

Working with Microsoft Excel 2013 2

LESSON SKILL MATRIX

Skills	Exam Objective	Objective Number
Creating Workbooks	Create new blank workbooks.	1.1.1
Saving Workbooks	Save workbooks in alternate file formats.	1.5.2
	Maintain backward compatibility.	1.5.6
	Save files to remote locations.	1.5.8
Entering and Editing Basic Data in a Worksheet	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
Using Data Types to Populate a Worksheet	Apply Number formats.	2.2.6
Cutting, Copying, and Pasting Data	Copy and paste data.	2.1.3
Editing a Workbook's Properties	Add values to workbook properties.	1.4.8



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KEY TERMS

- Auto Fill
- AutoComplete
- copy
- copy pointer
- cut
- fill handle
- Flash Fill
- formula bar
- keywords
- label
- move pointer
- natural series
- Office Clipboard
- paste
- range
- selecting text
- workbook properties



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Purchasing a home is generally the biggest financial investment most people make in a lifetime. Real estate agents advise and assist those who want to buy a new home or sell their present home. Some real estate agents can also help people find rental homes. When people are ready to sell their homes, they often list with a real estate agent who earns a commission or percentage of the home's selling price when the home sells. Agents take an exam to be licensed by their state. Many licensed agents also become Realtors®. This is a trademarked name that an agent can use only when he or she joins the local, state, and national associations of Realtors®. Fabrikam, Inc., located in Columbus, Ohio, is a real estate firm owned by Richard Carey and David Ortiz. Fabrikam has five fulltime sales agents and a college intern. Fabrikam's intern uses Excel to help manage sales, expenses, and support the business. In this lesson, you continue to view, add, and manipulate data in an Excel 2013 spreadsheet similar to that used by Fabrikam, Inc.

SOFTWARE ORIENTATION

Excel's HOME Tab

The ribbon in Microsoft Office Excel 2013 is made up of a series of tabs, each related to specific kinds of tasks that you perform in Excel. The HOME tab, shown in Figure 2-1, contains the commands that people use the most when creating Excel documents. Having commands visible on the work surface enables you to see at a glance most tasks you want to perform. Each tab contains groups of commands related to specific tasks or functions.

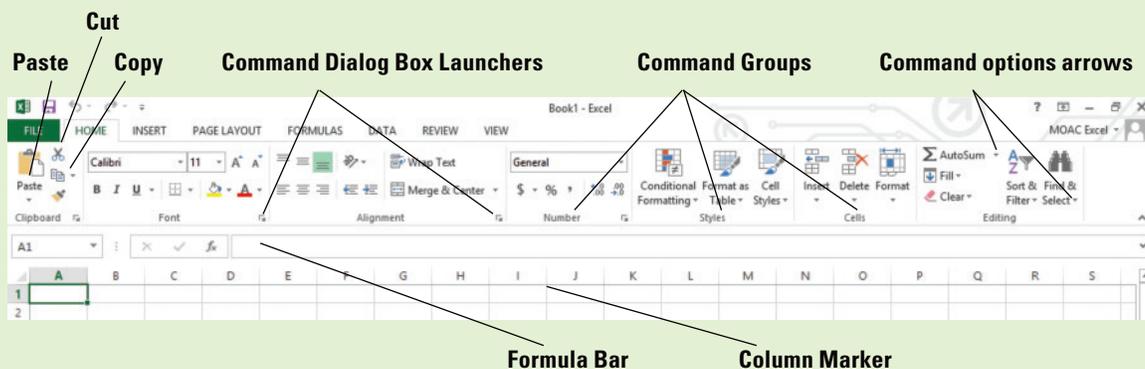


Figure 2-1

Ribbon, formula bar, and command options

Some commands have an arrow associated with them. In Figure 2-1, you see the option arrows associated with AutoSum and Find & Select. This indicates that in addition to the default task, other options are associated with the task. Similarly, some of the groups have Dialog Box Launchers associated with them. Clicking these displays additional commands not shown on the ribbon. In Figure 2-1, the Clipboard, Font, Alignment, and Number groups have associated dialog boxes, whereas Styles, Cells, and Editing do not.

Bottom Line

CREATING WORKBOOKS

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. 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.

Creating a Workbook from Scratch

To create a new workbook, launch Excel and select a blank workbook or another type of template. If you are working in Excel and want to begin a new workbook, click the FILE tab, click New, and then click Blank workbook. Worksheets often begin with text that describes the content of the worksheet. In this exercise, you create two Excel workbooks: one with a company address and one with a quick phone message.

STEP BY STEP

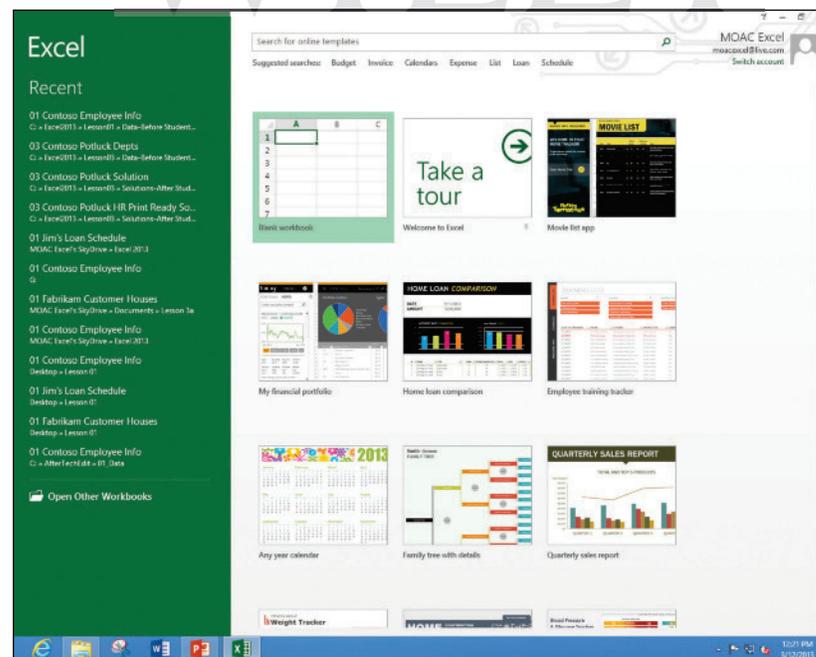
Create a Workbook from Scratch



GET READY. LAUNCH Excel. Excel gives you options for starting a blank workbook, taking a tour, or using templates (see Figure 2-2).

Figure 2-2

Available options after Excel is launched



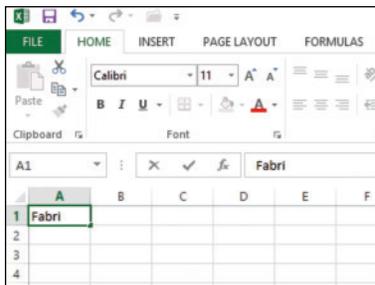
CERTIFICATION READY? 1.1.1

How do you create a new workbook file?

1. Click **Blank workbook**. If you have just launched Excel, *Book1 – Excel* appears in the title bar at the top of the window. A blank workbook opens with A1 as the active cell.
2. In cell A1, type **Fabrikam Inc.** This cell is the primary title for the worksheet. Note that as you type, the text appears in the cell and in the formula bar (see Figure 2-3). See the definition of formula bar in the “Editing a Cell’s Contents” section on page 37.

Figure 2-3

Typed text appears in both the active cell and the formula bar.



3. Press **Enter**. The text is entered into cell A1, but appears as if it flows into cell B1.
4. In cell A2, type **123 Fourth Street** and press **Enter**.
5. In cell A3, type **Columbus, OH 43204** and press **Enter**.
6. Sometimes you need a quick work area to complete another task while you are in the middle of a workbook. You can open another workbook as a scratch area. Click the **FILE** tab, and in the left pane, click **New**. The different templates available appear (refer to Figure 2-2).
7. In the Backstage view, click **Blank workbook**. A second Excel workbook opens and *Book2* appears in the title bar.
8. In cell A1, type **Phone Calls** and press **Enter**.
9. In cell A2, type **David Ortiz UA flight 525 arriving 4:30 pm** and press **Enter**.

PAUSE. LEAVE both Excel workbooks open for the next exercise.



Another Way

When you work in Excel, you can open a blank workbook with the shortcut combination **Ctrl + N**.

Switching Between Open Workbooks

The ability to multitask is prized by most employers. Windows and Excel enable you to work on multiple projects simultaneously. When the phone rings, you can quickly go to another area, make notes, or research a question, and then return to your work. If you have multiple workbooks open, you might need to move quickly between the workbooks to finish your tasks.

STEP BY STEP

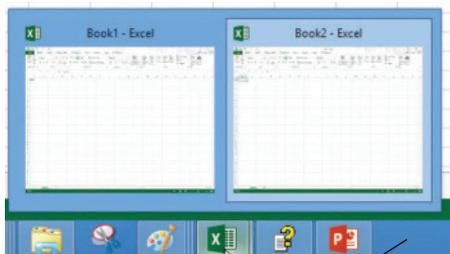
Switch Between Open Workbooks

GET READY. Both temporary workbooks with the address and phone message should be open. The Phone Calls workbook is the current workbook in this case.

1. To return to the company address, click the **Excel** icon on the taskbar (see Figure 2-4). Each of the open workbooks appears in a preview window. When you move the mouse pointer over each workbook, it previews on the screen.

Figure 2-4

Open workbooks appear by clicking the Excel icon on the taskbar.



Excel icon
(open)

Taskbar



Another Way

You can also switch between two recent active workbooks with **Ctrl + Tab**.

2. Click **Book1 - Excel**. The unsaved company address becomes the active workbook.

Take Note Unlike previous versions, Excel now displays each workbook in a separate window.

SAVING WORKBOOKS

Bottom Line

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.

Naming and Saving a Workbook

When you save a file for the first time, you are asked two important questions: Where do you want to save the file? What name will you give to the file? In this lesson, you practice answering these questions for two different files. By default in all Office applications, documents are saved to the My Documents folder.

STEP BY STEP

Name and Save a Workbook



Another Way

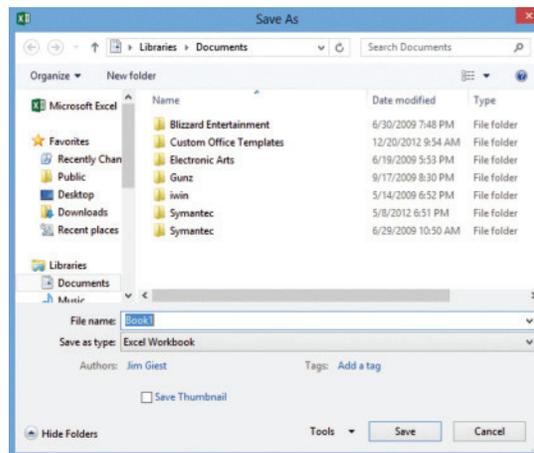
You can also save the workbook with Ctrl + S.

GET READY. USE the workbook from the previous exercise or type your name and address in a new workbook.

1. Click the **FILE** tab to open Backstage view. In the left pane, click **Save As** to display the save options.
2. Double-click **Computer** to open the Save As dialog box (see Figure 2-5).

Figure 2-5

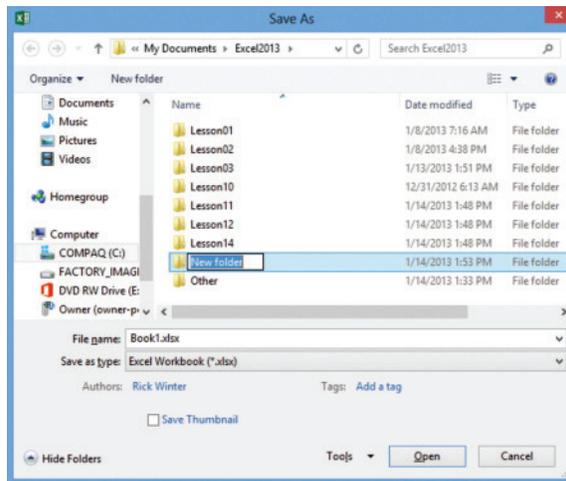
Save As dialog box



3. From the left-hand navigation pane, in the Save As dialog box, click **Desktop**. The Desktop becomes the new destination of your saved file.
4. In the Save As dialog box, click **New folder**. A folder icon appears with the words *New folder* selected (see Figure 2-6).

Figure 2-6

Type a new name in place of New folder.



**CERTIFICATION
READY? 1.5.2**

How do you name and save a workbook to a specific location?

5. Type **Excel Lesson 2** and press **Enter**.
6. Click the **Open** button.
7. In the File name box, type **02 Fabrikam Address Solution**.
8. Click the **Save** button.

PAUSE. LEAVE the workbook open to use in the next exercise.

Take Note

Save your workbook often and especially before opening another workbook, printing, or after you enter information.



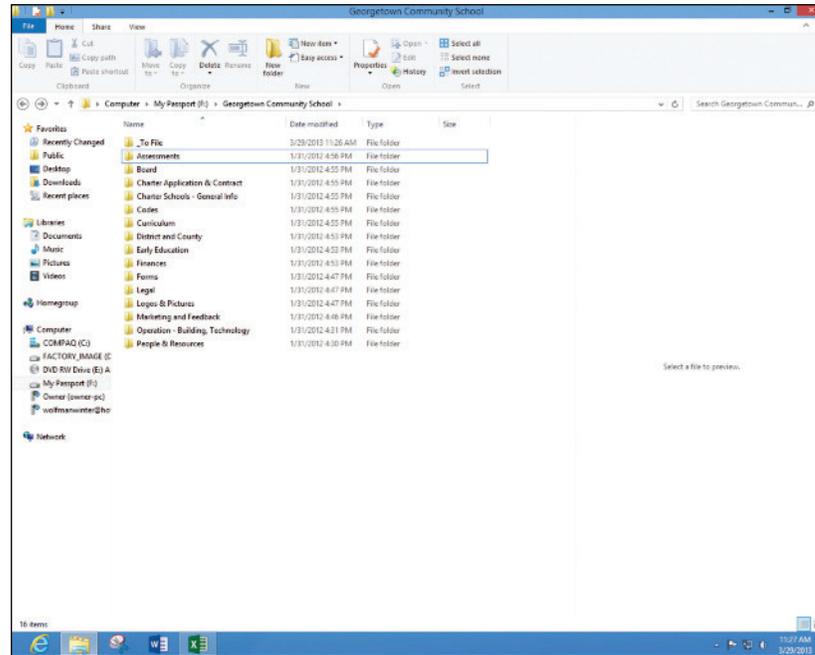
Workplace Ready

ORGANIZATIONS' FILE CONVENTIONS

When you first start working at any organization, your employer might give you conventions to use when naming files or editing those files. File conventions might include adding the date or your name or initials to a portion of a file name or adding “r” or “rev” followed by a revision number. An example might be 2014-03-17FiveYearBudgetR3.

In addition to file naming, your organization might want you to save files to specific network drives and folders for different kinds of documents. They might have rules for which files require passwords, when files should be destroyed, and frequencies required for backups. If you go into the business knowing how to manage files, you will be an asset to the organization. Even if there are no existing conventions, you might want to think about your own personal conventions to ensure you can find and protect your files.

Following is an example of a simple drive structure for a charter school.



Saving to Your SkyDrive

SkyDrive is a cloud-based application that allows you to store your files so you can retrieve them anywhere and share them with other people if desired. SkyDrive is also a great place to store backup files of important documents. SkyDrive comes with Windows 8 or you can install the free desktop app on Windows 7 and Windows Vista. This exercise assumes you have Windows 8 already loaded with SkyDrive.

STEP BY STEP

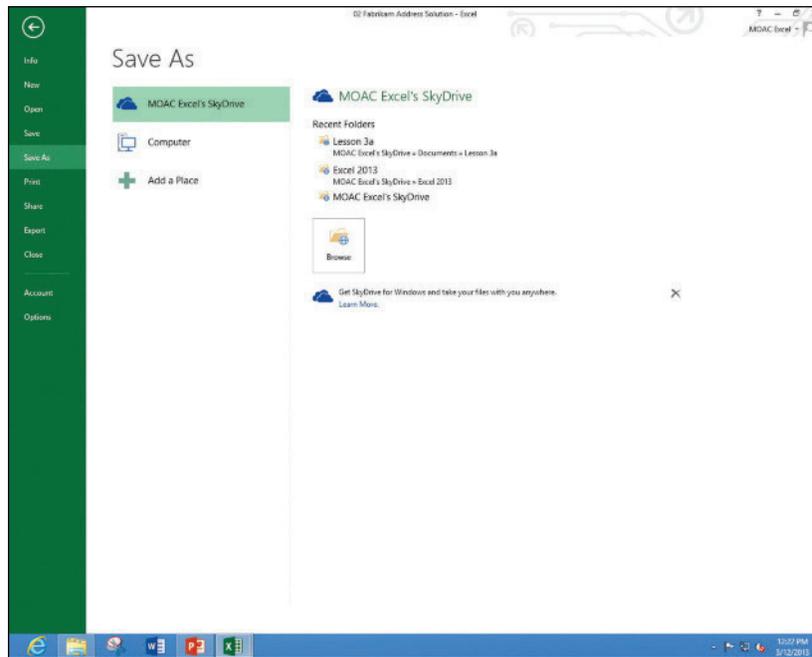
Save to Your SkyDrive

GET READY. USE the workbook from the previous exercise or type your name and address in a new workbook.

1. Click the **FILE** tab and then click **Save As**.
2. In the Backstage view, under Save As, click **[Your name] SkyDrive** (see Figure 2-7). You may need to sign in to SkyDrive if you haven't already.

Figure 2-7

SkyDrive information on the Backstage view



**CERTIFICATION
READY? 1.5.8**

How do you save a file to SkyDrive?

3. Click the **Browse** button.
4. Click the **New folder** button.
5. In the New folder text box, type **Excel Lesson 2** to save a folder for this lesson on your SkyDrive and press **Enter**.
6. Double-click the **Excel Lesson 2** icon to move to that folder.
7. Keep the file with the same name (or type **02 Fabrikam Address Solution** in the File name box), and then click the **Save** button.

PAUSE. LEAVE the workbook open to use in the next exercise.

Saving a Workbook Under a Different Name

You can rename an existing workbook to create a new workbook. For example, the address you created in the preceding exercise is current. When you have multiple offices, you can save the file with a new name and use it to enter data for another office. You can also use an existing workbook as a template to create new workbooks. In this exercise, you learn how to use the Save As dialog box to implement either of these options.

STEP BY STEP

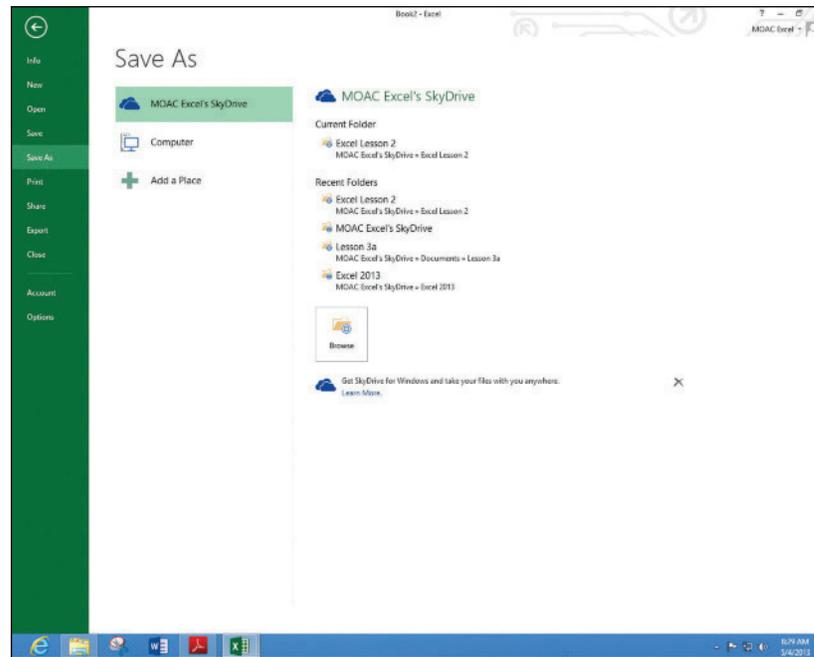
Save a Workbook Under a Different Name

GET READY. USE the workbook from the previous exercise or type **Fabrikam Inc.** in cell A1.

1. In cell A2, type **87 East Broad Street** and press **Enter**.
2. In cell A3, type **Columbus, OH 43215** and press **Enter**.
3. Click the **FILE** tab, and in the left pane, click **Save As**. The Backstage view shows that the Current Folder (see Figure 2-8) is Excel Lesson 2 on your SkyDrive, because it was the folder that was last used to save a workbook.

Figure 2-8

Current and Recent folders used



4. Click **Computer** to return to the drive you used before.
5. In the right pane, double-click **Excel Lesson 2**.
6. Click in the **File name** box, click after **Fabrikam**, and type **Broad** so the name reads **02 Fabrikam Broad Address Solution**.
7. Click **Save**. You created a new workbook by saving an existing workbook with a new name.
8. Click the **FILE** tab, click **Save As** in the left pane, and click **Browse**.
9. In the File name box, type **02 Fabrikam Address Template Solution**.
10. In the Save a type box, click the **drop-down arrow** and choose **Excel Template**. Click the **Save** button.

Take Note Templates are automatically saved in another location so they can be opened with the FILE, New option.

**CERTIFICATION
READY?** 1.5.2

How do you rename and save an existing workbook?

PAUSE. CLOSE Excel. Do not save the Phone Calls workbook.

Creating a template to use for each new workbook based on the example file eliminates the possibility that you might lose data because you might overwrite a file after you enter new data. To use the template, you choose FILE > New > Personal and select the template you saved. When you exit, you are prompted to save the file with a new name.



**Cross
Ref**

For more information on templates, see the “Accessing and Using Excel Templates” section in Lesson 3.

Saving a Workbook in a Previous Excel Format

Files created in earlier Excel versions can be opened and revised in Excel 2013. However, if some of your users do not have the latest version or use other applications, they might not be able to open your file. You can save a copy of an Excel 2013 workbook (with the .xlsx file extension) to a version that is compatible with Excel 97 through Excel 2013 (with the .xls file extension) versions. The program symbol displayed with the filenames is different, but it is a good idea to give the earlier edition file a different name. It is also a good idea to check which issues might be lost with Excel’s compatibility checker.

STEP BY STEP**Save a Workbook in a Previous Excel Format**

GET READY. LAUNCH Excel.

1. At the bottom of the left pane, click **Open Other Workbooks**.
2. In the Backstage Recent Workbooks pane, click **02 Fabrikam Broad Address Solution**.
3. First check for compatibility issues. Click the **FILE** tab, click **Info**, click **Check for Issues**, and then click **Check Compatibility**. The Microsoft Excel – Compatibility Checker dialog box in Figure 2-9 opens.

Figure 2-9

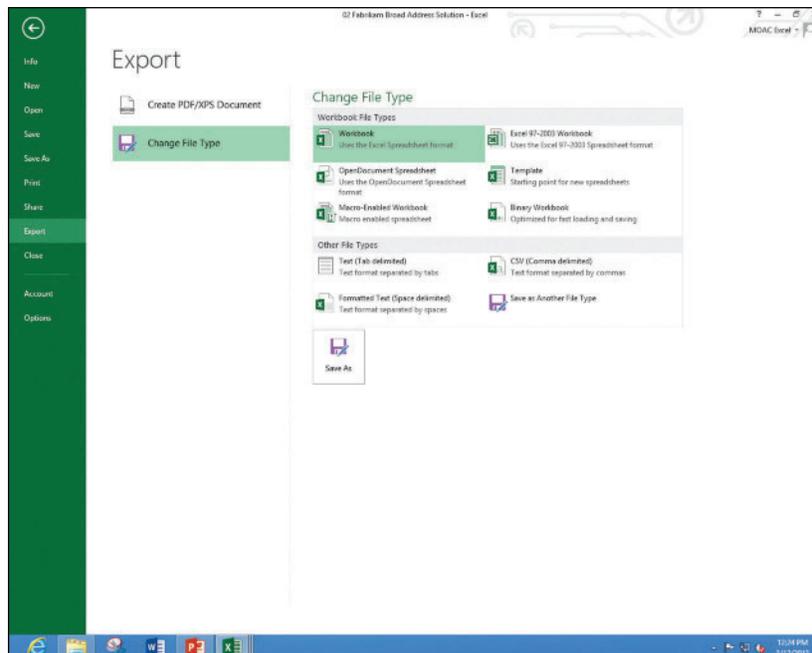
The Compatibility Checker showing no compatibility issues



4. Read the information in the Compatibility Checker dialog box and click **OK**.
5. Click the **FILE** tab, click **Export**, and then click **Change File Type**. The Backstage view shows the different file types (see Figure 2-10).

Figure 2-10

Change File Type options in Backstage view.



6. Click **Excel 97-2003 Workbook (*.xls)** and click **Save As**.
7. In the File name box, click before **Solution** and type **97-03**, and then click **Save**.
8. Click the **FILE** tab, and then click **Open**. The Recent Workbooks pane in Backstage view shows the last set of documents that have been saved.
9. Click **02 Fabrikam Broad Address Solution**.

PAUSE. LEAVE the workbook open to use in the next exercise.

CERTIFICATION READY? 1.5.6

How do you save a workbook for use in a previous version of Excel?

Saving in Different File Formats

You can save an Excel 2013 file in a format other than .xlsx or .xls. The file formats that are listed as options in the Save As dialog box or on the FILE tab depend on what type of file format the application supports. When you save a file in another file format, some of the formatting, data, and features might be lost.

STEP BY STEP

Save in Different File Formats

GET READY. USE the workbook from the previous exercise or type your name and address in a new workbook.

1. Click the **FILE** tab, and then click the **Export** button.
2. Click the **Change File Type** button. Excel explains the different file types (refer to Figure 2-10).
3. Click the **Create PDF/XPS Document** option. Figure 2-11 shows the reason for using this format.

Figure 2-11

Backstage preview giving you information about the PDF/XPS format



4. In the right pane, click the **Create PDF/XPS** button.
5. In the left navigation pane, click **Desktop**.
6. Double-click **Excel Lesson 2** to move to that folder.
7. The file name gives the last name with a PDF extension.
8. Click **Publish**.
9. The Reader application opens with the PDF file displayed (see Figure 2-12).

CERTIFICATION READY? 1.5.2

How do you save a workbook in PDF format?

Figure 2-12

PDF Reader



10. Press **Alt + F4** to close the Reader application.
11. If necessary, press **Alt + Tab** to return to the Excel file.

PAUSE. CLOSE all open workbooks and LEAVE Excel open to use in the next exercise.

Take Note Adobe PDF (Portable Documents Format) ensures that your printed or viewed file retains the formatting that you intended, but the file cannot be easily changed. You can also save your workbooks in a Web page format for use on websites with Single File Web Page or Web Page options. To import data into another format, you can also try Text (Tab delimited) or CSV (Comma delimited) formats. All of these options are available from the Save a type drop-down menu or the FILE tab.

ENTERING AND EDITING BASIC DATA IN A WORKSHEET

Bottom Line

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 into another location. To enter data in a cell in 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.

Entering Basic Data in a Worksheet

When you finish typing the entries in a row, press Enter to move to the beginning of the next row. You can also use the arrow keys to move to an adjacent cell or click on any cell to make that cell active. Press Enter to accept the entry. In the following exercise, you create a list of people working in the office.

STEP BY STEP

Enter Basic Data in a Worksheet

GET READY. If necessary LAUNCH Excel and **OPEN** a new workbook.

1. Click cell **A1**, type **Fabrikam Inc.**, and press **Enter**. Notice that the active cell moves to the next row, to cell **A2**.

2. In cell A2, type **Employee List** and press **Enter**.
3. Click cell A4, type **Name**, and press **Tab**. Notice that the active cell moves to the next column, to cell B4.



Troubleshooting

If you type the wrong data, you can click the cell and retype the entry. In the following sections, you see how to edit text.

CERTIFICATION READY? 2.1.1

How do you add text and values to a workbook?

4. Type **Extension** and press **Enter**. Notice that the active cell moves to the first cell in the next row.
5. Type **Richard Carey** and press **Tab**.
6. Type **101** and press **Enter**. Richard Carey looks cut off.
7. Click cell A5 and notice that the complete entry for Richard Carey appears in the formula bar.
8. Click cell A6, type **David Ortiz**, and press **Enter**.
9. Type **Kim Akers** and press **Enter**.
10. Type **Nicole Caron** and press **Enter**.
11. SAVE the workbook in the Computer's Excel Lesson 2 folder as **02 Fabrikam Employees Solution**. Your file should look like Figure 2-13.

Figure 2-13

The completed 02 Fabrikam Employees workbook

	A	B
1	Fabrikam Inc.	Employee List
2	Employee List	
3	Name	Extension
4	Richard Carey	101
5	David Ortiz	
6	Kim Akers	
7	Nicole Caron	

CERTIFICATION READY? 2.1.5

How do you display characters that extend longer than one column?

PAUSE. LEAVE the workbook open for the next lesson.

Take Note

Text is stored in only one cell, even when it appears to extend into adjacent cells. If an entry is longer than the cell width and the next cell contains data, the entry appears in truncated form. To edit the data, you need to go to the cell where the text starts and not in the adjacent cells.

Changing the Column Width

In Excel, column width is established based on the existing data. When you add an entry in a column that extends beyond the column's width, it is necessary to adjust the column width to accommodate the entry.

STEP BY STEP

Change the Column Width

GET READY. Use the **02 Fabrikam Employees Solution** file from the previous exercise.

1. Move the mouse pointer between columns A and B, to the column markers at the top of the worksheet (see Figure 2-14). The mouse pointer changes to a double-headed arrow.

Figure 2-14

Column markers for columns A and B

	A	B
1	Fabrikam Inc.	Employee List
2	Employee List	
3	Name	Extension
4	Richard Carey	101
5	David Ortiz	
6	Kim Akers	
7	Nicole Caron	

Column width double-headed arrow

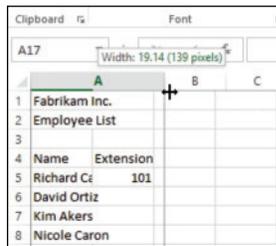
2. Double-click the column marker between A and B. The width of the column changes to the widest entry in column A. In this case, the widest entries are Employee List and Richard Carey's name.

Take Note To change the column width manually, point to the column marker between columns A and B and drag the pointer left or right instead of double-clicking.

3. Drag the double-headed arrow mouse pointer between columns B and C until the ScreenTip shows *Width: 20 (145 pixels)* or something close to this amount (see Figure 2-15).

Figure 2-15

By dragging the double-headed arrow the ScreenTip shows the width of the column



CERTIFICATION READY? 1.3.5

How do you change the width of a column?

4. SAVE the *02 Fabrikam Employees Solution* file. This overwrites your previous version without the column width change.

PAUSE. CLOSE the workbook and **LEAVE** Excel open for the next exercise.

Take Note When you type text that is longer than the cell's width, the text appears as if it extends into the next cell. However, when you type in the next cell, the overflow text does not display. The text is still there. It is often easier to proof your work if you have the column widths match the longest text. You can double-click on the column markers to automatically adjust to the widest entry or drag the column marker to adjust the column width to your desired width.

Editing a Cell's Contents

One advantage of electronic records versus manual records is that changes can be made quickly and easily. To edit information in a worksheet, you can make changes directly in the cell or edit the contents of a cell in the **formula bar**, located between the ribbon and the worksheet. When you enter data in a cell, the text or numbers appear in the cell and in the formula bar. You can also enter data directly in the formula bar. Before changes can be made, however, you must select the information that is to be changed. **Selecting text** means that you highlight the text that is to be changed. You can select a single cell or a portion of the cell's text in the formula bar before you make changes. You can also double-click in a cell to position the insertion point for editing.

STEP BY STEP

Edit a Cell's Contents

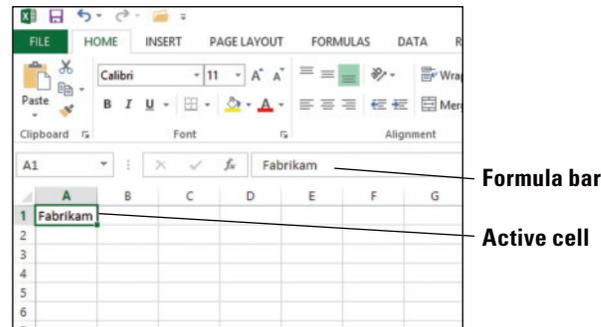


GET READY. OPEN a blank workbook.

1. Click cell **A1**, type **Fabrikam**, and press **Enter**. The insertion point moves to cell A2 and nothing appears in the formula bar.
2. Click cell **A1**. Notice that the formula bar displays *Fabrikam* (see Figure 2-16).

Figure 2-16

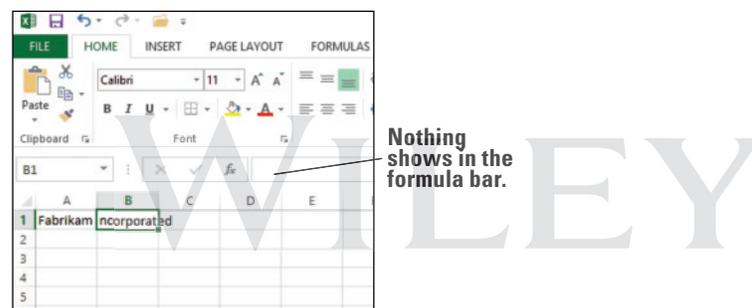
Active cell and formula bar displaying the same information



3. Click after **Fabrikam** in the formula bar, type a space, type **Incorporated**, and press **Tab**. The insertion point moves to cell B1 and nothing appears in the formula bar (see Figure 2-17).

Figure 2-17

Although it looks like text is in B1, it is extended text from A1.



4. Click cell **A1** and in the formula bar, double-click on **Incorporated** to select it. Type **Inc.** and press **Enter**.
5. Type **Sales** and press **Enter**.
6. Click cell **A2** and click after **Sales** in the formula bar.
7. Press **Home**. The insertion point moves to the beginning of the formula bar.

Take Note

While you are editing in the formula bar, you can press **Home** to move to the beginning, **End** to move to the end, or the left or right arrow keys to move one character at a time. Press **Delete** to delete characters after the insertion point. Press **Backspace** to delete characters before the insertion point.

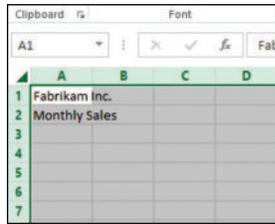
**CERTIFICATION
READY? 2.1.2**

How do you change a cell's data?

8. Type **Monthly** and then press the **spacebar**. Press **Enter**.
9. In cell **A3**, type **January** and press **Enter**.
10. Click cell **A3**, type **February**, and press **Enter**. Cell **A3**'s original text is gone and February replaces January.
11. Click cell **A3** and press **Delete**. The entry in **A3** is removed.
12. Above row 1 and to the left of column A, click the **Select All** button (see Figure 2-18). All cells on the worksheet are selected.

Figure 2-18

The mouse pointer changes to a white cross when moved to the Select All button.



13. Press **Delete**. All entries are removed.

PAUSE. CLOSE the workbook without saving and LEAVE Excel open for the next exercise.

Take Note

If you edit a cell's contents and change your mind before you press Enter, press Esc and the original text will be restored. If you change the contents of a cell and then do not want the change, click the Undo button on the Quick Access Toolbar or press Ctrl + Z. The deleted text will be restored.



Another Way

You can right-click a cell or a selected range of cells and choose Delete from the shortcut menu that appears.

You can edit a cell by double-clicking the cell and then typing the replacement text in the cell. Or, you can click the cell and then click in the formula bar.

When you are in Edit mode:

- The insertion point appears as a vertical bar and most commands are inactive.
- You can move the insertion point by using the left and right arrow keys.

Use the Home key on your keyboard to move the insertion point to the beginning of the cell, and use the End key to move the insertion point to the end of the cell. You can add new characters at the location of the insertion point.

To select multiple characters while in Edit mode, press Shift while you press the arrow keys. You also can use the mouse to select characters while you are editing a cell. Just click and drag the mouse pointer over the characters that you want to select.

As in the preceding exercises, there are several ways to modify the values or text you enter into a cell:

- **Erase** the cell's contents.
- **Replace** the cell's contents with something else.
- **Edit** the cell's contents.

Deleting and Clearing a Cell's Contents

To erase the entire contents of a cell, click the cell and press Delete. This deletes what is in the cell rather than the cell itself. To erase the contents of more than one cell, select all the cells that you want to erase and on your keyboard, press Delete. Pressing Delete removes the cell's contents, but does not remove any formatting (such as bold, italic, or a different number format) that you might have applied to the cell.

**CERTIFICATION
READY?** 2.1.6

Delete and Clear a Cell's Contents

GET READY. OPEN a blank workbook.

How do you delete data in a workbook?

1. In cell A1, type **1** and press **Enter**.
2. Type **2** and press **Enter**.



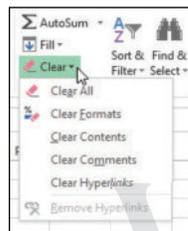
Another Way

You can right-click a cell or a selected range of cells and choose Delete from the shortcut menu that appears.

3. Type **3** and press **Enter**.
4. Type **4** and press **Enter**.
5. Highlight cells **A1** through **A4** (containing the numbers 1 through 4).
6. Press **Delete**. All the cells are erased.
7. On the Quick Access Toolbar, click the **Undo** button to return the cell entries.
8. Click cell **B5**, type **\$275,000**, and press **Enter**. The value and format are placed into the cell.
9. Click cell **B5** and press **Delete**.
10. Type **225000** without the dollar sign and comma and press **Enter**. Notice that \$225,000 is formatted. Although the original entry is gone, the cell retains the previous format when you press **Delete**.
11. Click cell **B5** and on the HOME tab, in the Editing group, click **Clear** (see Figure 2-19).

Figure 2-19

The Clear menu



12. Click **Clear Formats**. **225000** displays without the dollar sign and comma.

Take Note Clear displays a number of options. To remove both the entry and the format, choose **Clear All**.

PAUSE. CLOSE the workbook without saving and LEAVE Excel open for the next exercise.

USING DATA TYPES TO POPULATE A WORKSHEET

Bottom Line

You can enter three types of data into Excel: text, numbers, and formulas. In the following exercises, you enter text (labels) and numbers (values). You enter formulas in Lesson 4, “Using Basic Formulas.” Text entries contain alphabetic characters and any other characters that do not have a purely numeric value. The strength of Excel is its capability 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.

Entering Labels and Using AutoComplete

Labels are used to identify numeric data and are the most common type of text entered in a worksheet. Labels are also used to sort and group data. If the first few characters that you type in a column match an existing entry in that column, Excel automatically enters the remaining characters. This **AutoComplete** feature works only for entries that contain text or a combination of text and numbers.

STEP BY STEP

Enter Labels and Use AutoComplete

GET READY. OPEN a blank workbook.



Troubleshooting

To verify that AutoComplete is enabled, click the FILE tab accessing Backstage view, click Options, and then click Advanced in the navigation pane. In the Editing options section, click the Enable AutoComplete for cell values check box if it is not already checked. Click OK.

1. In cell A1, type **Fabrikam Inc.** and press **Enter**.

2. Type **Monthly Sales**.
3. Click cell **A4** and type **Agent** and press **Tab**.
4. In cell B4, type **Last Closing Date** and press **Tab**.
5. In cell C4, type **January** and press **Enter**.
6. In cell A5, type **Richard Carey**, and press **Enter**.
7. In cell A6, type **David Ortiz** and press **Enter**.
8. In cell A7, type **Kim Akers** and press **Enter**.
9. Type **Nicole Caron** and press **Enter**.
10. Click cell **A9** and type **R**. As shown in Figure 2-20, AutoComplete is activated when you type the R because it matches the beginning of a previous entry in this column. AutoComplete displays the entry for Richard Carey.

Figure 2-20

AutoComplete displaying a previous entry with matching first character

	A	B	C	D
1	Fabrikam Inc.			
2	Monthly Sales			
3				
4	Agent	Last Closing Date	January	
5	Richard Carey			
6	David Ortiz			
7	Kim Akers			
8	Nicole Caron			
9	R			
10				

11. Type **y**. The AutoComplete entry disappears. Finish typing the entry for **Ryan Calafato** and press **Enter**.
12. Type **R**. Notice that no AutoComplete entry appears this time. Type **i** and notice that the AutoComplete entry shows **Richard Carey**.
13. Press **Esc** to undo the entry.
14. Increase the column widths for columns A and B so you can see the entries in row 4 and below (see Figure 2-21).



Cross Ref

See “Changing the Column Width” previously in this lesson for information on how to change the column widths.

Figure 2-21

Column widths for columns A and B adjusted to see items in all cells

	A	B	C
1	Fabrikam Inc.		
2	Monthly Sales		
3			
4	Agent	Last Closing Date	January
5	Richard Carey		
6	David Ortiz		
7	Kim Akers		
8	Nicole Caron		
9	Ryan Calafato		
10			
11			
12			

PAUSE. LEAVE the workbook open to use in the next exercise.

Take Note Excel bases the list of potential AutoComplete entries on the text in the rows above the current row. If different rows start with the same character, you might have to type more than one character for the AutoComplete entry to display.

To accept an AutoComplete entry, press Enter or press Tab. When you accept AutoComplete, the completed entry matches the pattern of uppercase and lowercase letters of the existing entry. To delete the automatically entered characters, press Backspace. Entries that contain only numbers, dates, or times are not automatically completed. If you do not want to use the AutoComplete option, the feature can be turned off by selecting FILE > Options > Advanced > Editing options section > Enable AutoComplete for cell values.

Entering Numeric Values

Numeric values are the foundation for Excel's calculations, analyses, charts, and graphs. Numbers can be formatted as currency, percentages, decimals, and fractions. By default, numeric entries are right-justified in a cell. Applying formatting to numbers changes their appearance but does not affect the cell value that Excel uses to perform calculations. The value is not affected by formatting or special characters (such as dollar signs) that are entered with a number. The true value is always displayed in the formula bar.

STEP BY STEP

Enter Numeric Values

GET READY. USE the workbook from the previous exercise.

1. Click cell **C5**, type **\$275,000**, and press **Enter**.
2. Click cell **C5** and notice that **275000** appears in the formula bar and the formatted value appears in the cell.
3. Click cell **C6**, type **125,000**, and press **Enter**. Be sure to include the comma in your entry. The number is entered in C6 and C7 becomes the active cell. The number appears in the cell with the comma and no dollar sign (unlike the entry in C5); however, the formula bar displays the true value and disregards the special characters.
4. Type **209000** and press **Enter**. The number is entered with no dollar sign and no comma.
5. Type **258,000** and press **Enter**.
6. Type **145700** and then click cell **C5**. Figure 2-22 illustrates how your worksheet should look with the values you just typed.

Figure 2-22

The actual value of the cell entry in C5 is unaffected by formatting.

	A	B	C
1	Fabrikam Inc.		
2	Monthly Sales		
3			
4	Agent	Last Closing Date	January
5	Richard Carey		\$275,000
6	David Ortiz		125,000
7	Kim Akers		209000
8	Nicole Caron		258,000
9	Ryan Calafato		145700
10			

PAUSE. LEAVE the workbook open to use in the next exercise.

Special characters that indicate the type of value can also be included in the entry. Table 2-1 illustrates special characters that can be entered with numbers.

Table 2-1

Characters used to identify values

Character	Description
+	Indicates a positive value.
- or ()	Indicates a negative value.
\$	Indicates a currency value.
%	Indicates a percentage (typed after number).
/	Indicates a fraction or a date.
=	Indicates what follows is a number (or a formula). This is useful when there is an ambiguous entry. For example, 4/5 assumes April 5th of the current year, whereas =4/5 enters four-fifths or 0.8.
.	Indicates a decimal.
,	Separates the digits of an entry (thousands, millions, and so on).

Entering Dates

Dates are often used in worksheets to track data over a specified period of time. Like text, dates can be used as row and column headings. However, dates are considered serial numbers, which means that they are sequential and can be added, subtracted, and used in calculations. Dates can also be used in formulas and in developing graphs and charts. The way a date is initially displayed in a worksheet cell depends on the format in which you type the characters. In Excel 2013, the default date format uses four digits for the year. Also by default, dates are right-justified in the cells.

STEP BY STEP

Enter Dates

GET READY. Use the workbook from the previous exercise.

1. Click cell **B5**, type **1/4/2014**, and press **Enter**.
2. Click cell **B6**, type **1/25/14**, and press **Enter**. The date is entered in C6 as **1/25/2014** and B7 becomes the active cell.
3. Type **1/17** and press **Enter**. **17-Jan** is entered in the cell. Click cell **B7**, and notice that **1/17/20XX** (with XX representing the current year) appears in the formula bar.
4. If the year is not 2014, click cell **B7** and press **F2**. Change the year to **2014** and press **Enter**.
5. In cell **B8**, type **1/28/14** and press **Enter**.
6. Type **January 21, 2014** and press **Enter**. **21-Jan-14** appears in the cell. If you enter a date in a different format than specified or had already entered something in the cell and deleted it, your worksheet might not reflect the results described. The date formats in column B are not consistent (see Figure 2-23). You apply a consistent date format in the next section.

Figure 2-23

If you don't type dates the same way, the formats are inconsistent in a workbook.

	A	B	C	D
1	Fabrikam Inc.			
2	Monthly Sales			
3				
4	Agent	Last Closing Date	January	
5	Richard Carey	1/4/2014	\$275,000	
6	David Ortiz	1/25/2014	125,000	
7	Kim Akers	17-Jan	209,000	
8	Nicole Caron	1/28/2014	258,000	
9	Ryan Calafato	21-Jan-14	145,700	
10				
11				
12				

- In cell B9, type **1/1/10** and press **Enter**. Notice that the value changes but the formatting remains the same.
- Click the **Undo** button to return to the workbook shown in Figure 2-23.

PAUSE. LEAVE the workbook open to use in the next exercise.



Another Way

Ctrl + ; (semicolon) enters the current date into a worksheet cell; Ctrl + : (colon) enters the current time.

Excel interprets two-digit years from 00 to 29 as the years 2000 to 2029; two-digit years from 30 to 99 are interpreted as 1930 to 1999. If you enter 1/28/28, the date will be displayed as 1/28/2028 in the cell. If you enter 1/28/37, the cell will display 1/28/1937.

If you type January 28, 2020, the date will display as 28-Jan-20. If you type 1/28 without a year, Excel interprets the date to be the current year. 28-Jan will display in the cell, and the formula bar will display 1/28/ followed by the current year. In the next section, you learn to apply a consistent format to a series of dates.

Take Note When you enter a date into a cell in a particular format, the cell is automatically formatted even if you delete the entry. Subsequent numbers entered in that cell will be converted to the date format of the original entry.

Regardless of the date format displayed in the cell, the formula bar displays the date in month/day/four-digit-year format because that is the format required for calculations and analyses.

Filling a Series with Auto Fill

Excel provides **Auto Fill** options that automatically fill cells with data and/or formatting. To populate a new cell with data that exists in an adjacent cell, use the Auto Fill feature either through the command or the fill handle. The **fill handle** is a small green square in the lower-right corner of a selected cell or range of cells. A **range** is a group of adjacent cells that you select to perform operations on all of the selected cells. When you refer to a range of cells, the first cell and last cell are separated by a colon (for example, C4:H4). To use the fill handle, point to the lower-right corner of the cell or range until the mouse pointer turns into a +. Click and drag the fill handle from cells that contain data to the cells you want to fill with that data, or have Excel automatically continue a series of numbers, numbers and text combinations, dates, or time periods, based on an established pattern. In this exercise, you use the Auto Fill command and fill handle to populate cells with data. To choose an interval for your series, type the first two entries, select them, and then use the fill handle to expand the series using the pattern of the two selected cells.

STEP BY STEP

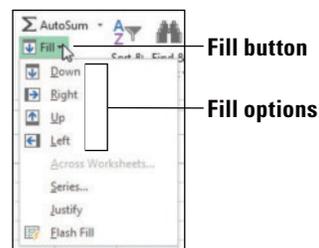
Fill a Series with Auto Fill

GET READY. USE the workbook from the previous exercise or type the text in Figure 2-23.

- Select the range **C4:H4**. January is in the first cell.
- On the **HOME** tab, in the Editing group, click the **Fill** button. The Fill menu appears (see Figure 2-24).

Figure 2-24

Fill drop-down menu



Another Way

To quickly fill a range of cells with the contents of the first cell, select the range, and then press Ctrl + D (cells below) or Ctrl + R (cells to the right).

- From the menu, click **Right**. The contents of C4 (January) are filled into all the cells.
- Click the **Undo** button.

**CERTIFICATION
READY? 2.1.4**

How do you copy a cell's contents using Auto Fill?

Figure 2-25

Mouse pointer changes to a black + in the bottom right of a selected range

The screenshot shows a spreadsheet with the following data:

	A	B	C
1	Fabrikam Incorporated		
2	Monthly Sales		
3			
4	Agent	Last Closing Date	January
5	Richard Carey	1/4/2014	\$275,000
6	David Ortiz	1/25/2014	125,000

A black crosshair (fill handle) is visible in the bottom-right corner of cell C4. A label "Fill handle" points to this crosshair.

- Click cell **C5**, point to the fill handle, and drag it to **C9** and release. All the numbers turn to **\$275,000** in column C. The Auto Fill Options button appears in D10 (see Figure 2-26).

Figure 2-26

You can fill numbers, formats, or other options.

The screenshot shows a zoomed-in view of the spreadsheet data from Figure 2-25. The data is as follows:

Last Closing Date	January	February
1/4/2014	\$275,000	
1/25/2014	\$275,000	
17-Jan	\$275,000	
1/28/2014	\$275,000	
21-Jan-14	\$275,000	

In cell D10, the "Auto Fill Options" button is visible. A label "Auto Fill Options button" points to this button.

- Click the **Auto Fill Options** button, and choose **Fill Formatting Only** from the list that appears. All the numbers return to their previous values and are formatted with dollar signs and commas.
- Repeat Steps 8 and 9 for the range **B5:B9**.
- Click cell **A9**, and then drag the fill handle down to **A15**. Ryan Calafato's name is repeated.
- Click the **Undo** button to return the spreadsheet to what is shown in Figure 2-27.
- SAVE the workbook as **02 Fabrikam Sales Solution**.

**CERTIFICATION
READY? 2.2.6**

How do you apply formatting with Auto Fill?

Figure 2-27

The completed sales workbook

The screenshot shows the completed spreadsheet with the following data:

	A	B	C	D	E
1	Fabrikam Inc.				
2	Monthly Sales				
3					
4	Agent	Last Closing Date	January	February	March
5	Richard Carey	1/4/2014	\$275,000		
6	David Ortiz	1/25/2014	\$125,000		
7	Kim Akers	1/17/2014	\$209,000		
8	Nicole Caron	1/28/2014	\$258,000		
9	Ryan Calafato	1/21/2014	\$145,700		
10					

PAUSE. CLOSE Excel.

Take Note

When Excel recognizes a series, the default fill option is to complete the series. When you use the fill handle and a series is not present, the default is to copy the cell contents. The Auto Fill Options button also allows you to fill formatting only or to fill without formatting.

**CERTIFICATION
READY? 2.1.4**

How do you fill a series using Auto Fill?

After you fill cells using the fill handle, the Auto Fill Options button appears so that you can choose how the selection is filled. In Excel, the default option is to copy the original content and formatting. With Auto Fill, you can select how the content of the original cell appears in each cell in the filled range.

Take Note When you type sufficient data for Excel to recognize a series, the fill handle will do the rest. For example, to record daily sales, you might want to have consecutive columns labeled with the days of the week. If you type Monday in the first cell, you can fill in the rest of the days by dragging the fill handle from the Monday cell to complete the series.

Excel recognizes January as the beginning of a natural series and completes the series as far as you take the fill handle. By definition, a **natural series** is a formatted series of text or numbers that are in a normal sequence such as months, weekdays, numbers, or times. For example, a natural series of numbers could be 1, 2, 3, or 100, 200, 300, or a natural series of text could be Monday, Tuesday, Wednesday, or January, February, March. For different natural series, see Table 2-2.

Table 2-2
Examples of Auto Fill series

Initial Selection	Extended Series
1	1, 1, 1, 1, ...
1, 2	3, 4, 5, ...
2012, 2013	2014, 2015, 2016, ...
8:00	9:00, 10:00, 11:00, ...
6:00 PM	7:00 PM, 8:00 PM, ...
Mon	Tue, Wed, Thu, ...
Monday	Tuesday, Wednesday, Thursday, ...
Jan	Feb, Mar, Apr, ...
January	February, March, April, ...
Qtr1	Qtr2, Qtr3, Qtr4, Qtr1, ...
2/8/2014, 2/15/2014	2/22/2014, 3/1/2014, 3/8/2014, ...
1st anytext	2nd anytext, 3rd anytext, 4th anytext, ...
Anytext 1	Anytext 2, Anytext 3, Anytext 4, ...

Take Note Note that you might have to select two cells rather than one to continue some of the previous patterns. To create your own custom list, go to FILE > Options > Advanced > General section > Create lists for use in sorts and fill sequences > Edit Custom Lists.

Filling Cells with Flash Fill

Flash Fill is like Auto Fill, but Excel does more work. This is a new feature in Excel 2013. When Excel recognizes a pattern based on other information in your workbook, it will use the pattern. This is helpful in an example where you have typed first and last names in one column and later decide that you want to sort by last name and then first name. You can create two more columns to separate the names. After you start typing the first names, Excel completes the column. You can repeat with the last name column.

STEP BY STEP

Fill Cells with Flash Fill



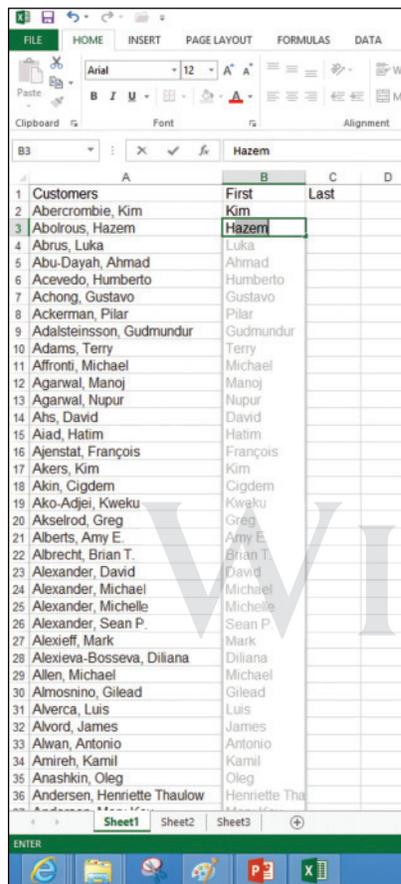
GET READY. Before you begin these steps, LAUNCH Microsoft Excel.

1. Open the **02 Customers** file.
2. Click cell **B1**, type **First**, and press **Tab**.
3. Click cell **C1**, type **Last**, and press **Enter**.

4. Click cell **B2**, type **Kim**, and press **Enter**.
5. In cell **B3**, type **H**. Notice that Hazem shows in the rest of the cell and the other first names of the customers appear (see Figure 2-28).

Figure 2-28

Flash Fill showing a possible list for all first names



6. Press **Enter**.
7. Click cell **C2**, type **Abercrombie**, and press **Enter**.
8. In cell **C3**, type **A** and notice that *Abercrombie* is repeated with AutoComplete. Continue typing **bol** and notice that the last names all appear. Press **Enter**.
9. Double-click the right border of columns **B** and **C** to set the column width.
10. Scroll down and notice that the entire worksheet is filled in.
11. **SAVE** the file as *02 Customers Solution*.

PAUSE. CLOSE Excel.

Bottom Line

CUTTING, COPYING, AND PASTING DATA

After you enter data into a worksheet, you 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.

Cut, copy, and paste functions can be performed in a variety of ways by using:

- The mouse
- Ribbon commands
- Shortcut commands, such as Ctrl + C (copy), Ctrl + X (cut), and Ctrl + V (paste)
- The Office Clipboard pane

Copying a Data Series with the Mouse

By default, drag-and-drop editing is turned on so that you can use the mouse to copy (duplicate) or move cells. Just select the cell or range of cells you want to copy and hold down Ctrl while you point to the border of the selection. When the pointer becomes a **copy pointer** (arrow with a plus), you can drag the cell or range of cells to the new location. As you drag, a scrolling ScreenTip identifies where the selection will be copied if you release the mouse button. In this exercise, you practice copying data with the mouse.

STEP BY STEP

Copy a Data Series with the Mouse

GET READY. Before you begin these steps, LAUNCH Microsoft Excel.



1. Open the *02 Customer Houses* file.
2. Select the range **A12:A22**.
3. Press **Ctrl** and hold the mouse button down as you point to the right border of the selected range. The copy pointer is displayed.



Troubleshooting

Be sure to hold down the Ctrl key the entire time you are dragging a data series for copying with the mouse, or you will move the series instead of copying it.

4. With the copy pointer displayed, hold down the left mouse button and drag the selection to the right, until H12:H22 appears in the scrolling ScreenTip next to the selection.
5. Release the mouse button and then release **Ctrl**. The data in A12:A22 also appears in H12:H22.

CERTIFICATION
READY? 2.1.3

How do you copy a data series with the mouse?

PAUSE. LEAVE the workbook open to use in the next exercise.

Moving a Data Series with the Mouse

Data can be moved from one location to another within a workbook in much the same way as copying. To move a data series, select the cell or range of cells and point to the border of the selection. When the pointer becomes a **move pointer**, you can drag the cell or range of cells to a new location. When data is moved, it replaces any existing data in the destination cells. In this exercise, you practice moving a data series from one range of cells to another.

STEP BY STEP

Move a Data Series with the Mouse

GET READY. USE the *02 Customer Houses* workbook from the previous exercise.

1. Select **E12:E22**.
2. Point to the right border of the selected range. The move pointer is displayed.
3. With the move pointer displayed, hold down the left mouse button and drag the selection to the right, until I12:I22 appears in the scrolling ScreenTip beside the selected range.

CERTIFICATION
READY? 2.1.3

How do you move a data series with the mouse?

4. Release the mouse button. In your worksheet, the destination cells are empty; therefore, you are not concerned with replacing existing data. The data previously in E12:E22 is now in I12:I22.
5. Drag **A1** to **H12**. Note that a dialog box warns you about replacing the contents of the destination cells.
6. Click **Cancel**.
7. Drag **A1** to **H11**.
8. Drag **E1** to **I11**. Your worksheet should look like the one shown in Figure 2-29.

PAUSE. LEAVE the workbook open to use in the next exercise.

Figure 2-29

02 Customer Houses

	Bedrooms	Baths	SqFt	Price
1				
2	4	3	3,044	\$380,500
3	3	2	3,838	\$479,750
4	4	3	2,834	\$354,250
5	3	2	2,068	\$258,500
6	4	3	2,753	\$344,125
7	4	2	4,387	\$548,375
8	3	1	2,228	\$278,500
9	3	2	3,216	\$402,000
10	3	1	1,245	\$155,825
11	5	3	1,813	\$228,825
12	5	3	2,940	\$380,500
13	5	3	1,913	\$258,500
14	2	1	4,090	\$548,375
15	5	3	3,138	\$402,000
16	2	1	2,038	\$258,500
17	2	1	1,386	\$177,177
18	5	3	2,543	\$326,262
19	5	4	2,014	\$258,500
20	2	1	1,717	\$228,825
21	2	1	2,675	\$344,125
22	3	2	2,394	\$304,404
23				

Take Note When you attempt to move a selection to a location that contains data, a caution dialog box opens. “There’s already data here. Do you want to replace it?” is a reminder that moving data to a new location replaces the existing data. You can click OK or cancel the operation.

Copying and Pasting Data

The **Office Clipboard** 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 Microsoft Office programs. You can **paste** (insert) selected items from the Clipboard to a new location in the worksheet. **Cut** (moved) data is removed from the worksheet but is still available for you to use in multiple locations. If you copy multiple items and then click Paste, only the last item copied will be pasted. To access multiple items, you must open the Clipboard pane. In this exercise, you use commands in the Clipboard group and the Clipboard pane to copy and paste cell data.

STEP BY STEP

Copy and Paste Data

GET READY. USE the **02 Customer Houses** workbook from the previous exercise.

1. On the HOME tab of the ribbon, click the **Clipboard** Dialog Box Launcher. The Clipboard pane opens on the left side of the worksheet. The most recently copied item is always added at the top of the list in this pane, and it is the item that will be copied when you click Paste or a shortcut command.
2. Select **A1:E22** and press **Delete**.
3. Select **H11:I22** and in the Clipboard group, click the **Copy** button. The border around the selected range becomes a moving border.



Another Way

To copy, you can use Ctrl + C or right-click and choose Copy. To paste, you can use Ctrl + V or right-click and choose Paste.

4. Select **A1** and click the **Paste** button. The moving border remains active around H11:I22. A copied range does not deactivate until you type new text, issue another command, or double-click on another cell, or press **Esc**.
5. Select **A20** and click the down arrow on the **Paste** button. The Paste options menu appears (see Figure 2-30).

Figure 2-30

Paste options

**CERTIFICATION READY? 2.1.3**

How do you copy and paste a data series?

6. Under Paste Values, select the first option. Notice that the values in column B are no longer formatted.
7. Click the **Undo** button.
8. Select **H11:I22** and press **Delete**.
9. Press **Ctrl + Home** to return to the top of the workbook.
10. **SAVE** the workbook as **02 Customer Houses Solution**.

PAUSE. LEAVE the workbook open to use in the next exercise.

Take Note

Paste with Live Preview was new as of Office 2010. If you point to the Paste options in either the shortcut menu or the Paste command options in the Clipboard group, you will be able to view your changes before actually implementing them.

Cutting and Pasting Data

Most of the options for copying and pasting data also apply to cutting and pasting. The major difference is that data copied and pasted remains in the original location as well as in the destination cell or range. Cut and pasted data appears only in the destination cell or range. In this exercise, you cut and paste cell contents.

STEP BY STEP**Cut and Paste Data**

GET READY. USE the **02 Customer Houses Solution** workbook from the previous exercise.

1. Select **A1:B12** to highlight the Customer House Prices table.
2. In the Clipboard group, click the **Cut** button. The contents of A1:B12 are displayed in the Clipboard pane. Close the Clipboard pane.
3. Click the **New sheet** button on the bottom of the worksheet. Sheet2 is created and cell A1 is the active cell.
4. Click **Paste** to move the former contents of Sheet1 to cell A1 into Sheet2.

PAUSE. CLOSE Excel and do not save the workbooks if requested.

**Another Way**

To cut, you can use **Ctrl + X** or right-click and choose **Cut**.

Take Note

When you delete text, it is not stored on the Clipboard. To remove data and use the text later, use **Cut** rather than **Delete**. By using the **Cut** feature, you are able to access the data or information from the Clipboard if needed. Deleted text can be restored only with **Undo**.

Bottom Line

EDITING A WORKBOOK'S PROPERTIES

The 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 **keywords** to 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.

Assigning Keywords

If you work for Fabrikam, Inc., you might assign the keyword *sales* to worksheets that contain data about revenue. You can then search for and locate all files containing information about sales. You can assign more than one keyword to a document.

STEP BY STEP

Assign Keywords

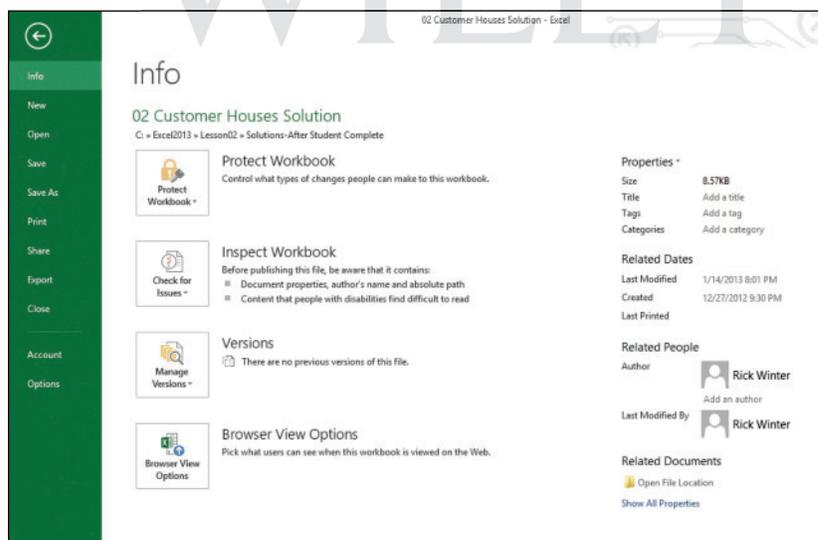
GET READY. Before you begin these steps, LAUNCH Microsoft Excel.



1. OPEN the **02 Customer Houses Solution** file you worked with in the previous exercises.
2. Click **FILE**. The Backstage view displays current properties on the right side of the window (see Figure 2-31).

Figure 2-31

Current document's properties

CERTIFICATION
READY?

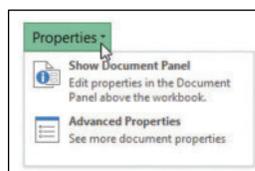
1.4.8

How do you add keywords
to a workbook's properties?

3. At the top of the right pane, click the **Properties** button. The Properties drop-down menu shows two options (see Figure 2-32). Click **Show Document Panel**.

Figure 2-32

Properties drop-down menu



4. Click the **Keywords** field and type **Customer, Sq Ft, Price**.
5. Click the **Category** field and type **Revenue**.
6. Click the **Author** field and type your name.

7. Above the Author field, click the **Document Properties** drop-down arrow, and then click **Advanced Properties**. The Properties dialog box opens.
8. Click the **Summary** tab in the dialog box to see the properties you entered.
9. Click the **Statistics** tab to see the date you modified the file.
10. Click **OK** to close the Properties dialog box.
11. At the top right corner of the Document Information panel, click the **Close** button.
12. SAVE the workbook in the Lesson 2 folder as **02 Customer Houses Prop Solution**.

PAUSE. CLOSE Excel.

After a file is saved, the Statistics tab records when the file was accessed and when it was modified. It also identifies the person who last saved the file. After a workbook is saved, the Properties dialog box title bar displays the workbook name and location.

SKILL SUMMARY

In this lesson you learned how:	Exam Objective	Objective Number
To create workbooks	Create new blank workbooks.	1.1.1
To save workbooks	Save workbooks in alternate file formats.	1.5.2
	Maintain backward compatibility.	1.5.6
	Save files to remote locations.	1.5.8
To enter and edit basic data in a worksheet	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
To cut, copy, and paste data	Copy and paste data.	2.1.3
To edit a workbook's properties	Add values to workbook properties.	1.4.8

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. If you want to use a workbook in another kind of document, 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 of the following 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 existing data into adjacent 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 in 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.

Competency Assessment

Project 2-1: Creating a Highly Desired Housing Options Workbook

Create a new workbook for Fabrikam, Inc., that is a result of a focus group showing the most desired options for houses for first-time home buyers.

GET READY. LAUNCH Excel and start a new blank workbook.

1. Click cell **A1** and type **Fabrikam, Inc.** and press **Enter**.
2. Click cell **A2** and type **Focus Group Requests (Age 20-30)**.
3. Beginning in **A4**, type the following labels and values. Press **Tab** between each new cell and **Enter** to move to a new row:

Option	Priority	Cost
Gameroom	Low	25,000
Exercise equipment	Low	2500
Fenced yard for dog	Medium	\$10,000
Flat screen HDTV	Medium	1000
Furnished	Medium	15000
Washer & dryer	High	1500
Dishwasher	Medium	1000
Near bike path	High	0
Basketball hoop	Low	100

4. If necessary, adjust the column widths to display all of the text in the columns.
5. Drag the fill handle from **C5** through **C13** and choose **Fill Formatting Only**.
6. SAVE the workbook as **02 Focus Group Solution** in the Excel Lesson 2 folder you created in a previous exercise.

PAUSE. LEAVE the workbook open for the next project.

Project 2-2: Setting Document Properties and Assigning Keywords

Use Document Properties to assign document properties to an existing workbook.



GET READY. If necessary, OPEN the **02 Focus Group Solution** workbook you created in the previous project.

1. Click the **FILE** tab.
2. Click **Properties**, and then click **Show Document Panel**.
3. Click the **Author** field, type **[your name]**, and press **Tab**.
4. In the Title field, type **Focus Group Requests** and press **Tab**.
5. In the Subject field, type **Sales** and press **Tab**.
6. In the Keywords field, type **20-30, options, priorities**.

7. Click the Status field, and type **Needs to be formatted**.
8. SAVE the file as **02 Focus Properties Solution**.
9. At the top of the Document Information Panel, click the **Close (X)** button.
10. CLOSE the file.

PAUSE. LEAVE Excel open for the next project.

Proficiency Assessment

Project 2-3: Creating a Commission Schedule

You have been asked to create a commission schedule in 5 minutes or less. Because you know how to use the fill handle, you should be able to quickly create the following workbook.

GET READY. OPEN a blank workbook.

1. Create the entries shown in Figure 2-33.

Figure 2-33

Create the worksheet in 5 minutes or less

	A	B	C	D	E	F	G
1	Sales	Jan	Feb	Mar	Apr	May	Jun
2	100,000	2.80%	2.80%	2.80%	2.80%	2.80%	3.00%
3	200,000	2.90%	2.90%	2.90%	2.90%	2.90%	3.10%
4	300,000	3.00%	3.00%	3.00%	3.00%	3.00%	3.20%
5	400,000	3.10%	3.10%	3.10%	3.10%	3.10%	3.30%
6	500,000	3.20%	3.20%	3.20%	3.20%	3.20%	3.40%
7							

2. Move the table so you can add text in cell A1, cell A2, and a blank cell in A3.
3. Click cell **A1** and type **Fabrikam Incorporated**.
4. Click cell **A2** and type **Commission Schedule**.
5. Add the following Document Properties:

Property	Value
Author	[Your Name]
Title	Commission Schedule
Keywords	Agent, Amount, Sales
Category	Revenue
6. SAVE the file as **02 Commission Solution** and CLOSE the workbook.

PAUSE. LEAVE Excel open for the next project.

Project 2-4: Advertising Expenditures

Fourth Coffee specializes in unique coffee and tea blends. Create a workbook to track and classify expenditures for January.

GET READY. OPEN a blank workbook.

1. Click cell **A1** and type **Fourth Coffee**.
2. Click cell **A2** and type **January Expenditures**.
3. Enter the following column headings in row 4: **Date**, **Check No**, **Paid to**, **Category**, and **Amount**.
4. Enter the following expenditures data in the appropriate columns:
 - January 3, paid \$3,000 to World Wide Importers for coffee, Check No. 4076**
 - January 20, paid \$600 to Northwind Traders for tea, Check No. 4077**

January 22, paid \$300 to City Power and Light for utilities
 January 28, paid \$200 to A. Datum Corporation for advertising
 January 29, paid \$2,500 to World Wide Importers for coffee

5. Checks are written sequentially. Use the fill handle to enter the missing check numbers.
6. Adjust column widths as needed.
7. SAVE the workbook as **02 Advertising Expenses Solution**. CLOSE the workbook.

LEAVE Excel open for the next project.

Mastery Assessment

Project 2-5: Creating a Home Sales Workbook

Richard Carey asked you to keep track of the home sales for the Fabrikam staff. Each person sends you an e-mail with the home sales information.

GET READY. OPEN a blank workbook.

1. Create the workbook with the data in Figure 2-34.

Figure 2-34

Create this workbook for
Project 2-5

	A	B	C
1	Fabrikam Inc.		
2	Sales Data		
3			
4	Agent	Date	Sales
5	Kim Akers	1/18/2014	\$179,898
6	Kim Akers	1/27/2014	\$426,611
7	Ryan Calafato	1/28/2014	\$308,431
8	Nicole Caron	2/3/2014	\$422,161
9	David Ortiz	2/10/2014	\$140,477
10	Ryan Calafato	2/16/2014	\$473,953
11	Richard Carey	2/25/2014	\$130,510
12	David Ortiz	3/4/2014	\$439,371
13	Kim Akers	3/5/2014	\$418,616
14	Richard Carey	3/10/2014	\$467,949
15	Ryan Calafato	3/15/2014	\$349,203
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
26			
27			
28			
29			

2. SAVE the workbook as **02 Home Sales Solution**.
3. Create a New workbook and copy the data and titles for the first quarter only.
4. Click cell **A3** and type **First Quarter 2014**.
5. Move the Agent, Date, and Sales titles and data down so there is a blank row in row 4.
6. SAVE the new workbook as **02 Home Sales Q1 Solution**.
7. Repeat for the second quarter (4/9/2014-5/20/2014) and SAVE the workbook as **02 Home Sales Q2 Solution**.

CLOSE the workbooks and LEAVE Excel open for the next project.

Project 2-6: Using Flash Fill

Fabrikam's director has asked you to redo the workbook you created in Project 2-5 with separate columns for first name and last name and sequentially numbered sales. Save this as a PDF and Excel 1997-2003 file formats and with document properties in the new file.

1. OPEN the *02 Home Sales Solution* file.
2. Use Flash Fill to create columns for the First and Last name.
3. Delete the content of cells **A4:A29**.
4. In **A4**, type **Item#** and then use Auto Fill to create numbers starting with **1** that are sequential through **25**.
5. Add a label in **A3** that says **2014 To-Date**.
6. Make sure there is a blank row 4.
7. Add your own Document Properties for **Author**, **Title**, **Subject**, **Keywords**, **Category**, and **Status**. In the Comments, type **Project 2-6 final review**.
8. SAVE the workbook as *02 Home Sales Flash Fill Solution*.
9. Create a PDF file and SAVE it with the same name.
10. Verify whether there are any compatibility issues for earlier versions of Excel.
11. Create an Excel 1997-2003 file and SAVE it as *02 Home Sales Flash Fill 97-03 Solution*.

CLOSE Excel.

WILEY