Technical Institute of Administration

Business Administration

1. Microsoft Excel - Basics

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2024-2025

Table of Contents

1. Excel 2016 Basics

1.1. Introduction

Excel is a **spreadsheet program** that allows you to **store**, **organize**, and **analyze information**. While you may believe Excel is only used by certain people to process complicated data, anyone can learn how to take advantage of the program's **powerful features**. Whether you're keeping a budget, organizing a training log, or creating an invoice, Excel makes it easy to work with different types of data.

1.2. Getting to know Excel

If you've previously used Excel 2010 or Excel 2013, then Excel 2016 should feel familiar. If you are new to Excel or have more experience with older versions, you should first take some time to become familiar with the **Excel interface**.

1.3. The Excel interface

When you open Excel 2016 for the first time, the **Excel Start Screen** will appear. From here, you'll be able to create a **new workbook**, choose a **template**, and access your **recently edited workbooks**.

- From the **Excel Start Screen**, locate and select **Blank workbook** to access the Excel interface.
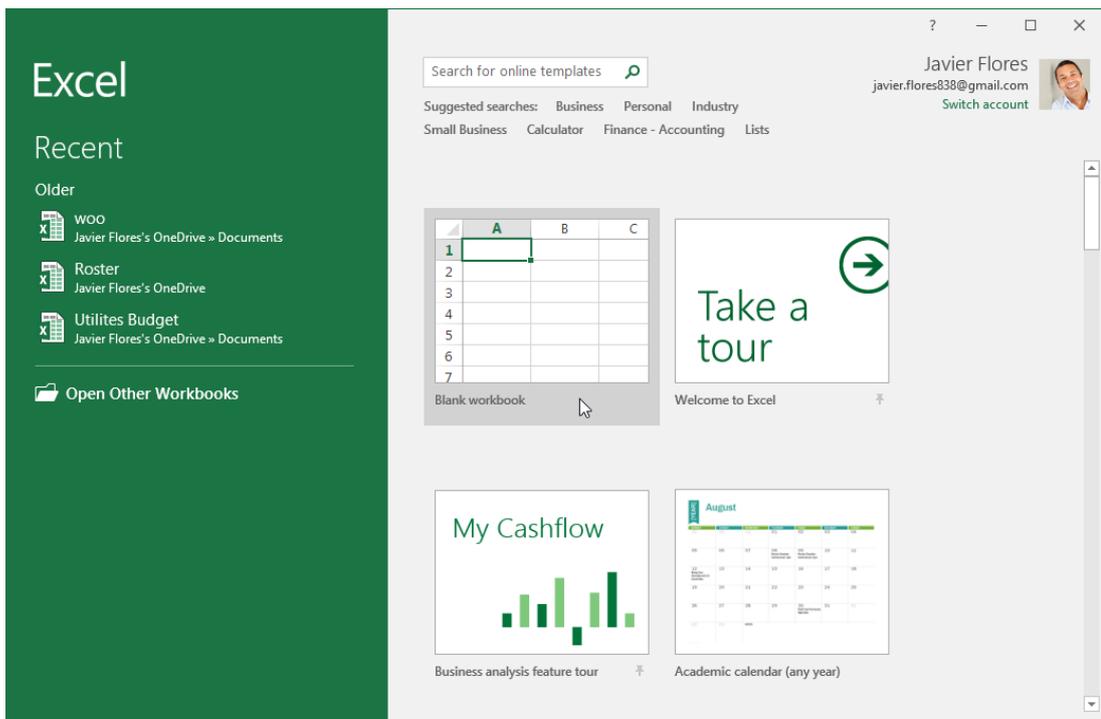
Click the buttons in the below to become familiar with the Excel interface.
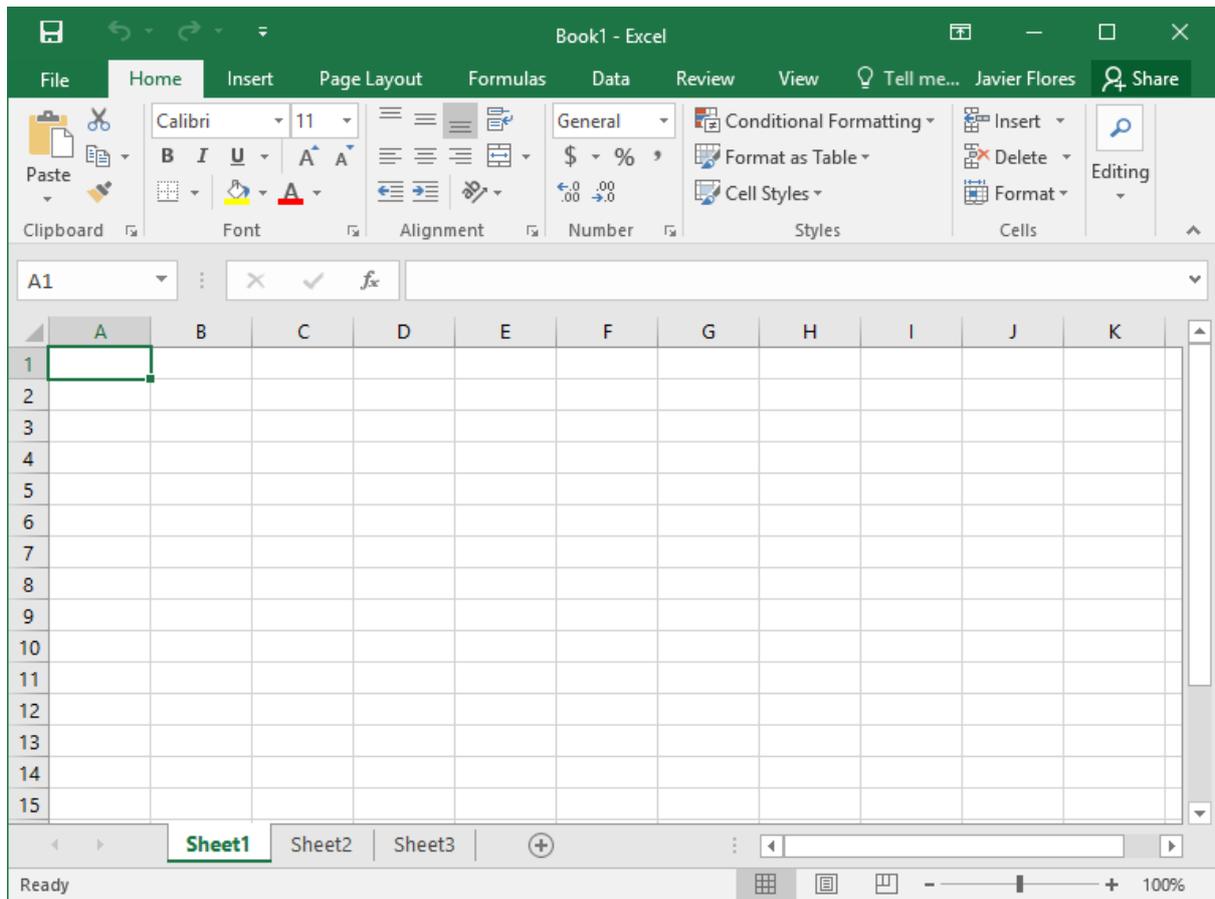
1.4. Working with the Excel environment

The **Ribbon** and **Quick Access Toolbar** are where you will find the commands to perform common tasks in Excel. The **Backstage view** gives you various options for saving, opening a file, printing, and sharing your document.

1.4.1. The Ribbon

Excel 2016 uses a **tabbed Ribbon system** instead of traditional menus. **The Ribbon** contains **multiple tabs**, each with several **groups of commands**. You will use these tabs to perform the most **common tasks** in Excel.

- Each tab will have one or more groups.
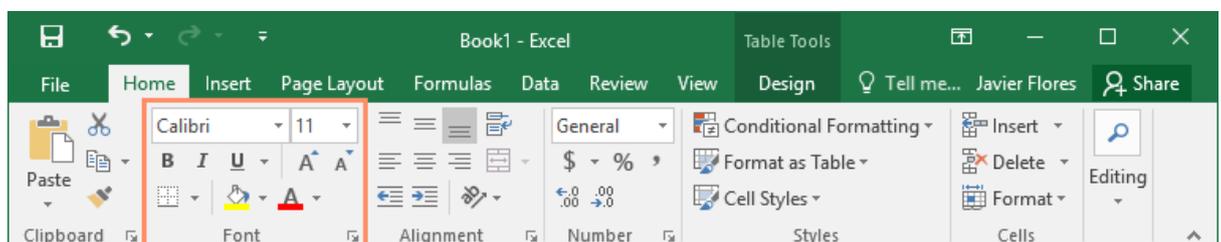
- Some groups will have an arrow you can click for more options.
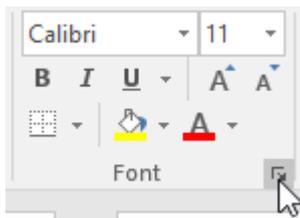
- Click a tab to see more commands.
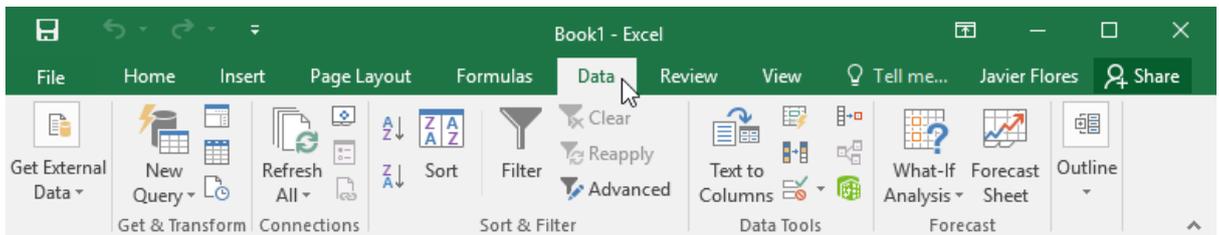
- You can adjust how the Ribbon is displayed with the Ribbon Display Options.
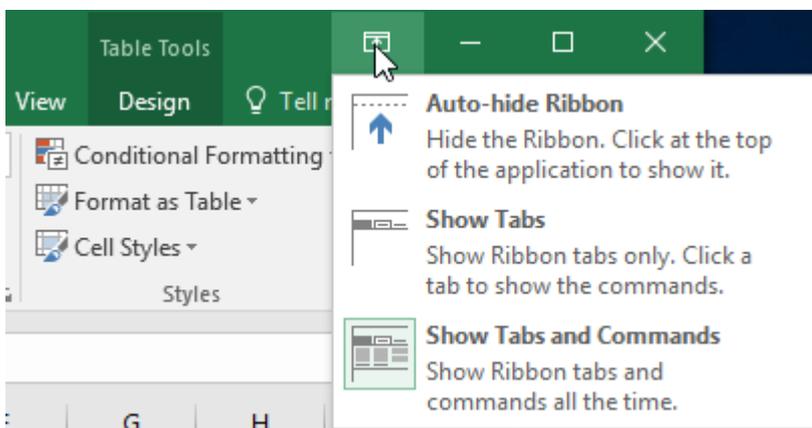
Certain programs, such as **Adobe Acrobat Reader**, may install additional tabs to the Ribbon. These tabs are called **add-ins**.

1.4.2. To change the Ribbon Display Options:

The Ribbon is designed to respond to your current task, but you can choose to **minimize** it if you find that it takes up too much screen space. Click the **Ribbon Display Options** arrow in the upper-right corner of the Ribbon to display the drop-down menu.
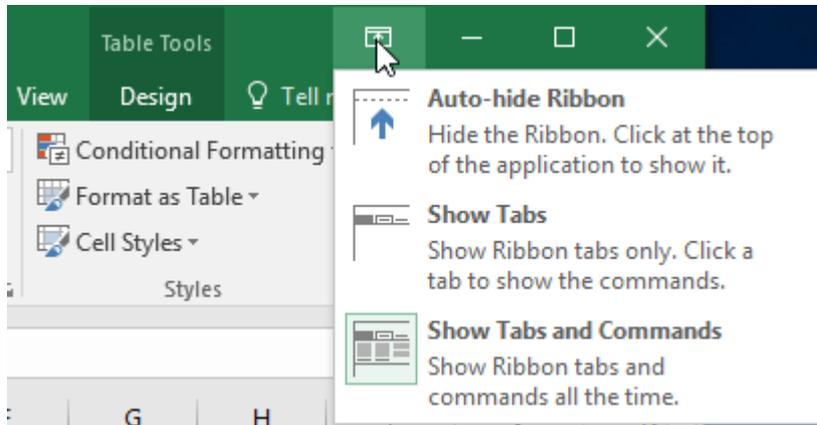
There are three modes in the Ribbon Display Options menu:

- **Auto-hide Ribbon:** Auto-hide displays your workbook in full-screen mode and completely hides the Ribbon. To **show the Ribbon**, click the **Expand Ribbon** command at the top of screen.
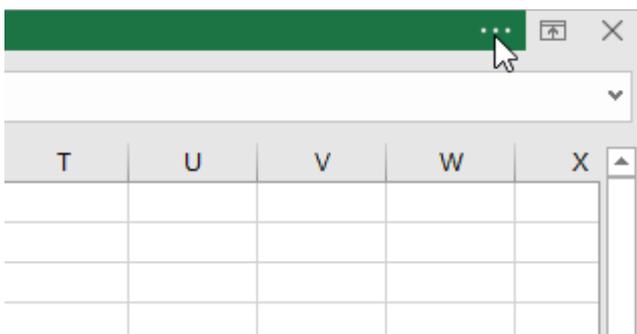
- **Show Tabs:** This option hides all command groups when they're not in use, but **tabs** will remain visible. To **show the Ribbon**, simply click a tab.
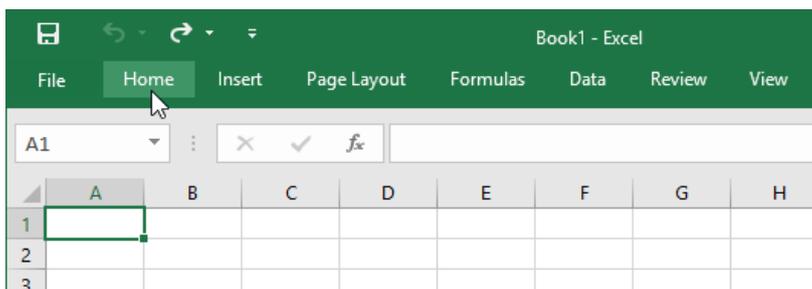
- **Show Tabs and Commands:** This option maximizes the Ribbon. All of the tabs and commands will be visible. This option is selected by default when you open Excel for the first time.

1.5. The Quick Access Toolbar

Located just above the Ribbon, the **Quick Access Toolbar** lets you access common commands no matter which tab is selected. By default, it includes the **Save**, **Undo**, and **Repeat** commands. You can add other commands depending on your preference.

1.5.1. To add commands to the Quick Access Toolbar:

1. Click the **drop-down arrow** to the right of the **Quick Access Toolbar**.
2. Select the **command** you want to add from the drop-down menu. To choose from more commands, select **More Commands**.
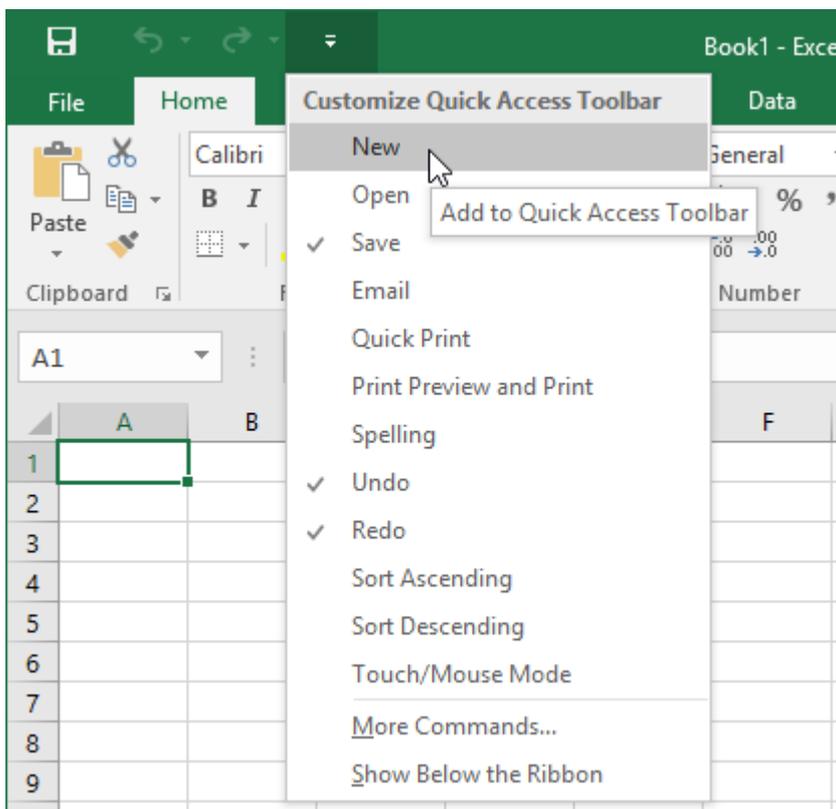
3. The command will be **added** to the Quick Access Toolbar.
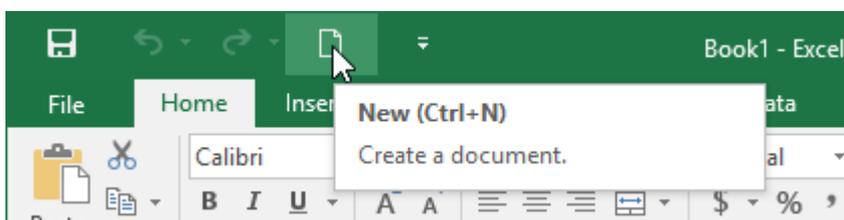
1.5.2. How to use Tell me:

The **Tell me** box works like a search bar to help you quickly find tools or commands you want to use.
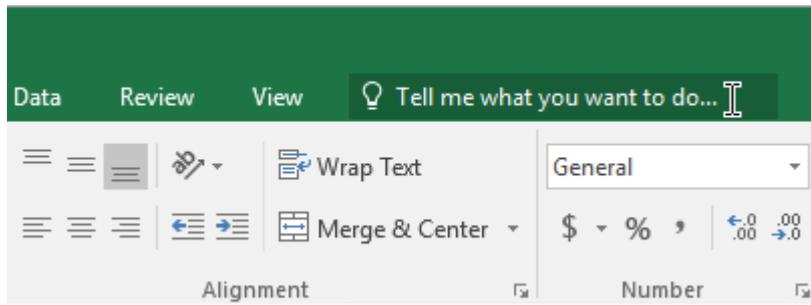
1. Type in your own words what you want to do.
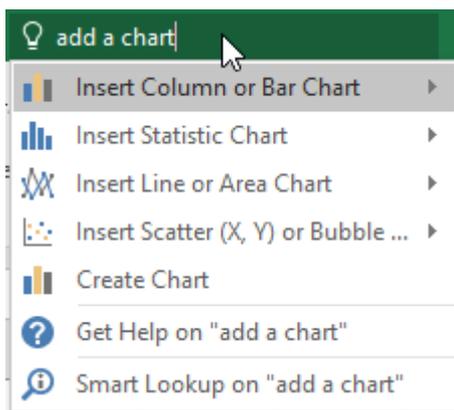
2. The results will give you a few relevant options. To use one, click it like you would a command on the Ribbon.
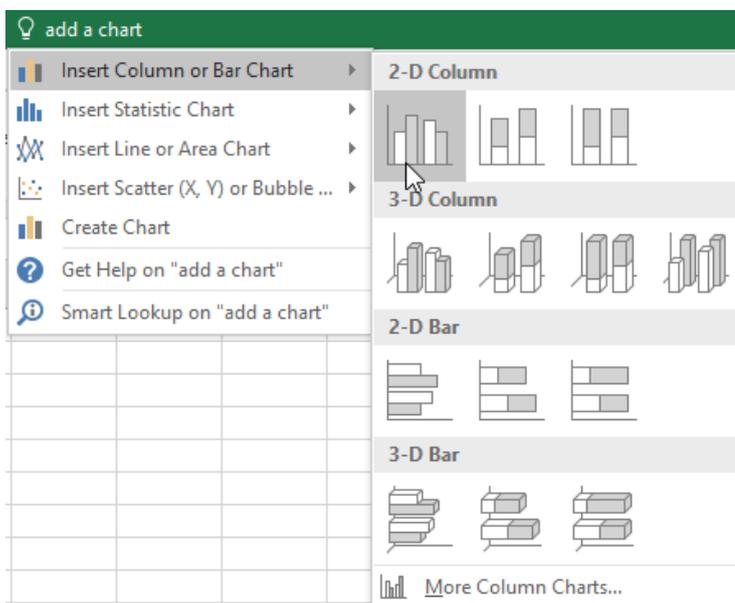
1.6. Worksheet views

Excel 2016 has a variety of viewing options that change how your workbook is displayed. These views can be useful for various tasks, especially if you're planning to **print** the spreadsheet. To **change worksheet views**, locate the commands in the bottom-right corner of the Excel window and select **Normal view**, **Page Layout view**, or **Page Break view**.
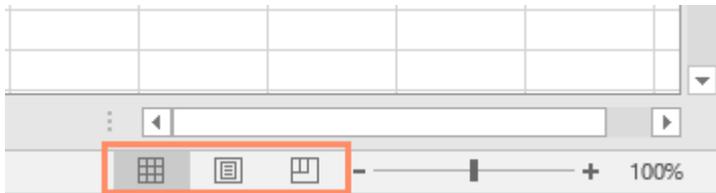
- **Normal view** is the default view for all worksheets in Excel.

- **Page Layout view** displays how your worksheets will appear when printed. You can also add headers and footers in this view.
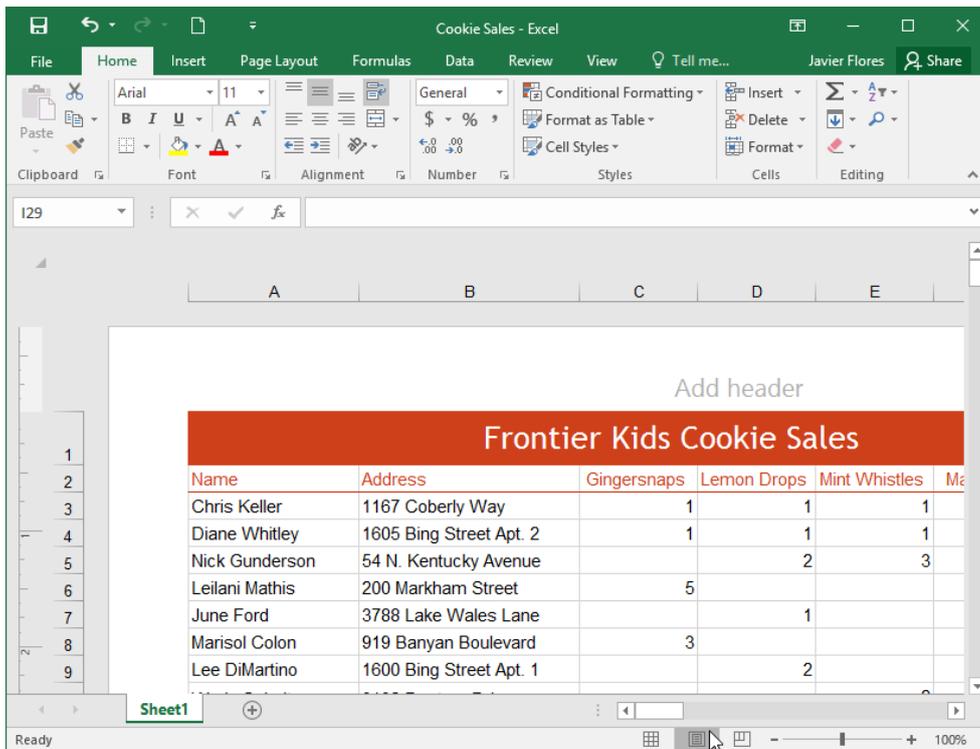
- **Page Break view** allows you to change the location of page breaks, which is especially helpful when printing a lot of data from Excel.
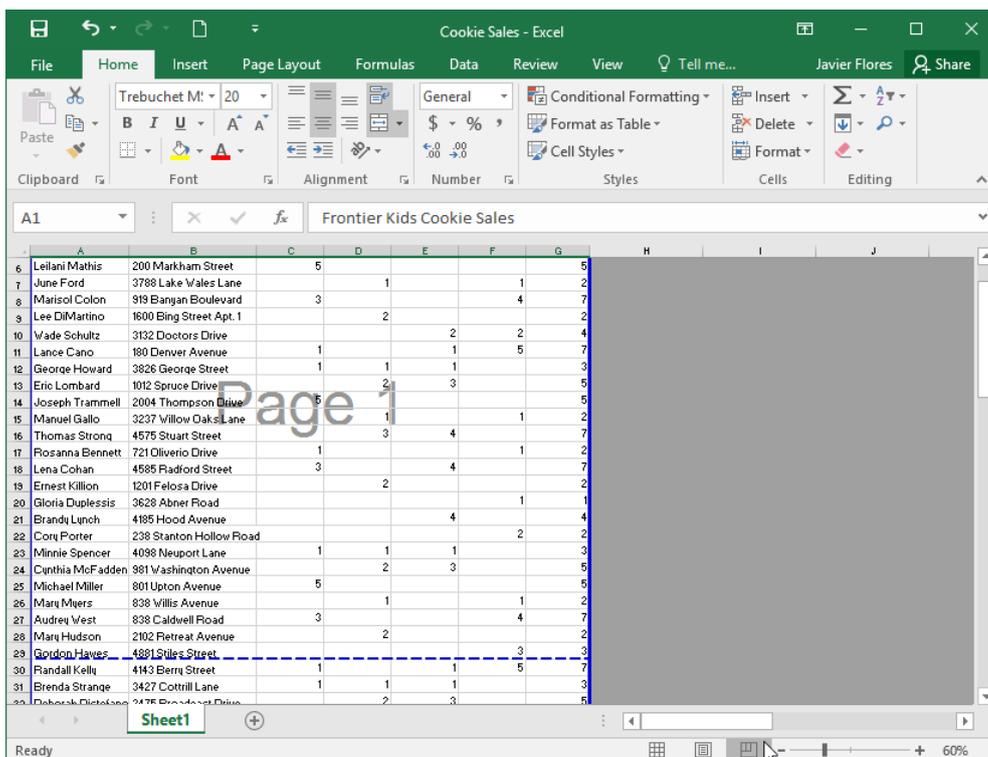
1.6.1. Backstage view

Backstage view gives you various options for saving, opening a file, printing, and sharing your workbooks.

1.6.1.1. To access Backstage view:

1. Click the **File** tab on the **Ribbon**. **Backstage view** will appear.
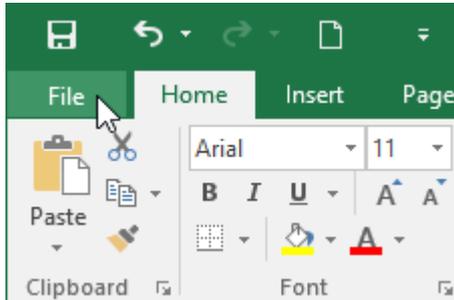
Click the buttons in the interactive below to learn more about using Backstage view.
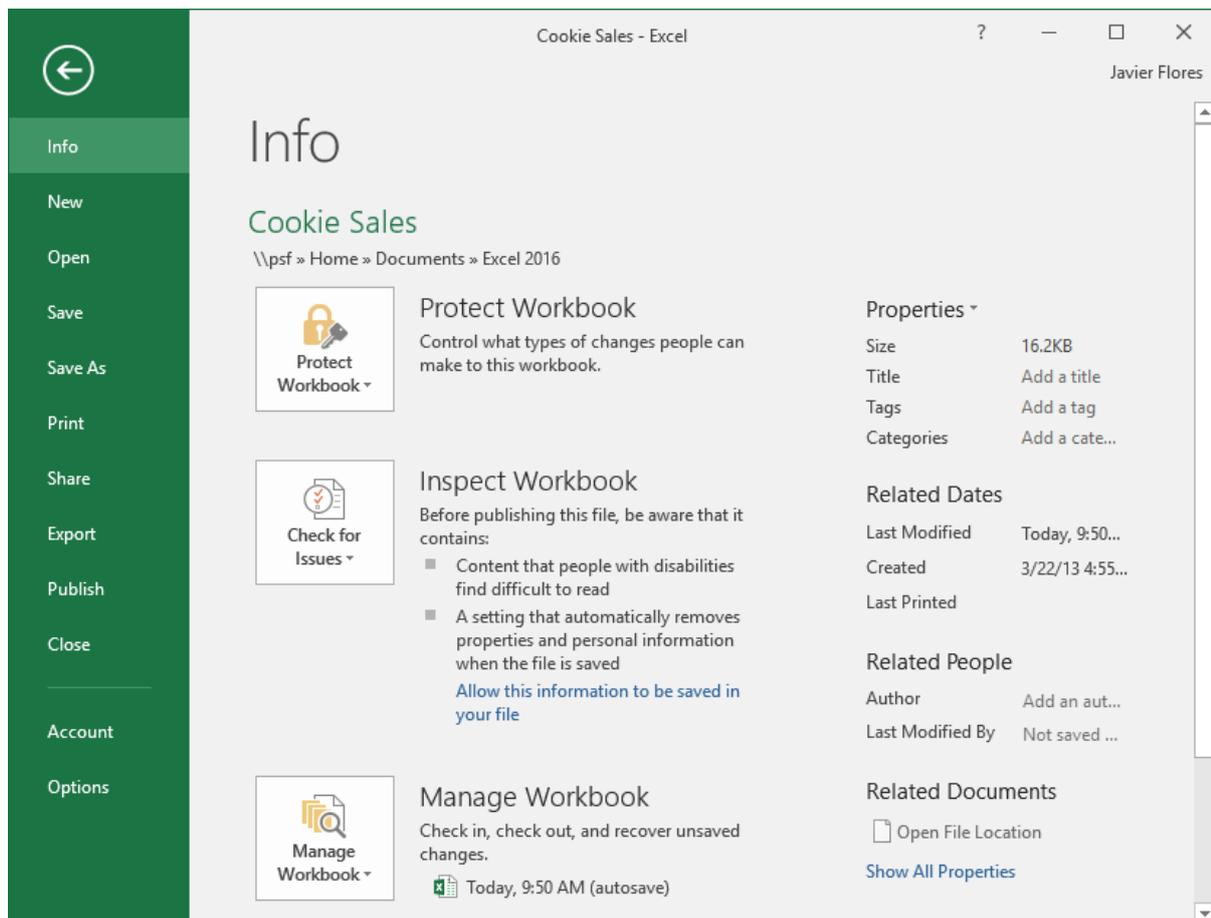
1.7. Creating and Opening Workbooks

Excel files are called **workbooks**. Whenever you start a new project in Excel, you'll need to **create a new workbook**. There are several ways to start working with a workbook in Excel. You can choose to **create a new workbook**—either with a **blank workbook** or a predesigned **template**—or **open an existing** workbook.

1.7.1. To create a new blank workbook:

1. Select the **File** tab. **Backstage view** will appear.

2. Select **New**, then click **Blank workbook**.
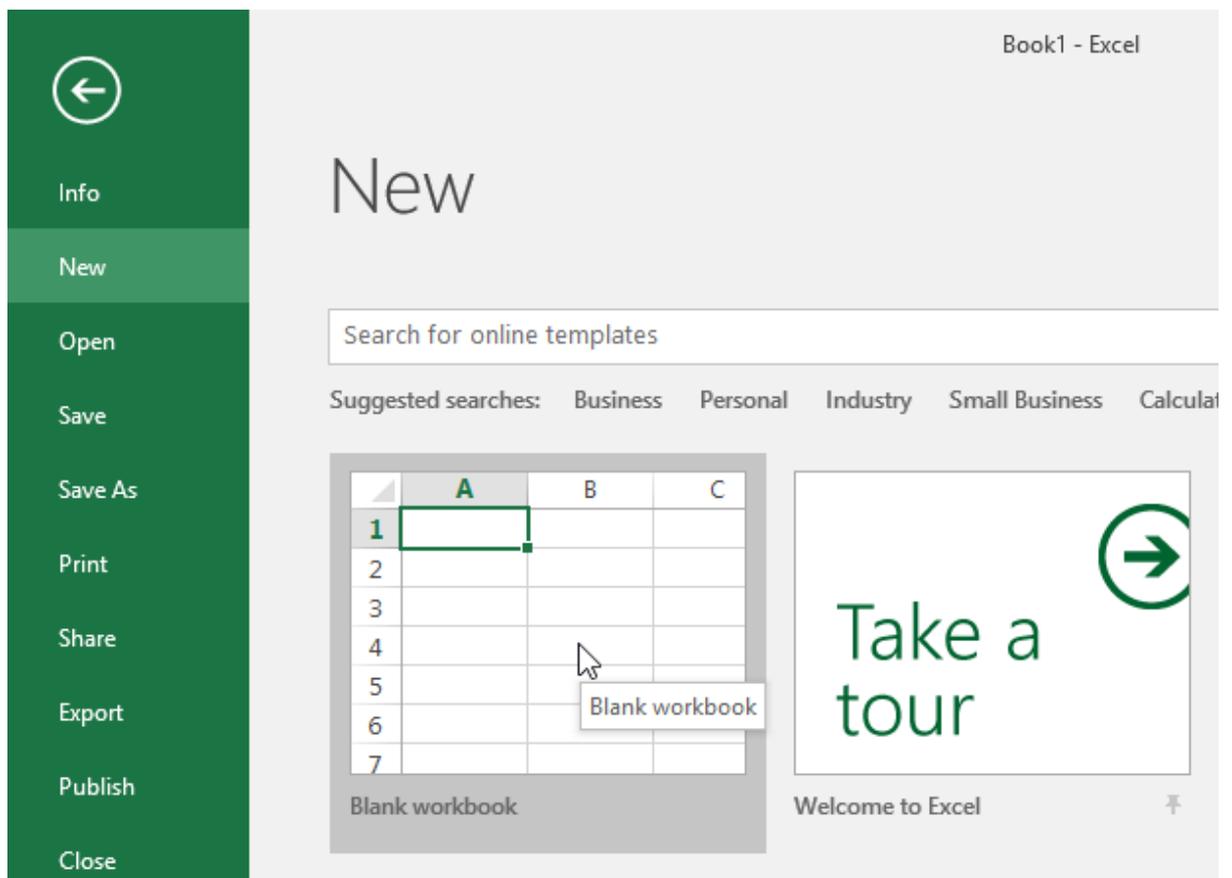
3. A new blank workbook will appear.

1.7.2. To open an existing workbook:

In addition to creating new workbooks, you'll often need to open a workbook that was previously saved.

1. Navigate to **Backstage view**, then click **Open**.
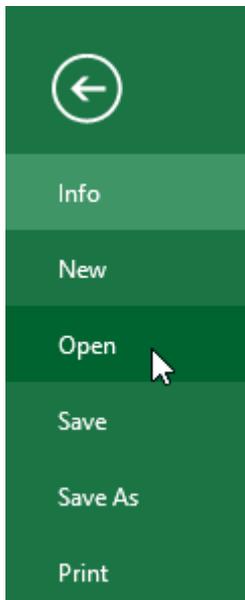
2. Select **Computer**, then click **Browse**. Alternatively, you can choose **OneDrive** to open files stored on your **OneDrive**.
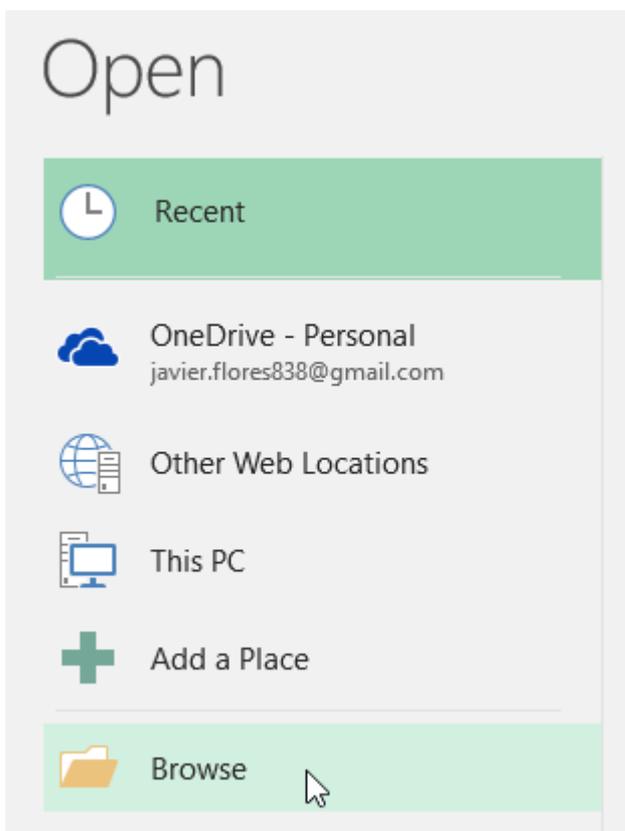
3. The **Open** dialog box will appear. Locate and select your **workbook,** then click **Open**.
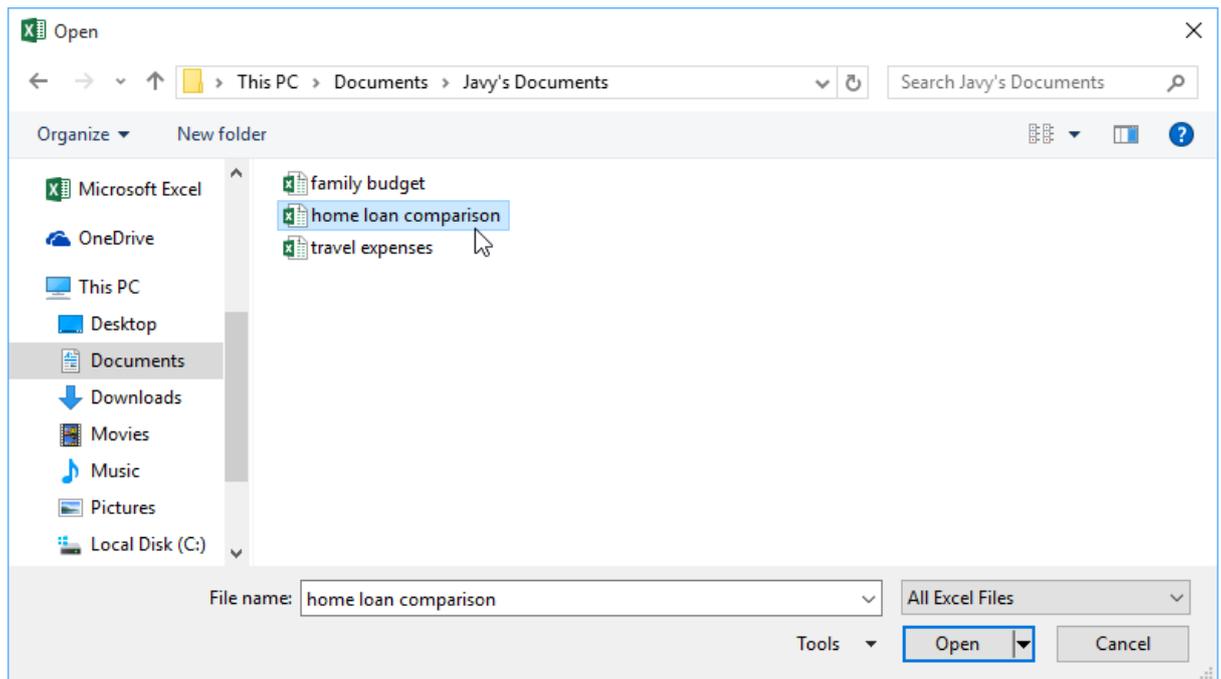
If you've opened the desired workbook recently, you can browse your **Recent Workbooks** rather than search for the file.
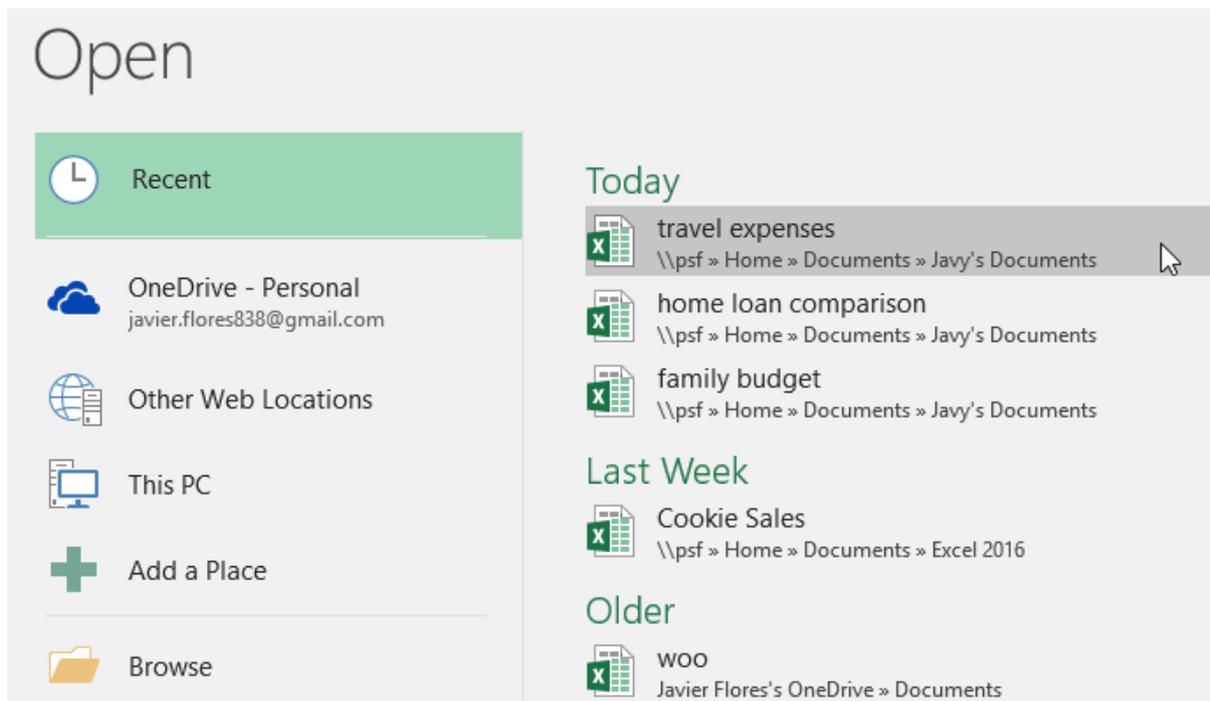
1.7.3. To pin a workbook:

If you frequently work with the **same workbook**, you can **pin it** to Backstage view for faster access.

1. Navigate to **Backstage view**, then click **Open**. Your **recently edited workbooks** will appear.
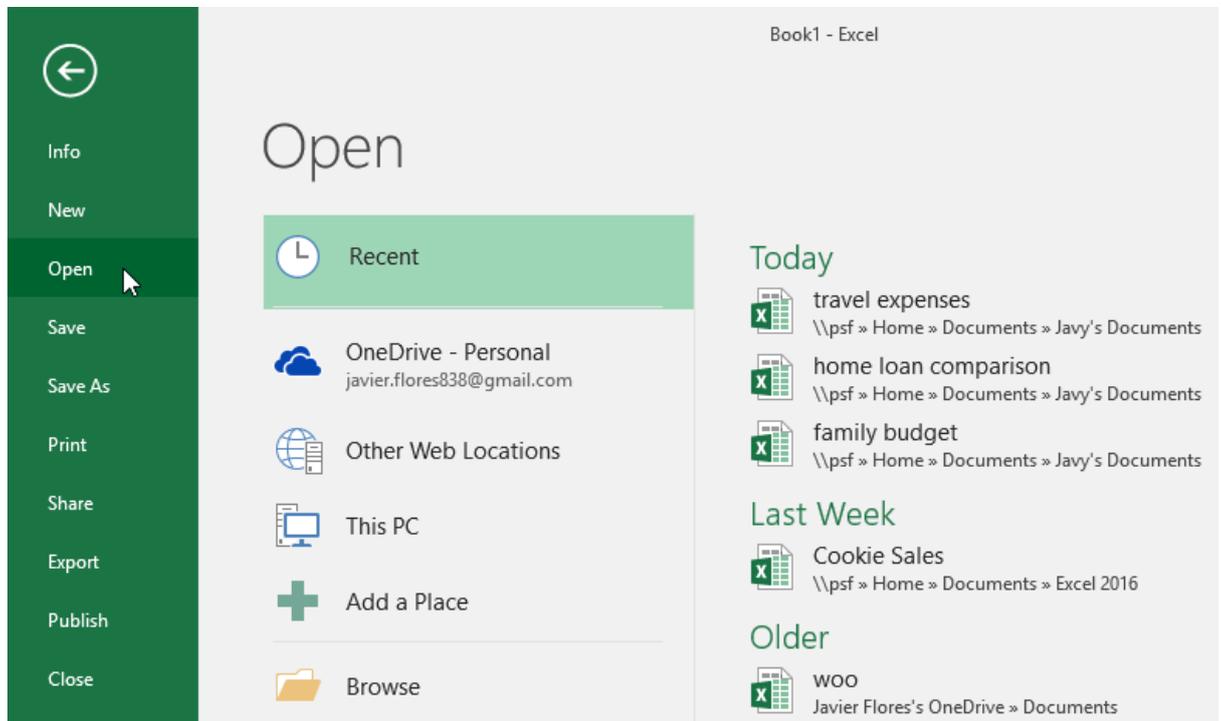
2. Hover the mouse over the **workbook** you want to pin. A **pushpin icon** will appear next to the workbook. Click the **pushpin icon**.
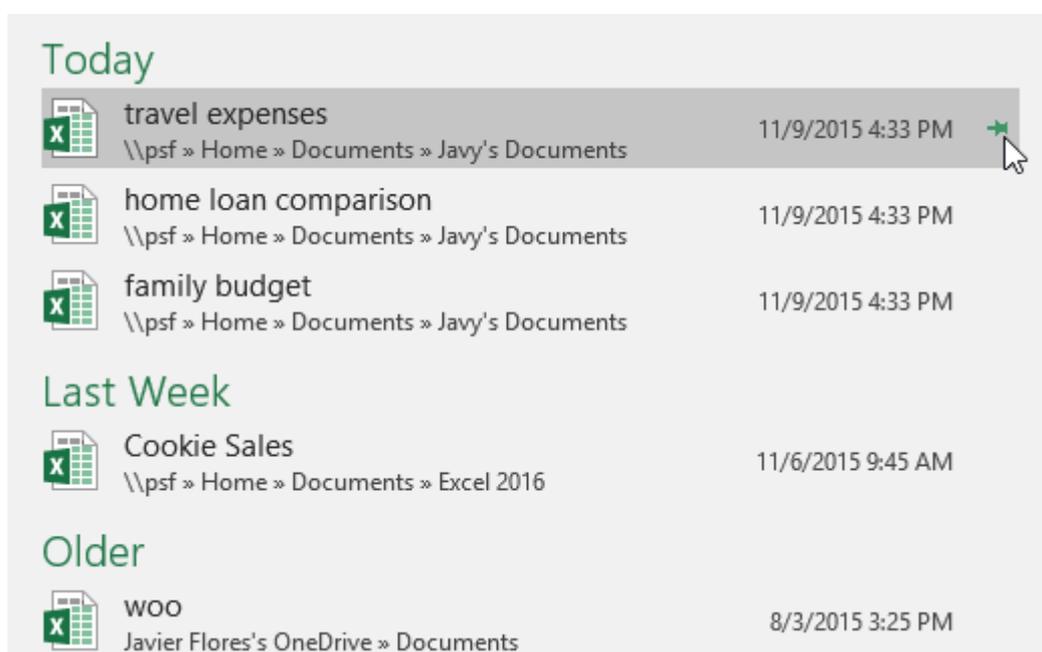
3. The workbook will stay in Recent Workbooks. To **unpin** a workbook, simply click the pushpin icon again.
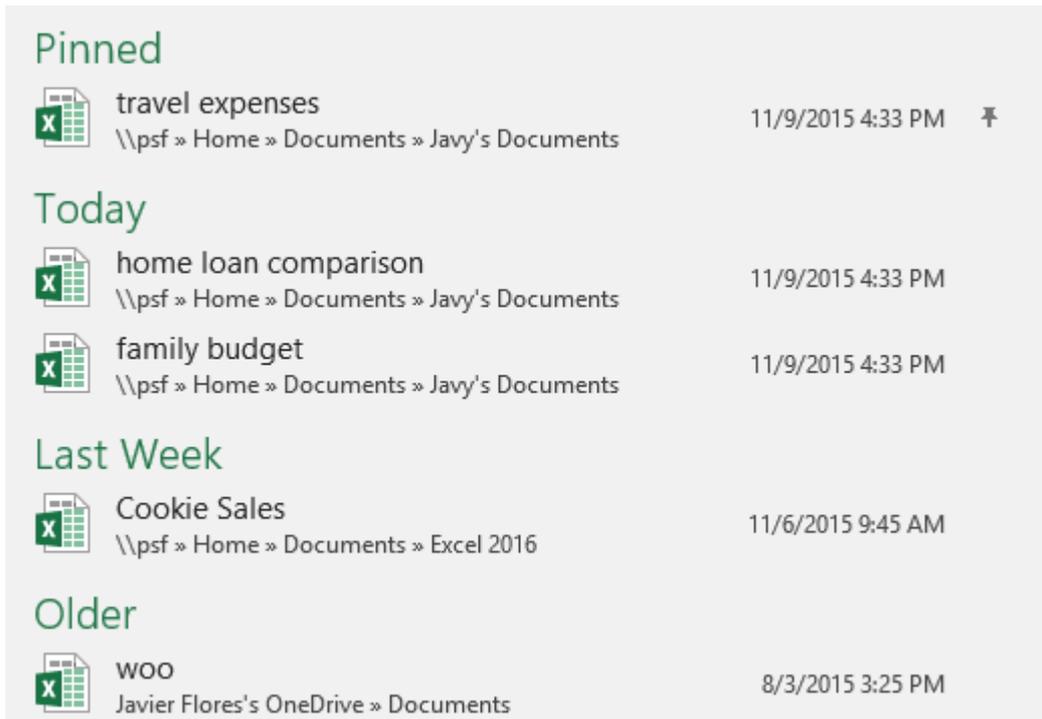
1.7.4. Using templates

A **template** is a **predesigned spreadsheet** you can use to create a new workbook quickly. Templates often include **custom formatting** and **predefined formulas**, so they can save you a lot of time and effort when starting a new project.

1.7.4.1.   To create a new workbook from a template:

1. Click the **File** tab to access **Backstage view**.

2. Select **New**. Several templates will appear below the **Blank workbook** option.
3. Select a **template** to review it.
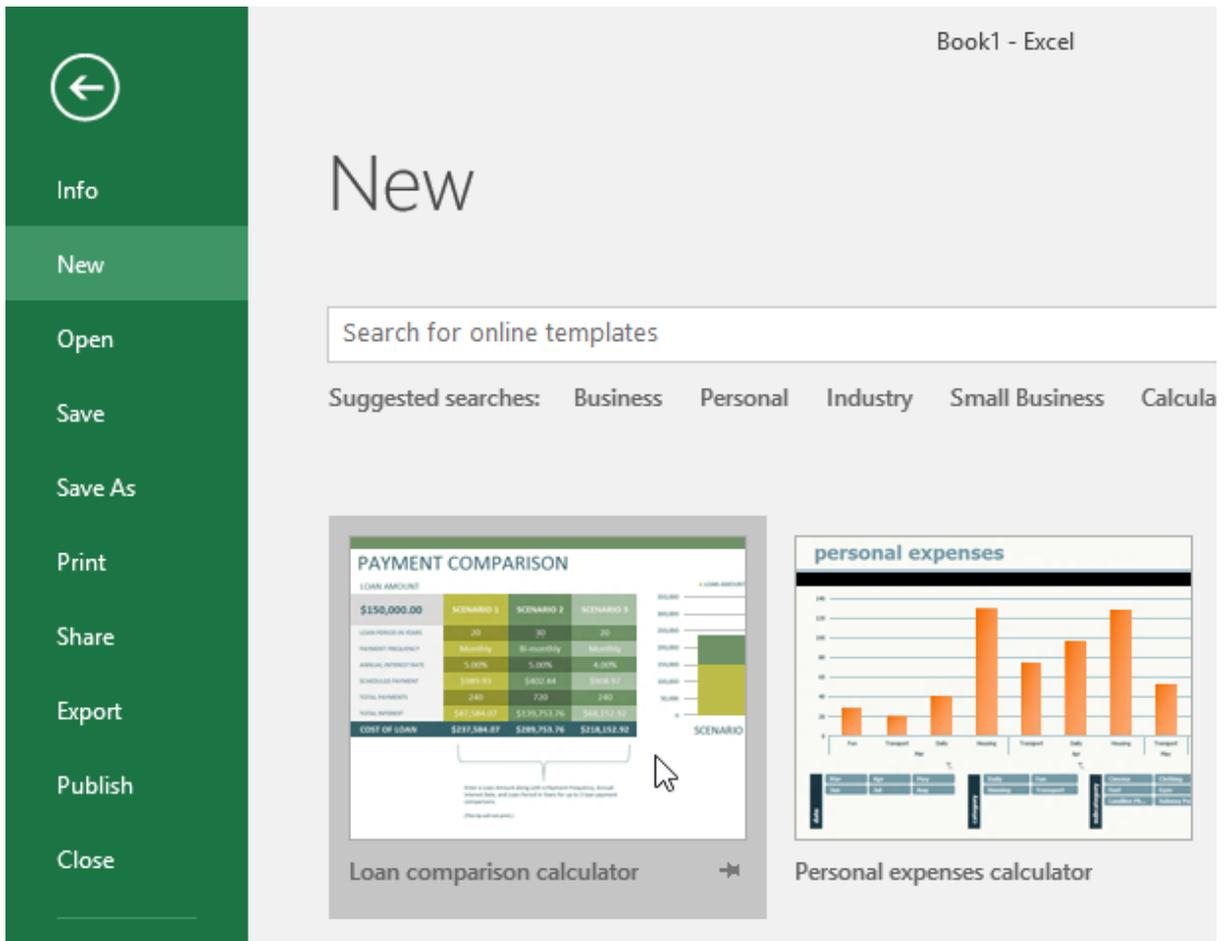
4. A **preview** of the template will appear, along with **additional information** on how the template can be used.
5. Click **Create** to use the selected template.
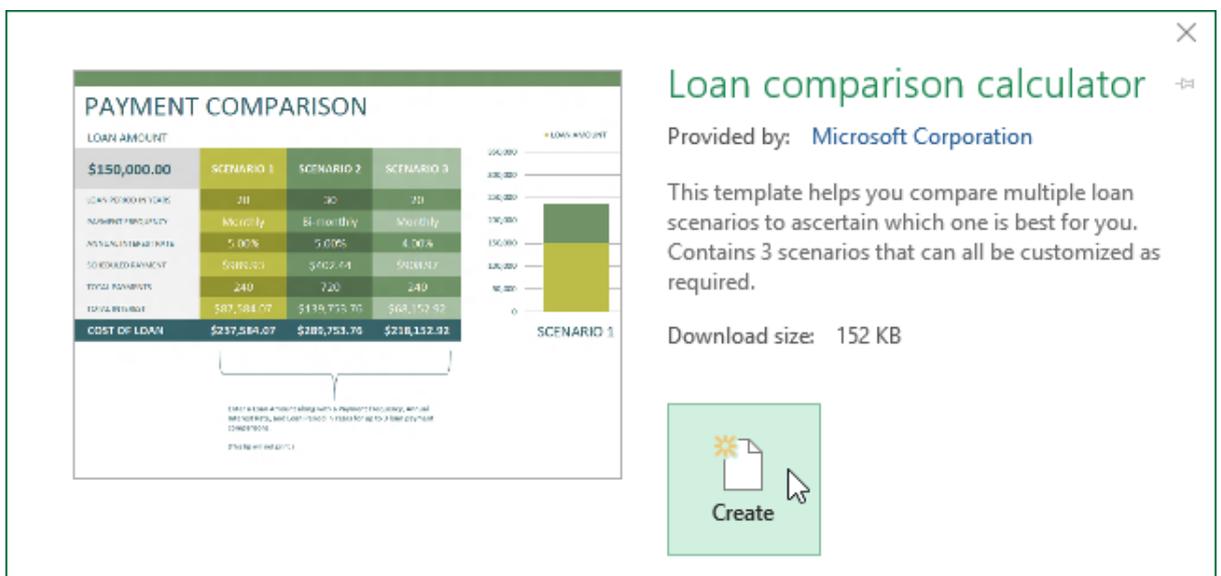
6. A new workbook will appear with the **selected template**.

You can also browse templates by **category** or use the **search bar** to find something more specific.

It's important to note that not all templates are created by Microsoft. Many are created by third-party providers and even individual users, so some templates may work better than others.

1.8.Save and Save As

Excel offers two ways to save a file: **Save** and **Save As**. These options work in similar ways, with a few important differences:

- **Save**: When you create or edit a workbook, you'll use the **Save** command to save your changes. You'll use this command most of the time. When you save a file, you'll only need to choose a file name and location the first time. After that, you can just click the Save command to save it with the same name and location.
- **Save As**: You'll use this command to create a **copy** of a workbook while keeping the original. When you use Save As, you'll need to choose a different name and/or location for the copied version.

1.8.1. To save a workbook:

It's important to **save your workbook** whenever you start a new project or make changes to an existing one. Saving early and often can prevent your work from being lost. You'll also need to pay close attention to **where you save** the workbook so it will be easy to find later.

1. Locate and select the **Save** command on the **Quick Access Toolbar**.
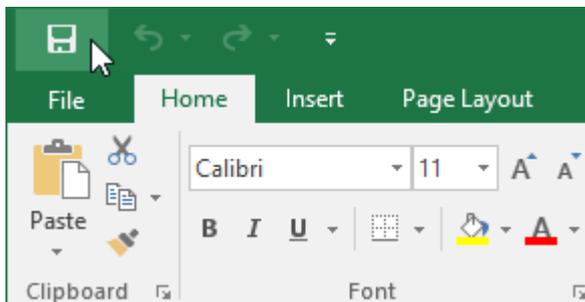
2. If you're saving the file for the first time, the **Save As** pane will appear in **Backstage view**.
3. You'll then need to choose **where to save** the file and give it a **file name**. To save the workbook to your computer, select **Computer**, then click **Browse**. Alternatively, you can click **OneDrive** to save the file to your OneDrive.
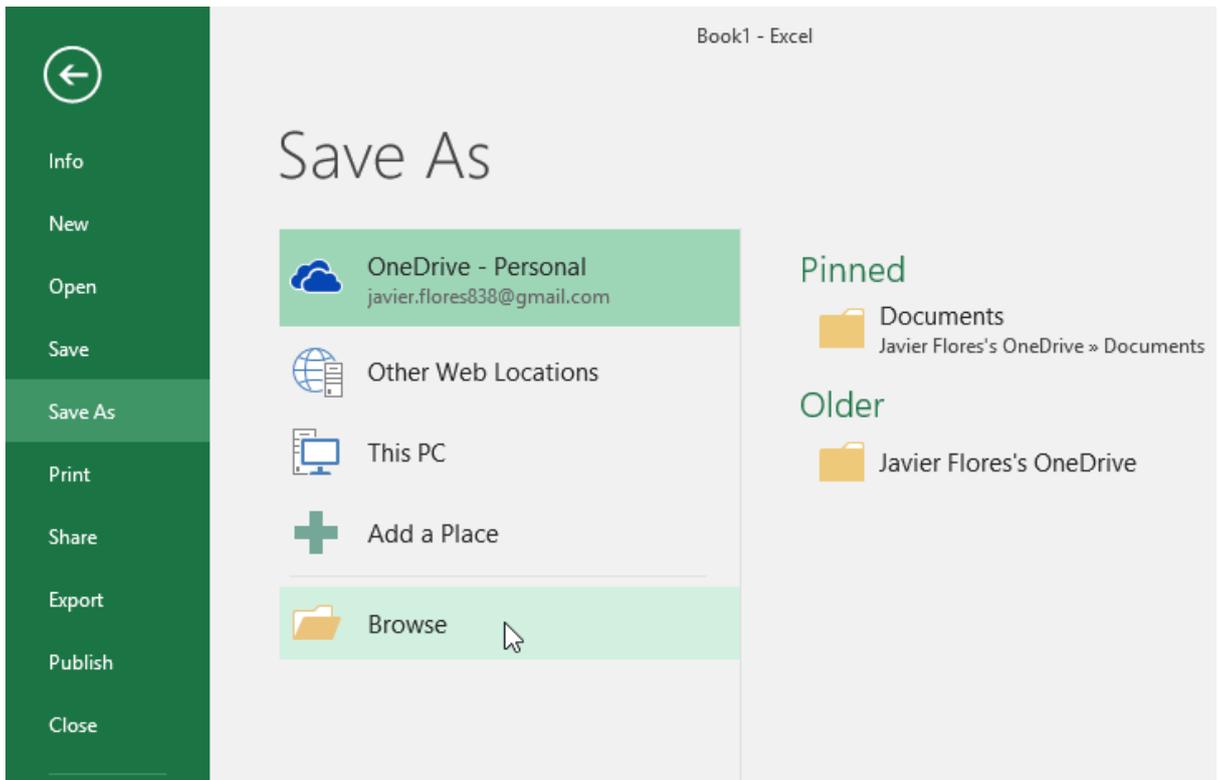
4. The **Save As** dialog box will appear. Select the **location** where you want to save the workbook.
5. Enter a **file name** for the workbook, then click **Save**.
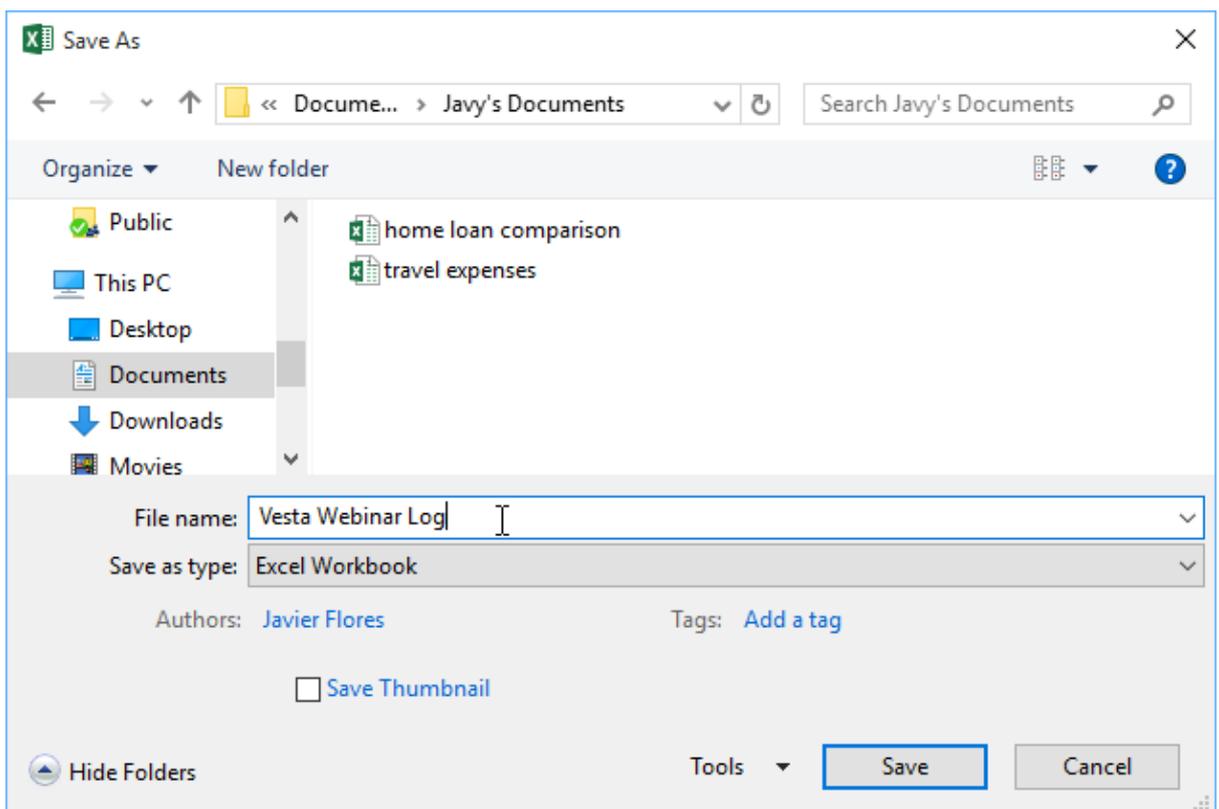
6. The workbook will be **saved**. You can click the **Save** command again to save your changes as you modify the workbook.

You can also access the **Save** command by pressing **Ctrl+S** on your keyboard.

1.8.2. Using Save As to make a copy

If you want to save a **different version** of a workbook while keeping the original, you can create a **copy**. For example, if you have a file named **Sales Data**, you could save it as **Sales Data 2** so you'll be able to edit the new file and still refer back to the original version.

To do this, you'll click the **Save As** command in Backstage view. Just like when saving a file for the first time, you'll need to choose **where to save** the file and give it a new **file name**.
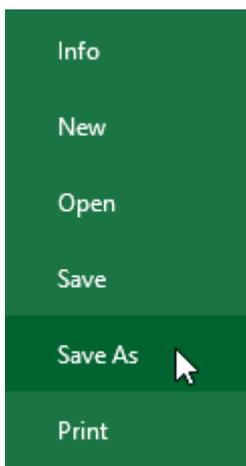
1.8.3. To change the default save location:

If you don't want to use **OneDrive**, you may be frustrated that OneDrive is selected as the default location when saving. If you find it inconvenient to select **Computer** each time, you can change the **default save location** so **Computer** is selected by default.

1. Click the **File** tab to access **Backstage view**.

2. Click **Options**.

3. The **Excel Options** dialog box will appear. Select **Save**, **check the box** next to **Save to Computer by default**, then click **OK**. The default save location will be changed.
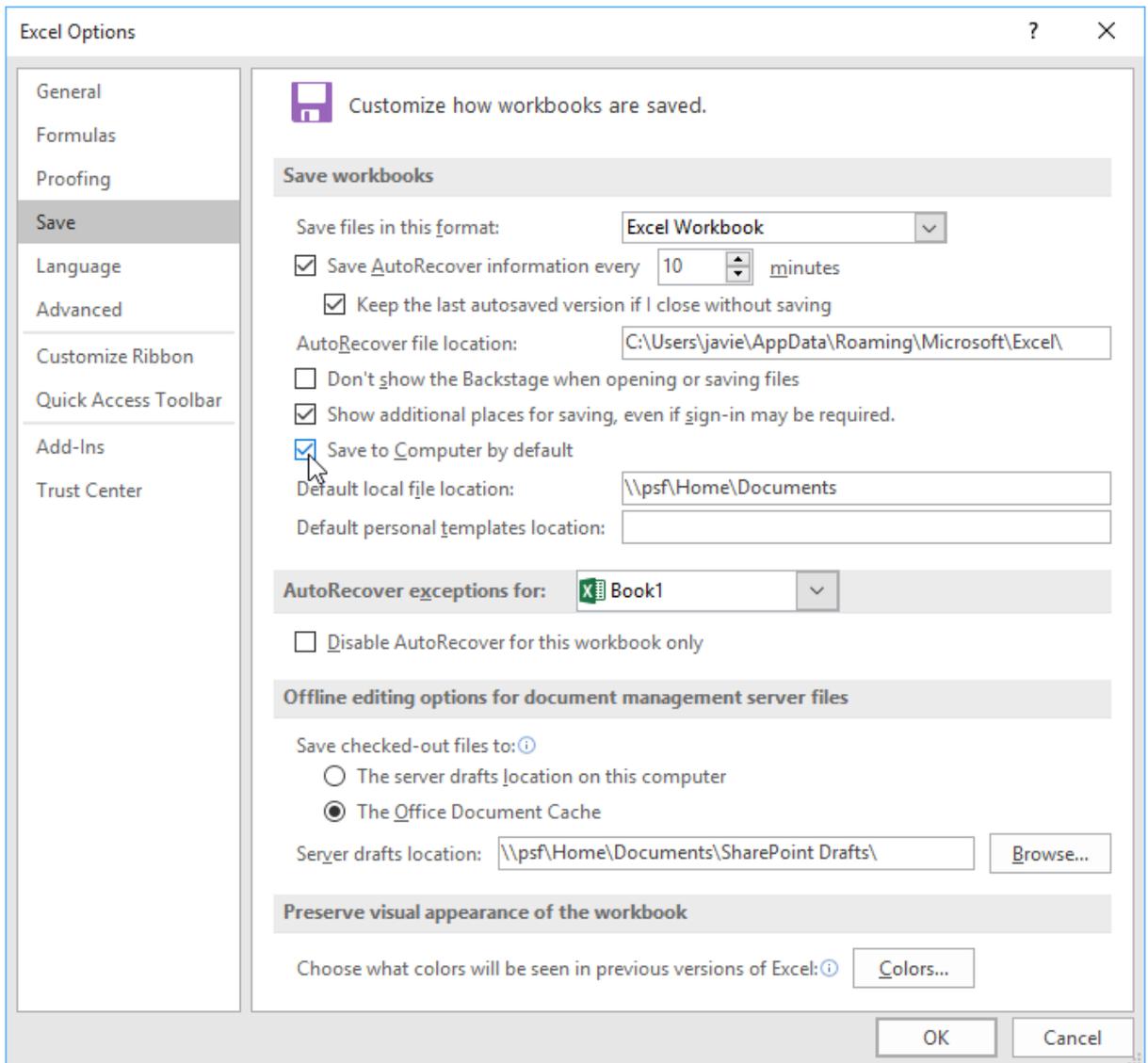
1.8.4. AutoRecover

Excel automatically saves your workbooks to a temporary folder while you are working on them. If you forget to save your changes or if Excel crashes, you can restore the file using **AutoRecover**.

1.8.4.1.   To use AutoRecover:

1. Open Excel. If **autosaved versions** of a file are found, the **Document Recovery** pane will appear.
2. Click to **open** an available file. The workbook will be **recovered**.
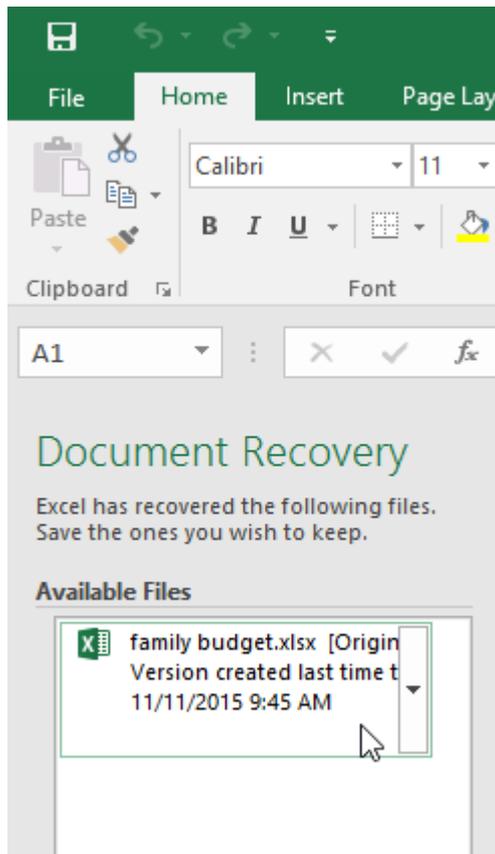
By default, Excel autosaves every 10 minutes. If you are editing a workbook for less than 10 minutes, Excel may not create an autosaved version.

If you don't see the file you need, you can browse all autosaved files from **Backstage view**. Just select the **File** tab, click **Manage Versions,** then choose **Recover Unsaved Workbooks**.

1.8.5. Exporting workbooks

By default, Excel workbooks are saved in the **.xlsx** file type. However, there may be times when you need to use **another file type,** such as a **PDF** or **Excel 97-2003 workbook**. It's easy to **export** your workbook from Excel to a variety of file types.

1.8.5.1.   To export a workbook as a PDF file:

Exporting your workbook as an **Adobe Acrobat document**, commonly known as a **PDF file**, can be especially useful if you're sharing a workbook with someone who does not have Excel. A PDF will make it possible for recipients to view but not edit the content of your workbook.

1. Click the **File** tab to access **Backstage view**.

2. Click **Export**, then select **Create PDF/XPS**.
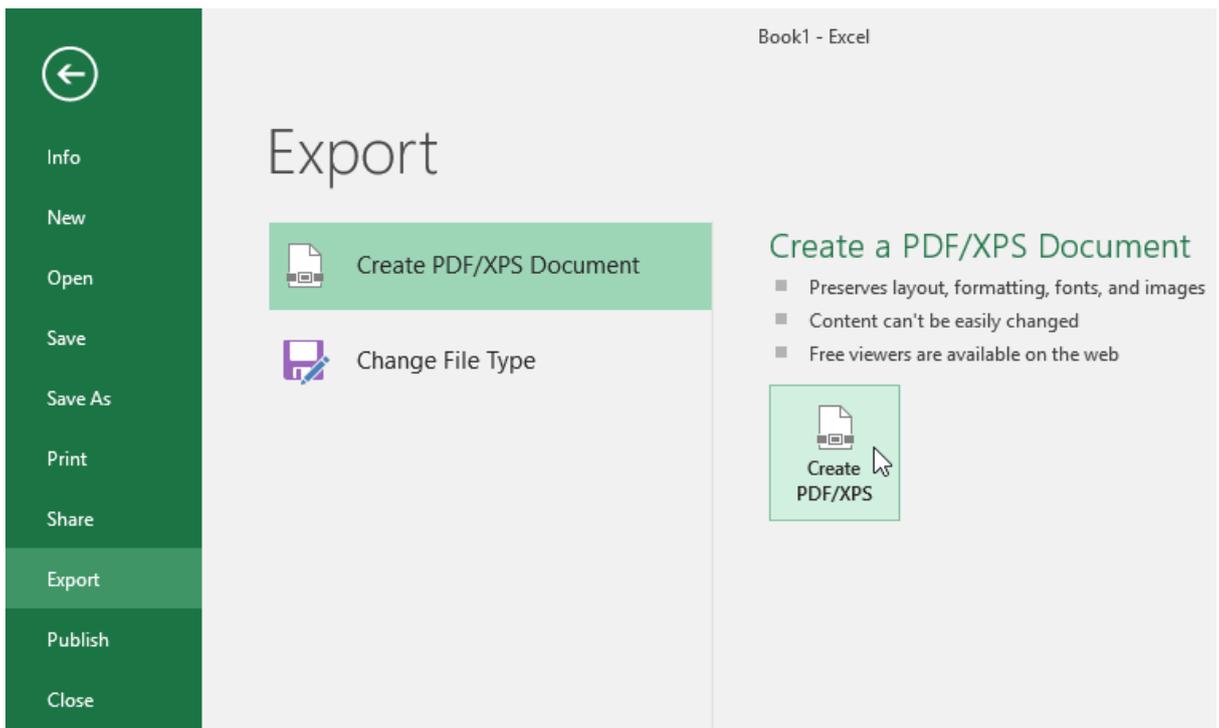
3. The **Save As** dialog box will appear. Select the **location** where you want to export the workbook, enter a **file name**, then click **Publish**.
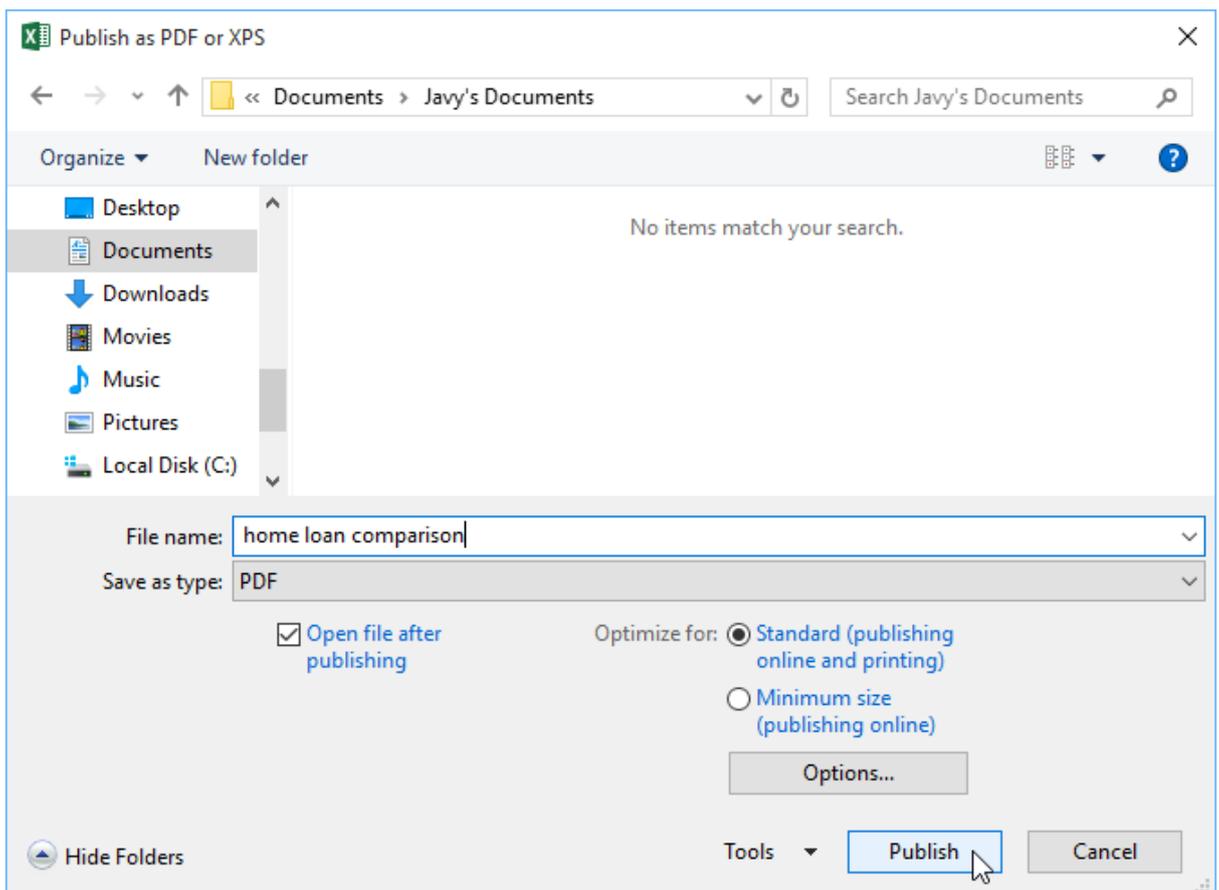
By default, Excel will only export the **active worksheet**. If you have multiple worksheets and want to save all of them in the same PDF file, click **Options** in the **Save As** dialog box. The **Options** dialog box will appear. Select **Entire workbook**, then click **OK**.
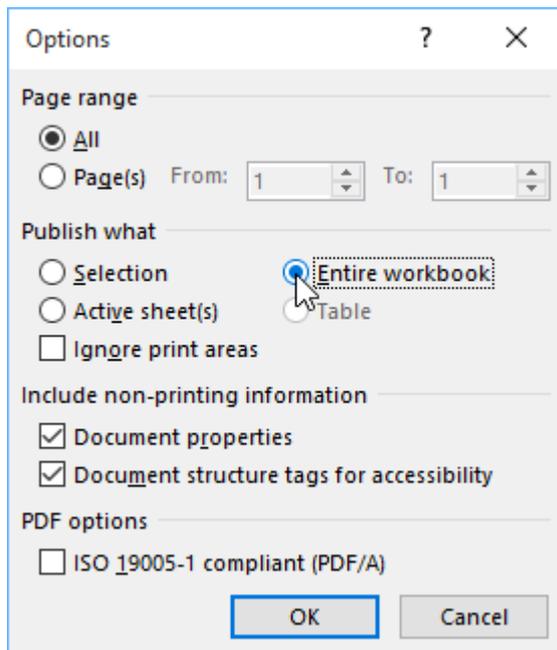
Whenever you export a workbook as a PDF, you'll also need to consider how your workbook data will appear on each **page** of the PDF, just like **printing** a workbook. Visit our Page Layout and Printing lesson to learn more about what to consider before exporting a workbook as a PDF.

1.8.6. To export a workbook to other file types:

You may also find it helpful to export your workbook to other file types, such as an **Excel 97-2003 workbook** if you need to share with people using an older version of Excel, or a **.CSV file** if you need a **plain-text version** of your workbook.

1. Click the **File** tab to access **Backstage view**.
2. Click **Export**, then select **Change File Type**.
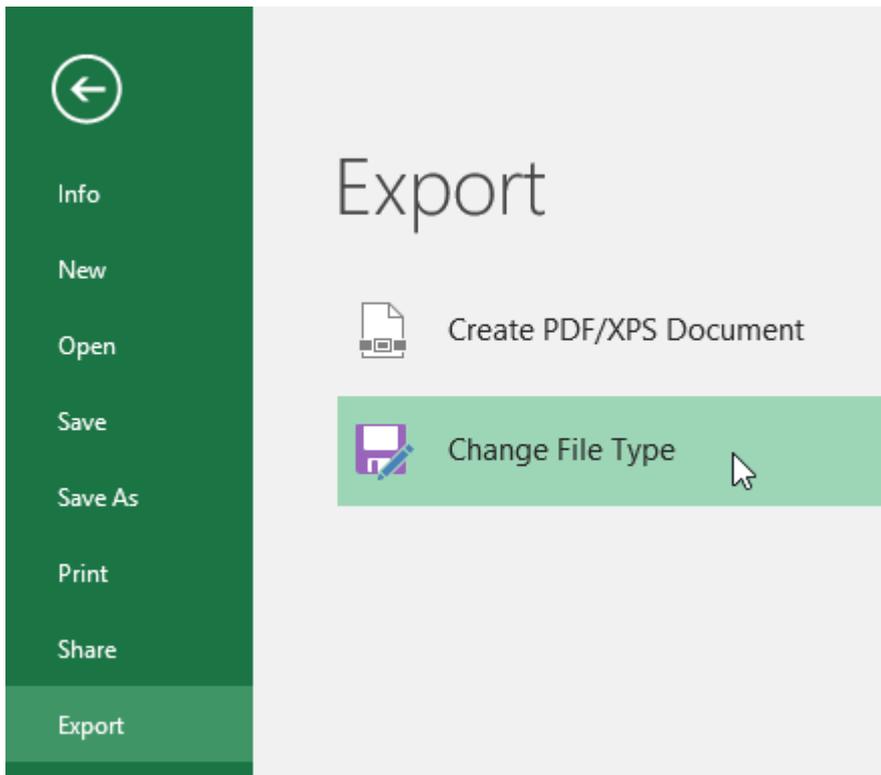
3. Select a common **file type**, then click **Save As**.
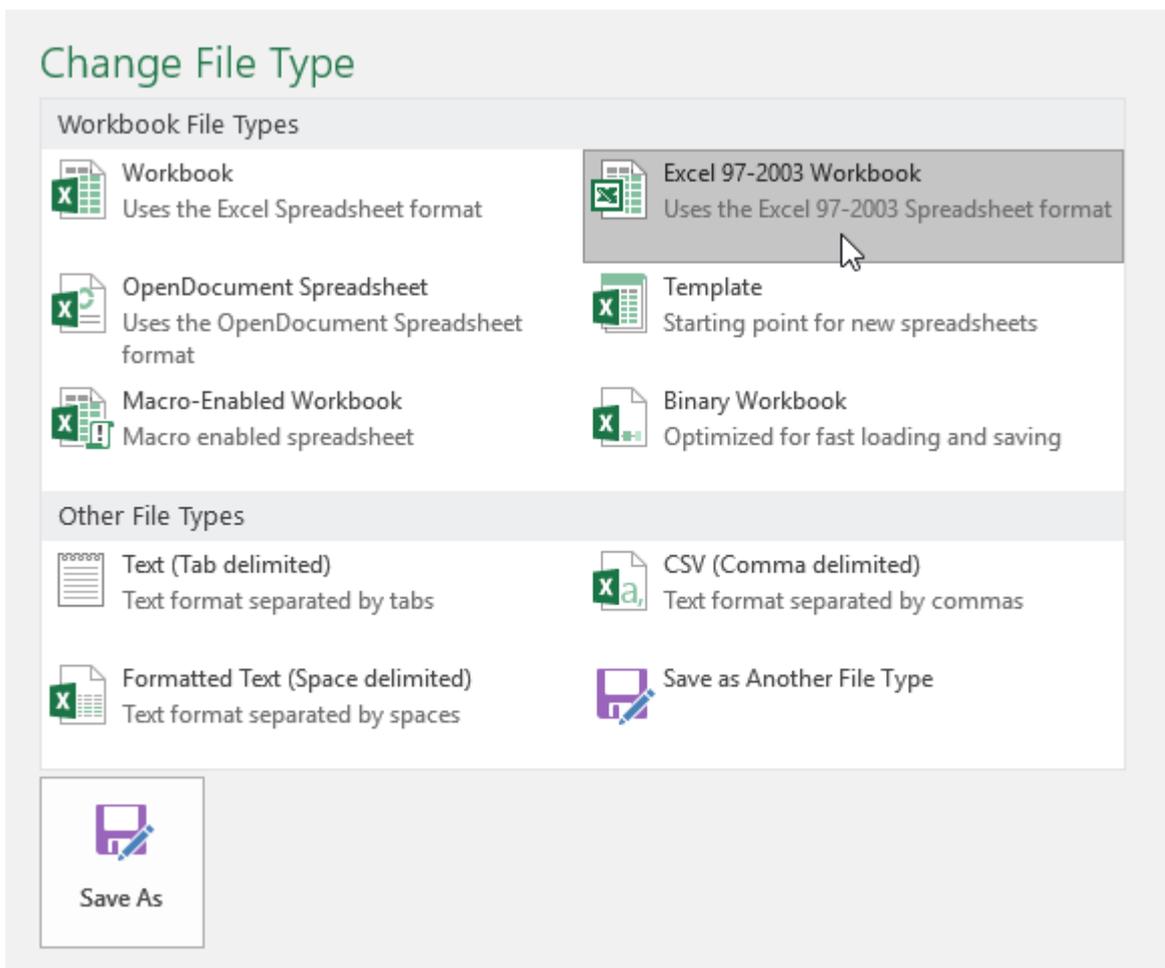
4. The **Save As** dialog box will appear. Select the **location** where you want to export the workbook, enter a **file name**, then click **Save**.
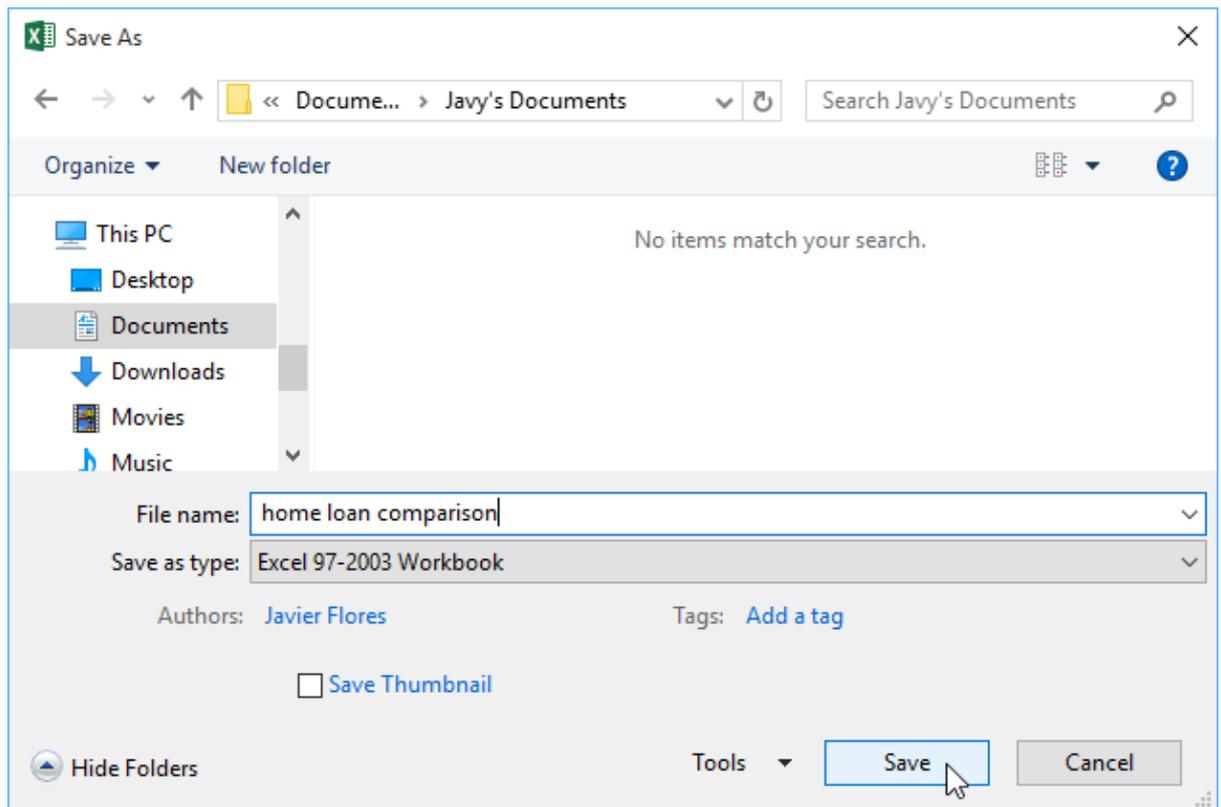
You can also use the **Save as type:** drop-down menu in the **Save As** dialog box to save workbooks in a variety of file types.