

Microsoft Excel 2013 Essentials

Introduction

Microsoft Excel is one of the most widely used programs for organizing information and data using spreadsheets. This is due not only to the ease of learning and use of the program, but also to the wide range of customization options that it offers. For this reason, we aim to become proficient at understanding the basics of this program because many users in the labs are using Excel for their schoolwork. With a strong knowledge of the most commonly used elements, we can efficiently help users with a majority of their questions.

Objectives

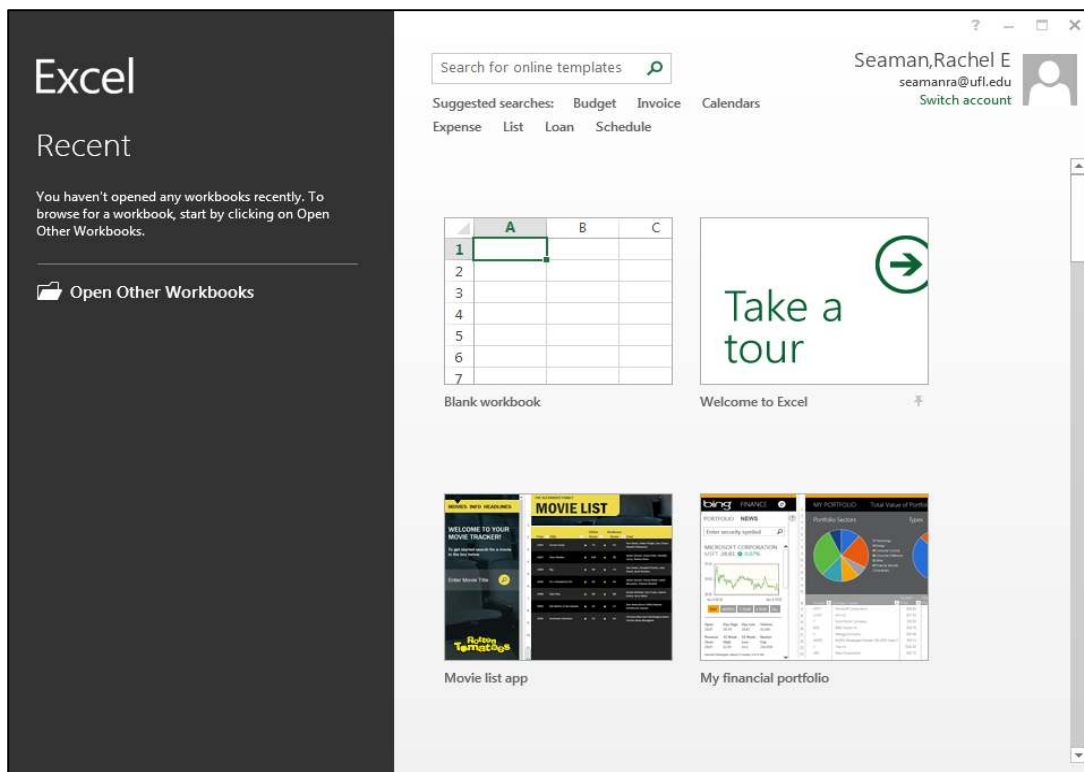
- 1) Become familiar with the basic interface of Excel 2013
- 2) Learn to create, edit and delete worksheets
- 3) Format/modify tables (basic and advanced)
- 4) Use formulas
- 5) Understanding Referencing
- 6) Create graphs and charts
- 7) Use pivot tables and pivot charts

Navigating the Interface

In this section, we will become familiar with the ribbon menu and the Backstage View in Excel 2013. These menus are what you will use to navigate your way to the different tools that we are going to use.

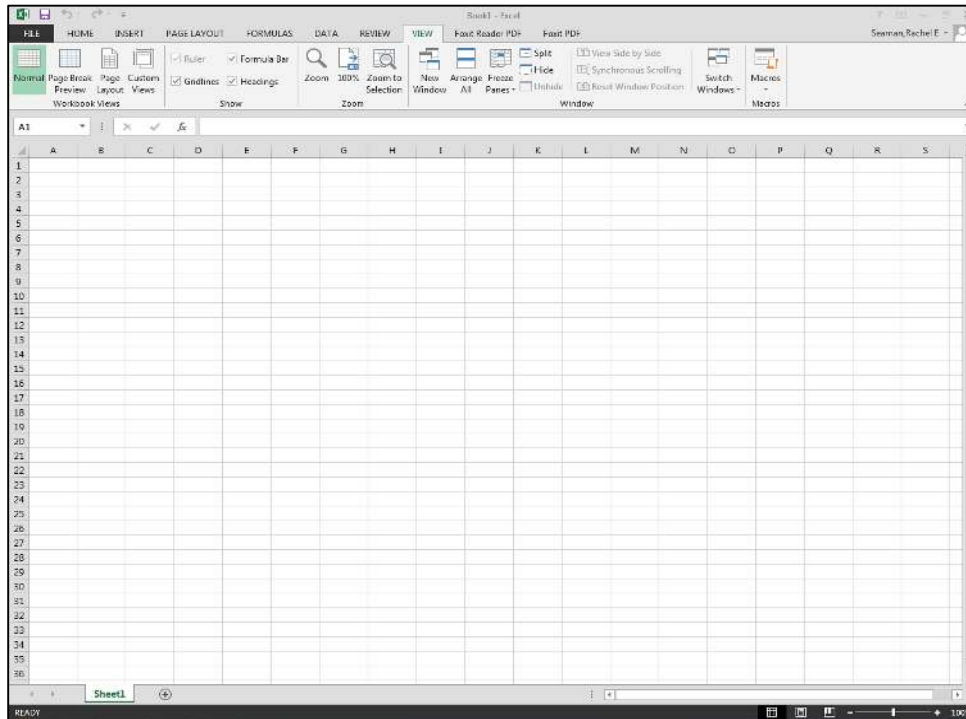
1. First, open Excel 2013 from the start menu.

The “Recent” window will be the first thing to open. You can open up a new spreadsheet or another spreadsheet you had previously been working on. Your screen will look like this:



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For the purposes of this lesson plan, go ahead and click on the “Blank workbook” icon. Then your screen should look like this.



Now we will introduce the features and functions of the ribbon. The ribbon is the long, horizontal strip of menus and buttons at the top of the screen. This is where all of your tools are located that allow you to edit your spreadsheet.

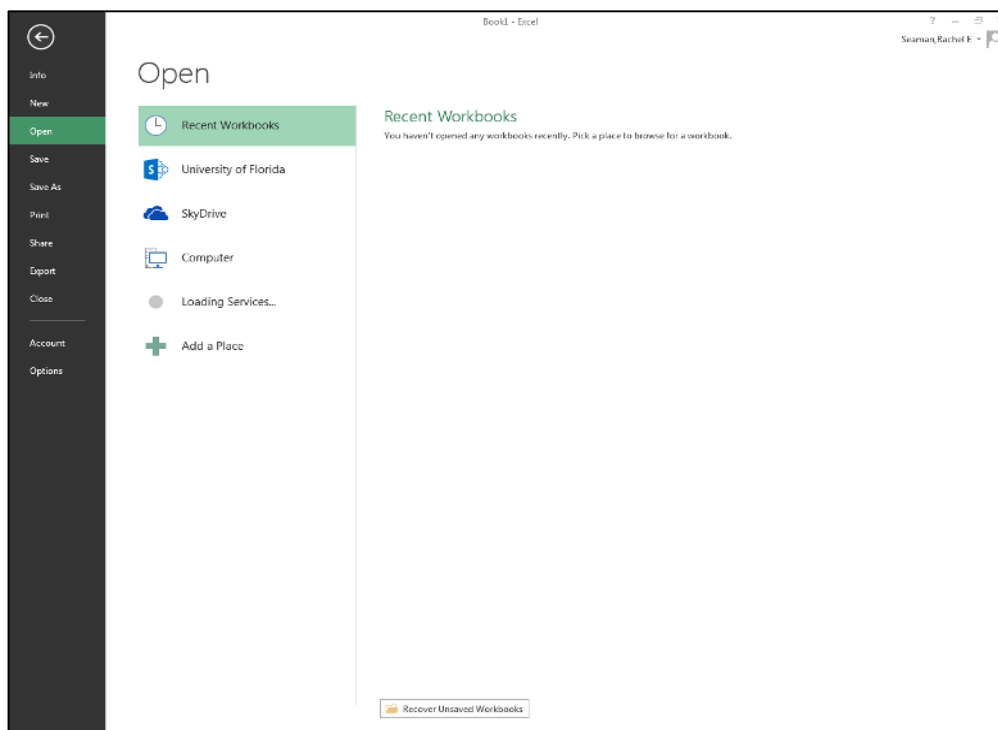
2. Click on the “HOME” tab. This tab contains all of your basic formatting functions that allow you to edit cells and the appearance of the information they contain.
3. Click on the “INSERT” tab. This tab allows you to place objects and images into your spreadsheet to supplement your data
4. Click on the “PAGE LAYOUT” tab. This tab contains all of the tools that allow you to edit the actual page characteristics of the spreadsheet and decide how it will look when it is exported to another format or printed. Here is where you can also decide which information to include for printing.
5. Click on the “FORMULAS” tab. This tab allows you to create, edit and automate formulas in your spreadsheet.
6. Click on the “DATA” tab. This tab allows you to import data from other sources as well as manage the data in your spreadsheet.

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7. Click on the “REVIEW” tab. This tab allows you to check your document for errors, and it also contains tools for editing, collaborating and protecting your information.
8. Click on the “VIEW” tab. This tab allows you to change the views not only of the spreadsheet you are currently working on, but also the actual orientation of the program window in case you are working with multiple files.

Now that we have gone over the basic elements of the ribbon, we are going to talk about the File tab and Backstage View. In the file tab you will find some of the options that were available under the Office Button menu in Excel 2010 as well as some new options.

9. Click on the “FILE” tab at the top left corner of the screen.
10. The program will switch to Backstage View, which looks like this:



You will notice that there are many different options available to choose from, they might look familiar if you have ever used an earlier version of Excel or another Office program.

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- **“Info”** - allows you to protect your workbook, inspect your workbook for issues, manage the version of your workbook, edit browser view options if sharing on the web, and look at your workbook’s properties.
- **“New”** - allows you to create a new workbook, either a blank workbook, a template provided on the computer’s software, or an online template.
- **“Open”** - will allow you to search for a file that was either recently opened or used, on the UF Team Site, on your SkyDrive, or on the Computer’s drive.
- **“Save”** - will allow you to save the latest changes made to your workbook in the same location and under the same file name that it was last saved. If this is the first time saving this file, Excel will prompt you to choose a name and a location for your file.
- **“Save As”** - allows you not only to be specific about the file name and location, but also presents several other options for saving in different formats.
- **“Print”** - will show you a list of printing options as well as a print preview in the same area. This view should be very similar to you if you used Office 2010.
- **“Share”** - will give you two options to share your workbook. You can share your document either through SkyDrive or through e-mail as an attachment (PDF or XPS), a link to a shared location, or through Internet fax.
- **“Export”** - allows you to either create a PDF or XPS document, or change the file type of the workbook. You can change the workbook’s file type to an Excel 97-2003 workbook, an OpenDocument Spreadsheet (for Open Office), an Excel template, a Macro-Enabled workbook, a Binary workbook, a text file (tab delimited, .txt), a CSV file (comma-delimited, .csv), or a formatted text file (space-delimited, .prn).
- To access even more file types, double-click on **“Save as Another File Type”**
- **“Close”** - will close your document without closing the program. If you have made changes, it will prompt you to save those changes.
- **“Account”** - will show your user information and product information. Underneath “user information” there is the option to change your Office Background & theme.

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