



## **S.B. JAIN INSTITUTE OF TECHNOLOGY MANAGEMENT & RESEARCH, NAGPUR**

### **Prelab**

**Aim:** Introduction to Excel's interface and basic functionalities.

**Name:**

**USN:**

**Semester / Year:** IV / II

**Academic Session:** 2024 – 25

**Date of Performance:** \_\_\_\_\_ / 2025

**Date of Submission:** \_\_\_\_\_ / \_\_\_\_\_ / 2025

■ **Aim:** Introduction to Excel's interface and basic functionalities.

■ **Objectives:** Introduction to Excel's interface and basic functionalities.

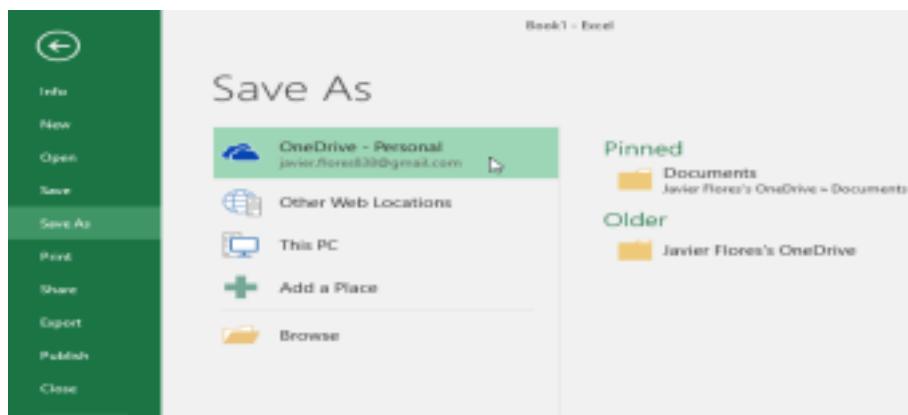
### **Activities:**

- A. i) Open and save workbooks.  
ii) Understand the Ribbon, Tabs, and Quick Access Toolbar.
- B. i) Enter and format data in cells.  
ii) Basic navigation and selection techniques.

## **Introduction**

Microsoft Excel is a widely used spreadsheet application for organizing, calculating, and analyzing data efficiently. It provides an easy-to-use interface consisting of the Ribbon, tabs, Quick Access Toolbar, and worksheet area, which helps users access various tools and commands quickly.

Basic operations such as opening and saving workbooks, entering and formatting data, and navigating between cells are essential skills for working with spreadsheets. These fundamental features improve productivity and form the foundation for advanced data analysis tasks.



### **Save and Save As**

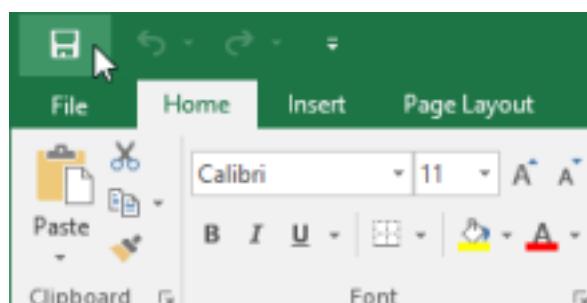
Excel offers two ways to save a file: **Save** and **Save As**. These options work in similar ways, with a few important differences:

**Save:** When you create or edit a workbook, you'll use the **Save** command to save your changes. You'll use this command most of the time. When you save a file, you'll only need to choose a file name and location the first time. Then you can just click the Save command to save it with the same name and location.

**Save As:** You'll use this command to create a **copy** of a workbook while keeping the original. When you use Save As, you'll need to choose a different name and/or location for the copied version.

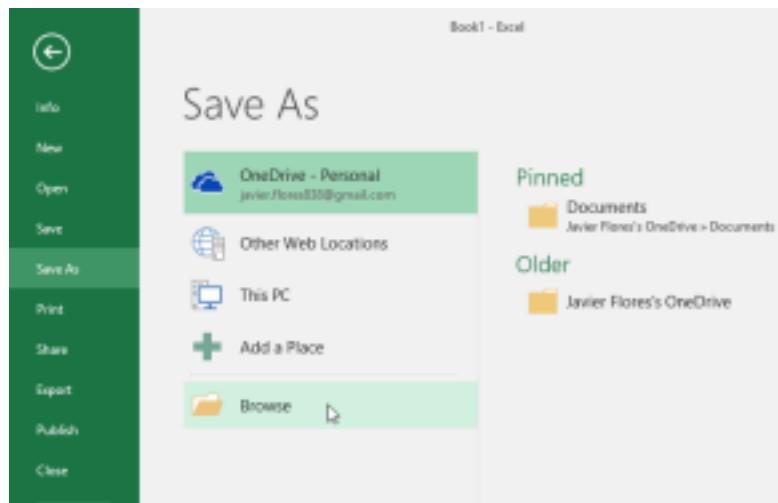
### To save a workbook:

It's important to **save your workbook** whenever you start a new project or make changes to an existing one. Saving early and often can prevent your work from being lost. You'll also need to pay close attention to **where you save** the workbook so it will be easy to find later. Locate and select the **Save** command on the **Quick Access Toolbar**.



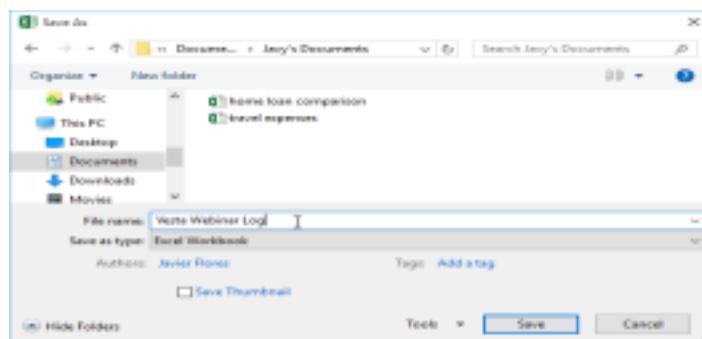
If you're saving the file for the first time, the **Save As** pane will appear in **backstage view**.

You'll then need to choose **where to save** the file and give it a **file name**. To save the workbook to your computer, select **Computer**, then click **Browse**. You can also click **OneDrive** to save the file to your OneDrive.



The **Save As** dialog box will appear. Select the **location** where you want to save the workbook.

Enter a **file name** for the workbook, then click **Save**.

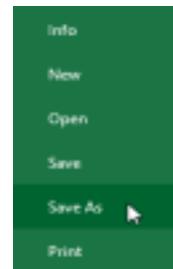


The workbook will be **saved**. You can click the **Save** command again to save your changes as you modify the workbook.

You can also access the **Save** command by pressing **Ctrl+S** on your keyboard.

### Using Save As to make a copy

If you want to save a **different version** of a workbook while keeping the original, you can create a **copy**. For example, if you have a file named **Sales Data**, you could save it as **Sales Data 2** so you'll be able to edit the new file and still refer back to the original version. To do this, click the **Save As** command in Backstage view. Just like when saving a file for the first time, you'll need to

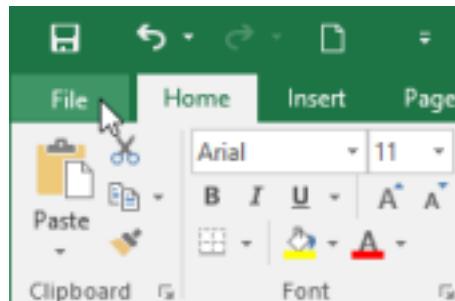


choose **where to save** the file and give it a new **file name**.

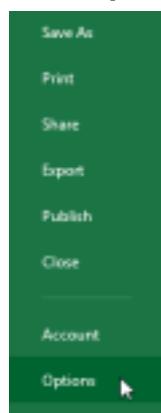
### To change the default save location:

If you don't want to use **OneDrive**, you may be frustrated that OneDrive is selected as the default location when saving. If you find it inconvenient to select **Computer** each time, you can change the **default save location** so **Computer** is selected by default.

Click the **File** tab to access **Backstage view**.

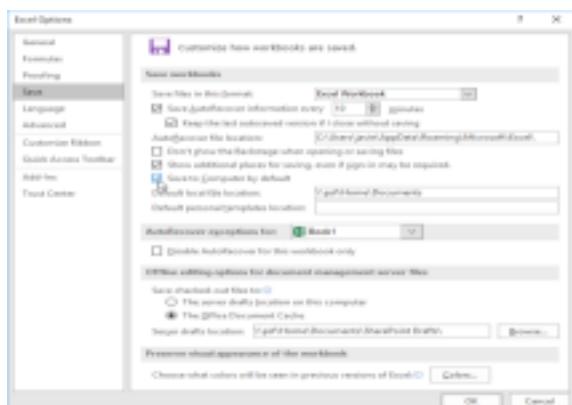


Click **Options**.



The **Excel Options** dialog box will appear. Select **Save**, check the box next to **Save to Computer by default**, then click **OK**. The default save location will be changed.

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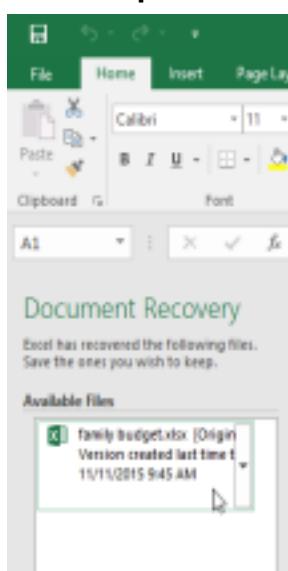
### Auto Recover

Excel automatically saves your workbooks to a temporary folder while you are working on them. If you forget to save your changes or if Excel crashes, you can restore the file using **Auto Recover**.

#### To use AutoRecover:

Open Excel. If **autosaved versions** of a file are found, the **Document Recovery** pane will appear.

Click to **open** an available file. The workbook will be **recovered**.

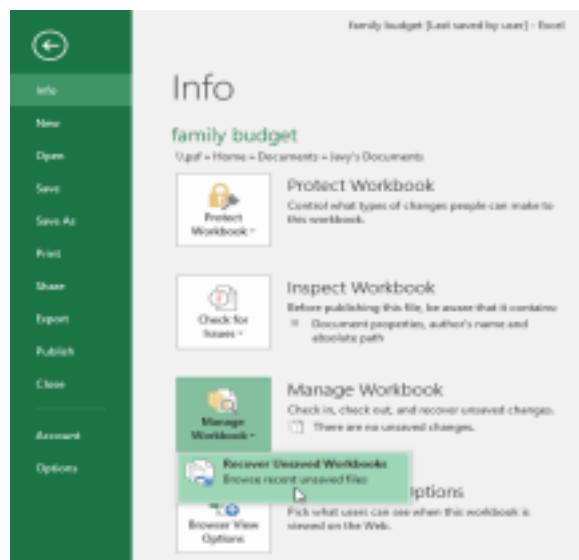


By default, Excel autosaves every 10 minutes. If you are editing a workbook for less than 10 minutes, Excel may not create an autosaved version.

If you don't see the file you need, you can browse all autosaved files from **Backstage view**.

Just select the **File** tab, click **Manage Workbook**, then choose **Recover Unsaved Workbooks**.

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### Exporting workbooks

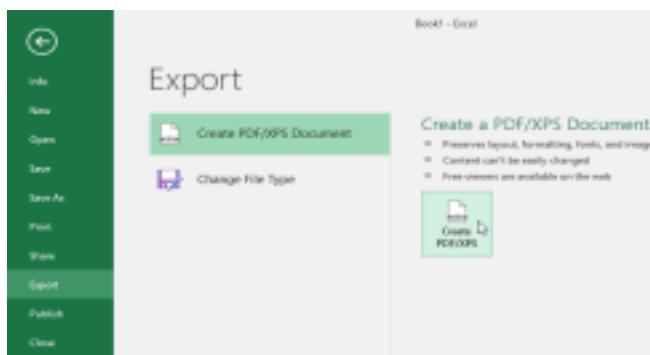
By default, Excel workbooks are saved in the **.xlsx** file type. However, there may be times when you need to use **another file type**, like a **PDF** or **Excel 97-2003 workbook**. It's easy to **export** your workbook from Excel to a variety of file types.

#### To export a workbook as a PDF file:

Exporting your workbook as an **Adobe Acrobat document**, commonly known as a **PDF file**, can be especially useful if you're sharing a workbook with someone who does not have Excel. A PDF will make it possible for recipients to view but not edit the content of your workbook.

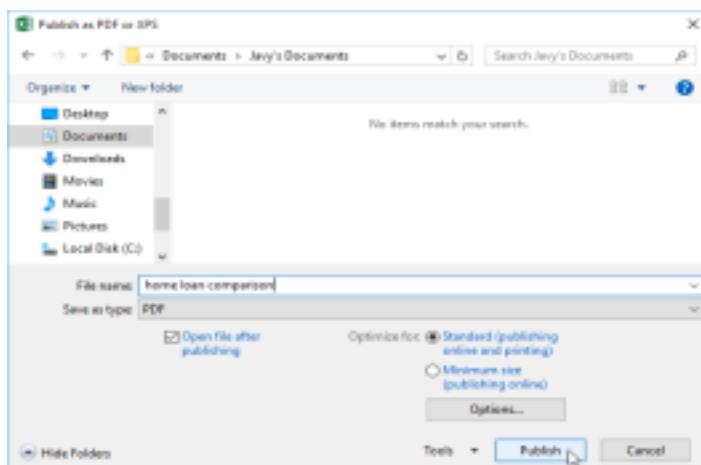
Click the **File** tab to access **Backstage view**.

Click **Export**, then select **Create PDF/XPS**.

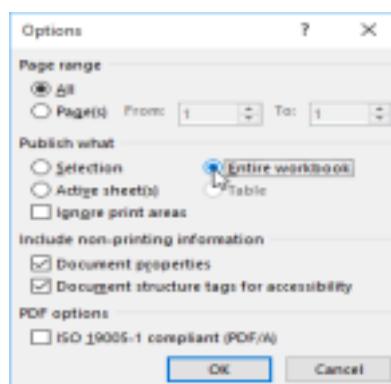


The **Save As** dialog box will appear. Select the **location** where you want to export the workbook, enter a **file name**, then click **Publish**.

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By default, Excel will only export the **active worksheet**. If you have multiple worksheets and want to save all of them in the same PDF file, click **Options** in the **Save As** dialog box. The **Options** dialog box will appear. Select **Entire workbook**, then click **OK**.



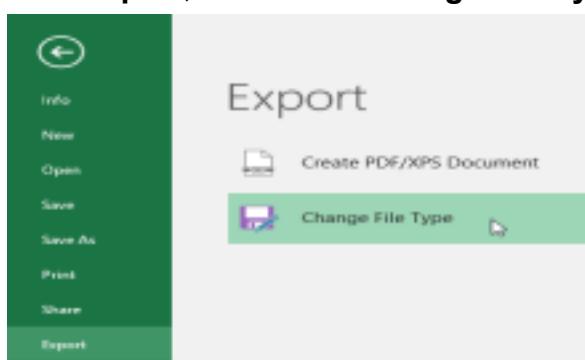
Whenever you export a workbook as a PDF, you'll also need to consider how your workbook data will appear on each **page** of the PDF, just like **printing** a workbook. Visit our **Page Layout and Printing** lesson to learn more about what to consider before exporting a workbook as a PDF.

### To export a workbook to other file types:

You may also find it helpful to export your workbook to other file types, like an **Excel 97-2003 workbook** if you need to share with people using an older version of Excel, or a **.CSV file** if you need a **plain-text version** of your workbook.

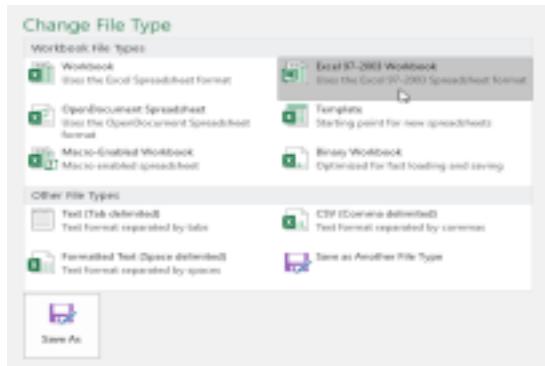
Click the **File** tab to access **Backstage view**.

Click **Export**, then select **Change File Type**.



Select a common **file type**, then click **Save As**.

## **Advance Data Analysis Using Spreadsheet Lab ((N-SECCM401P)**



**Activity:** Understand the Ribbon, Tabs, and Quick Access Toolbar and Enter and format data in cells

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 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.

To change the Ribbon Display Options:

The Ribbon is designed to respond to your current task, but you can choose to minimize it if you find that it takes up too much screen space. Click the Ribbon Display Options arrow in the upper-right corner of the Ribbon to display the drop-down menu.

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.

Worksheet views

Excel has a variety of viewing options that change how your workbook is displayed. These views can be useful for various tasks, especially if you're planning to print the spreadsheet. To

change worksheet views, locate the commands in the bottom-right corner of the Excel window and select Normal view, Page Layout view, or Page Break view.

**▣ OUTPUT:**

**INSERT SCREENSHOTS HERE**

- ▣ Conclusion:** In this practical, we conclude that Excel's interface and basic functionalities, such as using the Ribbon, Quick Access Toolbar, and basic data entry and formatting, are fundamental skills for efficiently working with spreadsheets. Mastery of these techniques enhances productivity and lays the foundation for more advanced Excel tasks.

**▣ Discussion Questions:**

**1. What is the Ribbon in Excel, and what is its purpose?**

**Ans:** The Ribbon in Excel is a toolbar at the top of the window that contains tabs with various commands and tools. It helps users access Excel's features, such as formatting options, data tools, and inserting elements like charts and tables. Each tab on the Ribbon is organized into groups of related commands.

**2. How can you open a new workbook and save an existing one in Excel?** **Ans:** To open a new workbook, you can go to the **File** tab and select **New** or use the shortcut **Ctrl + N**. To save an existing workbook, go to the **File** tab, select **Save** (or use the shortcut **Ctrl + S**), or select **Save As** if you want to save the workbook with a new name or location.

**3. What is the Quick Access Toolbar, and how can you customize it?** **Ans:** The Quick Access Toolbar is a small toolbar located above or below the Ribbon that provides quick access to frequently used commands, such as Save, Undo, Redo, etc. To customize it, click on the dropdown arrow at the end of the Quick Access Toolbar and choose commands from the list or select **More Commands** to add or remove specific commands.

**4. How can you format data in Excel cells?**

**Ans:** To format data in Excel cells, you can use options in the **Home** tab on the Ribbon. You can change the font style, size, and color, apply text alignment, set cell borders, and adjust number formats (e.g., currency, percentage, date). You can also use the **Format Cells** dialog box (**Ctrl + 1**) for advanced formatting options.

**5. Explain the basic navigation techniques in Excel.**

**Ans:** Basic navigation in Excel can be done using the arrow keys, mouse, or shortcuts. You can move between cells using the arrow keys or click on a cell with the mouse. To navigate to the last cell with data, use **Ctrl + Arrow key** (up, down, left, right). **Ctrl + Home** takes you to the first cell (A1), and **Ctrl + End** takes you to the last cell with data.

**References:**

<https://edu.gcfglobal.org/en/excel/>  
<https://www.geeksforgeeks.org/introduction-to-ms-excel/>  
[https://www.w3schools.com/excel/excel\\_introduction.php](https://www.w3schools.com/excel/excel_introduction.php)

Date: \_\_\_ / \_\_\_ /2025

Signature

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Sem: 4th / 2025-26