

Teach Yourself
VISUALLYTM
Excel 365



Paul McFedries

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A Wiley Brand

Teach Yourself
VISUALLY™

Excel 365

by Paul McFedries



Teach Yourself VISUALLY™ Excel 365

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About the Author

Paul McFedries is a full-time technical writer. He has been authoring computer books since 1991 and has more than 100 books to his credit. Paul's books have sold more than 4 million copies worldwide. These books include the Wiley titles *Teach Yourself VISUALLY Microsoft 365*, *Teach Yourself VISUALLY Microsoft Windows 11*, *Microsoft Excel All-in-One For Dummies*, and *Microsoft Excel Data Analysis For Dummies, Fifth Edition*. Paul invites you to drop by his personal website at www.paulmcfedries.com or follow him on Twitter @paulmcf or on Facebook at www.facebook.com/PaulMcFedries.

Author's Acknowledgments

It goes without saying that writers focus on text, and I certainly enjoyed focusing on the text that you will read in this book. However, this book is more than just the usual collection of words and phrases designed to educate and stimulate the mind. A quick thumb through the pages will show you that this book is also chock-full of treats for the eye, including copious screenshots, beautiful colors, and sharp fonts. Those sure make for a beautiful book, and that beauty comes from a lot of hard work by the production team at Straive. Of course, what you read in this book must also be accurate, logically presented, and free of errors. Ensuring all of this was an excellent group of editors that I got to work with directly, including project manager Lynn Northrup, technical editor Joyce Nielsen, content refinement specialist Archana Pragash, copyeditor Elizabeth Welch, and managing editor Christine O'Connor. Thanks to all of you for your exceptional competence and hard work. Thanks, as well, to associate publisher Jim Minatel for asking me to write this book.



How to Use This Book

Who This Book Is For

This book is for the reader who has never used this particular technology or software application. It is also for readers who want to expand their knowledge.

The Conventions in This Book

1 Steps

This book uses a step-by-step format to guide you easily through each task. **Numbered steps** are actions you must do; **bulleted steps** clarify a point, step, or optional feature; and **indented steps** give you the result.

2 Notes

Notes give additional information — special conditions that may occur during an operation, a situation that you want to avoid, or a cross-reference to a related area of the book.

3 Icons and Buttons

Icons and buttons show you exactly what you need to click to perform a step.

4 Tips

Tips offer additional information, including warnings and shortcuts.

5 Bold

Bold type shows command names, options, and text or numbers you must type.

6 Italics

Italic type introduces and defines a new term.

CHAPTER
9
Formatting Workbooks

Add a Workbook Footer

If you will be printing a workbook, you can enhance the printout by building a custom footer that includes information such as the current page number, the total number of pages, the worksheet name, and more.

The **footer** is the printed page between the bottom of the page text and the bottom margin. Excel offers several predefined footer items that enable you to quickly add data to the workbook footer. If none of the predefined footer items suits your needs, Excel also offers tools that enable you to build a custom footer.

Add a Workbook Footer

- 1 Click the **View** tab.
- 2 Click **Page Layout**.
- 3 You can also click the **Page Layout** button.
- 4 Scroll down to the bottom of the page and click the **Add Footer** button.

Note: You can also click the **Add header** text and then click the **Header & Footer** tab's **Go to Footer** command.

- 5 Excel opens the footer area for editing.
- 6 Excel adds the **Header & Footer** contextual tab.

- 4 Type your text in the footer.
- 5 If you want to include a predefined footer item instead, click **Footer**.
- 5 You can also click in either of these footer areas and type or insert text.

- 5 Click a button in the **Header & Footer Elements** group to add that element to the footer.
- 6 Excel inserts a code into the footer, such as `&[Pages]` for the **Number of Pages** element, as shown here.
- 6 Repeat steps 4 and 5 to build the footer.
- 7 Click outside the footer area.

Excel applies the footer. When you are in **Page Layout** view, you see the current values for elements such as the page number.

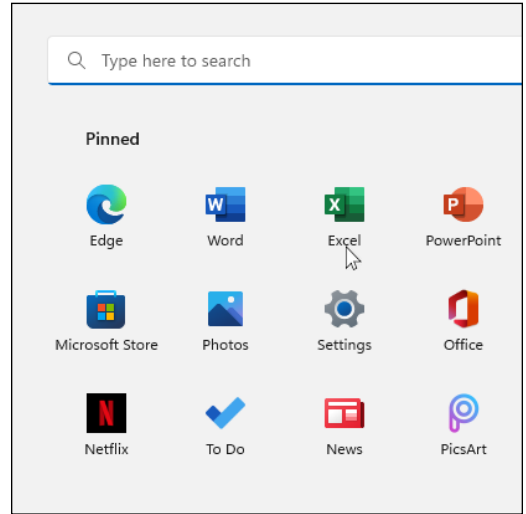
TIP
Can I view my headers and footers before I print the workbook?
Yes. Follow these steps:

- 1 Click the **File** tab.
- 2 Click **Print**.
- 3 The right side of the **Print** tab shows you a preview of the workbook printout.
- 4 The header appears here.
- 5 The footer appears here.

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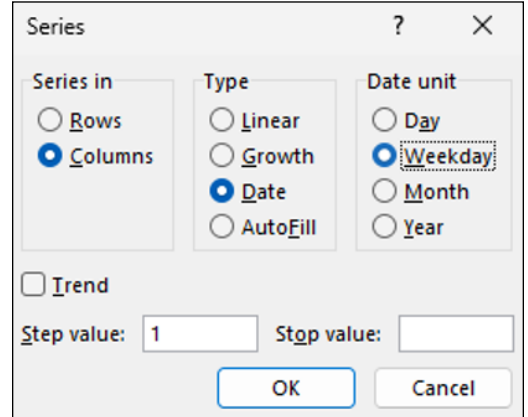
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	A	B	C	D	E	F
1	Expense Budget Calculation - 1st Quarter					
2						
3		INCREASE		1.03	← Please check this number!	
4						
5		EXPENSES	January	February	March	Total
6		Advertising	\$4,600	\$4,200	\$5,200	\$14,000
7		Rent	\$2,100	\$2,100	\$2,100	\$6,300
8		Supplies	\$1,300	\$1,200	\$1,400	\$3,900
9		Salaries	\$16,000	\$16,000	\$16,500	\$48,500
10		Utilities	\$500	\$600	\$600	\$1,700
11		2022 TOTAL	\$24,500	\$24,100	\$25,800	\$74,400
12						
13		2023 BUDGET	\$25,235	\$24,823	\$26,574	\$76,632
14						

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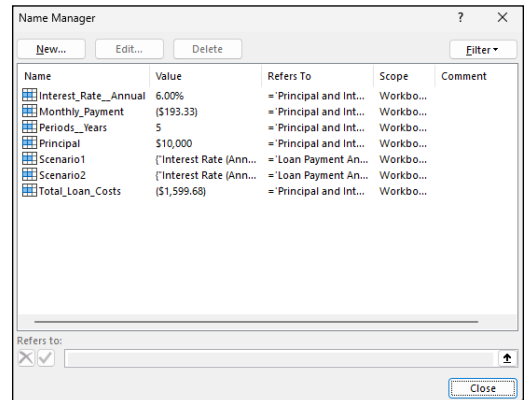
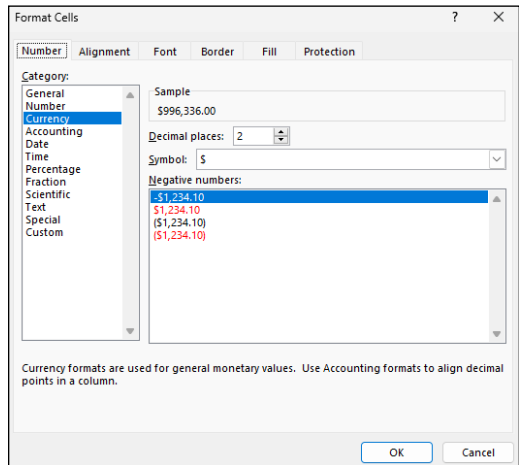


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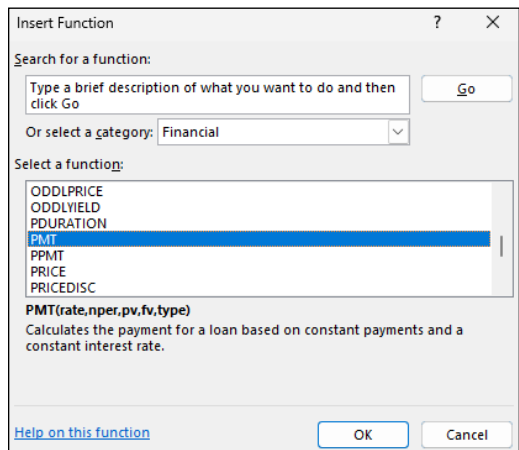
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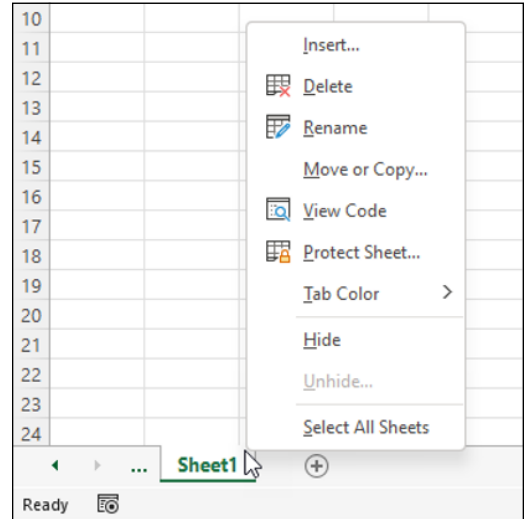
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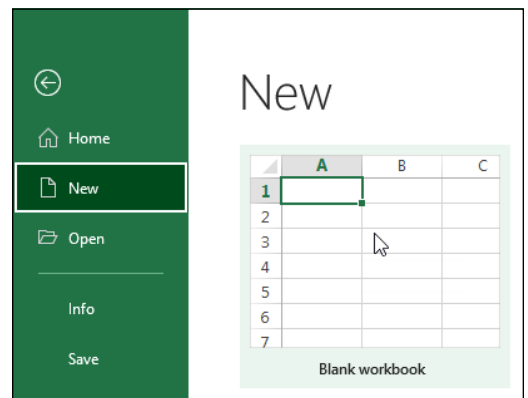
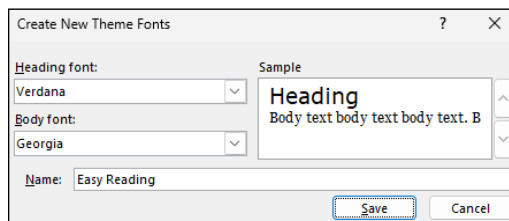


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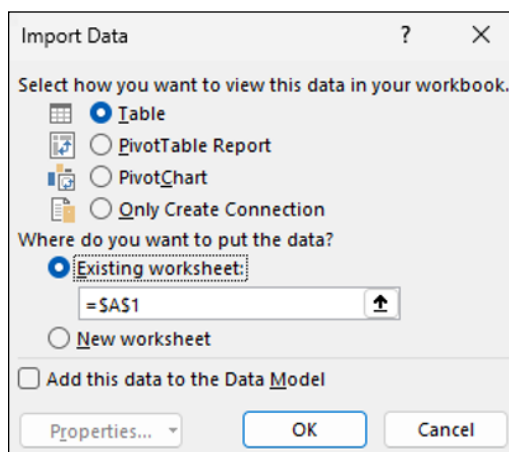
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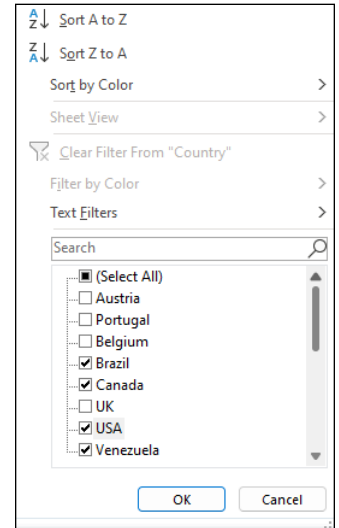
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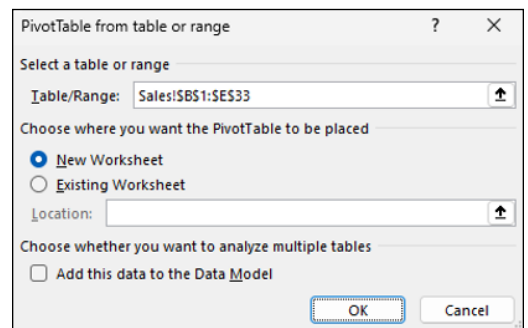
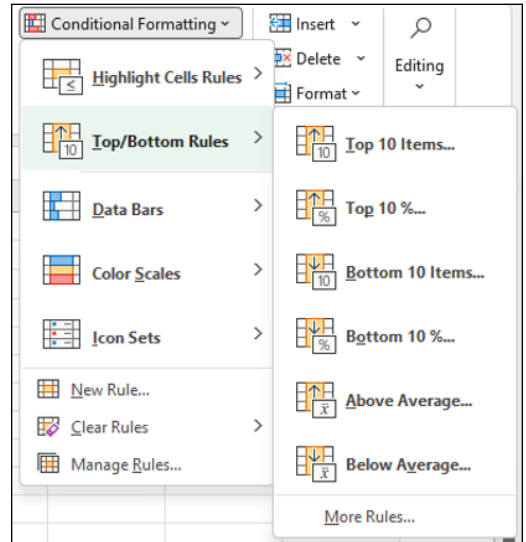


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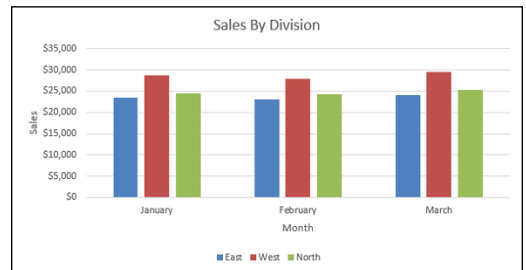
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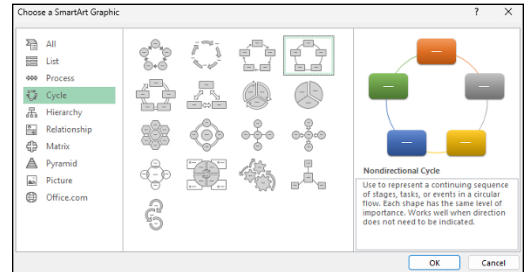
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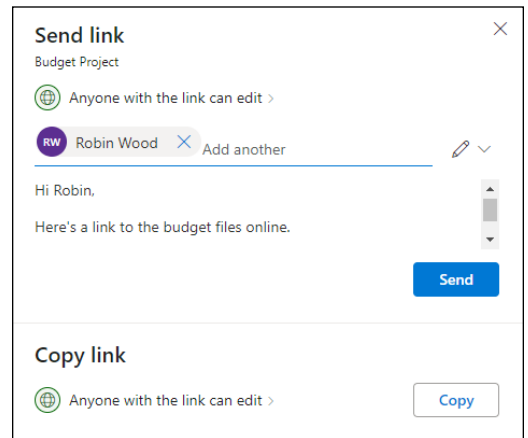
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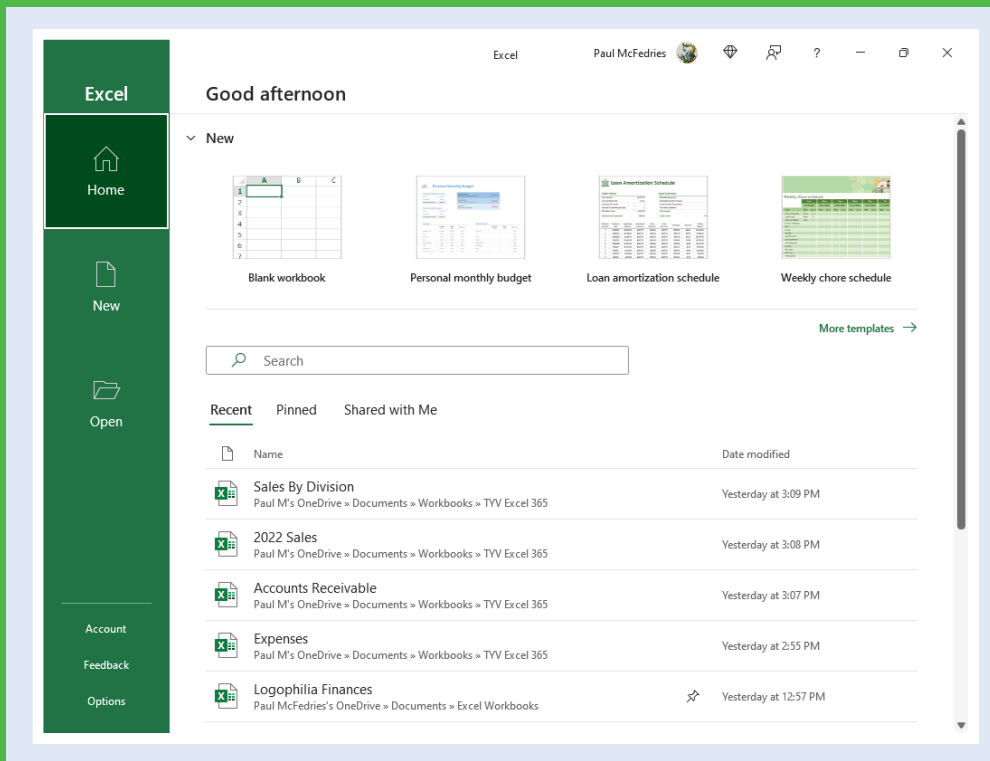


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CHAPTER 1

Getting Started with Excel

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.



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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.

	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

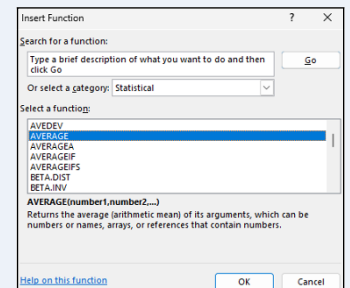
Add a Formula

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.

	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.



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 (Σ), 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.

	A	B	C	D	E	F
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	
9	TOTAL		=SUM(C4:C8)			
10						

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.

	A	B	C
1	January		
2	February		
3	March		
4	April		
5	May		
6	June		
7	July		
8	August		
9	September		
10	October	October	
11			

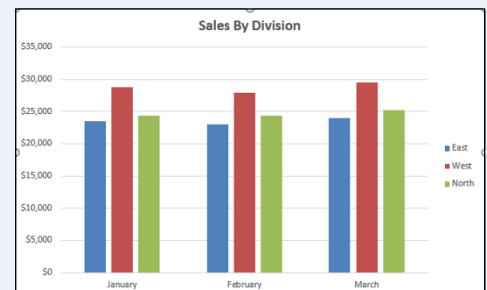
Manage Tables

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	Invoice 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.



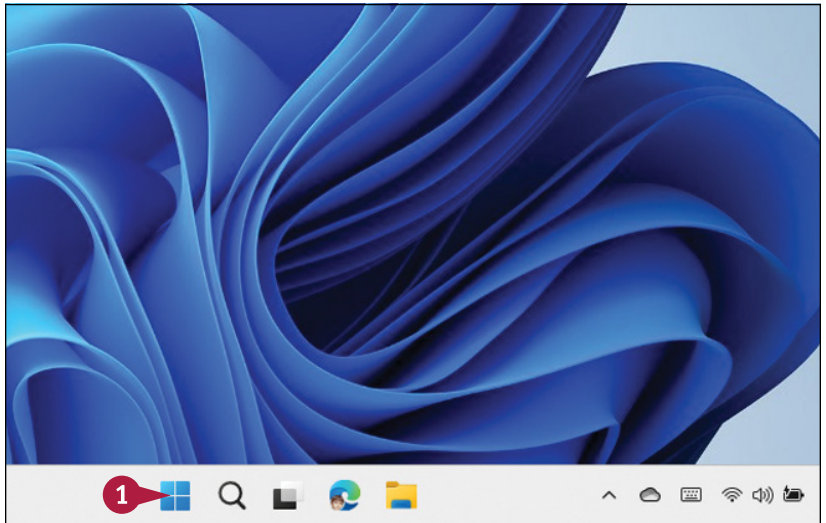
Start Excel on the Desktop

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** (🪟).

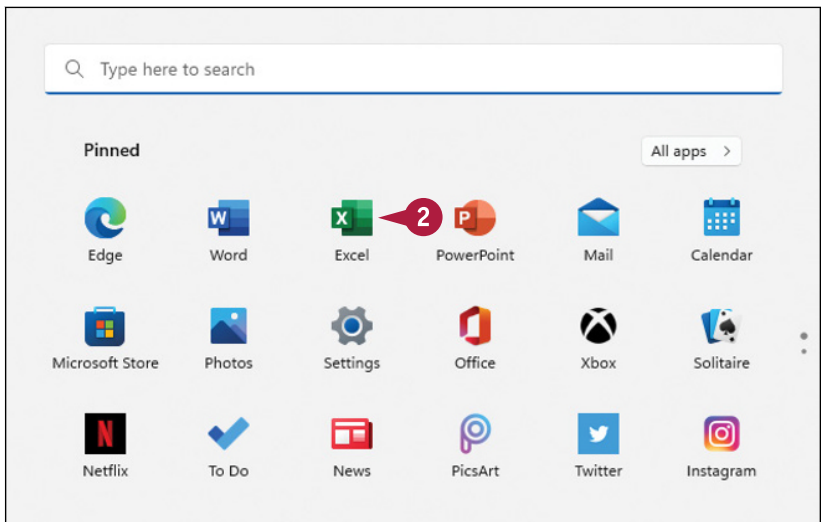


The Start menu appears.

2 Click **Excel**.

The Microsoft Excel window appears on the desktop.

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



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.

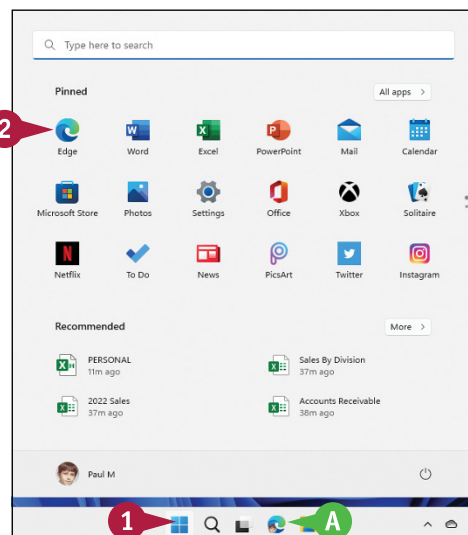
Navigate to Excel for the Web

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.

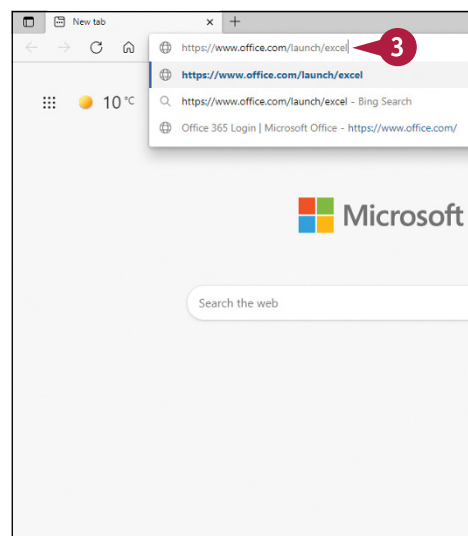
Note: If you prefer to use a different web browser, start that browser instead of Edge.

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 Title Bar

The title bar displays the name of the current workbook.

B Ribbon Tabs

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

C 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.”

D Workbook Window Controls

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

E File Tab

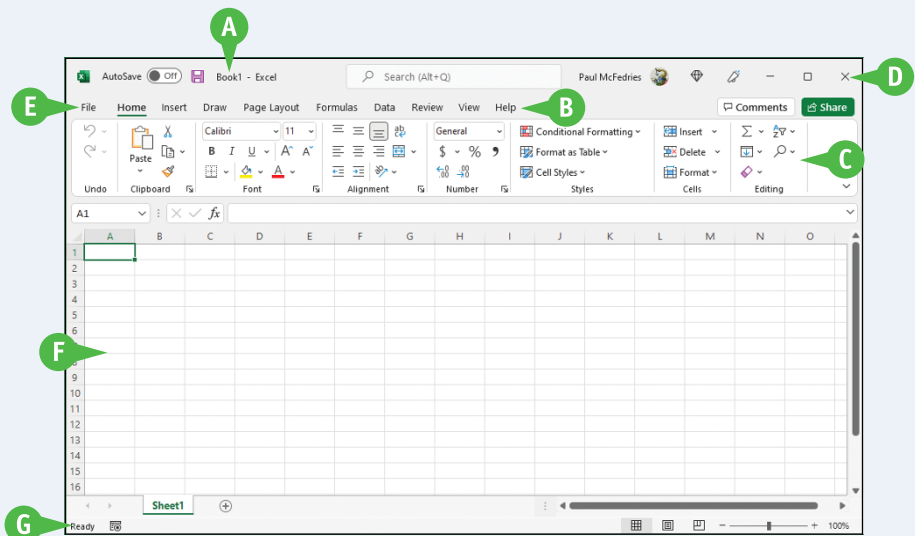
Click this tab to access file-related commands, such as Save and Open.

F Worksheet

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

G Status Bar

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



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

Excel displays the controls in the tab.

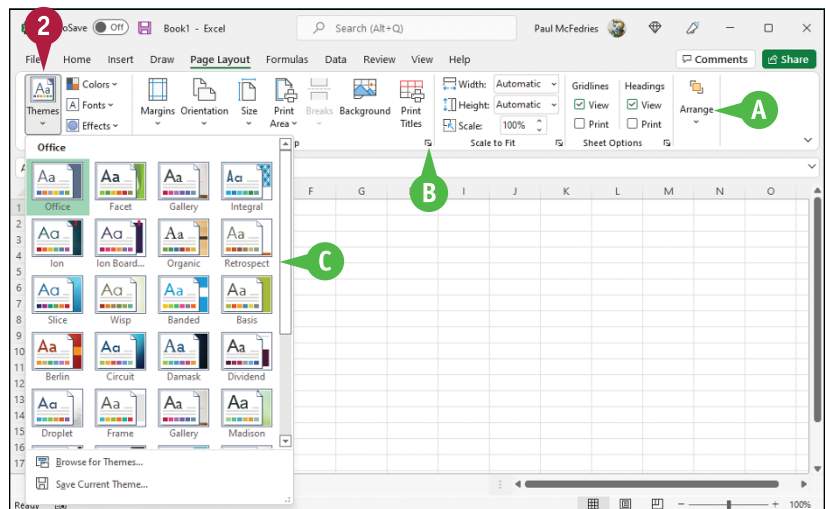
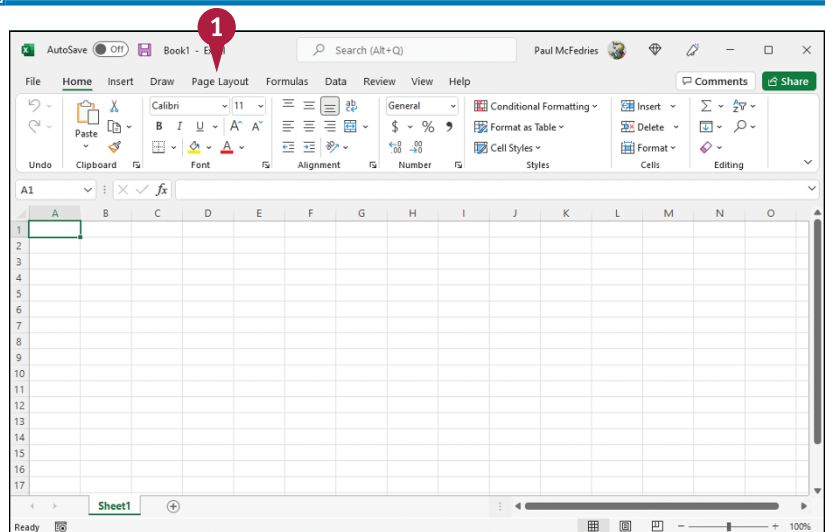
- A Each tab is organized into groups of related controls.
- B In many groups you can click the dialog box launcher button (☰) to display a dialog box that contains group settings.

- 2 Click the control for the feature.

- C 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.



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Learning the Layout of a Worksheet

In Excel, a spreadsheet file is called a *workbook*, and each workbook consists of one or more *worksheets*. These worksheets are where you enter your data and formulas, so you need to know the layout of a typical worksheet.

In particular, you need to know that worksheets are laid out in *rows* and *columns*, that a *cell* is the intersection of a row and column that has its own unique address, and that a *range* is a collection of cells. You also need to be familiar with *worksheet tabs* and the Excel *mouse pointer*.

A Cell

A *cell* is a box in which you enter your spreadsheet data.

B Column

A *column* is a vertical line of cells. Each column has a unique letter that identifies it. For example, the leftmost column is A, and the next column is B.

C Row

A *row* is a horizontal line of cells. Each row has a unique number that identifies it. For example, the topmost row is 1, and the next row is 2.

D Cell Address

Each cell has its own *address*, which is determined by the letter and number of the intersecting column and row. For example, the cell at the intersection of column C and row 10 has the address C10.

E Range

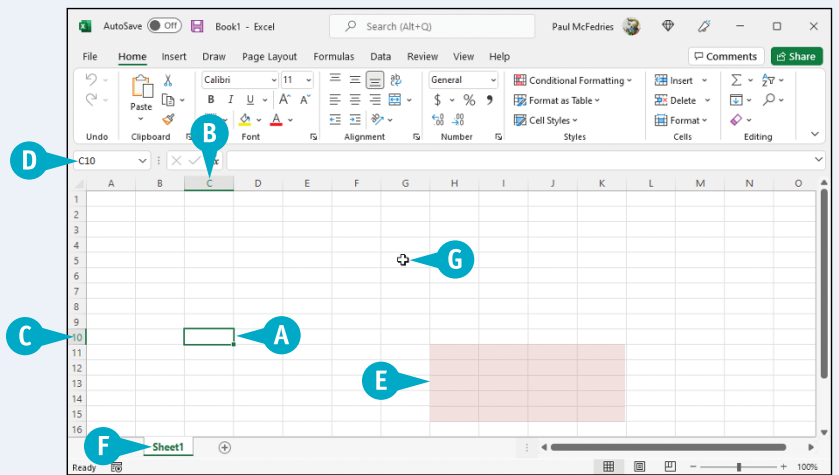
A *range* is a rectangular grouping of two or more cells. The range is indicated by the address of the top-left cell and the address of the bottom-right cell. H11:K15 is an example of a range of cells, and it refers to all the cells within the rectangle from column H, row 11 to column K, row 15.

F Worksheet Tab

The *worksheet tab* displays the worksheet name. Most workbooks contain multiple worksheets, and you use the tabs to navigate between the worksheets.

G Mouse Pointer

Use the Excel mouse pointer (⊕) to select cells.



Understanding the Types of Data You Can Use

You might think that Excel would accept only numeric input, but it is actually much more flexible than that. So, to build a spreadsheet in Excel, you should understand the different types of data that Excel accepts. There are three main types of data that you can enter into a cell: text, numbers, and dates and times. Excel places no restrictions on where or how often you can enter these types of data on a worksheet.

Text

Text entries can include any combination of letters, symbols, and numbers. You will mostly use text to describe the contents of your worksheets. This is very important because even a modest-sized spreadsheet can become a confusing jumble of numbers without some kind of text guidelines to keep things straight. Most text entries are usually labels such as *Sales* or *Territory* that make a worksheet easier to read. However, text entries can also be text or number combinations for items such as phone numbers and account codes.

Account Name	Account Number
Door Stoppers Ltd.	01-0045
Door Stoppers Ltd.	01-0045
Door Stoppers Ltd.	01-0045
Door Stoppers Ltd.	01-0045
Chimera Illusions	02-0200
Chimera Illusions	02-0200
Chimera Illusions	02-0200
Chimera Illusions	02-0200
Renaud & Son	07-0025
Renaud & Son	07-0025
Renaud & Son	07-0025
Rooter Office Solvents	07-4441
Reston Solicitor Offices	07-4441

Numbers

Numbers are the most common type of Excel data. The numbers you enter into a cell can be dollar values, weights, interest rates, temperatures, or any other numerical quantity. In most cases you just type the number that you want to appear in the cell. However, you can also precede a number with a dollar sign (\$) or other currency symbol to indicate a monetary value, or follow a number with a percent sign (%) to indicate a percentage value.

Period	Payment	Interest	Principal
1	(299.71)	(41.67)	(258.04)
2	(299.71)	(40.59)	(259.12)
3	(299.71)	(39.51)	(260.20)
4	(299.71)	(38.43)	(261.28)
5	(299.71)	(37.34)	(262.37)
6	(299.71)	(36.25)	(263.46)
7	(299.71)	(35.15)	(264.56)
8	(299.71)	(34.05)	(265.66)
9	(299.71)	(32.94)	(266.77)
10	(299.71)	(31.83)	(267.88)
11	(299.71)	(30.71)	(269.00)

Dates and Times

Date entries appear in spreadsheets that include dated information, such as invoices and sales. You can either type out the full date (such as August 23, 2023) or use either the forward slash (/) or the hyphen (-) as a date separator (such as 8/23/2023 or 8-23-2023). Note that the order in which you enter the date values depends on your regional settings. For example, in the United States the format is month/day/year. For time values, you use a colon (:) as a time separator, followed by either a.m. or p.m., such as 9:15 a.m.

	Current Date	20-Mar-23
Due Date	Date Paid	Days Overdue
2/2/2023		
1/16/2023	1/16/2023	
1/26/2023		
2/11/2023		37
2/12/2023	2/16/2023	
3/15/2023		5
3/6/2023	3/6/2023	
1/14/2023		65
2/8/2023		40
4/9/2023		
2/13/2023		35
2/15/2023	3/2/2023	

Enter Text into a Cell

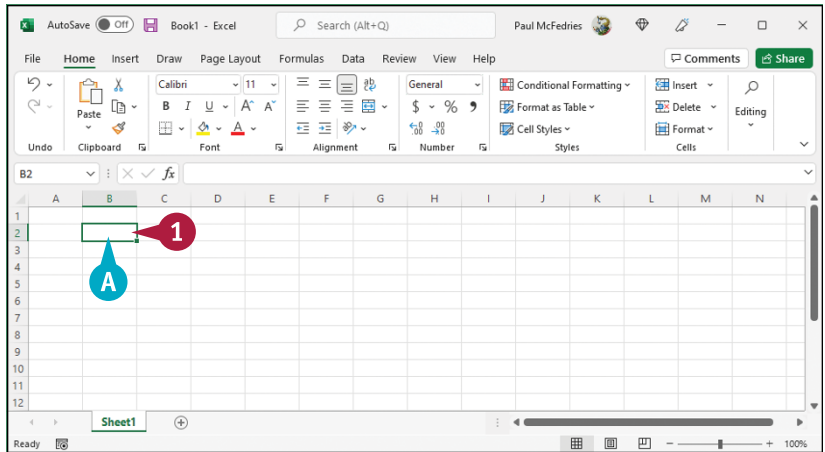
Your first step when building a spreadsheet is usually to enter the text data that defines the spreadsheet's labels or headings. Most labels appear in the cell to the right or above where the data will appear, whereas most headings appear above a column of data or to the left of a row of data.

Note, however, that you do not have to use text for just labels and headings. You can also enter text as data, such as a database of book or movie names. You can also write short notes that explain sections of the worksheet, and add reminders to yourself or others about missing data or other worksheet to-do items.

Enter Text into a Cell

1 Click the cell in which you want to enter the text.

A Excel marks the current cell by surrounding it with a thick, green border.

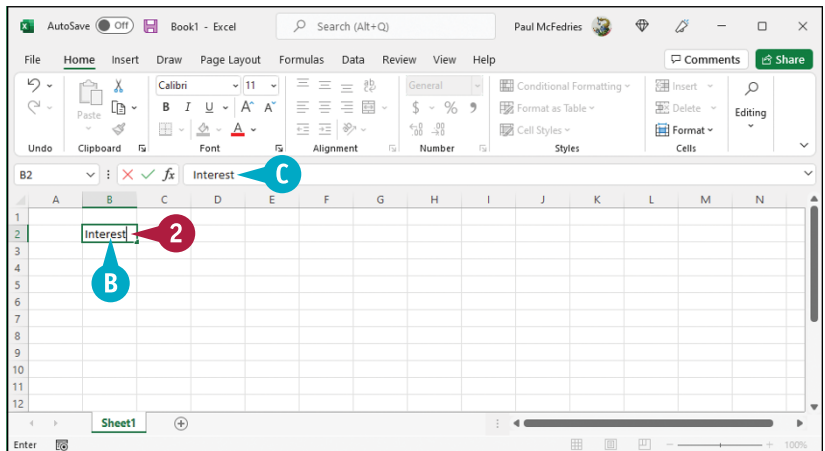


2 Start typing your text.

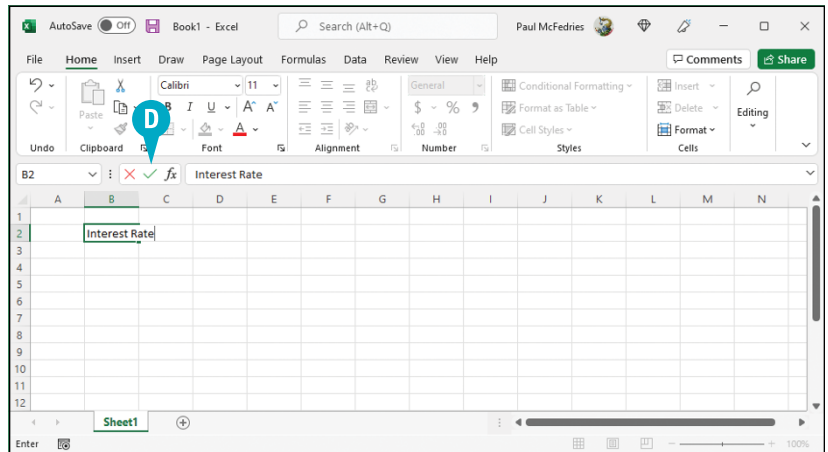
B Excel opens the cell for editing and displays the text as you type.

C Your typing also appears in the formula bar.

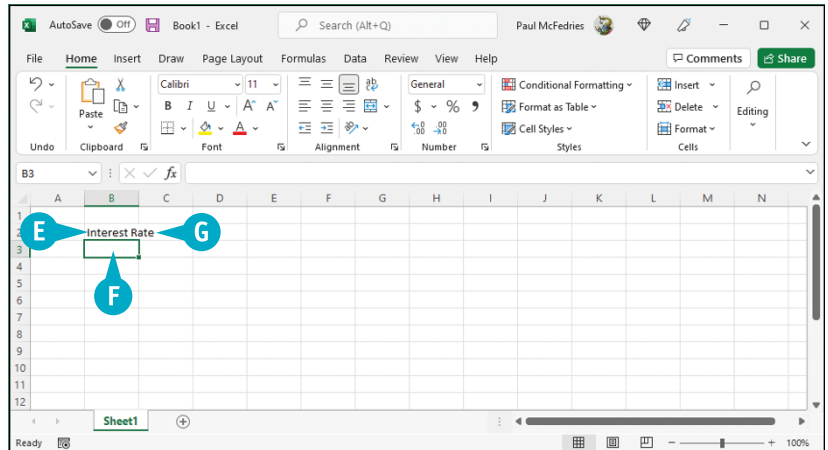
Note: Rather than typing the text directly into the cell, you can also type the text into the formula bar.



- 3** When your text entry is complete, press **Enter**.
- D** If you do not want Excel to move the selection, you can instead either click **Enter** (✓) or press **Ctrl** + **Enter**.



- E** Excel closes the cell for editing.
- F** If you pressed **Enter**, Excel moves the selection to the cell below.
- G** If your text is longer than the cell width, Excel either extends the text into the cell to the right (if that cell is empty, as shown here) or temporarily truncates the display of the text (if the cell to the right is not empty). To learn how to widen a column, see Chapter 5.



TIPS

When I press Enter, the selection moves to the next cell down. Can I make the selection move to the right instead?

Yes. When you have finished adding the data to the cell, press **→**. This tells Excel to close the current cell for editing and move the selection to the next cell on the right. If you prefer to move left instead, press **←**; if you prefer to move up, press **↑**.

When I start typing text into a cell, why does Excel sometimes display the text from another cell?

This is part of an Excel feature called AutoComplete. If the letters you type at the start of a cell match the contents of another cell in the same column, Excel fills in the full text from the other cell under the assumption that you are repeating the text in the new cell. If you want to use the text, click ✓ or press **Enter**; otherwise, just keep typing your text.

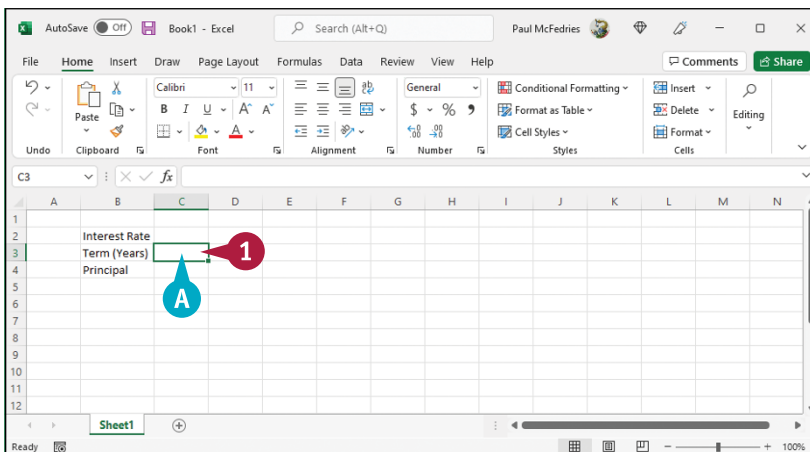
Enter a Number into a Cell

Excel's forte is crunching numbers, so most of your worksheets will include numeric values. Although you will often use numbers by themselves as part of a database or table, many of the numbers you enter will be used as the inputs for the formulas you build, as described in Chapter 6.

You can enter whole numbers (such as 5 or 1,024), decimals (such as 0.25 or 3.14), negative numbers (such as -10 or -6.2), percentages (such as 6% or 25.9%), and currency values (such as \$0.25 or \$24.99). To get the most out of Excel, you need to know how to enter these numeric values.

Enter a Number into a Cell

- 1 Click the cell in which you want to enter the number.
- A Excel marks the current cell by surrounding it with a thick, green border.



- 2 Start typing your number.
 - B Excel opens the cell for editing and displays the number as you type.
 - C Your typing also appears in the formula bar.

Note: Rather than typing the number directly into the cell, you can also type the number into the formula bar.

