Getting Started with Excel

Introduction

Excel is a **spreadsheet program** that allows you to **store**, **organize**, and **analyze information**. While you may believe Excel is only used by certain people to process complicated data, anyone can learn how to take advantage of the program's **powerful features**. Whether you're keeping a budget, organizing a training log, or creating an invoice, Excel makes it easy to work with different types of data.

Getting to know Excel

If you've previously used Excel 2010 or Excel 2013, then Excel 2016 should feel familiar. If you are new to Excel or have more experience with older versions, you should first take some time to become familiar with the **Excel interface**.

The Excel interface

When you open Excel 2016 for the first time, the **Excel Start Screen** will appear. From here, you'll be able to create a **new workbook**, choose a **template**, and access your **recently edited workbooks**.

- From the **Excel Start Screen**, locate and select **Blank workbook** to access the Excel interface.

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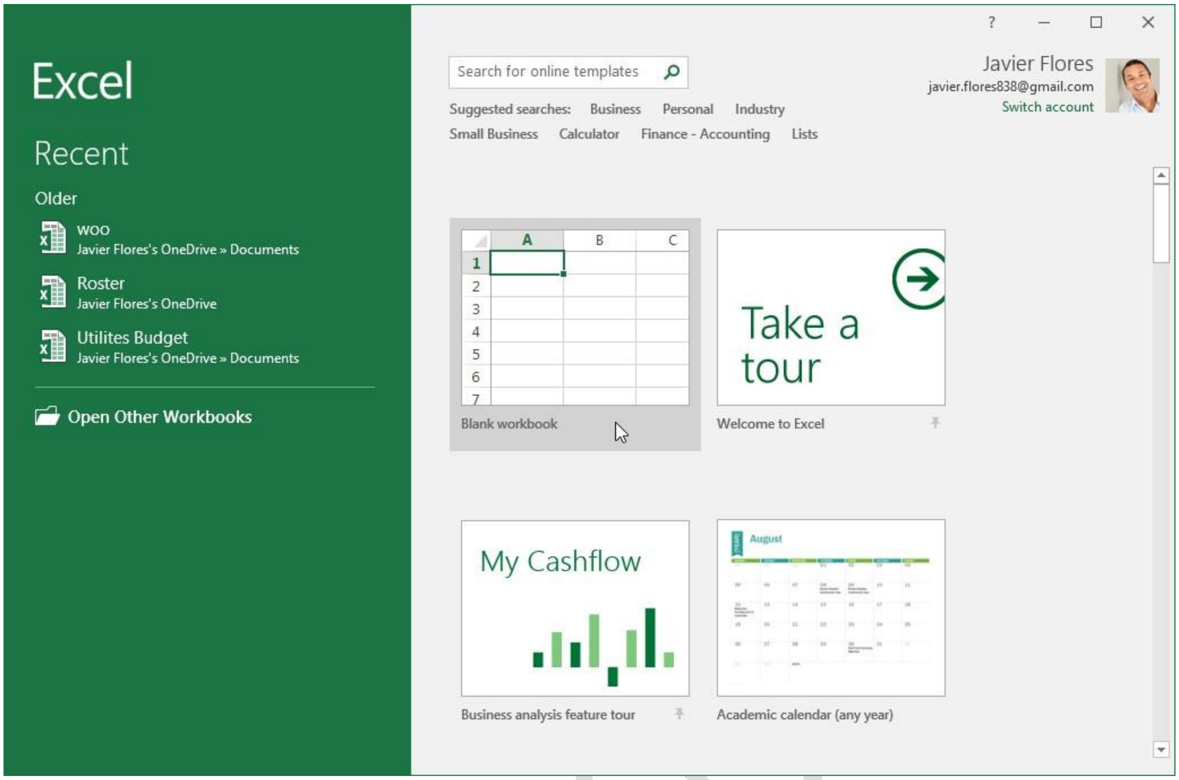
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Suggested searches: Business Personal Industry
Small Business Calculator Finance - Accounting Lists
Javier Flores
javier.flores838@gmail.com
Switch account
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1 2 3 4 5 6 7
Blank workbook
Take a tour
Welcome to Excel
My Cashflow
Business analysis feature tour
August
Academic calendar (any year)

Refer to the figure below to become familiar with the Excel interface.

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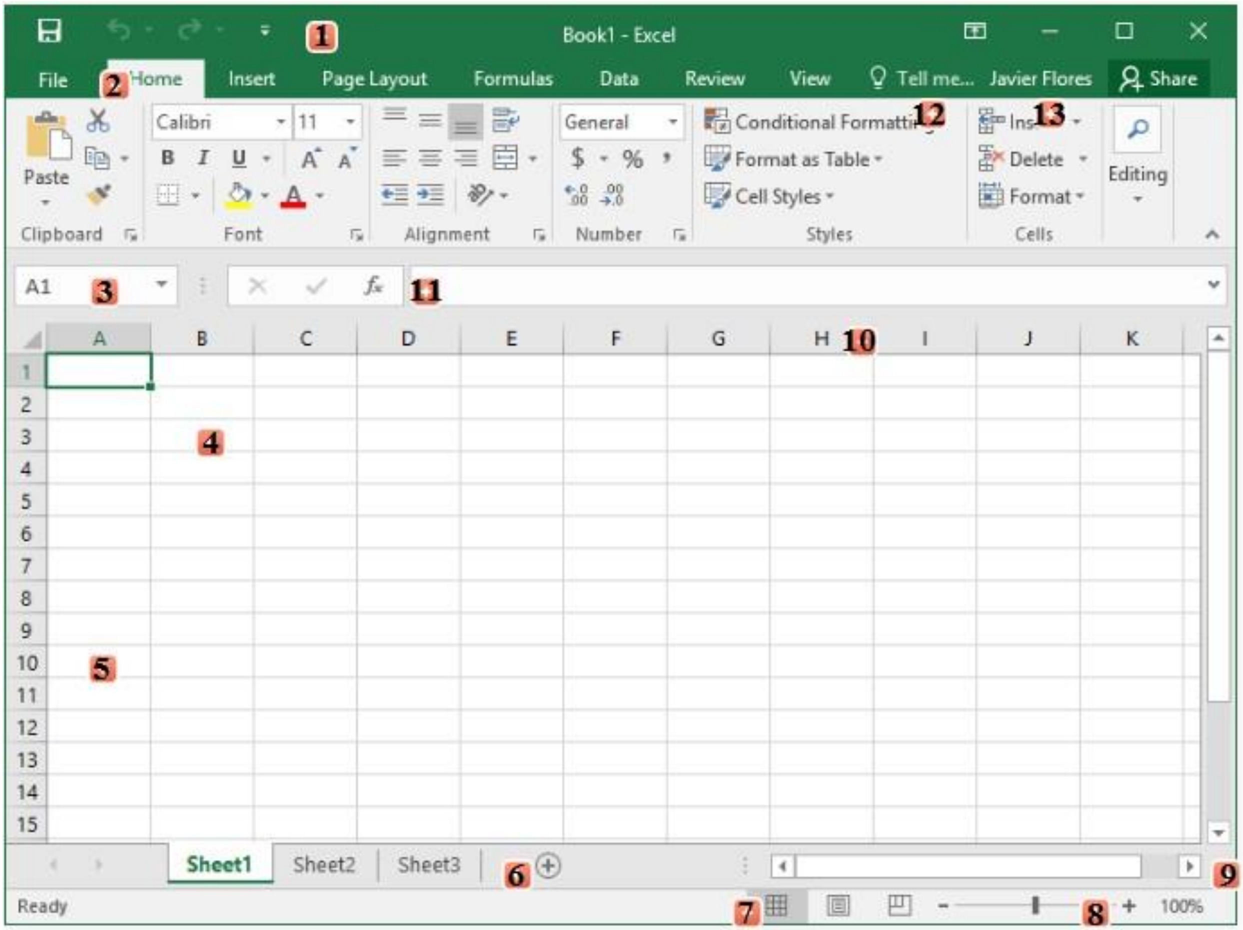
Book1 - Excel
File
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1. ***Quick Access Toolbar :*** The **Quick Access Toolbar** lets you access common commands no matter which tab is selected. You can customize the commands depending on your preference.

2. ***The Ribbon :*** The **Ribbon** contains all of the **commands** you will need to perform common tasks in Excel. It has multiple **tabs**, each with several **groups** of commands.

3. ***Name Box :*** The **Name box** displays the **location**, or **name**, of a **selected cell**.

4. ***Cell :*** Each rectangle in a workbook is called a **cell**. A cell is the **intersection** of a row and a column. Simply click to **select** a cell.

5. ***Row :*** A **row** is a group of cells that runs from the left of the page to the right. In Excel, rows are identified by **numbers**.

6. ***Worksheets :*** Excel files are called **workbooks**. Each workbook holds one or more **worksheets**. Click the tabs to switch between them, or right-click for more options.

7. ***Worksheet View Options :*** There are three ways to view a worksheet. Simply click a command to select the desired view.

8. ***Zoom Control :*** Click and drag the **slider** to use the **zoom control**. The number to the right of the slider reflects the **zoom percentage**.

9. ***Vertical and Horizontal Scroll Bars :*** The scroll bars allow you to scroll up and down or side to side. To do this, click and drag the **vertical** or **horizontal scroll bar**.

10. ***Column :*** A **column** is a group of cells that runs from the top of the page to the bottom. In Excel, columns are identified by **letters**.

11. ***Formula Bar :*** In the **formula bar**, you can enter or edit **data**, a formula, or a **function** that will appear in a specific cell.

12. ***Tell me :*** The **Tell me** box works like a search bar to help you quickly find tools or commands you want to use.

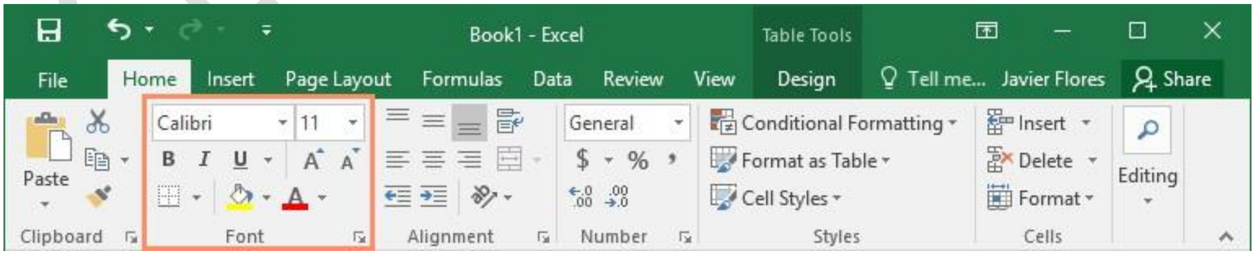
Working with the Excel environment

The **Ribbon** and **Quick Access Toolbar** are where you will find the commands to perform common tasks in Excel. The **Backstage view** gives you various options for saving, opening a file, printing, and sharing your document.

The Ribbon

Excel 2016 uses a **tabbed Ribbon system** instead of traditional menus. **The Ribbon** contains **multiple tabs**, each with several **groups of commands**. You will use these tabs to perform the most **common tasks** in Excel.

- Each tab will have one or more groups.


Book1 - Excel
Table Tools
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Some groups will have an arrow you can click for more options.

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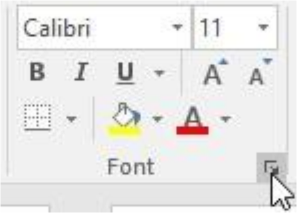
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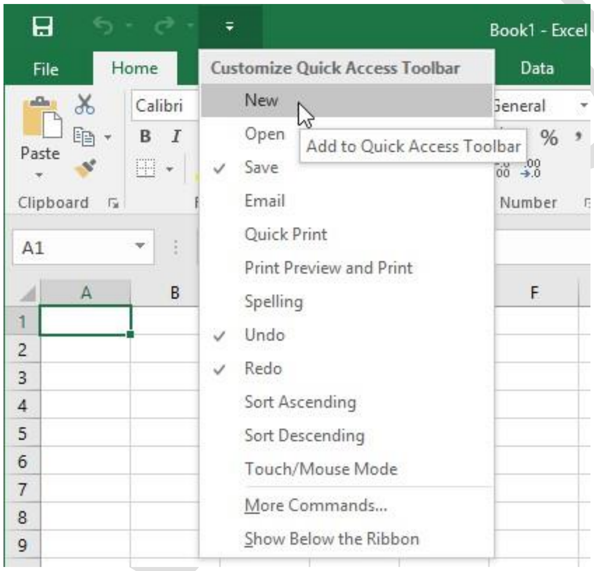
Click a tab to see more commands.

The Quick Access Toolbar

Located just above the Ribbon, the **Quick Access Toolbar** lets you access common commands no matter which tab is selected. By default, it includes the **Save**, **Undo**, and **Repeat** commands. You can add other commands depending on your preference.

To add commands to the Quick Access Toolbar:

1. Click the **drop-down arrow** to the right of the **Quick Access Toolbar**.
2. Select the **command** you want to add from the drop-down menu. To choose from more commands, select **More Commands**.


Book1 - Excel
File
Home
Data
Customize Quick Access Toolbar
New
Open
Save
Email
Quick Print
Print Preview and Print
Spelling
Undo
Redo
Sort Ascending
Sort Descending
Touch/Mouse Mode
More Commands...
Show Below the Ribbon
Add to Quick Access Toolbar
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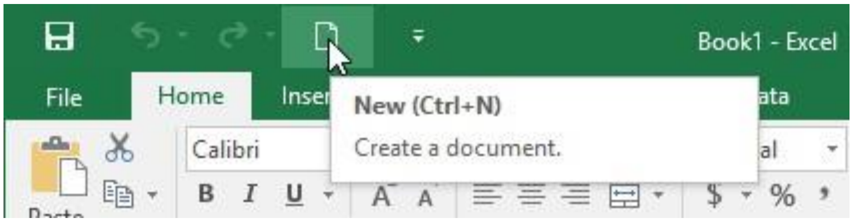
3. The command will be **added** to the Quick Access Toolbar.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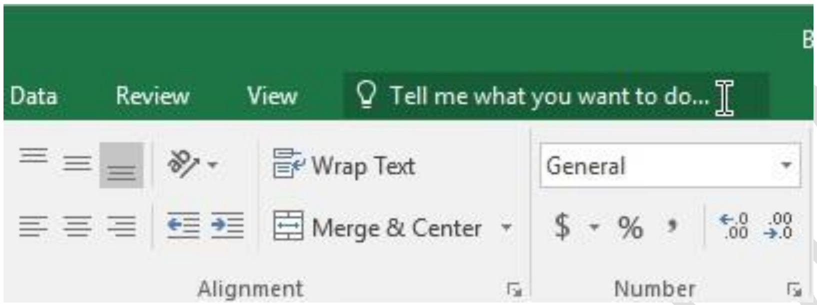
How to use Tell me:

The **Tell me** box works like a search bar to help you quickly find tools or commands you want to use.


Data
Review
View
Tell me what you want to do...
Wrap Text
Merge & Center
General
$
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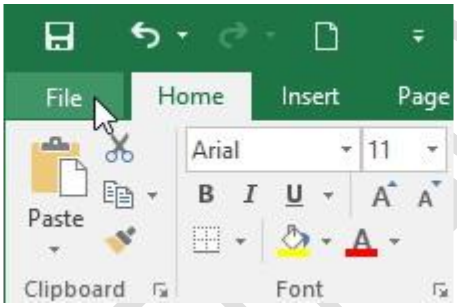
Alignment
Number

To access Backstage view:

1. Click the **File** tab on the **Ribbon**. **Backstage view** will appear.


File
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Refer to the figure below to learn more about using Backstage view.

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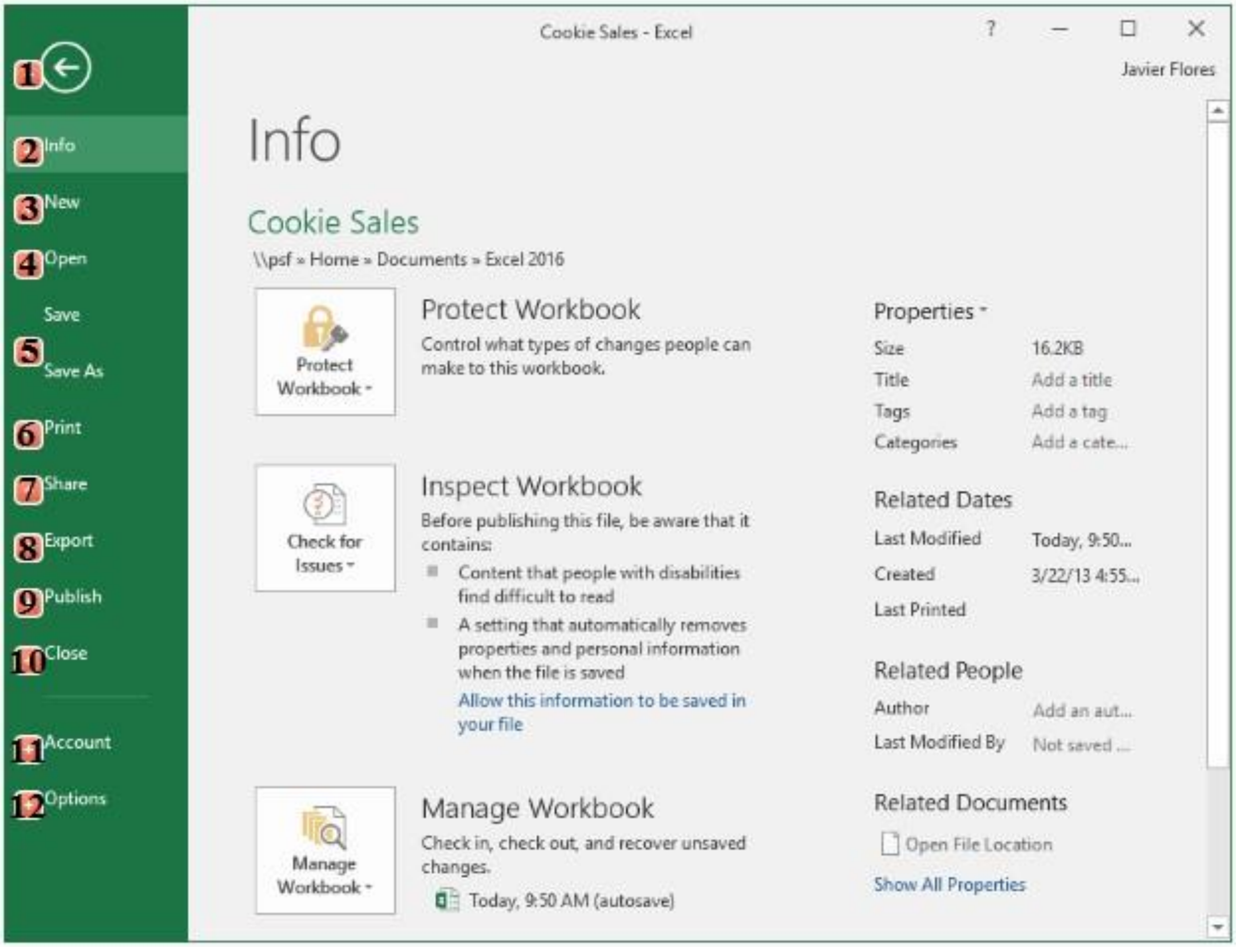
Cookie Sales - Excel
Javier Flores
1
2 Info
3 New
4 Open
Save
5 Save As
6 Print
7 Share
8 Export
9 Publish
10 Close
11 Account
12 Options
Info
Cookie Sales
\\psf » Home » Documents » Excel 2016
Protect Workbook
Check for Issues
Manage Workbook
Properties
Related Dates
Related People
Related Documents
Open File Location
Show All Properties

Protect Workbook

Control what types of changes people can make to this workbook.

Inspect Workbook

Before publishing this file, be aware that it contains:

- Content that people with disabilities find difficult to read
- A setting that automatically removes properties and personal information when the file is saved

Allow this information to be saved in your file

Manage Workbook

Check in, check out, and recover unsaved changes.

Today, 9:50 AM (autosave)

Size	16.2KB
Title	Add a title
Tags	Add a tag
Categories	Add a cate...
Last Modified	Today, 9:50...
Created	3/22/13 4:55...
Last Printed	
Author	Add an aut...
Last Modified By	Not saved ...

1. ***Return to Excel :*** You can use the arrow to **close Backstage view** and return to Excel.

2. ***Info :*** The **Info** pane will appear whenever you access Backstage view. It contains **information** about the current workbook.

3. ***New :*** From here, you can create a **new blank workbook** or choose from a large selection of **templates**.

4. ***Open :*** From here, you can **open recent workbooks**, as well as workbooks saved to your **OneDrive** or on your **computer**.

5. ***Save and Save As :*** Use **Save** and **Save As** to save your workbook to your **computer** or to your **OneDrive**.

6. ***Print :*** From the **Print** pane, you can change the **print settings** and print your workbook. You can also see a **preview** of your workbook.

7. ***Share :*** From here, you can invite people to **view and collaborate** on your workbook. You can also share your workbook by emailing it as an attachment.

8. ***Export :*** You can choose to **export** your workbook in another format, such as **PDF/XPS** or **Excel 1997-2003**.

9. ***Publish :*** Here, you can publish your workbook to **Power BI**, Microsoft's cloud-sharing service for Excel workbooks.

10. ***Close :*** Click here to **close** the current workbook.

11. ***Account :*** From the **Account** pane, you can access your **Microsoft account** information, modify your **theme** and **background**, and **sign out** of your account.

12. ***Options :*** Here, you can change various **Excel options**, **settings**, and **language** preferences.

To pin a workbook:

If you frequently work with the **same workbook**, you can **pin it** to Backstage view for faster access.

1. Navigate to **Backstage view**, then click **Open**. Your **recently edited workbooks** will appear.

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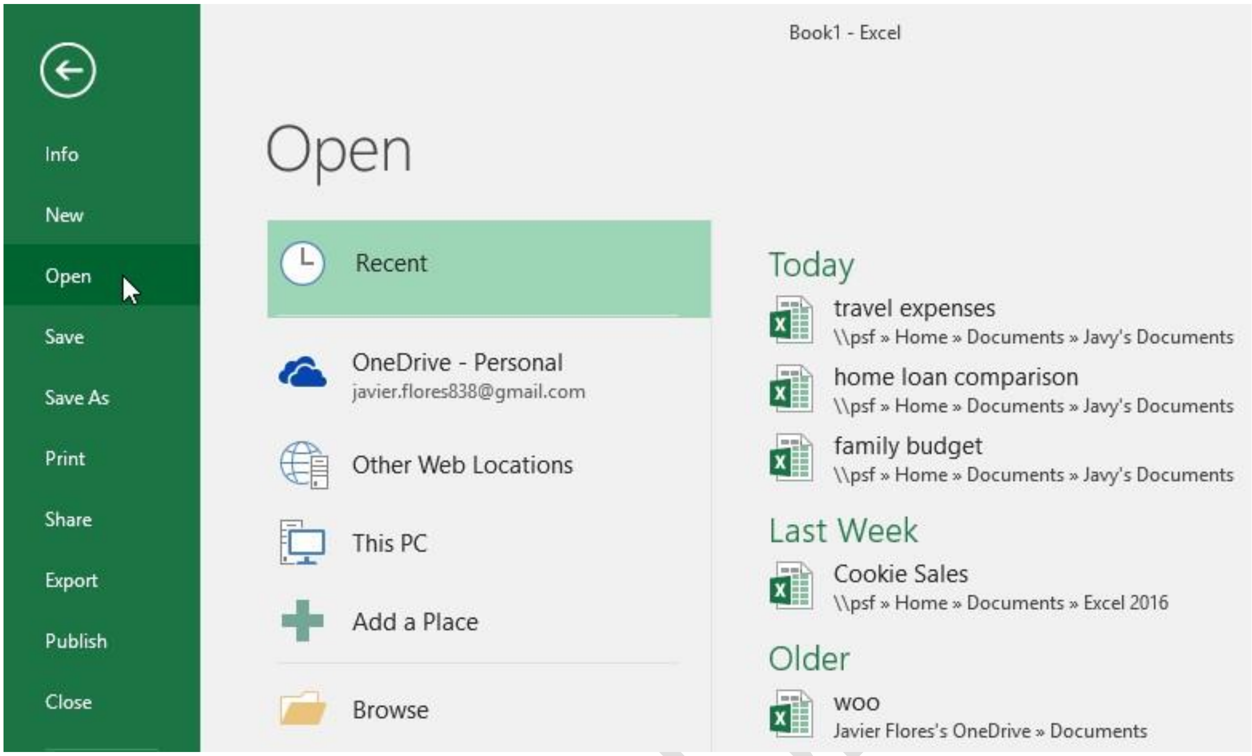
Book1 - Excel
Info
New
Open
Save
Save As
Print
Share
Export
Publish
Close
Open
Recent
OneDrive - Personal
javier.flores838@gmail.com
Other Web Locations
This PC
Add a Place
Browse
Today
travel expenses
\\psf » Home » Documents » Javy's Documents
home loan comparison
\\psf » Home » Documents » Javy's Documents
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Older
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Javier Flores's OneDrive » Documents

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