UNDERSTANDING THE EXCEL START SCREEN

Unless you start Excel with a specific data file, *Excel 2013* 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 2013 Start Screen

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

The Excel 2013 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*.
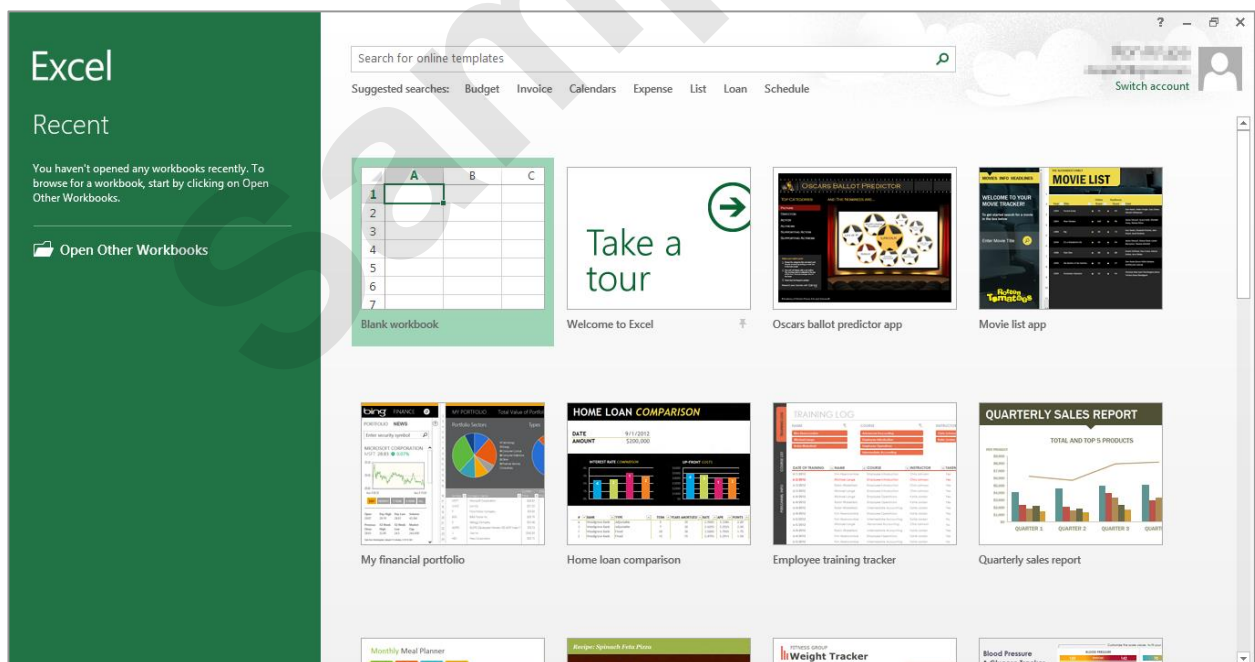
The *start* screen will only display when you launch the *Excel 2013* application directly – that is, by clicking on an Excel tile on the *Windows 8 Start* screen, clicking on the application on the *Apps* screen or under search results, or clicking on the taskbar icon if the application has been pinned to the desktop taskbar.

Excel 2013 can also be started in *Windows 8* by double-clicking on a workbook file in the *File Explorer*. When this occurs *Excel 2013* will bypass the *start* screen shown above and open the workbook directly.

HOW EXCEL 2013 WORKS

For a new user the Microsoft Excel 2013 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.
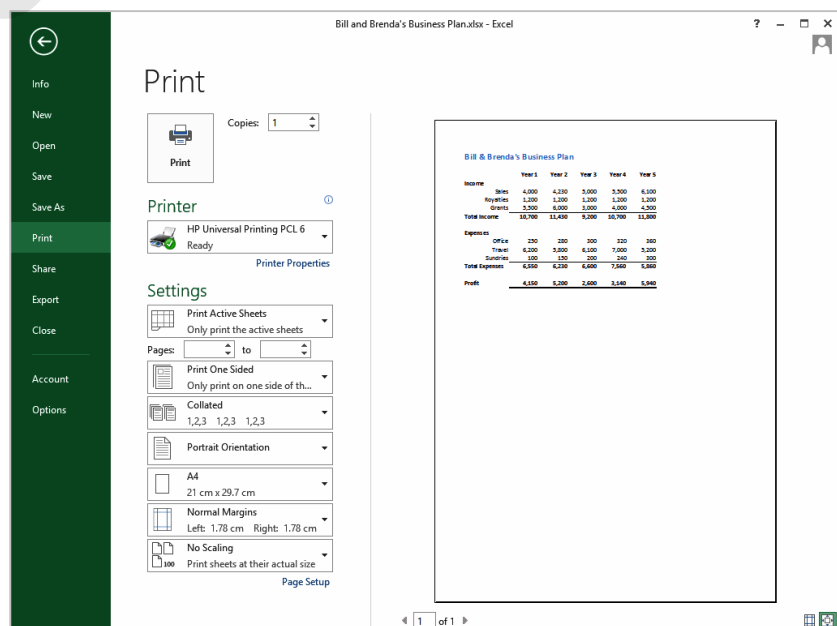
The Ribbon

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.
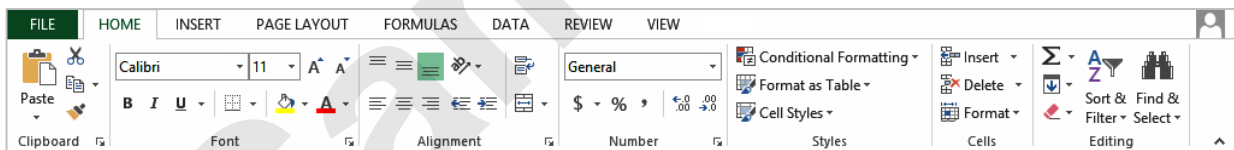
The Backstage View

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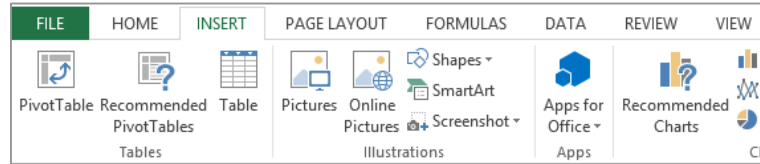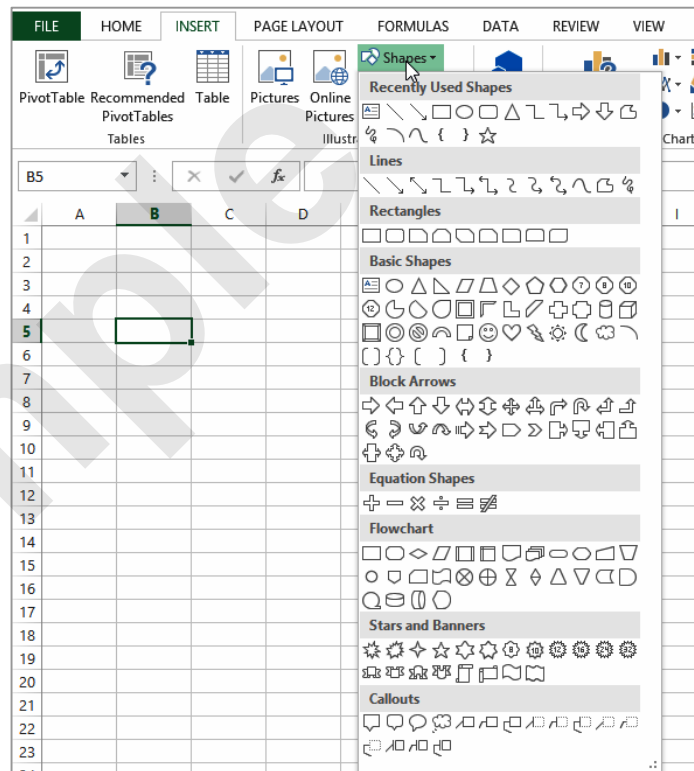
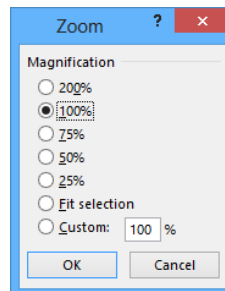*Dialog boxes like this one provide settings or options for you to choose from. For example in this one you can zoom the screen by varying percentages. We won't actually do anything at this point. You'll get plenty of opportunity for using dialog boxes at a later stage.*

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.

USING RIBBON KEY TIPS

Usually one would access commands on the ribbon by clicking on them with a mouse, however you can also use the keyboard. When you press the [Alt] key on the keyboard

alphabetical labels, known as *KeyTip badges*, appear on the ribbon. Pressing a key on the keyboard will activate the corresponding command just as if you'd clicked on the command.

Try This Yourself:

Open File

Before starting this ensure Microsoft Excel 2013 has started…

1. Press [Alt] to display the KeyTip badges for the tabs

2. Press [P] to display the *PAGE LAYOUT* tab and to see the KeyTip badges for these commands

3. Press [M] to display the *Margins* options

   You could use the [↑] or [↓] keys to move through the options, or [A] to see Custom Margins…

4. Press [Esc] twice to return to the *Tab* level of KeyTips

5. Press [M] to access the *Formulas* tab

6. Press [Tab] five times and notice that *Logical* is selected

7. Press [Enter] to see a list of *Logical* functions, then press [↓] several times to move down the menu

8. Press [Esc] to abort the operation
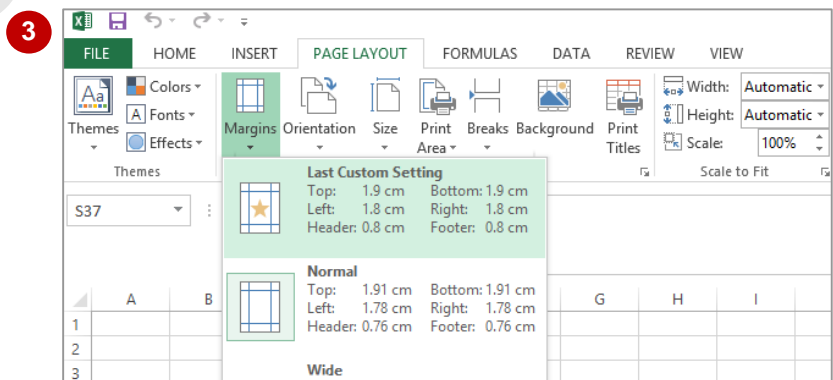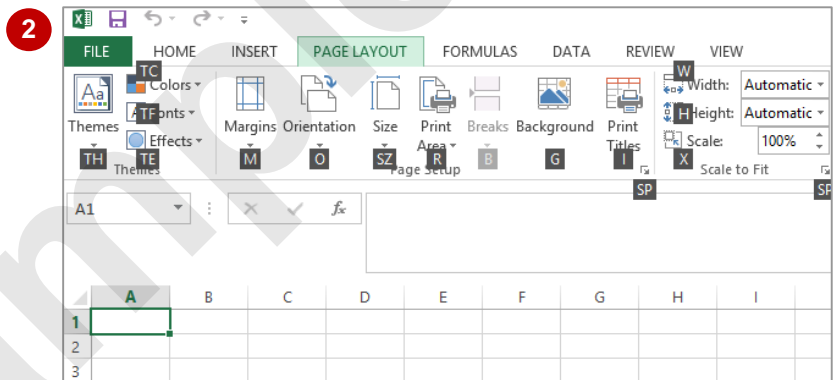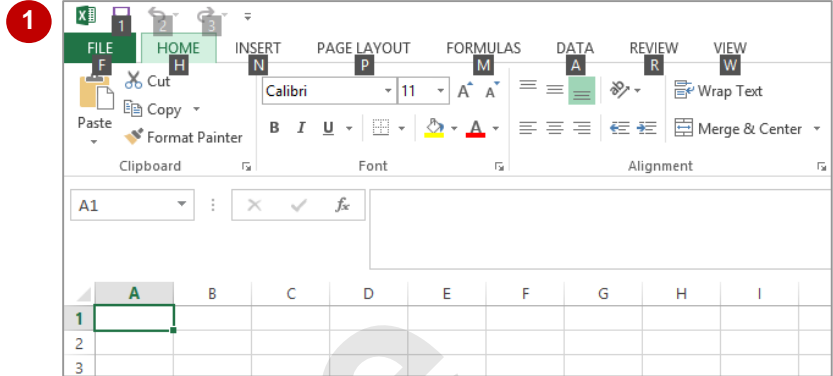
For Your Reference…

To *use KeyTip Badges* to *access commands*:

1. Press [Alt] to display the *KeyTip Badges*
2. Press the letter key of the command or tab that you want to select

Handy to Know…

- You can still use the *shortcut keys* for menu commands that were available in previous versions of Office. For example, [Ctrl] + [B] applies bold to selected text.

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.
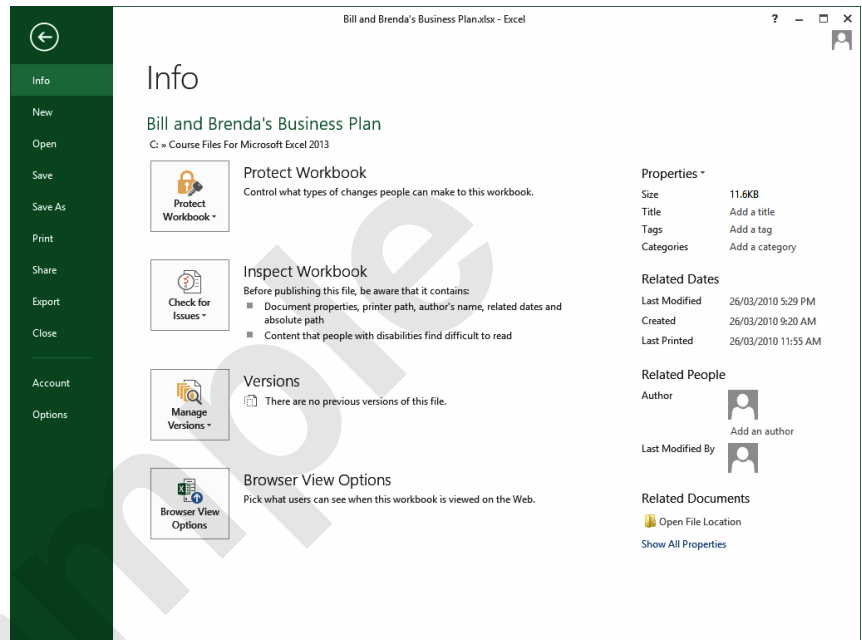
The Backstage View

The *FILE* tab on the ribbon is not a normal tab – as you can tell by the fact that it is coloured. 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.
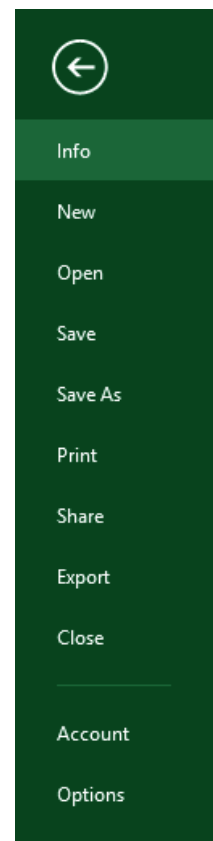
USING SHORTCUT MENUS

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 and 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
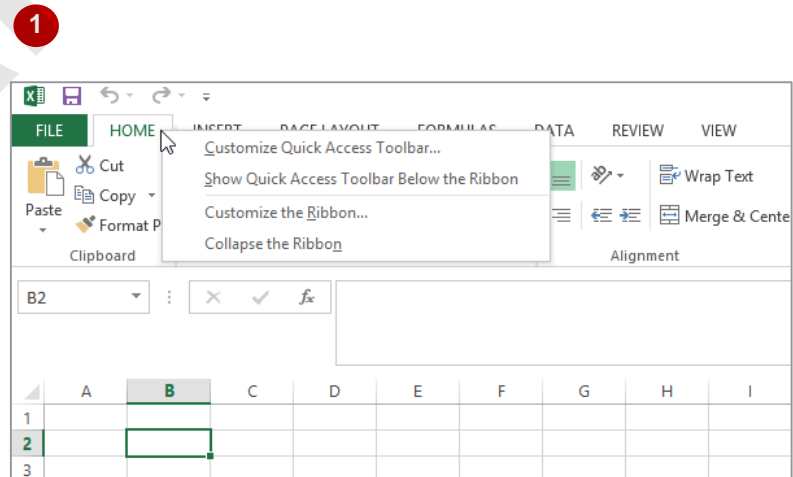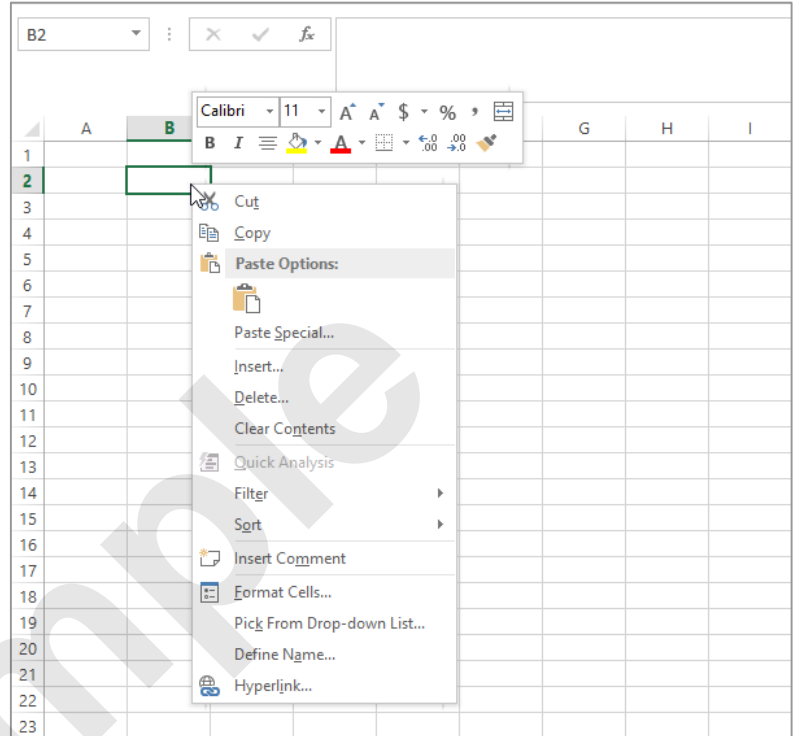
For Your Reference…

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.
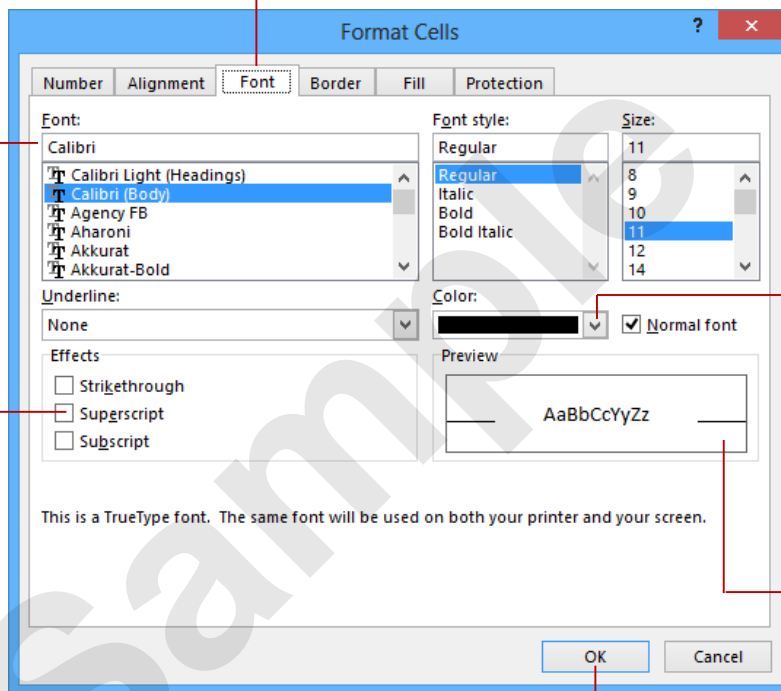
Drop arrows provide a list of options for the text box when the arrow is clicked. The list "drops down" from the arrow.

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].

UNDERSTANDING THE QUICK ACCESS TOOLBAR

The *Quick Access Toolbar*, also known as the *QAT*, is a small toolbar that appears at the top left corner of the Excel window. It is designed to provide access to the command tools you use most frequently, such as *Save*. By default the *QAT* also contains the *Undo* and *Redo* buttons. You can add buttons to the *Quick Access Toolbar* to make finding your favourite commands easier.
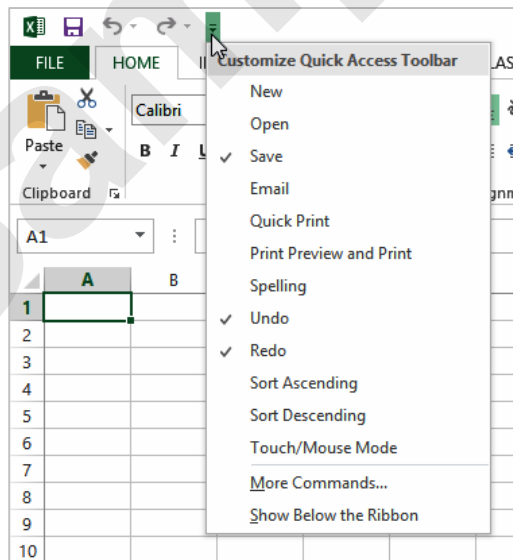
The Quick Access Toolbar

The *Quick Access Toolbar* is positioned at the top left corner of the Excel 2013 screen. In its default state, it includes the *Save* tool, the *Undo* tool and the *Repeat* tool.


Customising the Quick Access Toolbar

Appearing immediately to the right of the *Quick Access Toolbar* is the *Customise Quick Access Toolbar* tool. Clicking on this tool displays a list of commonly used commands that you can add to the toolbar. You can select the items that you want to add from the list by clicking on them. The ticks that appear to the left of the menu options show which options already appear on the *Quick Access Toolbar*.

You can also add commands to the *Quick Access Toolbar* by right clicking on a command in the ribbon and selecting **Add to Quick Access Toolbar**.

You can also add commands to the *Quick Access Toolbar* by right clicking on a command in the ribbon and selecting **Add to Quick Access Toolbar**.
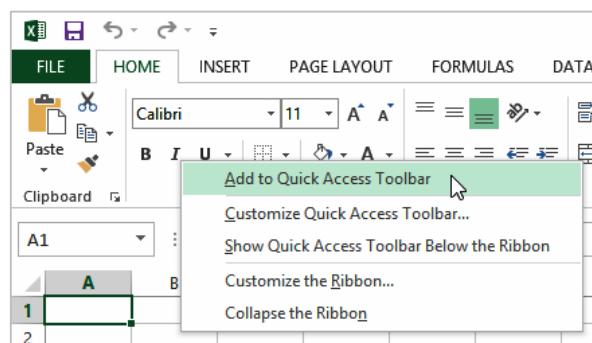
UNDERSTANDING THE STATUS BAR

The **status bar** is the bar across the bottom of the Excel window. It is a very useful aid that tells you the current status of Excel, performs quick calculations on the selected range in the worksheet, and allows you to zoom in and out of the worksheet. It also includes tools that can change the worksheet view. You can customise the status bar to change the information shown.
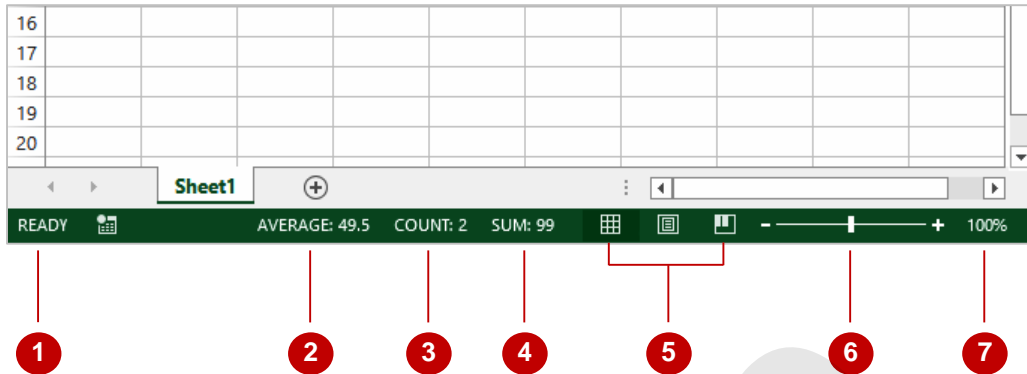
1	**Status Indicator**	The **Status Indicator** indicates the current status of Excel and the worksheet. The most common indicator you'll see here is **Ready** indicating that Excel is ready and waiting for you to do something.
2	**Average**	This tells you the average value in the cells currently selected in the worksheet – providing the cells contain numeric data. Selected cells are the ones that have the active cell indicator around them and are commonly referred to as a *range* of cells. Obviously for a calculation to be performed there will need to be numbers in the active range of cells.
3	**Count**	This tells you how many non-empty cells are in the cells currently selected in the worksheet.
4	**Sum**	This tells you the sum total of the cells currently selected in the worksheet – providing the cells contain numeric data.
5	**View Tools**	The **Worksheet View** tools allow you to change the view of the worksheet. You can select from **Normal**, **Page Layout** and **Page Break Preview**.
6	**Zoom Slider**	The **Zoom Slider** indicates the current zoom level, where the centre mark indicates 100%. You can either drag the marker to the left or right, or click on a specific point of the slider to set a zoom percentage. You can also click on the buttons at either end of the slider to zoom in or zoom out.
7	**Zoom Level**	This button displays the current zoom percentage. If you click on the button, the **Zoom** dialog box will appear so that you can select a specific zoom percentage.

What appears on the status bar can vary greatly. Don't be alarmed if the one on your screen doesn't exactly match the example shown above.

One way you can change your status bar is by right-clicking on the status bar itself and selecting from the shortcut menu any additional tools you may want to add to it.

EXITING SAFELY FROM EXCEL 2013

When you are finished working with Excel you'll find there are several ways to exit from it. If you have made changes to the workbook Excel will ask if you wish to save these changes before exiting. You'll learn all about saving a little later on. If you don't wish to retain any changes you've made you can decline Excel's offer to save your work.

Try This Yourself:

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

1 Click in cell *A1* (the top left cell), type your name and press `Enter`

Doing this has made a change to your workbook which should be picked up when you attempt to exit…

2 Click on *Close* at the top right hand corner of the Excel screen

You will now be prompted to save your workbook if you wish to retain your data. The message you receive will look like the one shown. We have no reason for keeping a workbook with our name in it so we won't bother saving…

3 Click on **[Don't Save]** to exit from Excel
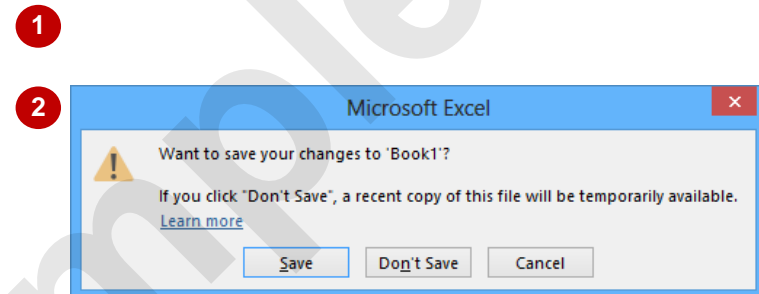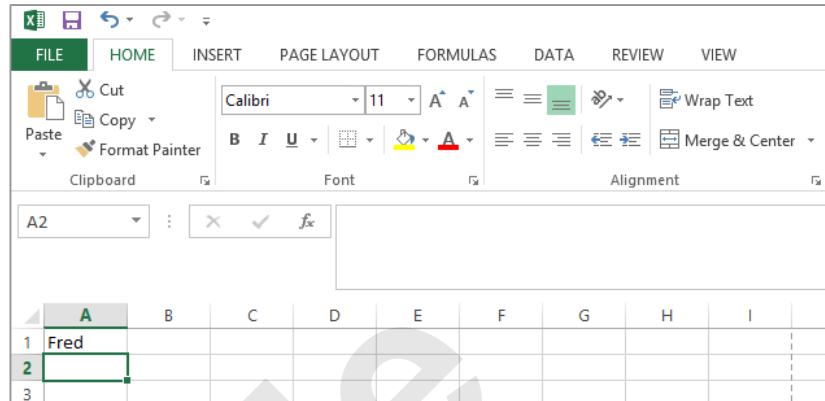
Special Notes:

- *If the workbook has been open for a while a temporary file copy will have been automatically saved behind the scenes. In this case your message will appear exactly as shown above. If a recent copy has not been created your message will appear without any reference to a temporary file.*
- *It is possible in Excel to have more than one workbook file open at a time. If you have multiple workbooks open you'll need to close each one using the steps in this exercise. When the last open workbook is finally closed Excel will terminate.*

For Your Reference…

To *safely exit* from *Microsoft Excel*:

1. Click on the *FILE* tab and click on *Close*
2. If you want to keep your changes click on **[Save]** then specify a workbook name and location, otherwise click on **[Don't Save]**

Handy to Know…

- Whenever you are in doubt about whether to save or not you should err on the side of caution and save the workbook. You can delete unwanted workbooks at a later date, but you can seldom retrieve data that has not been saved!

PRACTICE EXERCISE
Getting To Know Excel 2013

Tasks:	Completed:
Before starting this exercise you MUST have completed all of the topics in the chapter Getting To Know Excel 2013…	
1 If Microsoft Excel has already started, exit from it then start it again with a new, blank spreadsheet on the screen	☐
2 Display the **FORMULAS** tab on the ribbon and, in the space provided on the next page, write down the command **groups** that appear on the tab	☐
3 Display the **HOME** tab on the ribbon and open the **Format Cells** dialog box. In the space provided on the next page list all of the controls on the **Alignment** tab of the dialog box that have a drop arrow	☐
4 Close the **Format Cells** dialog box without changing any settings	☐
5 Display the shortcut menu for a blank cell. In the space provided on the next page list the four commands in the first group that appears on the shortcut menu	☐
6 In the space provided on the next page list the default commands that are included in the **Quick Access Toolbar**	☐
7 Make a photocopy of the next page with your completed answers	☐

Files required for exercise:	None
Files/work created by student:	Photocopy of answer sheet (next page)
Exercise Completed:	☐

PRACTICE EXERCISE WORKSPACE
Getting To Know Excel 2013

2 The following *groups* appear on the *FORMULAS* tab:

_____

_____

_____

_____

3 The following controls on the *Alignment* tab of the *Format Cells* dialog box have drop arrows:

_____

_____

_____

_____

5 The following commands on the shortcut menu appear in the first group:

_____

_____

_____

_____

6 The following commands can be found on the *Quick Access Toolbar*:

_____

_____

_____

_____