank workbook
Personal monthly budget
Loan amortization schedule
Weekly chore schedule
More templates →
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Name	Date modified
Sales By Division Paul M's OneDrive » Documents » Workbooks » TYV Excel 365	Yesterday at 3:09 PM
2022 Sales Paul M's OneDrive » Documents » Workbooks » TYV Excel 365	Yesterday at 3:08 PM
Accounts Receivable Paul M's OneDrive » Documents » Workbooks » TYV Excel 365	Yesterday at 3:07 PM
Expenses Paul M's OneDrive » Documents » Workbooks » TYV Excel 365	Yesterday at 2:55 PM
Logophilia Finances Paul McFedries's OneDrive » Documents » Excel Workbooks	Yesterday at 12:57 PM

Getting to Know Excel 4
Start Excel on the Desktop 6
Navigate to Excel for the Web 7
Tour the Excel Window 8
Work with the Excel Ribbon 9

Getting to Know Excel

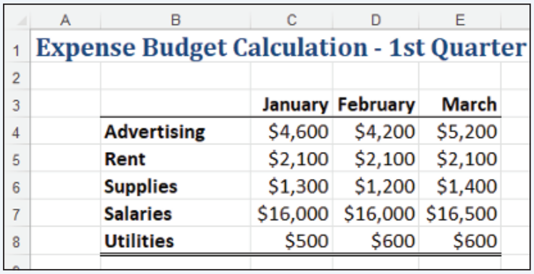
Working with Excel involves two basic tasks: building a spreadsheet and then manipulating the data on the spreadsheet. Building a spreadsheet involves adding data such as numbers and text, creating formulas that run calculations, and adding functions that perform specific tasks. Manipulating spreadsheet data involves calculating totals, adding data series, organizing data into tables, and visualizing data with charts.

This section gives you an overview of these tasks. You learn about each task in greater detail as you work through the book.

Build a Spreadsheet

Add Data

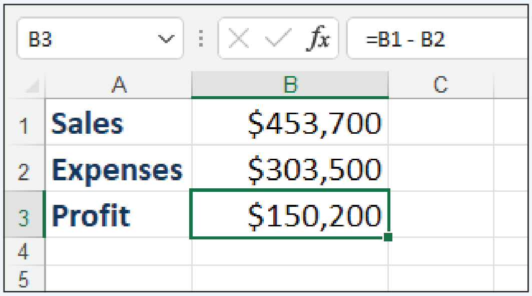
You can insert numbers, text, and other characters into any cell in the spreadsheet. Click the cell that you want to work with and then type your data. Your typing appears in the cell that you selected, as well as in the formula bar, which is the large text box above the column letters. When you are done, press Enter. To edit existing cell data, click the cell and then edit the text in the formula bar.



	A	B	C	D	E
1	Expense Budget Calculation - 1st Quarter				
2					
3			January	February	March
4		**Advertising**	$4,600	$4,200	$5,200
5		**Rent**	$2,100	$2,100	$2,100
6		**Supplies**	$1,300	$1,200	$1,400
7		**Salaries**	$16,000	$16,000	$16,500
8		**Utilities**	$500	$600	$600

Add a Formula

A *formula* is a collection of numbers, cell addresses, and mathematical operators that performs a calculation. In Excel, you enter a formula in a cell by typing an equal sign (=) and then the formula text. For example, the formula =B1 – B2 subtracts the value in cell B2 from the value in cell B1.

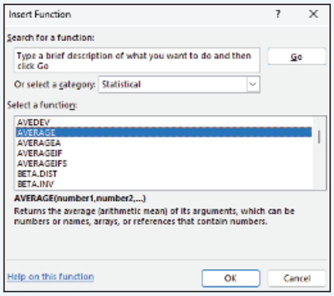


B3 | =B1 - B2

	A	B	C
1	Sales	$453,700	
2	Expenses	$303,500	
3	Profit	$150,200	
4			
5			

Add a Function

A *function* is a predefined formula that performs a specific task. For example, the AVERAGE function calculates the average of a list of numbers, and the PMT function calculates a loan or mortgage payment. You can use functions on their own, preceded by =, or as part of a larger formula. Click **Insert Function** (*fx*) to see a list of the available functions.



Insert Function

Search for a function: Type a brief description of what you want to do and then click Go

Or select a category: Statistical

Select a function:

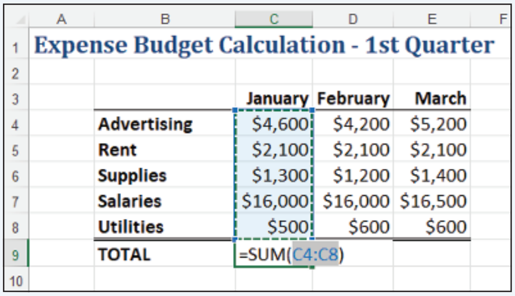
AVERAGE(number1,number2,...)

Returns the average (arithmetic mean) of its arguments, which can be numbers or names, arrays, or references that contain numbers.

Manipulate Data

Calculate Totals Quickly

If you just need a quick sum of a list of numbers, click a cell below the numbers and then click the **Sum** button (∑), which is available in the Home tab of the Excel Ribbon. You can also select the cells that you want to sum, and their total appears in the status bar.

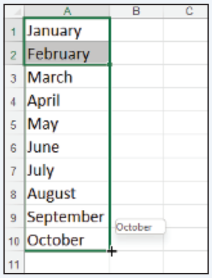


Expense Budget Calculation - 1st Quarter

	January	February	March
Advertising	$4,600	$4,200	$5,200
Rent	$2,100	$2,100	$2,100
Supplies	$1,300	$1,200	$1,400
Salaries	$16,000	$16,000	$16,500
Utilities	$500	$600	$600
TOTAL	=SUM(C4:C8)		

Fill a Series

Excel enables you to save time by completing a series of values automatically. For example, if you need to enter the numbers 1 to 100 in consecutive cells, you can enter just the first few numbers, select the cells, and then click and drag the lower-right corner to fill in the rest of the numbers. With Excel you can also fill in dates, as well as the names for weekdays and months.

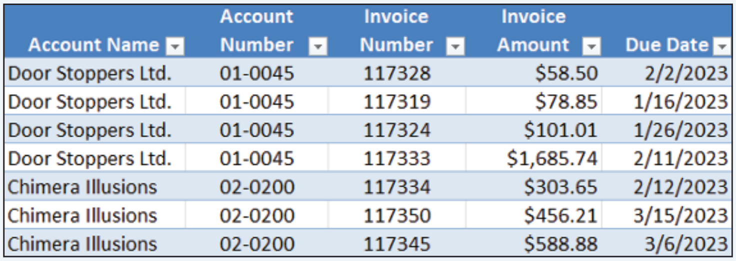


January
February
March
April
May
June
July
August
September
October

October

Manage Tables

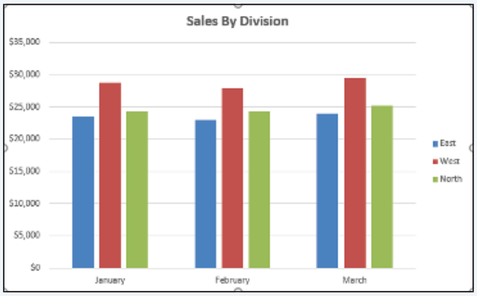
The row-and-column format of a spreadsheet makes Excel suitable for simple databases called *tables*. Each column becomes a field in the table, and each row is a record. You can sort the records, filter the records to show only certain values, and add subtotals.



Account Name	Account Number	Invoice Number	Invoice Amount	Due Date
Door Stoppers Ltd.	01-0045	117328	$58.50	2/2/2023
Door Stoppers Ltd.	01-0045	117319	$78.85	1/16/2023
Door Stoppers Ltd.	01-0045	117324	$101.01	1/26/2023
Door Stoppers Ltd.	01-0045	117333	$1,685.74	2/11/2023
Chimera Illusions	02-0200	117334	$303.65	2/12/2023
Chimera Illusions	02-0200	117350	$456.21	3/15/2023
Chimera Illusions	02-0200	117345	$588.88	3/6/2023

Add a Chart

A *chart* is a graphic representation of spreadsheet data. As the data in the spreadsheet changes, the chart automatically changes to reflect the new numbers. Excel offers a wide variety of charts, including bar charts, line charts, and pie charts.

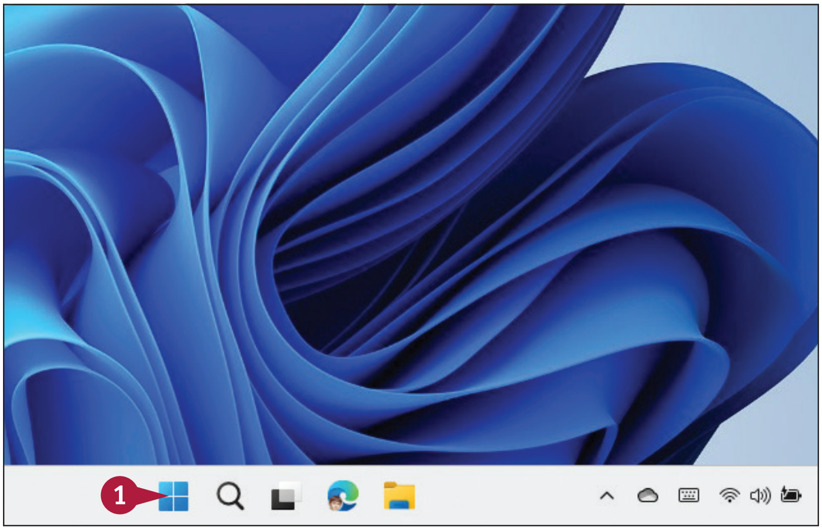


Start Excel on the Desktop

Before you can perform tasks such as adding data and building formulas, you must first start the desktop version of Excel. This brings the Excel window onto the Windows desktop, and you can then begin using the program. In this section, you learn how to start Excel in Windows 11, but the steps are similar if you are using Windows 10.

This task assumes that you have already installed Excel 365 on your computer. If you prefer to use Excel on the web, see the next section, "Navigate to Excel for the Web."

Start Excel on the Desktop

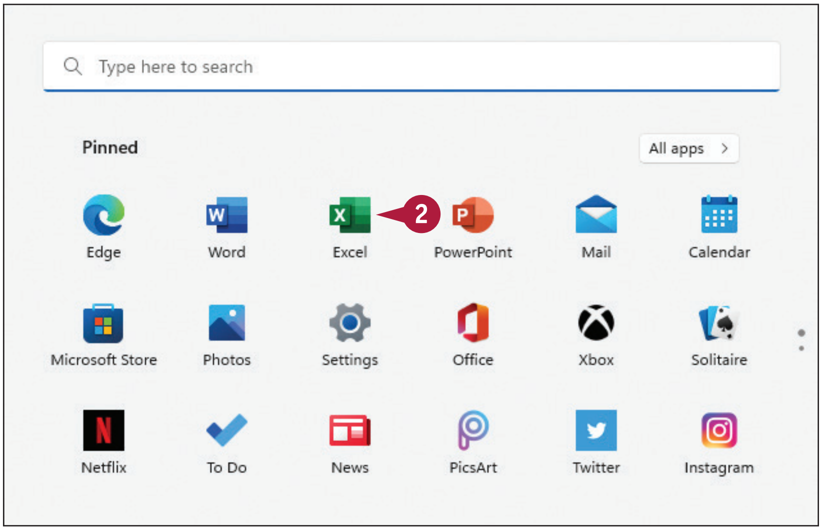


① Click **Start** (⊞).

The Start menu appears.

② Click **Excel**.

The Microsoft Excel window appears on the desktop.


Type here to search
Pinned
All apps >
Edge
Word
Excel
2
PowerPoint
Mail
Calendar
Microsoft Store
Photos
Settings
Office
Xbox
Solitaire
Netflix
To Do
News
PicsArt
Twitter
Instagram

Note: Click **Blank workbook** to open a new Excel file.

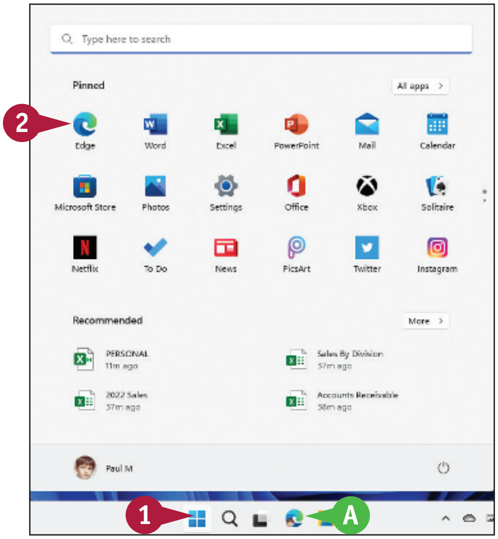
CHAPTER
1

Navigate to Excel for the Web

If you want to work with Excel online instead of on the desktop, you need to know how to use your web browser to navigate to the Excel for the web version of the program.

With your Microsoft 365 subscription, you get access to both the desktop and online versions of each app, including Excel. This book uses the desktop version of Excel for its example screens. Fortunately, Excel for the web uses the same layout as the desktop version and offers mostly the same features, so everything you learn in this book applies to Excel for the web.

Navigate to Excel for the Web


Type here to search
Pinned
All apps >
2
Edge
Word
Excel
PowerPoint
Mail
Calendar
Microsoft Store
Photos
Settings
Office
Xbox
Solitaire
Netflix
To Do
News
PicsArt
Twitter
Instagram
Recommended
More >
PERSONAL
11m ago
Sales By Division
57m ago
2022 Sales
57m ago
Accounts Receivable
58m ago
Paul M
1
A

1 Click **Start**.

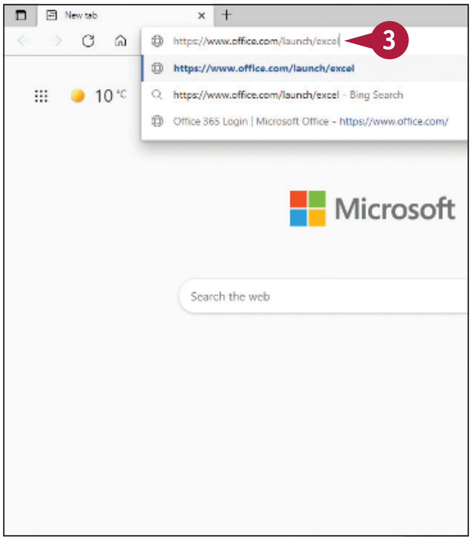
The Start menu appears.

2 Click **Edge**.

A If you have Edge pinned to the Windows taskbar, click the **Edge** icon ( ) instead of following steps **1** and **2**.

The Microsoft Edge web browser window appears.

Note: If you prefer to use a different web browser, start that browser instead of Edge.


New tab
https://www.office.com/launch/excel
3
https://www.office.com/launch/excel
https://www.office.com/launch/excel - Bing Search
Office 365 Login | Microsoft Office - https://www.office.com/
10 °C
Microsoft
Search the web

3 In the address bar, type www.office.com/launch/excel and press Enter.

4 If prompted, enter your Microsoft 365 username and password (not shown).

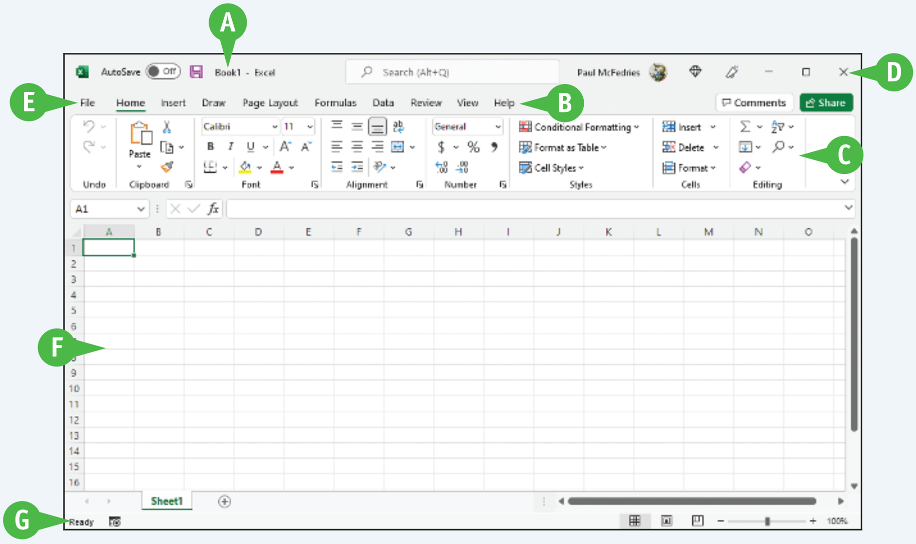
The Excel for the web app appears.

Note: Click **New blank workbook** to open a new Excel file.

Tour the Excel Window

To get up to speed quickly with Excel, it helps to understand the various elements of the Excel window. These include standard window elements such as the title bar, window controls, and status bar; Office-specific elements such as the Ribbon and File tab; and Excel-specific elements such as the worksheet.

If you are using Excel for the web, note that the window you see is nearly identical to the Excel desktop window. The main exception is that, by default, Excel for the web displays a simplified version of the Ribbon.


A
D
E
B
C
F
G
AutoSave
Off
Book1 - Excel
Search (Alt+Q)
Paul McFedries
File
Home
Insert
Draw
Page Layout
Formulas
Data
Review
View
Help
Comments
Share
Undo
Clipboard
Font
Alignment
Number
Styles
Cells
Editing
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
A1
Sheet1
Ready
100%

Ⓐ Title Bar

The title bar displays the name of the current workbook.

Ⓑ Ribbon Tabs

You use these controls to display different sets of Ribbon commands.

Ⓒ Ribbon

This area gives you access to all the Excel commands, options, and features. To learn how to use this element, see the following section, "Work with the Excel Ribbon."

Ⓓ Workbook Window Controls

You use these controls to minimize, maximize, restore, and close the current workbook window.

Ⓔ File Tab

Click this tab to access file-related commands, such as Save and Open.

Ⓕ Worksheet

This area displays the current worksheet, and it is where you will do most of your Excel work.

Ⓖ Status Bar

This area displays messages about the current status of Excel, the results of certain operations, and other information.

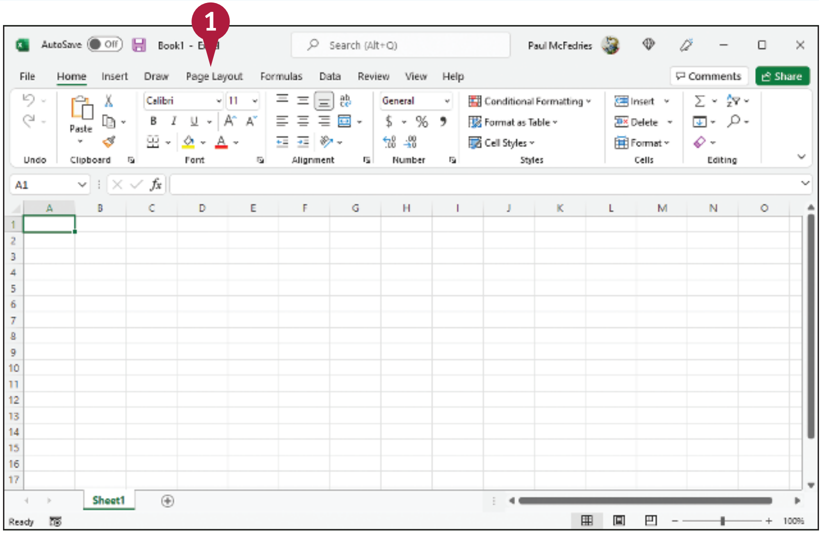
CHAPTER 1

Work with the Excel Ribbon

You use the Ribbon to access all the features, commands, and options in Excel. The Ribbon is organized into tabs, such as Home, Insert, and Page Layout, and each tab contains a collection of related controls. For example, the Insert tab contains controls related to inserting objects into a worksheet, while the Formulas tab contains controls related to building formulas. Each tab usually includes buttons, lists, and check boxes.

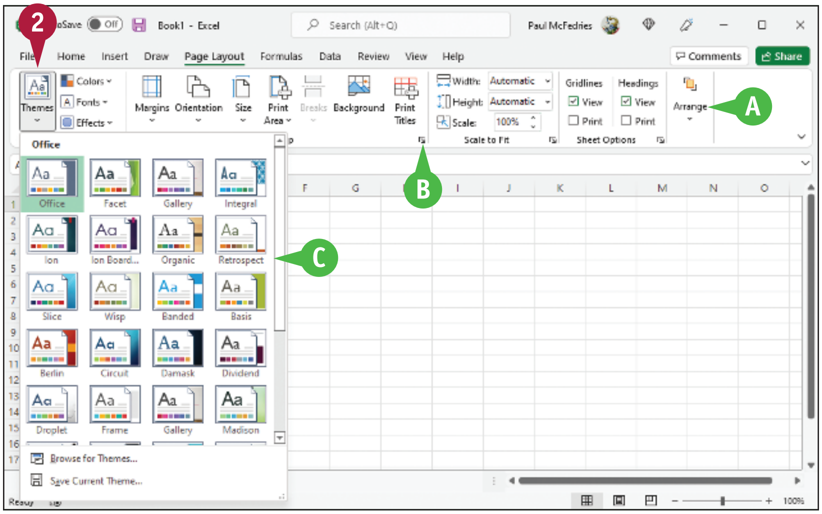
The File tab is a bit different because it displays the Backstage view, which contains controls related to working with Excel files, such as opening, saving, and printing them.

Work with the Excel Ribbon


1
AutoSave
Book1 - Excel
Search (Alt+Q)
Paul McFedries
File
Home
Insert
Draw
Page Layout
Formulas
Data
Review
View
Help
Comments
Share
Undo
Clipboard
Font
Alignment
Number
Styles
Cells
Editing
Conditional Formatting
Format as Table
Cell Styles
A1
Sheet1
Ready

1. Click the tab that contains the Excel feature you want to work with.

   Excel displays the controls in the tab.


2
A
B
C
Book1 - Excel
Search (Alt+Q)
Paul McFedries
File
Home
Insert
Draw
Page Layout
Formulas
Data
Review
View
Help
Comments
Share
Themes
Colors
Fonts
Effects
Margins
Orientation
Size
Print Area
Breaks
Background
Print Titles
Width: Automatic
Height: Automatic
Scale: 100%
Scale to Fit
Gridlines
Headings
View
Print
Sheet Options
Arrange
Office
Office
Facet
Gallery
Integral
Ion
Ion Board...
Organic
Retrospect
Slice
Wisp
Banded
Basis
Berlin
Circuit
Damask
Dividend
Droplet
Frame
Gallery
Madison
Browse for Themes...
Save Current Theme...

Ⓐ Each tab is organized into groups of related controls.

Ⓑ In many groups you can click the dialog box launcher button (↘) to display a dialog box that contains group settings.

2. Click the control for the feature.

Ⓒ If the control displays a list of options, click the option you want.

   Excel runs the command or sets the option.

Note: By default, Excel for the web displays a simplified Ribbon. To see the full Ribbon, click the **Switch Ribbon** icon (⌄) on the far right of the simplified Ribbon.