GETTING TO KNOW EXCEL 2016

Microsoft Excel is a *spreadsheet* application that is usually part of a suite of Microsoft applications, known as **Microsoft Office**.

You can use Excel for all sorts of tasks involving numbers such as budgeting, sales analysis, forecasting, charting and graphing and much more. Excel is a tool used to perform calculations with numbers, so virtually any task that requires calculation and number crunching can be setup and performed in Excel.

Before you start creating anything, it is worth taking some time to become familiar with the Excel environment and its features.

In this session you will:

- ✓ learn how to start **Excel** from the desktop in **Windows 10**
- ✓ gain an understanding of the **Excel Start** screen
- ✓ gain an understanding of the **Excel 2016** workbook screen
- ✓ gain an understanding of how **Excel** works
- ✓ learn how to use the ribbon to access commands
- ✓ learn how to show and collapse the ribbon
- ✓ gain an understanding of **Backstage** view in **Excel**
- ✓ learn how to access the **Backstage** view
- ✓ learn how to use shortcut menus
- ✓ gain an understanding of how dialog boxes work
- ✓ learn how to launch a dialog box
- ✓ gain an understanding of the **Quick Access Toolbar**
- ✓ learn how to add commands to the **Quick Access Toolbar**
- ✓ gain an understanding of the status bar
- ✓ learn how to exit correctly and safely from **Excel**.

STARTING EXCEL FROM THE DESKTOP

To create or edit a workbook, the first thing you must do is start Excel. The first time you use Excel you will need to open it from the taskbar *Search the web and Windows* bar or the *All* *apps* list in the *Start* menu. You can then choose to pin it to the *Start* menu or the taskbar so that you can access it more quickly and easily the next time you use it.

Try This Yourself:

Before you begin, ensure that your computer is switched on and the desktop is displayed…

1 If there is no *Excel* icon in the taskbar at the bottom of the desktop, click on the *Windows* icon in the taskbar, as shown, to display the *Start* menu

2 Click on *All apps* to display a list of all the apps on your computer

3 Scroll down to the *E* section

Excel 2016 is listed here…

4 Click on *Excel 2016* to start Excel

5 Right-click on the Excel icon in the taskbar to display a menu of options, as shown, then select **Pin this program to taskbar**

You can now click on this icon to open Excel from the desktop. This icon will remain in the taskbar unless you remove it…

6 Repeat step *5* to select **Close window** to close Excel

7 Click on the Excel icon in the taskbar to open *Excel* again
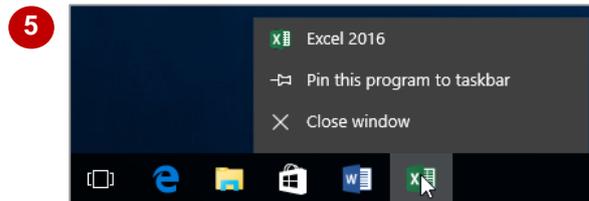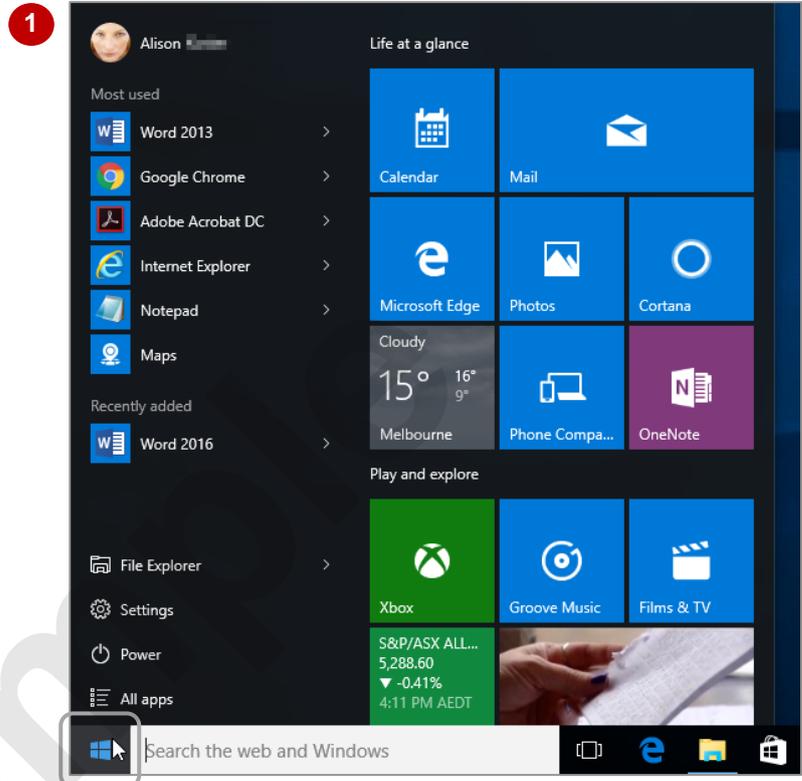
For Your Reference…

To *add* an *Excel icon* to the *desktop taskbar*:

1. Display the *Start* menu, then click on *All apps*
2. Right-click on *Excel 2016*
3. Select **Pin to taskbar**

Handy to Know…

- You can start Excel by clicking in the taskbar *Search…* bar, typing **excel**, then clicking on Excel in the list of search results.

- You can pin Excel to the *Start* menu by displaying the *All apps* list, right-clicking on *Excel 2016* and selecting **Pin to Start**.

UNDERSTANDING THE EXCEL START SCREEN

Unless you start Excel with a specific data file, *Excel 2016* will open with the Excel *start* screen displayed. This acts as a gateway into Excel and from this initial screen you can choose what kind of workbook you want to work with. You can choose to work with a recent file, open an existing file, or create a new file using the available templates.

The Excel 2016 Start Screen

In Microsoft Excel your data is stored in a file referred to as a workbook.

The Excel 2016 start screen is very helpful if you want to quickly access files you have worked on recently or create a new workbook file based on one of the available templates (including the default Blank workbook template). It acts as a gateway into the program.

If you have already worked on workbooks, a list of recent files will display below *Recent* in the green pane to the left of the screen. If you haven't worked on any workbooks yet you can open existing files by clicking on *Open Other Documents* (below *Recent* in the left green pane). This allows you to open an existing workbook file from your computer or *OneDrive*.

The right side of the start screen displays thumbnail previews of available templates you can use to create a new workbook. It also contains the *Search for online templates* box, which you can use to search the internet for additional templates.

Templates are simply layouts that have already been created which you can customise to suit your needs and then enter relevant data. If you want to start with a clean slate you can choose the *Blank workbook* template – you'll probably find this is the one you'll use the most.

In the top right corner of the start screen you'll see information about the account you've used to sign into Windows, as well as commands such as *Microsoft Excel Help*, *Minimise*, *Restore Down* (or *Maximise*) and *Close*.
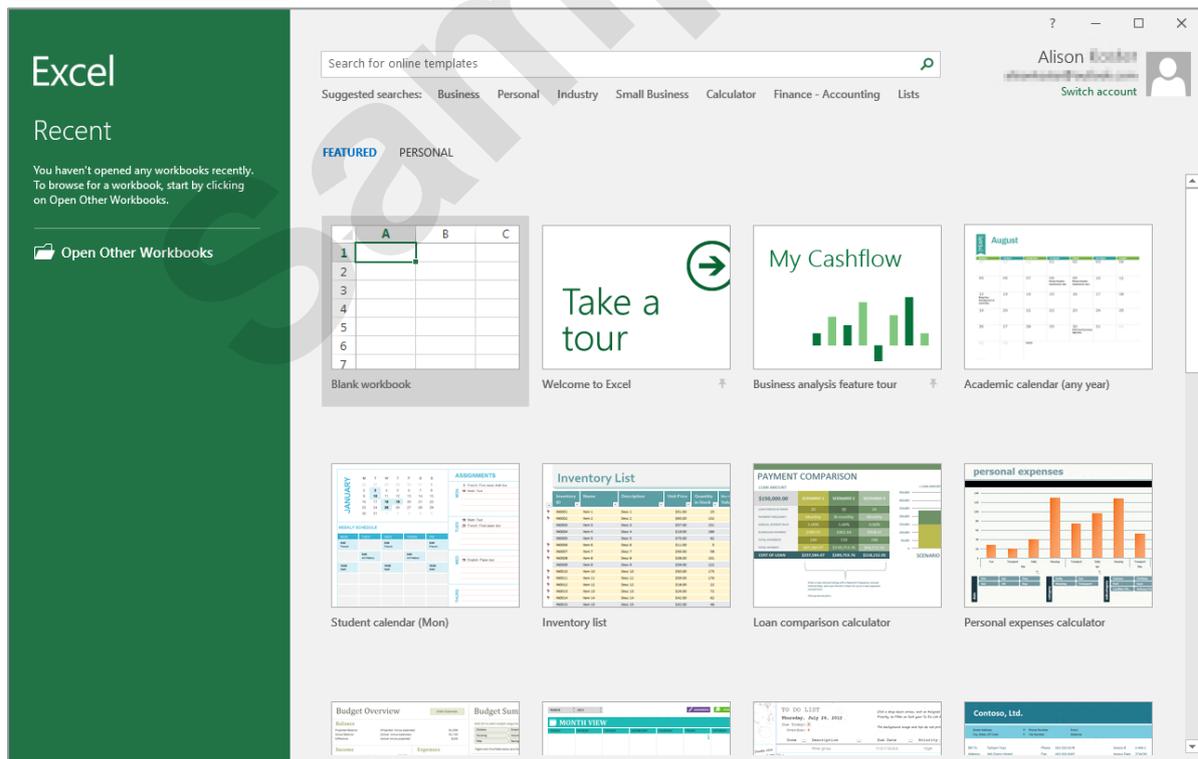

The *start* screen will only display when you launch the *Excel 2016* application directly – that is, by clicking on *Excel 2016* in the *All apps* list in the *Start* menu, searching for Excel and clicking on it in the search results, or clicking on the taskbar icon if the application has been pinned to the desktop taskbar.

Excel 2016 can also be started by double-clicking on a workbook file in *File Explorer*. When this occurs *Excel 2016* will bypass the *start* screen shown above and open the workbook directly.

THE EXCEL WORKBOOK SCREEN

The *Excel* screen is made up of several key components which are described on this page. Some of these components, such as the *ribbon* and *Backstage* view, are common to all other

Office 2016 applications so once you know how they work you won't have to relearn them when you use other applications.
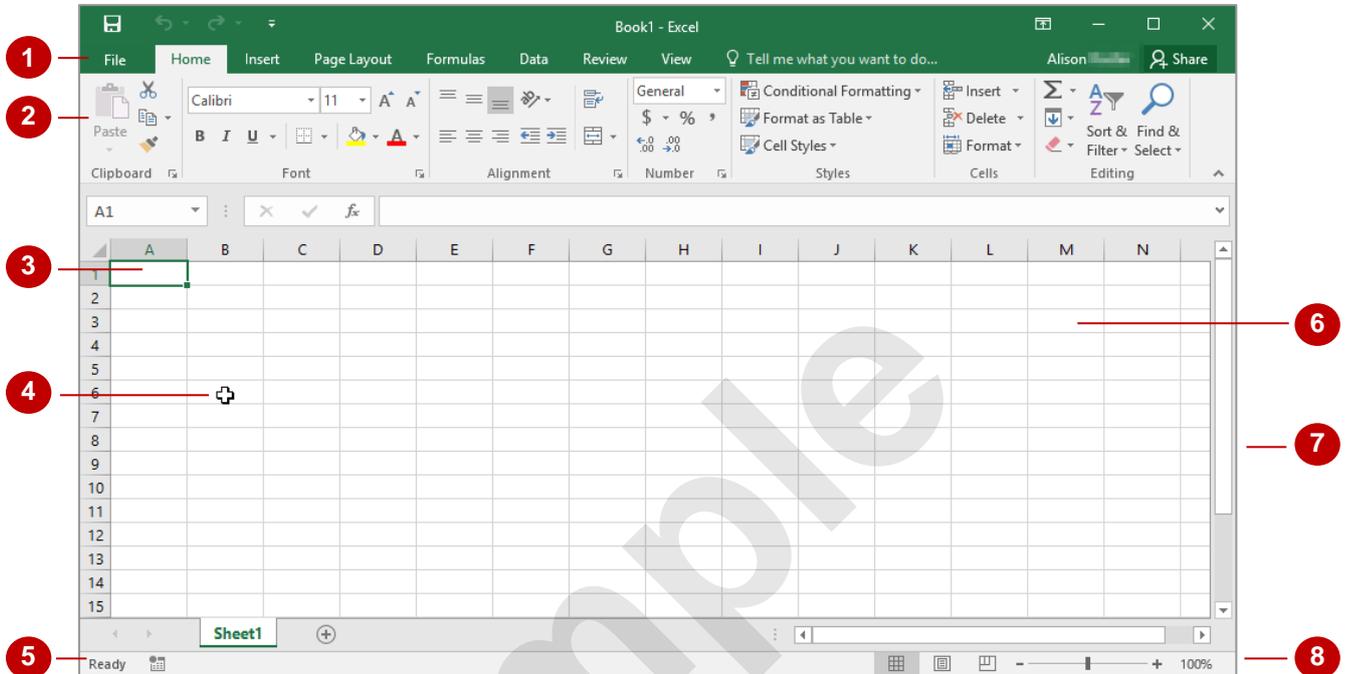
① The *File* tab is used to access the *Backstage* view which contains file management functions, such as saving, opening, closing, printing, sharing, and so on. There is also information contained here such as your document *Properties*. *Options* are also available so that you can set your working preferences for Excel.

② The *ribbon* is the tabbed band that appears across the top of the window. It is the control centre of Excel. You use the *tabs* on the ribbon to access the *commands* that are categorised into *groups*.

③ The *active cell* is where text, numbers, and formulas will appear when you start typing.

④ The *mouse pointer* is used, amongst other things, to select a cell and make it active. It may appear as a large cross, as in this example, as an I-bar, or any number of other forms, depending upon its function at that position on the screen.

⑤ The *status bar* appears across the bottom of the window and displays useful information about what is happening in the worksheet. At present it shows *Ready* which means that Excel is ready to be used for your project.

⑥ The *worksheet* is like an electronic piece of paper ruled into columns and rows. The worksheet is where you type numbers, letters, and formulas to perform calculations. Notice that columns are headed using letters of the alphabet (A, B, C, etc.) while rows are designated using numbers down the left side.

⑦ The *scroll bar* indicates your current position in the worksheet and lets you move to other positions in the worksheet by clicking or dragging. The arrows can also be used to move through the worksheet.

⑧ The *View* buttons and the *Zoom Slider* are used to change the view or to increase/decrease the zoom ratio for your worksheet.

HOW EXCEL 2016 WORKS

For a new user the Microsoft Excel 2016 screen can seem intimidating. However, you'll soon see that it is made up of three key areas. The data you type is placed on a *worksheet*. The data within the worksheet can be manipulated and changed using commands on the *ribbon*. The worksheet is part of a larger entity known as a workbook which is controlled on the *Backstage*.

The Worksheet

A worksheet appears as a number of rows and columns which form squares known as *cells*. Everything you type in Excel is entered into these cells. In the simple business plan shown to the right there are numbers and words entered into a worksheet. *Formulas* are also entered that automatically perform calculations. The *worksheet* is part of a larger entity known as a *workbook* – workbooks can be filed away for future use or for sharing and can also be printed.
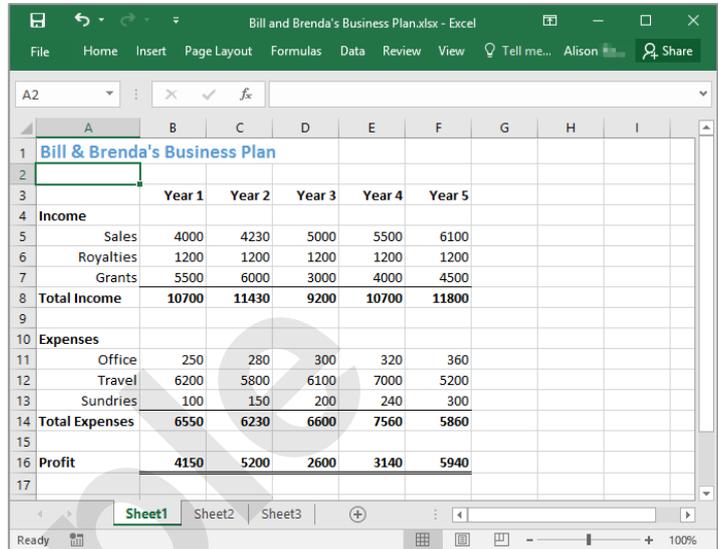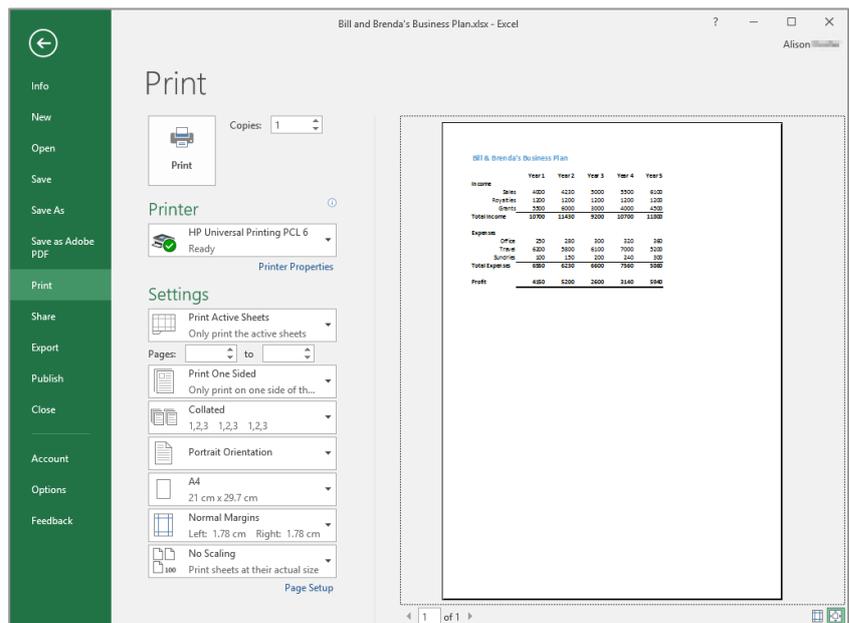

The Ribbon

When you need to do something with the data in a worksheet, such as format it, colour it, analyse it, move it, copy it, and much more, you'll find all of the relevant commands on the *ribbon*. The ribbon has commands organised thematically using a series of tabs across the top.
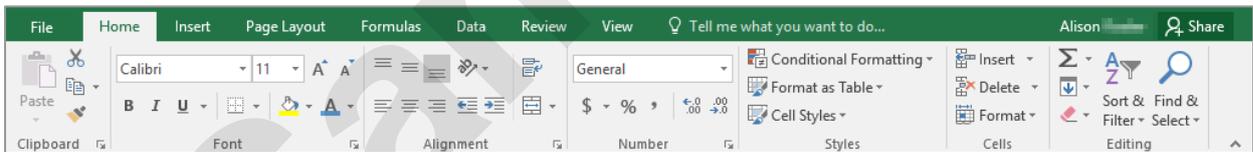
The Backstage View

When you want to do something with the data in your workbook, such as save it so that you can access it again later, print it, share it with a colleague, send it to your boss, protect it from prying eyes, or whatever, you will need to access the *Microsoft Office Backstage* area of Microsoft Excel. The *Backstage* is accessed using the *FILE* tab on the ribbon. Rather than offering you commands on a ribbon, *Backstage* occupies the entire screen and has a series of options down the left side. Here the *Print* option is active, and that is why you can see a preview of the worksheet and a series of print-related options.

USING THE RIBBON

The *ribbon* is the command centre for Microsoft Excel. It provides a series of *commands* organised into *groups* and placed on relevant *tabs*. Tabs are activated by clicking on their name to display the command groups. *Commands* are activated by clicking on a button, tool or gallery option. Everything you could possibly want to do in Excel will be found somewhere on this ribbon.

Try This Yourself:

Before you begin ensure Excel has started and you have a blank workbook open…

1 Examine the *groups* on the **Home** tab of the ribbon

These are the most commonly used commands, including copy and paste, font and number formatting, styles and editing...

2 Click on the *Insert* tab

The commands on this tab are used to create tables, illustrations, charts, headers and footers, text objects and symbols...

3 Click on *Shapes* in the *Illustrations* group

A gallery of shapes will appear which can be inserted into the worksheet…

4 Click on some of the other *tabs* across the top of the ribbon (*Page Layout*, *Formulas*, etc.) and examine the commands on them

Some of these open "dialog boxes"...

5 On the *View* tab, click on *Zoom* in the *Zoom* group to display the *Zoom* dialog box

6 Click on **[Cancel]** then click on the *Home* tab
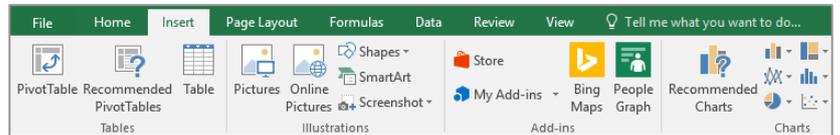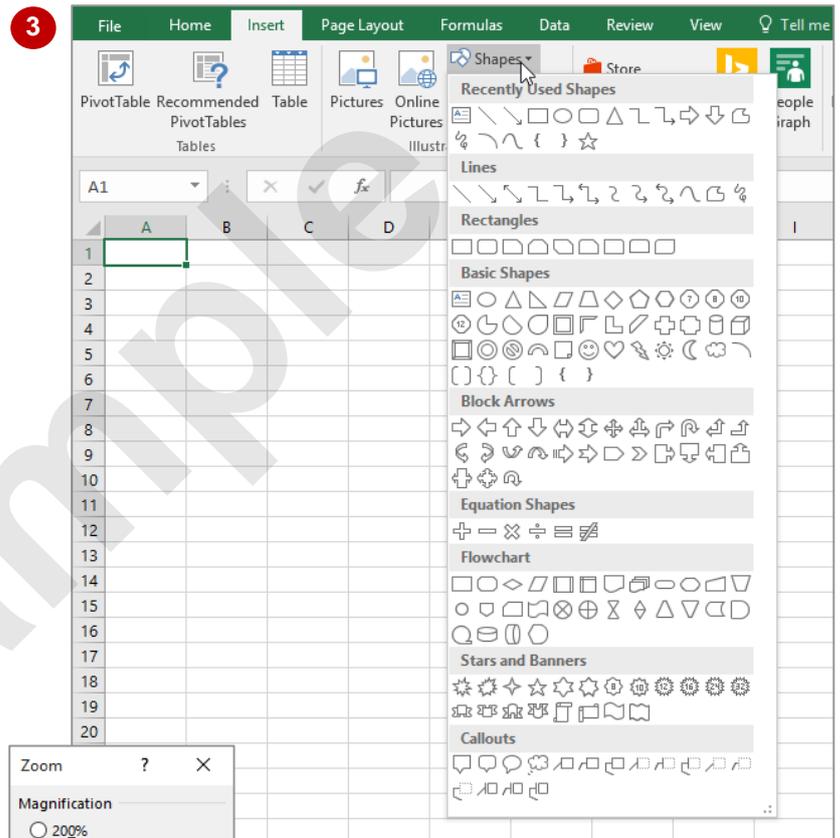
Dialog boxes like this one provide settings or options for you to choose from. For example, in this one you can zoom the screen by varying percentages. We won't actually do anything at this point. You'll get plenty of opportunity for using dialog boxes at a later stage.

For Your Reference…

To *use* the *ribbon*:

1. Click on a *tab* to display the commands
2. Click on a *button* to activate a *command*, display a *gallery*, or display a *dialog box*

Handy to Know…

- Additional tabs known as *contextual tabs* appear in specific circumstances. For example, if you insert a picture, the *Picture Tools: Format* tab will appear. This provides quick access to all of the tools you may need in order to modify and work with the picture.

SHOWING AND COLLAPSING THE RIBBON

The *ribbon*, valuable as it is, does occupy a reasonable amount of space. To maximise your working space you can minimise the *ribbon* so only the tabs are visible, minimise it as a once-off

operation or have it constantly minimised and display full commands only briefly when a tab is clicked. You can do all this by using *Ribbon Display Options* button.

Try This Yourself:

Before you begin ensure Excel has started and you have a blank workbook open…

1 Click on the *Insert* tab to display the *Insert* commands

2 Double-click on the *Insert* tab to minimise the ribbon

While the tabs stay visible, the rest of the commands are hidden...

3 Click on *Ribbon Display Options* in the top right of the *title bar* to display a menu

**4** Click on *Show Tabs and Commands* to redisplay the ribbon with the commands

The ribbon is now displayed permanently but we can change this so that the ribbon only appears when we are using a tab…

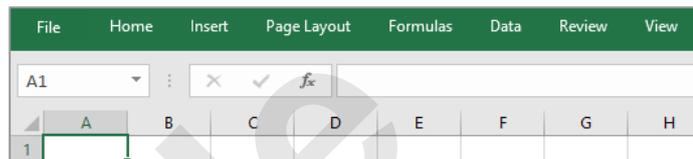**5** Click on *Ribbon Display Options* and click on *Show Tabs*

6 Click on the *Home* tab to display the ribbon, then click back into the worksheet

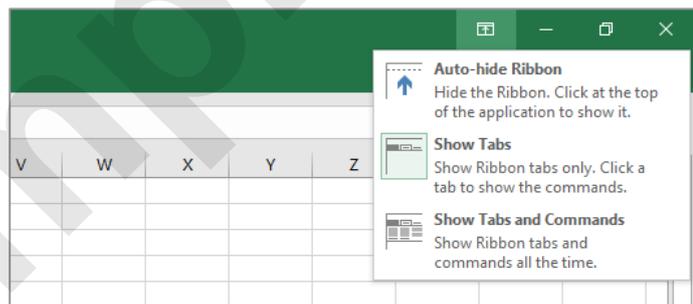*The ribbon will hide again – it only becomes visible when you click on a tab…*

7 Double-click on the *Insert* tab to redisplay the ribbon permanently again

1

2

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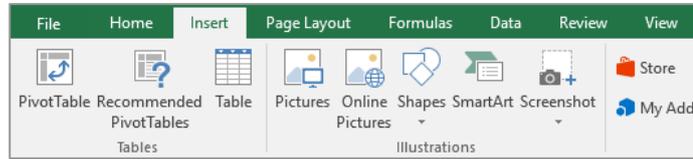
3 *The Auto-hide Ribbon function hides both the tabs and the commands on the ribbon. You can access the ribbon by pointing to the top of the screen and double-clicking on the blue bar when it appears. The ribbon will automatically hide when you click back into your worksheet.*

For Your Reference…

To *hide/display* the *ribbon*:

1. Double-click on the active tab to hide the ribbon
2. Click on a tab to see the ribbon temporarily
3. Double-click on a tab to show the ribbon permanently

Handy to Know…

- You can hide the ribbon by clicking on *Collapse the Ribbon.* This button is located at the far right end of the ribbon.
- You can use the keyboard shortcut Ctrl + F1 to show or hide the ribbon.

UNDERSTANDING THE BACKSTAGE VIEW

The ribbon lets you work on the content in a document so that you can add more content, format it, insert pictures into it, copy it, and much more. The *Backstage* view, which is accessed using the *File* tab, lets you do something with the content you create, such as save it for later use, print it on paper, send it via email, and more by using the options found in *Backstage* view.
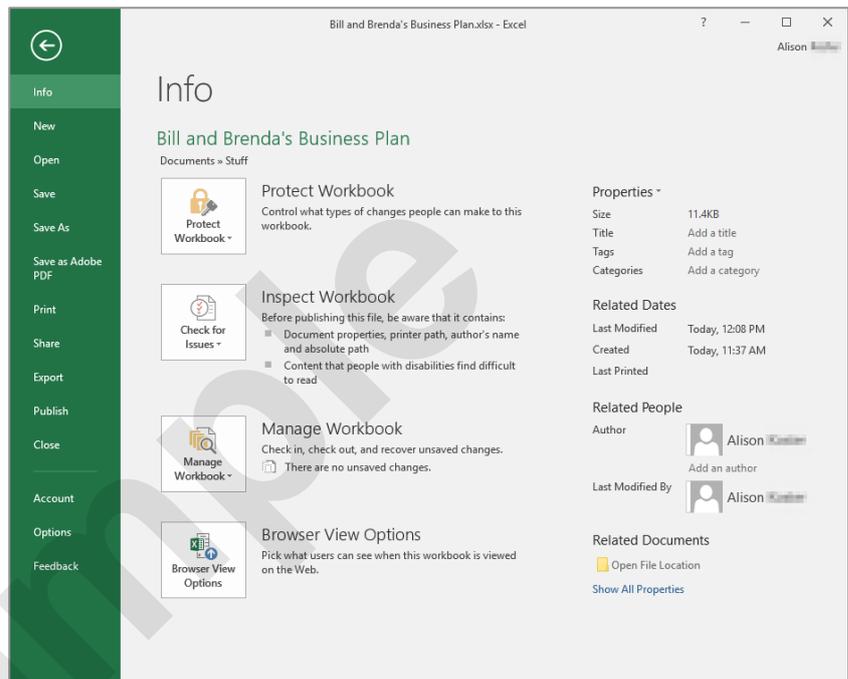
The Backstage View

The *File* tab on the ribbon is not a normal tab. Clicking on the *File* tab launches a mini-program within Microsoft Excel known as *Backstage* view. *Backstage*, as it's known for short, occupies the entire screen.

At the left of the *Backstage* is a navigation pane which is made up of *tabs*. These tabs provide you with access to various operations, such as printing, saving and sharing. They can also provide you with information about your workbook such as the file size.

Clicking on one of these tabs displays a range of options associated with the particular operation.

The whole underlying purpose of *Backstage* is to let you protect your data, share it with others, and provide you with valuable information about your workbook. Depending on what type of workbook it is and what has been done to it, different information may display when the *Info* tab is selected.

Backstage Tabs

The *Backstage* tabs provide more options for working with a document.

|	
Info	Provides status information about the current workbook and lets you manage versions and permissions.
New	Lets you create a new workbook and provides access to a gallery of inbuilt templates and ready access to a range of online templates.
Open	Provides a list of recent workbooks as well as the option to search through your Computer, OneDrive or other place, to find what you are looking for.
Save	Saves your current workbook (if already saved to a location) or prompts you to save to a location.
Save As	Allows you to name your workbook and save it to a location.
Print	Allows you to print the current workbook and preview it.
Share	Allows you to share your workbook with other people via email, online presentation, blog or Cloud (OneDrive).
Export	Allows you to create a PDF/XPS document or change the file type of your workbook.
Close	Closes your current workbook.
Account	Contains product and user information.
Options	Presents you with a range of options which assist in the creation and editing of your workbook.
Feedback	Allows you to provide Microsoft with feedback regarding Excel 2016.

ACCESSING THE BACKSTAGE VIEW

The *Backstage* view provides options for working on workbook files and key information about the status of Microsoft Excel 2016. It is usually accessed by clicking on the *File* tab to the left of the ribbon but can also appear when specific commands and options in the ribbon have been selected.

Try This Yourself:

Before you begin ensure Excel has started and you have a blank workbook open…

1 Click on the *File* tab to display the *Backstage* view

2 Click on *Info* in the left green pane if it is not already selected to view information relating to your workbook such as the *Properties*

3 Click on *Print* to see the printing options

If the worksheet has data in it a preview of how the printing will look will appear. If this is a new worksheet no preview will appear…

4 Click on the *Account* tab to see the account options and product licensing information

5 Click on the *Back* arrow at the top of the left green pane to close *Backstage* view and return to the document
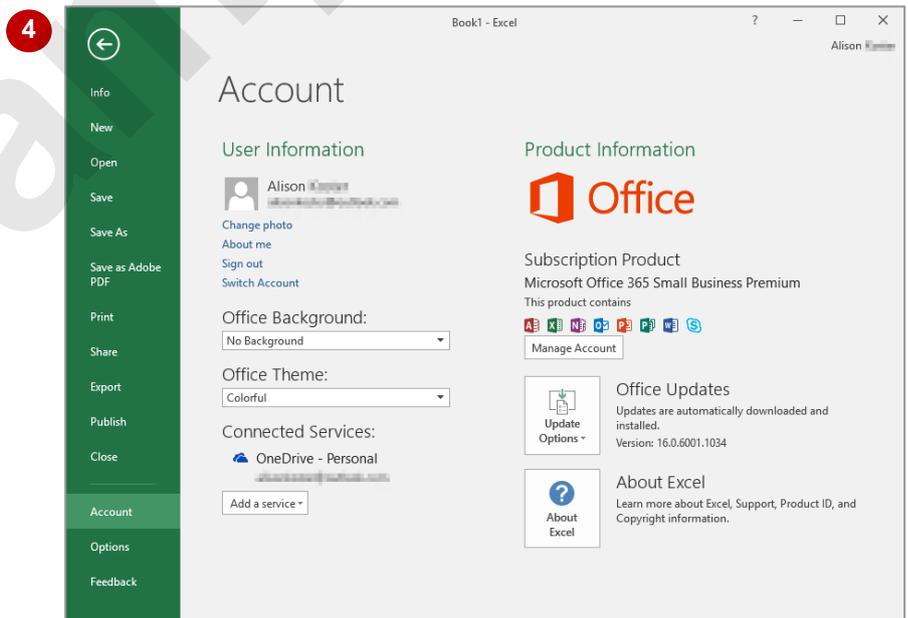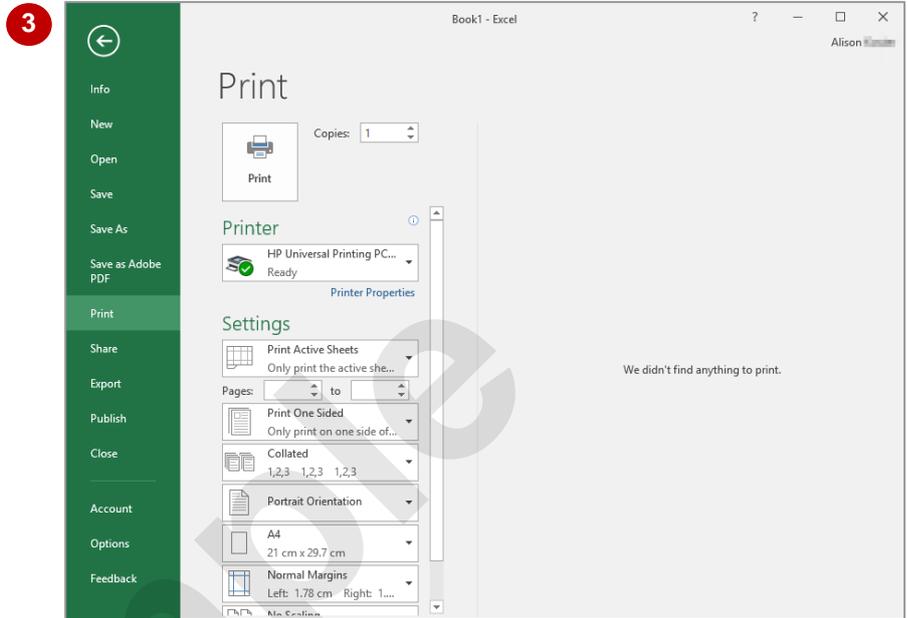
For Your Reference…

To *access* the *Backstage view*:

1. Click on the *File* tab
2. Click on the desired tab in the green pane to the left of the screen

Handy to Know…

• You can close the *Backstage* view by pressing Esc.

USING SHORTCUT MENUS

In addition to the ribbon, Excel also features **shortcut menus** (also known as **contextual menus**) that appear when you right-click in an area on the screen or on an object. The content of the menu will vary depending upon where you click. **Shortcut menus** provide an alternative (and usually a quicker) way to searching the ribbon to find a specific operation or command.

Try This Yourself:

Before you begin ensure Excel has started and you have a blank workbook open…

1 Click in cell **B2** (column **B**, row **2**) in the worksheet, then click with the right mouse button to display a shortcut menu

Because you have clicked in a worksheet cell the menu includes a number of options specific to what can be done in and with the cell...

2 Click anywhere else on the worksheet with the left mouse button to close the shortcut menu

3 Point to any of the tabs on the ribbon

4 Right-click on the tab to display a shortcut menu

This menu differs from the previous one and displays toolbar and ribbon options instead of text options. Excel has made an educated guess about what you want to do based upon what you have clicked...

5 Click anywhere in the worksheet with the left mouse button to close the shortcut menu

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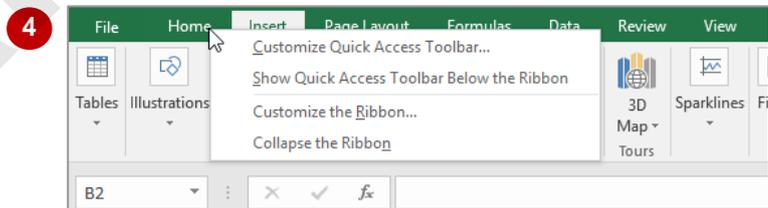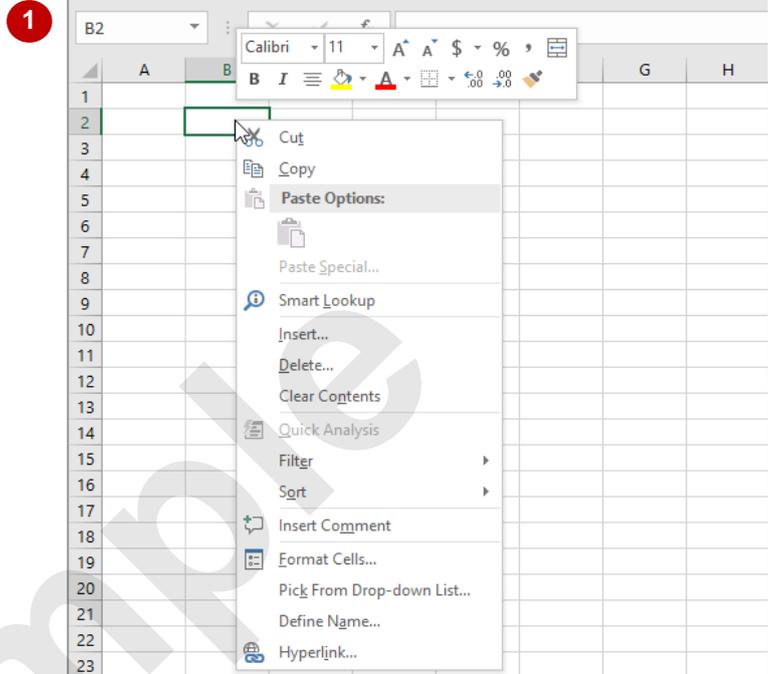
For Your Reference…

To **display** a **shortcut menu**:

1. Point to the object or area of the screen on which you want to perform an operation
2. Right-click to display the shortcut menu

Handy to Know…

- Once a **shortcut menu** appears, the options in it are selected by clicking on them with the left mouse button, or pressing the letter underlined in the menu option.

UNDERSTANDING DIALOG BOXES

Dialog boxes contain a series of controls that are used to adjust settings for a particular aspect of a worksheet or cell. They appear either when you click on a *dialog box launcher* at the bottom right corner of a ribbon group, or when you click on a command that displays a dialog box. Dialog boxes are often used for adjusting some of the more advanced aspects of a worksheet or cell.

Typical Dialog Box Controls

Dialog boxes have various tools to help you perform tasks. These tools are known as *controls* and some typical ones are shown below.

Tabs are used to provide more settings on the one dialog box.

Text boxes are used to enter details such as font or size.

Check boxes turn settings either on or off. When on they display a tick and therefore these controls are also known as tick boxes.
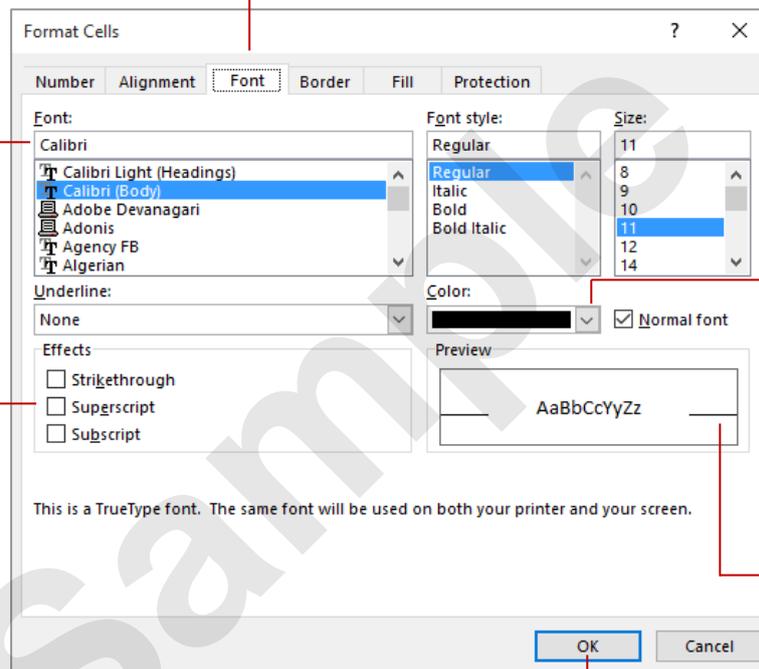
Drop arrows provide a list of options for the text box when the arrow is clicked. The list "drops down" from the arrow.

Preview boxes provide a preview of what the selected settings will look like.

Command buttons provide a means of saving the changed settings [OK], or closing the dialog box without accepting any changes made [Cancel].

LAUNCHING DIALOG BOXES

Dialog boxes can be launched either as the result of clicking on a *dialog box launcher* icon or a command button, or by selecting a command from a menu. In a menu, the presence of three dots (an ellipsis) ... after a menu option indicates that the menu option, when selected, will display a dialog box. Dialog boxes are generally used for advanced features or detailed settings.

Try This Yourself:

Before you begin ensure Excel has started and you have a blank workbook open…

1 On the *Home* tab, point to the dialog box launcher icon in the *Font* group to display a tooltip that explains what will happen if you click on it

2 Click on the dialog box launcher icon to open the *Font* dialog box

This dialog box has a selection of controls to make formatting fonts easier…

3 Click on the *Border* tab

This displays additional controls that you can use to adjust the borders around the active cell or range of cells...

4 Click on **[Cancel]** to close the dialog box

Some commands on the ribbon automatically launch a dialog box…

5 Click on the *Page Layout* tab, then click on *Print Titles* in the *Page Setup* group to display the *Page Setup* dialog box

6 Click on **[Cancel]**
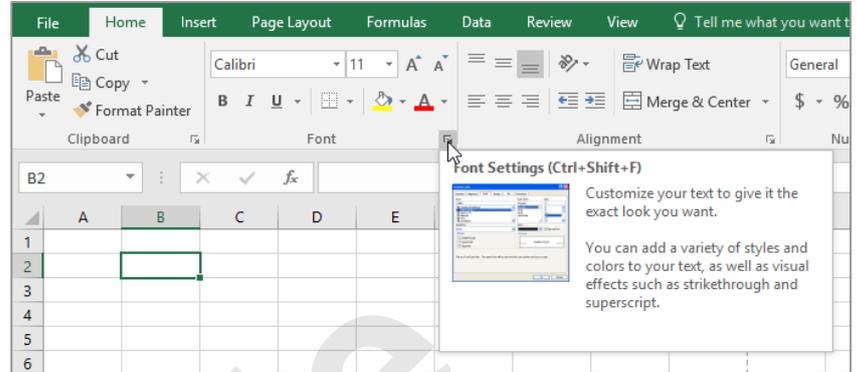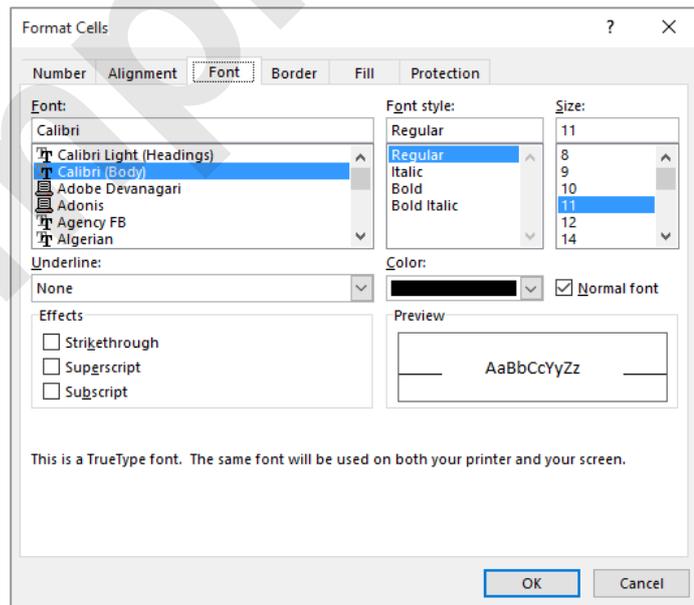
For Your Reference…

To *launch* a *dialog box*:

- Click on a dialog box launcher icon, or
- Click on a relevant command button, or
- Click on a menu option

Handy to Know…

- In some situations, the dialog box launcher icon actually displays a *pane*. For example, if you click on the dialog box launcher icon in the *Clipboard* group on the *Home* tab, the *Clipboard* pane appears.