Lesson 2

Working with Microsoft Excel 2013

Learning Objectives

Students will learn to:

* Create workbooks
* Save workbooks
* Enter and edit basic data in a worksheet
* Use data types to populate a worksheet
* Cut, copy, and paste data
* Edit a workbook's properties

MOS Skills

* Create new Blank workbooks *1.1.1*
* Save workbooks in alternate file formats *1.5.2*
* Maintain backward compatibility *1.5.6*
* Save files to remote locations *1.5.8*
* Append data to a worksheet *2.1.1*
* Find and replace data *2.1.2*
* Adjust column width *1.3.5*
* Demonstrate how to use the Auto Fill tool *2.1.4*
* Expand data across columns *2.1.5*
* Delete cells *2.1.6*
* Apply Number formats *2.2.6*
* Copy and paste data *2.1.3*
* Add values to workbook properties *1.4.8*

Lesson Summary — Lecture Notes

Lesson 2 expands on the foundational skills necessary to working with Excel, including creating workbooks, saving workbooks, entering and editing basic data in a worksheet, using data types to populate a worksheet, cutting, copying and pasting data, and editing a worksheet's properties.

Begin by explaining there are three ways to create a new Microsoft Excel workbook. You can open a new, blank workbook using the FILE tab to access Backstage view or when you launch Excel. You can open an existing Excel workbook, enter new or additional data, and save the file with a new name, thus creating a new workbook. You can also use a template to create a new workbook. Explain that a template is a model that has already been set up to display certain kinds of data, such as sales reports, invoices, and so on.

Next, explain that when you save a file, you can save it to a folder on your computer's hard drive, a network drive, disc, CD, USB drive, SkyDrive, or other storage location. You must first identify where the document is to be saved. The remainder of the Save process is the same, regardless of the location or storage device.

Then teach students that you can type data directly into a worksheet cell or cells. You can also copy and paste information from another worksheet or from other programs. Copy takes the information from one location and duplicates it. You use Paste to put this information in another location. To enter data in a cell within a worksheet, you must make the desired cell active and then type the data. To move to the next column after text is entered, press Tab. Continue to press Tab to go to the next column.

Next, explain that you can enter three types of data into Excel: text, numbers, and formulas. In the lesson exercises, you enter text (labels) and numbers (values). They will learn to enter formulas in Lesson 4 (Building Basic Formulas). Explain that text entries contain alphabetic characters and any other characters that do not have a purely numeric value. Students should understand that the strength of Excel is its ability to calculate and analyze numbers based on the numeric values you enter. Of course, if you enter the wrong numbers, you get the wrong calculations. For that reason, accurate data entry is crucial.

After they learn to enter data into a worksheet, they will learn that they frequently need to rearrange or reorganize some of it to make the worksheet easier to understand and analyze. You can use Excel’s Cut, Copy, and Paste commands to copy or move entire cells with their contents, formats, and formulas. These processes are discussed as the exercises in this section continue. You can also copy specific contents or attributes from the cells. For example, you can copy the format only without copying the cell value, or copy the resulting value of a formula without copying the formula itself. You can also copy the value from the original cell but retain the formatting of the destination cell.

Lastly, explain that a workbook has a number of properties that are associated with it to make managing it easier. The properties include items that you indirectly change such as file size and last edit date. The workbook properties also include items you directly change such as keywords. Assigning keywordsto the document properties makes it easier to organize and find documents. You can also add more notes to your file for classification and document management.

Key Terms

**Auto Fill** An Excel feature that automatically fill cells with data, formatting, or both.

**AutoComplete** An Excel feature that automatically enters the remaining characters of an entry when the first few typed characters match an entry made previously.

**copy** To duplicate data from a worksheet to the Clipboard.

**cut** To remove data from a worksheet. Cut data may be pasted into a new location or locations in a worksheet.

**fill handle** A small square in the lower, right corner of a selected cell or range of cells. Used mainly to copy data to adjacent cells.

**Flash fill** A tool identified with symbols such as dotted, dashed, or solid lines that fill the space before tabs.

**formula bar** A bar located between the ribbon and the worksheet in which users can edit the contents of a cell.

**keyword** A word assigned to a document’s properties that makes it easier to organize and find documents.

**label** Text entered in a worksheet that identifies numeric data and is the most common type of text entered in a worksheet. Labels are also used to sort and group data.

**move pointer** A mouse pointer that enables users to drag a cell or range of cells to a new location, replacing any existing data in the destination cells.

**Office Clipboard** A location that collects and stores up to 24 copied or cut items that are then available to be used in the active workbook, in other workbooks, and in other Office programs.

**paste** To insert data from the Clipboard to a new location in a worksheet.

**range** A group of adjacent cells you select to perform operations on all of the selected cells.

**selecting text** Highlighting text that is to be changed.

**workbook properties** Items you directly change, such as keywords.

Solutions for Step-by-Step Exercises

The ***Fabrikam Address Solution*** solution file is located in **Solutions/Lesson02** folder and is referenced in the following step-by-step exercise:

### Name and Save a Workbook

The ***Fabrikam Address Solution*** solution file is located in **Solutions/Lesson02** folder and is referenced in the following step-by-step exercises

### Save to Your SkyDrive

The ***Fabrikam Broad Address Solution*** solution file is located in **Solutions/Lesson02** folder and is referenced in the following step-by-step exercises:

### Save a Workbook Under a Different Name

The ***Fabrikam Address Template Solution*** solution file is located in **Solutions/Lesson02** folder and is referenced in the following step-by-step exercises:

### Save a Workbook Under a Different Name

The ***Fabrikam Employees Solution*** solution file is located in **Solutions/Lesson02** folder and is referenced in the following step-by-step exercises:

### Enter Basic Data in a Worksheet

### Change the Column Width

The ***Fabrikam Sales Solution*** solution file is located in **Solutions/Lesson02** folder and is referenced in the following step-by-step exercises:

### Delete and Clear a Cell's Contents

### Enter Labels and Use AutoComplete

### Enter Numeric Values

### Enter Dates

### Fill a Series with AutoFill

The ***Customers Solution*** solution file is located in **Solutions/Lesson02** folder and is referenced in the following step-by-step exercises:

### Fill Cells with Flash Fill

The ***Customers Houses Solution*** solution file is located in **Solutions/Lesson02** folder and is referenced in the following step-by-step exercises:

### Copy a Data Series with the Mouse

### Move a Data Series with the Mouse

### Copy and Paste Data

### Cut and Paste Data

### Assign Keywords

Answer Key

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

**1.** Which of the following consists of details that describe or identify a file, including the author?

**a.** Paste

**b.** Document properties

**c.** Copy

**d.** Range

**2.** Which command is used to insert a cut or copied selection to a cell or range of cells?

**a.** Paste

b. Document properties

**c.** Copy

**d.** Range

**3.** Which of the following is a group of adjacent cells that you select to perform operations on all of the selected cells?

**a.** Paste

**b.** Document properties

**c.** Copy

**d.** Range

**4.** Which of the following places a duplicate of a selection in the Office Clipboard?

**a.** Paste

**b.** Document properties

**c.** Copy

**d.** Range

**5.** To use a worksheet or workbook outside Excel, you have the option to save as which of the following?

**a.** File format

**b.** Worksheet

**c.** File sheet

**d**. File range

**6.** Which is a small green square in the lower-right corner of a selected cell or range that you can use to copy one cell to adjacent cells or to create a series?

**a.** Cell pointer

**b.** Column marker

**c.** Fill handle

**d.** Formula bar

**7.** Which is used to drag or double-click to change the width of a column.

**a.** Cell pointer

**b.** Column marker

**c.** Fill handle

**d.** Formula bar

**8.** Which of the following is a bar near the top of the Excel window where you can enter or edit cell entries or formulas?

**a.** Cell pointer

**b.** Column marker

**c.** Fill handle

**d.** Formula bar

**9.** Which Excel feature helps you quickly enter previous data into cells?

**a.** AutoComplete

**b.** AutoData

**c.** QuickComplete

**d.** QuickData

**10.** Which Excel feature automatically fills cells with data from another cell or range or completes a data series?

**a.** Range Fill

**b.** Auto Fill

**c.** Data Fill

**d.** Complete Fill

True / False

Circle T if the statement is true or F if the statement is false.

**T F 1.** When data is too wide for a cell, the part of the data that will not fit is automatically deleted.

**T F 2.** Using the Delete key removes both text and formats from a cell.

**T F 3.** Use Ctrl + : to enter the current date in a worksheet cell.

**T F 4.** You can assign keywords so that others can search for your documents online.

**T F 5.** To remove only the formats from a cell, you can use the Delete key.

**T F 6.** Dates can be displayed in only one way within Excel.

**T F 7.** All dates in Excel are actually stored in the serial date number system.

**T F 8.** The formula bar is found at the bottom of the Excel window.

**T F 9.** Use the fill handle to create a natural series, such as the months of the year.

**T F 10.** Workbooks can be saved as web pages, PDF files, and for use in previous versions of Excel.

Solutions for Competency Assessment

**Project 2-1**

The solution for Project 2-1 is named ***02 Focus Group Solution.xlxs*** and is located in the **Solutions/Lesson02** folder.

**Project 2-2**

The solution for Project 2-2 is named ***02 Focus Properties Solution.xlxs*** and is located in the **Solutions/Lesson02** folder.

Solutions for Proficiency Assessment

**Project 2-3**

The solution for Project 2-3 is named ***02 Commission Solution.xlxs*** and is located in the **Solutions/Lesson02** folder.

**Project 2-4**

The solution for Project 2-4 is named ***02 Advertising Expenses Solution.xlsx*** and is located in the **Solutions/Lesson02** folder.

Solutions for Mastery Assessment

**Project 2-5**

The solution for Project 2-5 is named ***02 Home Sales Solution.xlxs***, ***02 Home Sales Q1 Solution.xlxs***, and ***02 Home Sales Q1 Solution.xlxs*** are located in the **Solutions/Lesson02** folder.

**Project 2-6**

The solution for Project 2-6 is named ***02 Homes Sales Flash Fill 97-03 Solution.xlsx*** and is located in the **Solutions/Lesson02** folder.

Test Projects for grading with OfficeGrader

The following test projects are designed for your to distribute directly to your students. Data and solution files are provided where required. The solution files are designed for grading with OfficeGrader.

Test Project 2-1

MOAC, Microsoft Excel 2013

Lesson 2, Working with Microsoft Excel 2013

Complete the following task:

1. **OPEN** the ***02 Employees***.

2. **SAVE** the document as ***02 Employees Edited***  on your flash drive.

3. In C3, type **Name**. In C4:C27, use Flash Fill to enter each person’s full name.

4. In cell E22, change the value to 18. Then copy that value to the Clipboard, and paste it into cell E24, replacing the current value there.

5. Clear the contents from the range of cells A3:B27.

5. In cell A3, key **Edited on.**

6. In cell B3, key **1/12/2015**.

7. If the date does not appear exactly as you keyed it, open the drop-down list in the Number group on the Home tab and select Short Date from the menu that appears.

8. Resize the width of column A to accommodate its widest entry.

9. Resize the width of column B to 11.

10. **SAVE** the document.

**CLOSE** the workbook. Leave Excel open.

Test Project 2-2

MOAC, Microsoft Excel 2013

Lesson 2, Working with Microsoft Excel 2013

Complete the following task:

1. **OPEN** the ***02 Homes*** document.

2. **SAVE** the document as ***02 Homes for Sale*** in your flash drive.

3. Starting in row 23, enter the following new records:

**Bennett, Paige 3 2.5 3,100 $258,500**

**Bradley, Oscar 4 3 2,880 $310,900**

4. Use AutoFill to enter ID numbers in A2:24, starting with the ID ML001 and ending at ML023.

5. In the workbook’s properties, enter the keywords ***Real estate***, ***Realtor***, and ***Home***. Close the document panel if you opened it to enter the keywords.

6. **SAVE** the workbook.

**CLOSE** the workbook. Exit Excel.