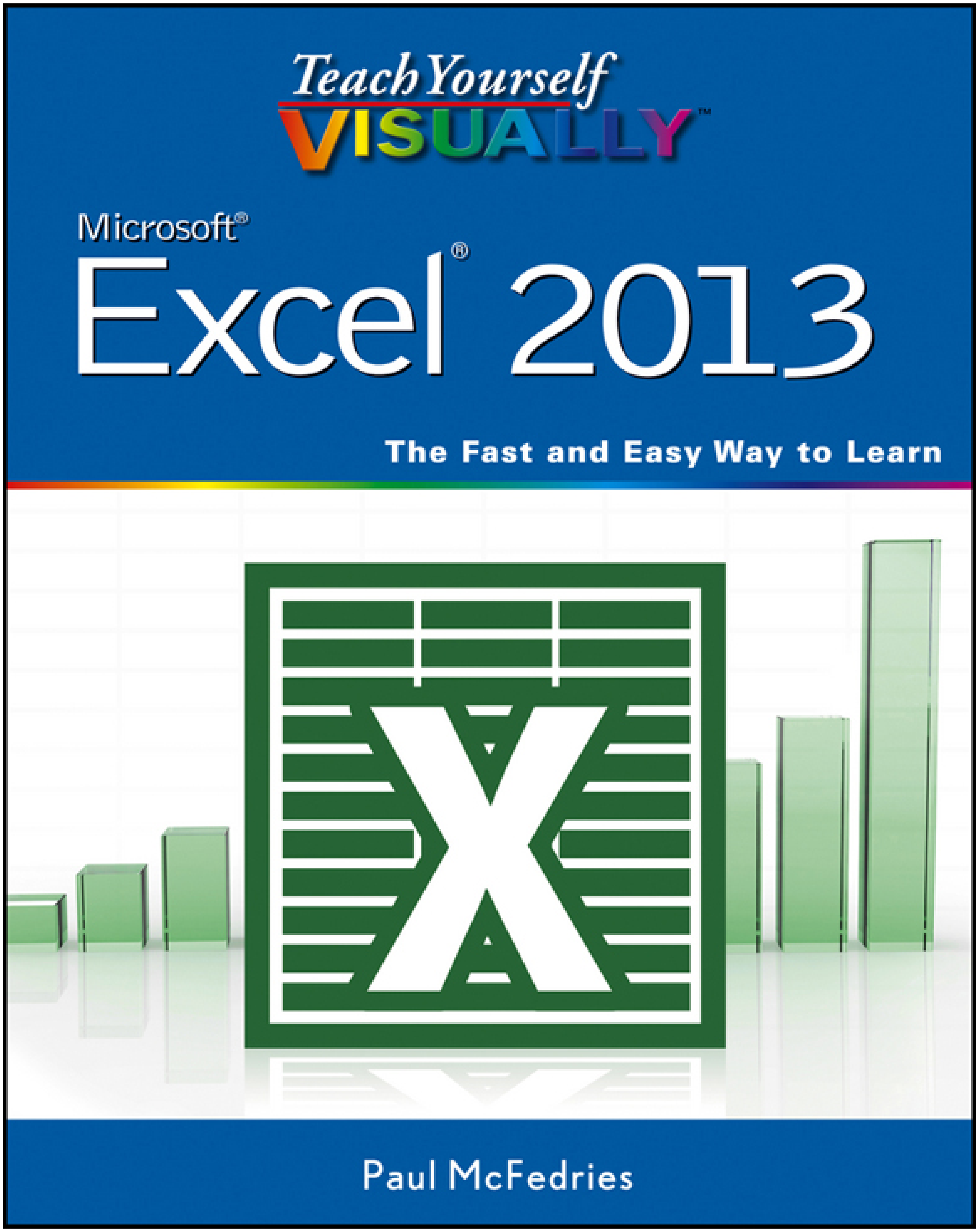
Teach Yourself

VISUALLY™

Microsoft® Excel® 2013

The Fast and Easy Way to Learn

Paul McFedries



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Share a Workbook with Other Users
Track Workbook Changes
Accept or Reject Workbook Changes
Save a Workbook to Your SkyDrive
Send a Workbook as an E-Mail Attachment
Save Excel Data as a Web Page
Make a Workbook Compatible with Earlier Versions of Excel
Mark Up a Worksheet with a Digital Pen
Collaborate on a Workbook Online

Teach Yourself VISUALLY™

Excel® 2013

Visual

Paul McFedries

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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 80 books to his credit. Paul's books have sold more than four million copies worldwide. These books include the Wiley titles *Teach Yourself VISUALLY Windows 8,* *Windows 8 Visual Quick Tips, The Facebook Guide for People Over 50, iPhone 5 Portable Genius,* and *iPad and iPad mini Portable Genius.* Paul is also the proprietor of Word Spy (www.wordspy.com), a website that tracks new words and phrases as they enter the language. Paul invites you to drop by his personal website at www.mcfedries.com or follow him on Twitter @paulmcf and @wordspy.

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 Wiley's immensely talented group of designers and layout artists. They are all listed in the Credits section on the previous page and I thank them for creating another gem. 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 with whom I got to work directly, including project editor Lynn Northrup, copy editor Marylouise Wiack, and technical editor Namir Shammas. Thanks to all of you for your exceptional competence and hard work. Thanks, as well, to Wiley executive editor Jody Lefevere 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

❶ 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.

❷ 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.

❸ Icons and Buttons

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

❹ Tips

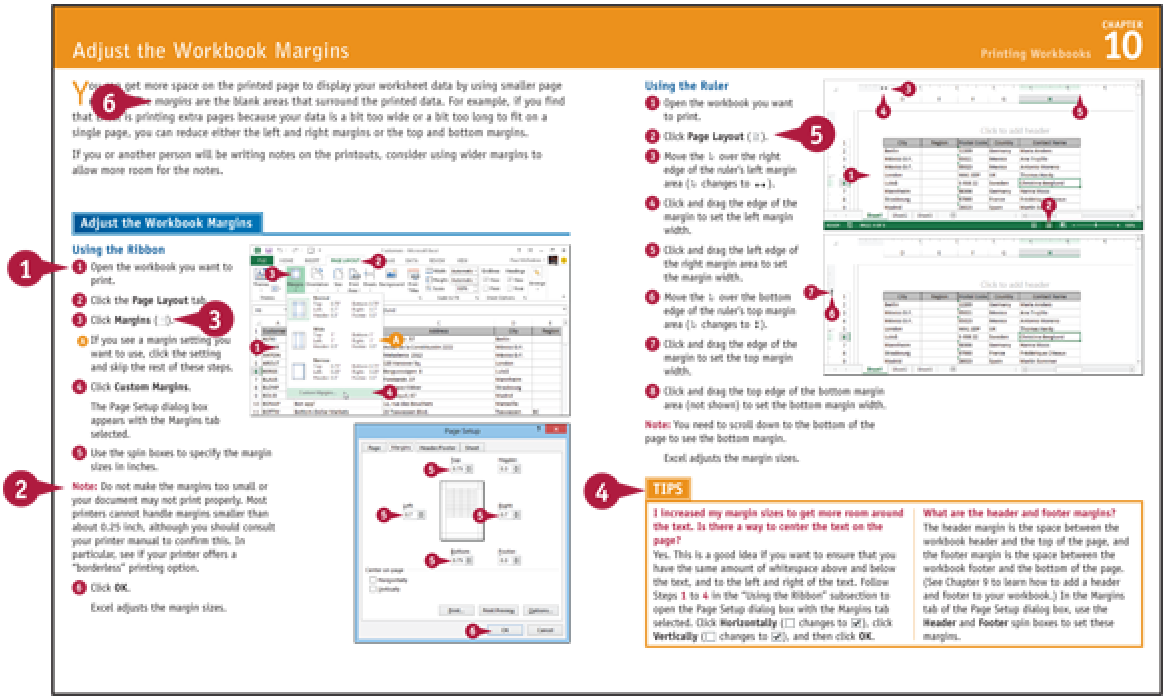
Tips offer additional information, including warnings and shortcuts.

❺ Bold

Bold type shows command names or options that you must click or text or numbers you must type.

❻ Italics

Italic type introduces and defines a new term.



Adjust the Workbook Margins

CHAPTER 10

Printing Workbooks

You can get more space on the printed page to display your worksheet data by using smaller page [illegible] margins are the blank areas that surround the printed data. For example, if you find that [illegible] is printing extra pages because your data is a bit too wide or a bit too long to fit on a single page, you can reduce either the left and right margins or the top and bottom margins.

If you or another person will be writing notes on the printouts, consider using wider margins to allow more room for the notes.

Adjust the Workbook Margins

Using the Ribbon

1. Open the workbook you want to print.
2. Click the **Page Layout** tab.
3. Click **Margins** (▭).

A. If you see a margin setting you want to use, click the setting and skip the rest of these steps.

4. Click **Custom Margins**.

The Page Setup dialog box appears with the Margins tab selected.

5. Use the spin boxes to specify the margin sizes in inches.

Note: Do not make the margins too small or your document may not print properly. Most printers cannot handle margins smaller than about 0.25 inch, although you should consult your printer manual to confirm this. In particular, see if your printer offers a "borderless" printing option.

6. Click **OK**.

Excel adjusts the margin sizes.

Using the Ruler

1. Open the workbook you want to print.
2. Click **Page Layout** (▭).
3. Move the ↖ over the right edge of the ruler's left margin area (↖ changes to ↔).
4. Click and drag the edge of the margin to set the left margin width.
5. Click and drag the left edge of the right margin area to set the margin width.
6. Move the ↖ over the bottom edge of the ruler's top margin area (↖ changes to ↕).
7. Click and drag the edge of the margin to set the top margin width.
8. Click and drag the top edge of the bottom margin area (not shown) to set the bottom margin width.

Note: You need to scroll down to the bottom of the page to see the bottom margin.

Excel adjusts the margin sizes.

TIPS

I increased my margin sizes to get more room around the text. Is there a way to center the text on the page?

Yes. This is a good idea if you want to ensure that you have the same amount of whitespace above and below the text, and to the left and right of the text. Follow Steps 1 to 4 in the "Using the Ribbon" subsection to open the Page Setup dialog box with the Margins tab selected. Click **Horizontally** (☐ changes to ☑), click **Vertically** (☐ changes to ☑), and then click **OK**.

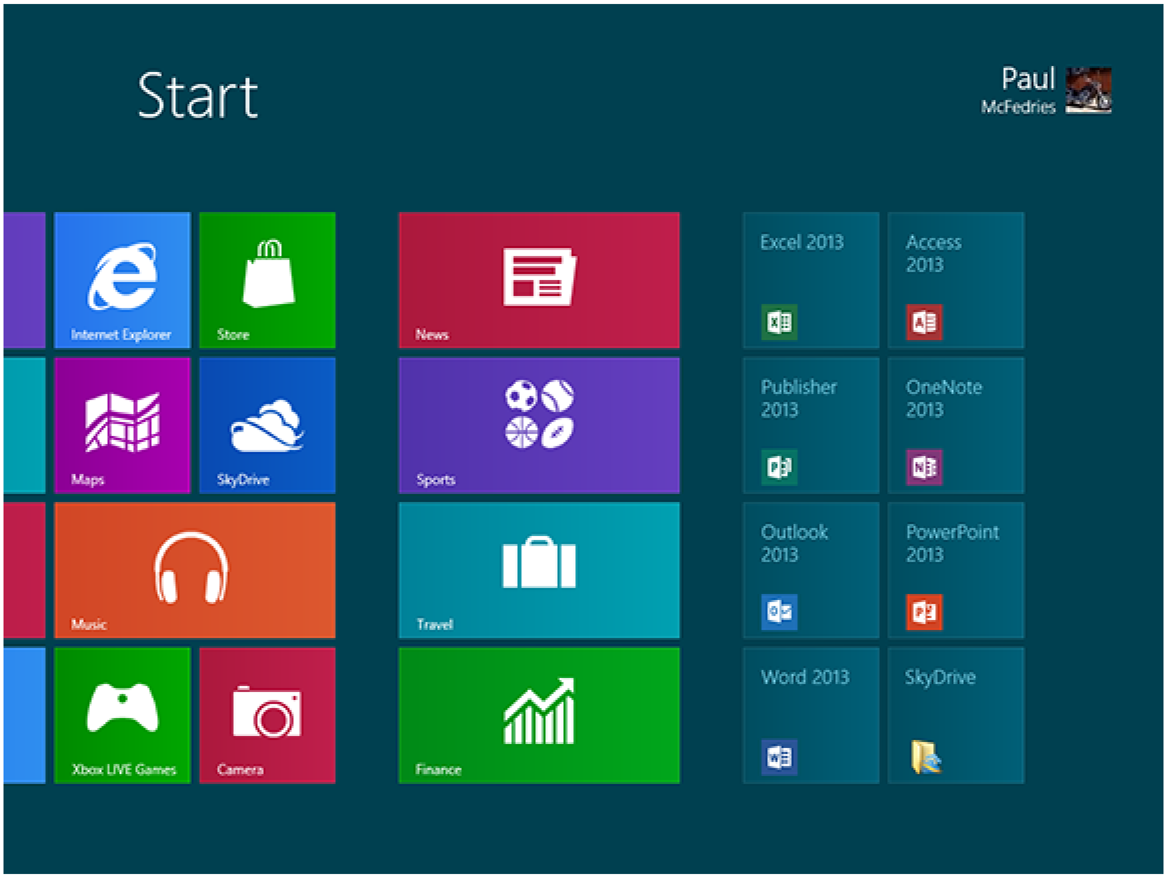
What are the header and footer margins?

The header margin is the space between the workbook header and the top of the page, and the footer margin is the space between the workbook footer and the bottom of the page. (See Chapter 9 to learn how to add a header and footer to your workbook.) In the Margins tab of the Page Setup dialog box, use the **Header** and **Footer** spin boxes to set these margins.

Chapter 1

Working 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 learn about Excel, take a tour of the program’s features, and learn how to customize some aspects of the program.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PowerPoint 2013
Xbox LIVE Games
Camera
Finance
Word 2013
SkyDrive

[Getting to Know Excel](#)

[Start Excel](#)

Tour the Excel Window

Work with the Excel Ribbon

Work with the Excel Galleries

Customize the Quick Access Toolbar

Customize the Ribbon

Change the View

Configure Excel Options

Add Excel to the Windows Taskbar

Quit Excel

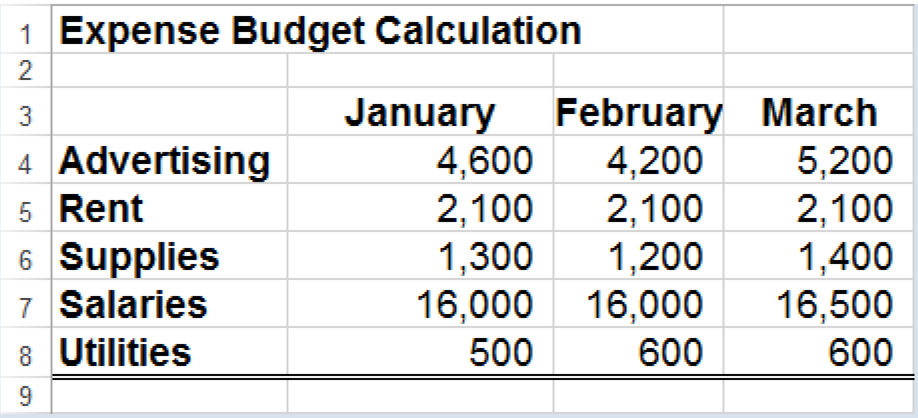
Getting to Know Excel

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

Build a Spreadsheet

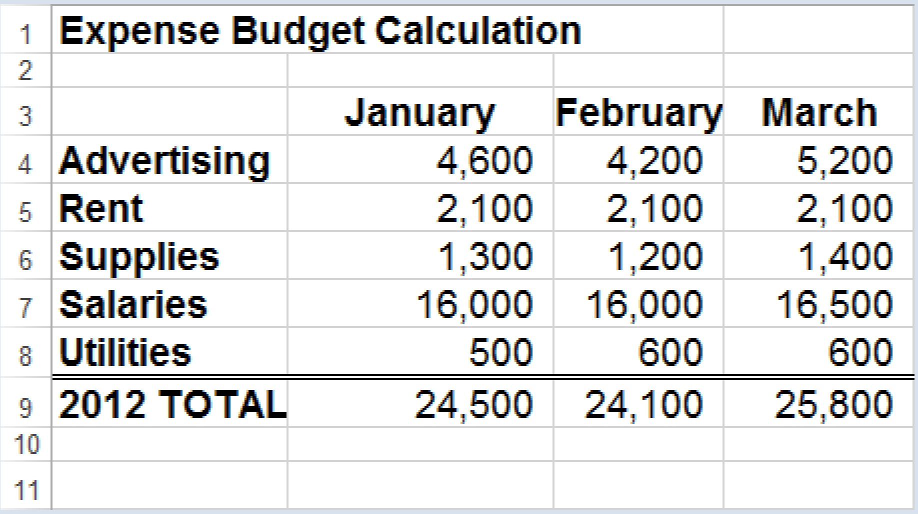
Add Data



1	**Expense Budget Calculation**			
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				

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 in the formula bar. This is the large text box above the column letters. Your typing appears in the cell that you selected. When you are done, press Enter. To edit existing cell data, click the cell and then edit the text in the formula bar.

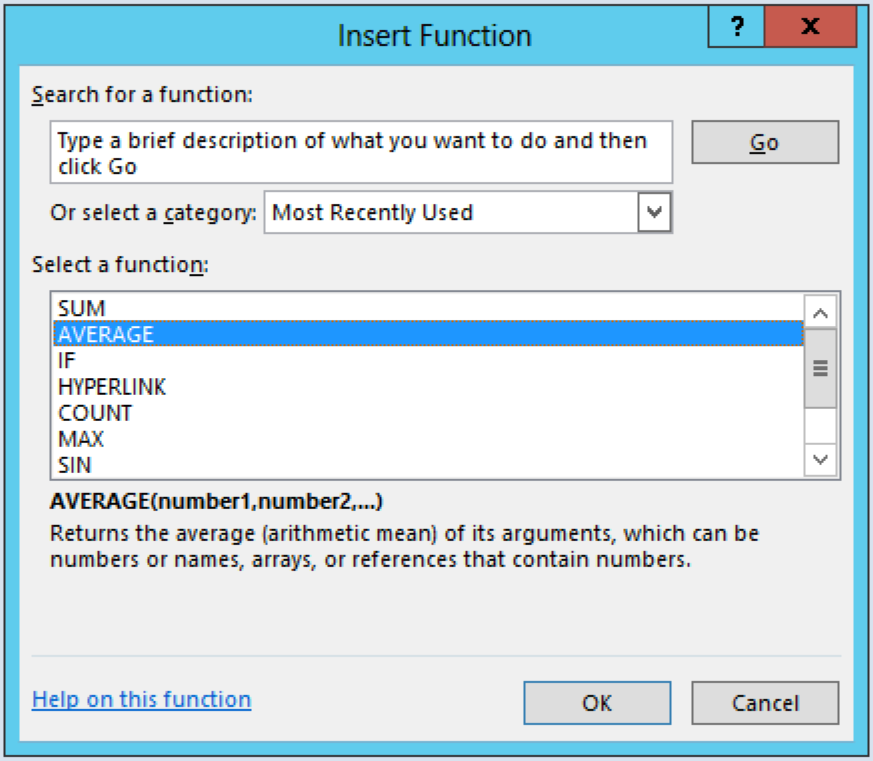
Add a Formula



1	**Expense Budget Calculation**			
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	**2012 TOTAL**	24,500	24,100	25,800
10				
11				

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.

Add a Function


Insert Function
?
Search for a function:
Go
Select a function:
SUM
AVERAGE
IF
HYPERLINK
COUNT
MAX
SIN
Help on this function
OK
Cancel

Type a brief description of what you want to do and then click Go

Or select a category: Most Recently Used

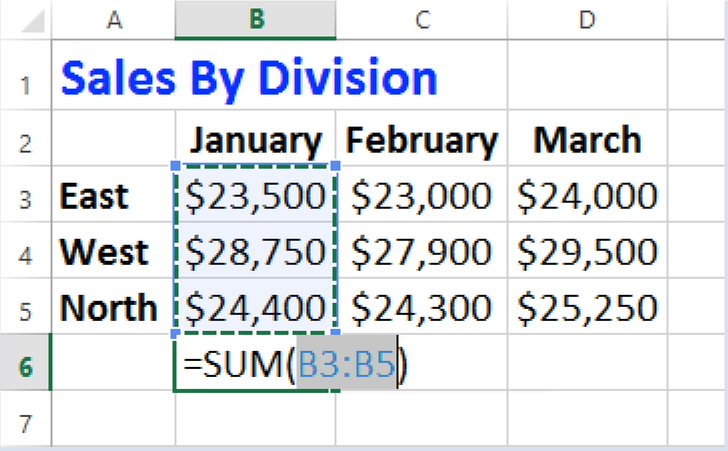
AVERAGE(number1,number2,...)

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

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

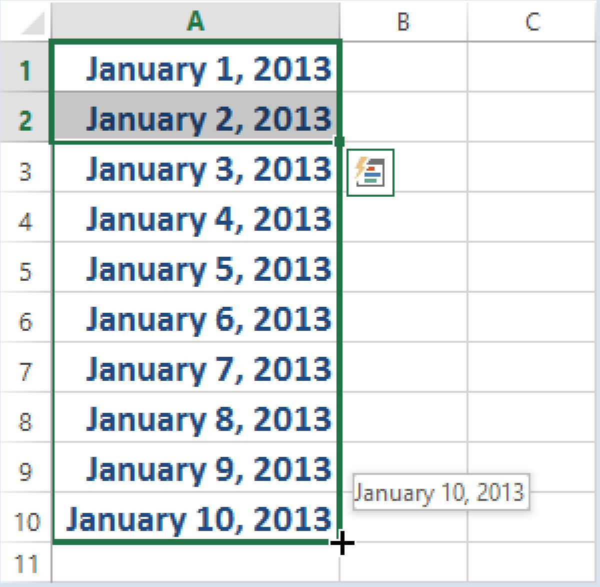
Calculate Totals Quickly



	A	B	C	D
1	Sales By Division			
2		January	February	March
3	East	$23,500	$23,000	$24,000
4	West	$28,750	$27,900	$29,500
5	North	$24,400	$24,300	$25,250
6		=SUM(B3:B5)		
7				

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.

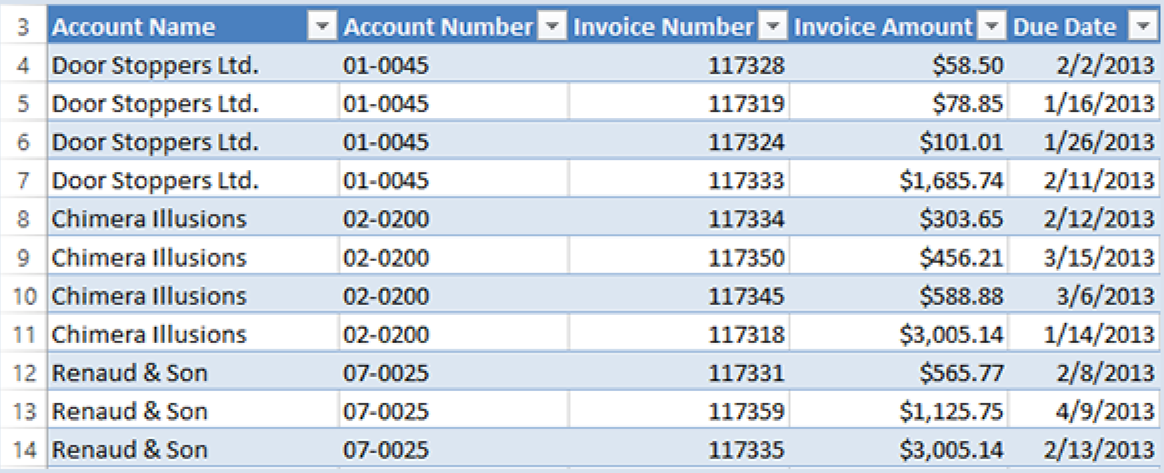
Fill a Series



	A	B	C
1	January 1, 2013		
2	January 2, 2013		
3	January 3, 2013		
4	January 4, 2013		
5	January 5, 2013		
6	January 6, 2013		
7	January 7, 2013		
8	January 8, 2013		
9	January 9, 2013		
10	January 10, 2013		
11			

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.

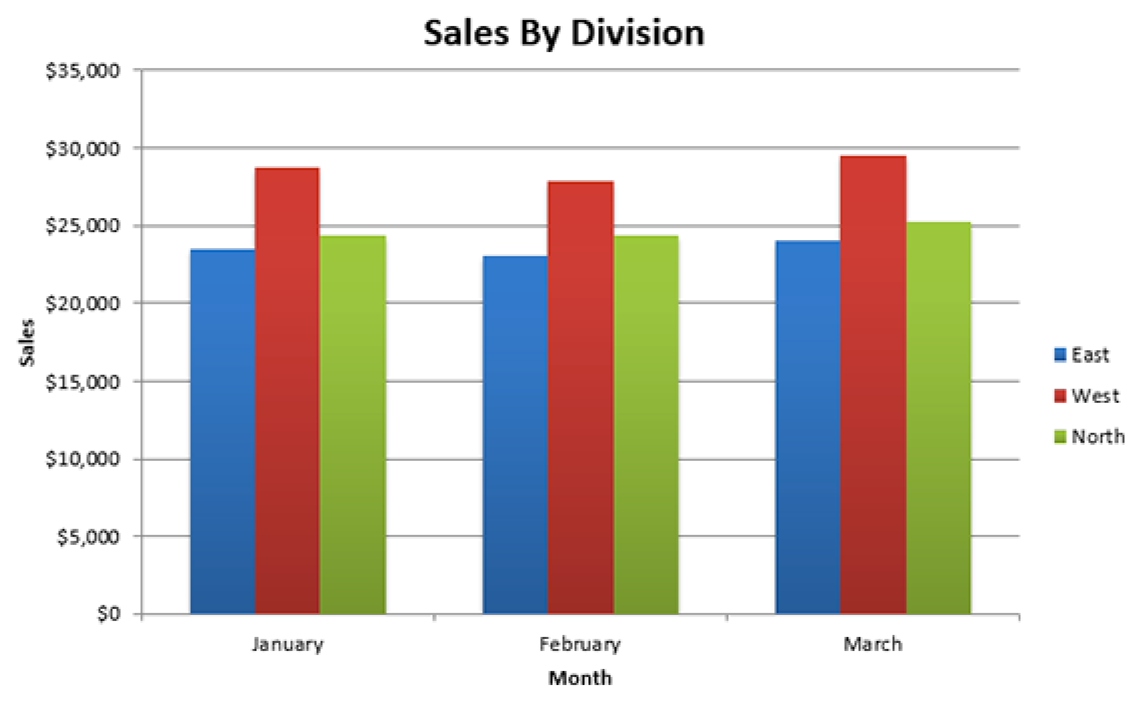
Manage Tables



3	Account Name	Account Number	Invoice Number	Invoice Amount	Due Date
4	Door Stoppers Ltd.	01-0045	117328	$58.50	2/2/2013
5	Door Stoppers Ltd.	01-0045	117319	$78.85	1/16/2013
6	Door Stoppers Ltd.	01-0045	117324	$101.01	1/26/2013
7	Door Stoppers Ltd.	01-0045	117333	$1,685.74	2/11/2013
8	Chimera Illusions	02-0200	117334	$303.65	2/12/2013
9	Chimera Illusions	02-0200	117350	$456.21	3/15/2013
10	Chimera Illusions	02-0200	117345	$588.88	3/6/2013
11	Chimera Illusions	02-0200	117318	$3,005.14	1/14/2013
12	Renaud & Son	07-0025	117331	$565.77	2/8/2013
13	Renaud & Son	07-0025	117359	$1,125.75	4/9/2013
14	Renaud & Son	07-0025	117335	$3,005.14	2/13/2013

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.

Add a Chart



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

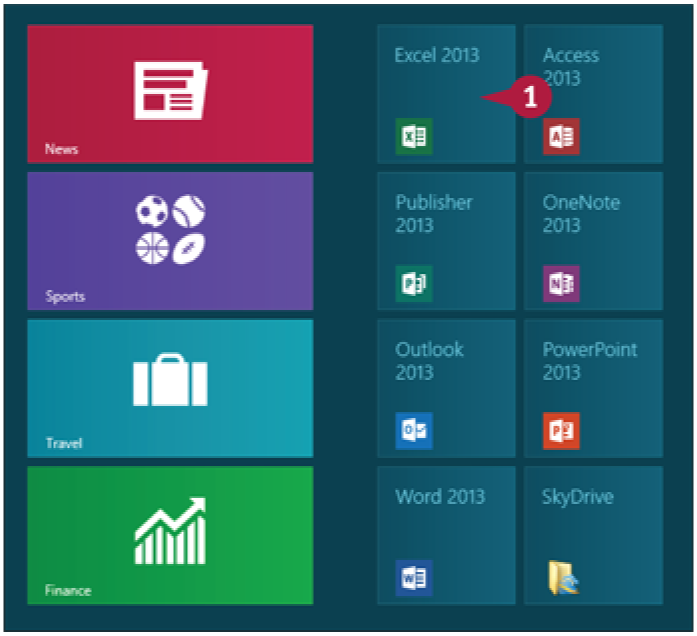
Start Excel

Before you can perform tasks such as adding data and building formulas, you must first start Excel. This brings the Excel window onto the Windows desktop, and you can then begin using the program. How you start Excel depends on which version of Windows you are using. In this section, you learn how to start Excel 2013 in Windows 8 and in Windows 7.

This task and the rest of the book assume that you have already installed Excel 2013 on your computer.

Start Excel

Start Excel in Windows 8

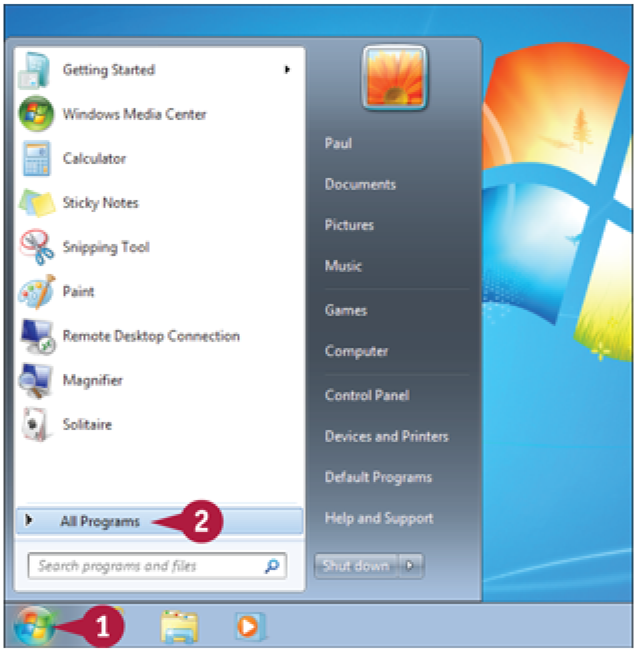

News
Sports
Travel
Finance
Excel 2013
1
Access 2013
Publisher 2013
OneNote 2013
Outlook 2013
PowerPoint 2013
Word 2013
SkyDrive

① In the Windows 8 Start screen, click **Excel 2013**.

The Microsoft Excel window appears on the desktop.

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

Start Excel in Windows 7

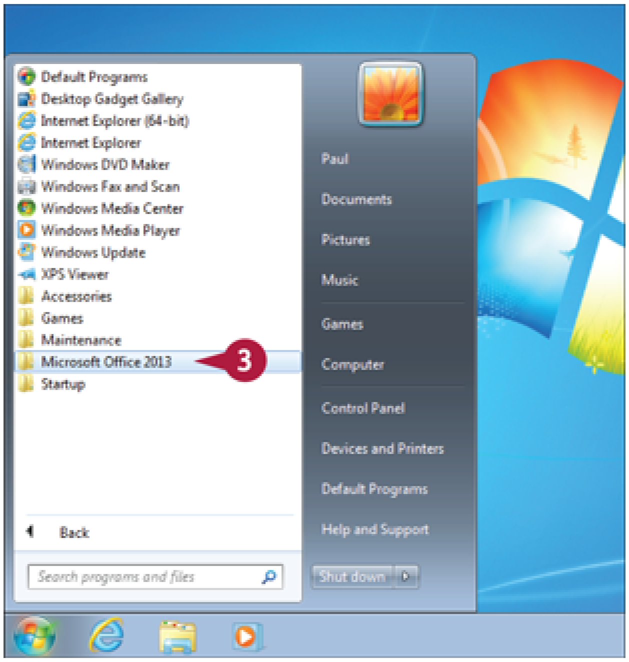

Getting Started
Windows Media Center
Calculator
Sticky Notes
Snipping Tool
Paint
Remote Desktop Connection
Magnifier
Solitaire
All Programs
2
Search programs and files
Paul
Documents
Pictures
Music
Games
Computer
Control Panel
Devices and Printers
Default Programs
Help and Support
Shut down
1

① Click **Start**.

The Start menu appears.

❷ Click **All Programs**.

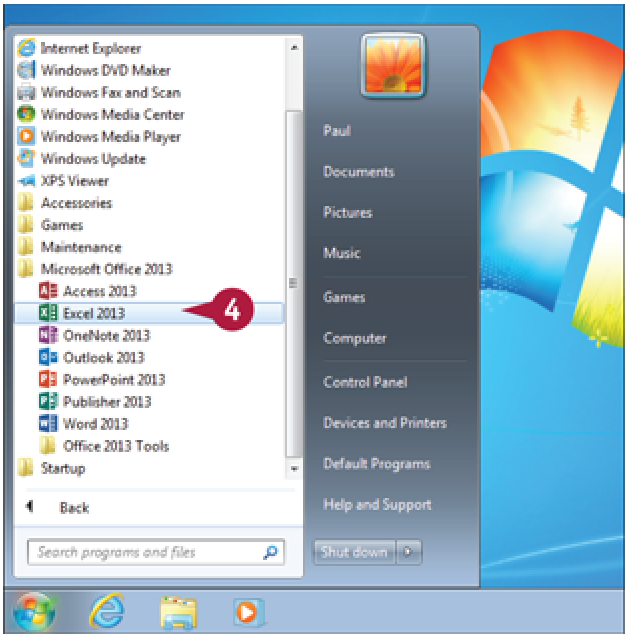
The All Programs menu appears.



Default Programs
Desktop Gadget Gallery
Internet Explorer (64-bit)
Internet Explorer
Windows DVD Maker
Windows Fax and Scan
Windows Media Center
Windows Media Player
Windows Update
XPS Viewer
Accessories
Games
Maintenance
Microsoft Office 2013
3
Startup
Back
Search programs and files
Paul
Documents
Pictures
Music
Games
Computer
Control Panel
Devices and Printers
Default Programs
Help and Support
Shut down

❸ Click **Microsoft Office 2013**.

The Microsoft Office menu appears.



Internet Explorer
Windows DVD Maker
Windows Fax and Scan
Windows Media Center
Windows Media Player
Windows Update
XPS Viewer
Accessories
Games
Maintenance
Microsoft Office 2013
Access 2013
Excel 2013
4
OneNote 2013
Outlook 2013
PowerPoint 2013
Publisher 2013
Word 2013
Office 2013 Tools
Startup
Back
Search programs and files
Paul
Documents
Pictures
Music
Games
Computer
Control Panel
Devices and Printers
Default Programs
Help and Support
Shut down

❹ Click **Excel 2013**.

The Microsoft Excel window appears on the desktop.

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

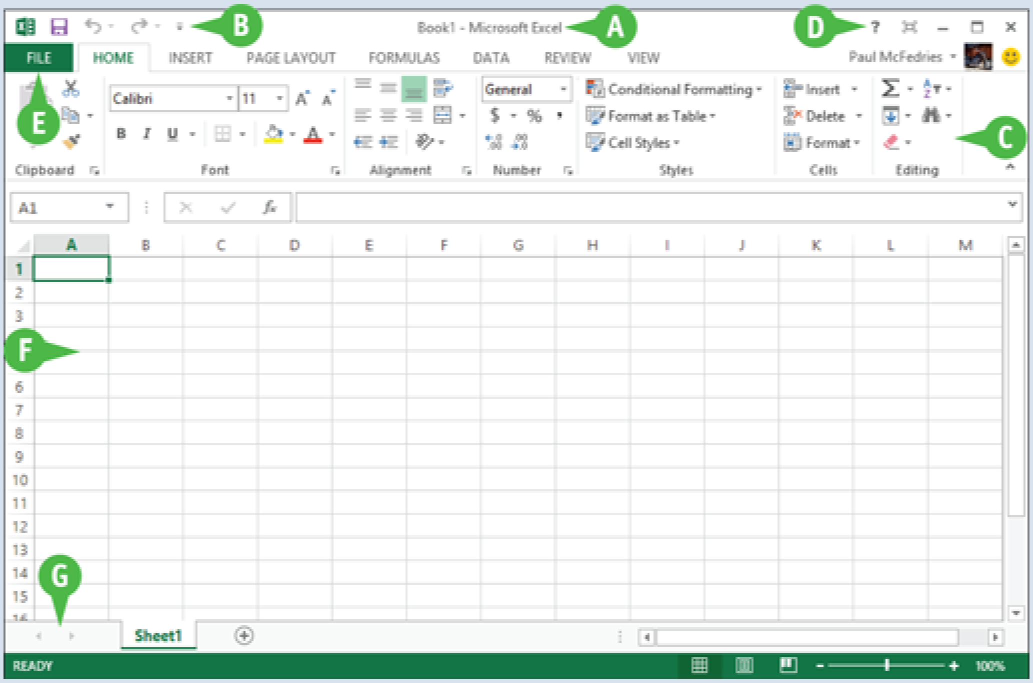
Tip

Are there faster methods I can use to start Excel?

Yes. After you have used Excel a few times in Windows 7, it should appear on the main Start menu in the list of your most-used programs. If so, you can click that icon to start the program. You can also add the Excel icon to the Start menu by following Steps 1 to 3 in the “Start Excel in Windows 7” subsection, right-clicking the **Excel 2013** icon, and then clicking **Pin to Start Menu**. If you are using Windows 8, you can right-click the **Excel 2013** tile and then click **Pin to Taskbar** to add the Excel icon to the desktop taskbar.

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, Quick Access Toolbar, and File tab; and Excel-specific elements such as the worksheet.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A Title Bar

The title bar displays the name of the current workbook.

B Quick Access Toolbar

This area gives you one-click access to commands that you use often. To learn how to customize this toolbar, see “Customize the Quick Access Toolbar,” later in this chapter.

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

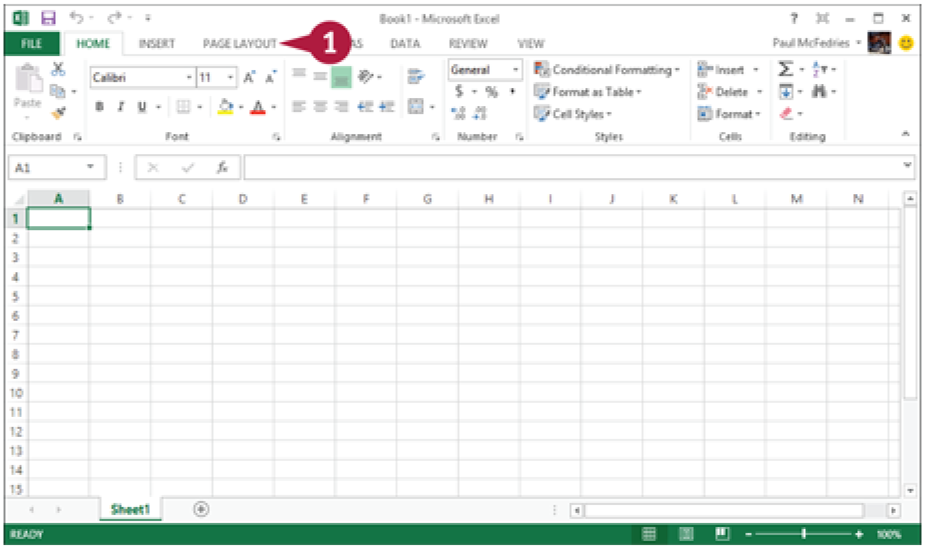
This area displays messages about the current status of Excel, the results of certain operations, and other information.

Work with the Excel Ribbon

You use the Ribbon element to access all the features, commands, and options in Excel. The Ribbon is organized into various tabs, such as File, Home, and Insert, and each tab contains a collection of controls that are related in some way. For example, the File tab contains controls related to working with files, such as opening, saving, and printing them. Similarly, the Insert tab contains controls related to inserting objects into a worksheet. Each tab usually includes buttons, lists, and check boxes.

There is no menu bar in Excel, so you do not use pull-down menus to access commands.

Work with the Excel Ribbon


Book1 - Microsoft Excel
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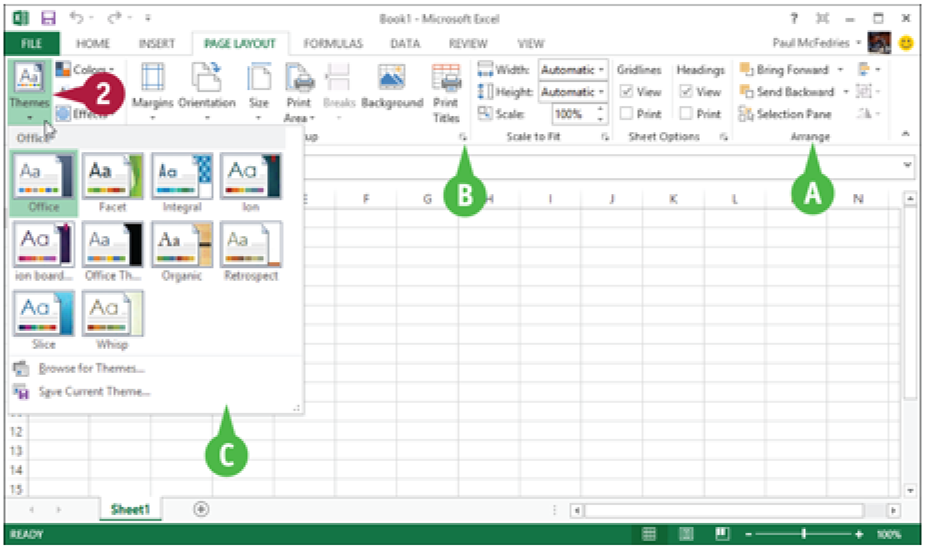
① Click the tab that contains the Excel feature you want to work with.

Excel displays the controls in the tab.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Breaks
Background
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Height: Automatic
Scale: 100%
Scale to Fit
Gridlines
Headings
View
Print
Sheet Options
Bring Forward
Send Backward
Selection Pane
Arrange
Office
Facet
Integral
Ion
Ion Board...
Office Th...
Organic
Retrospect
Slice
Wisp
Browse for Themes...
Save Current Theme...
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B
C
Sheet1
READY
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A Each tab is organized into groups of related controls, and the group names appear here.

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.