

# **Excel 2021 Basics**

---

Paul McFedries and  
Greg Harvey, PhD

# Table of Contents

---

<b>Introduction .....</b>	<b>1</b>
About This Book .....	1
Foolish Assumptions .....	1
How This Book Is Organized .....	2
Conventions Used in This Book .....	3
Where to Go from Here .....	4
<b>Chapter 1 – Excel: The 50-Cent Tour .....</b>	<b>5</b>
Learning Objectives .....	5
Introduction .....	5
A Bird’s-Eye View of Excel .....	5
Checking Out Excel’s Start Screen .....	6
Getting Comfy with the Excel User Interface .....	7
Going behind the scenes to Excel’s Backstage view .....	8
Ripping through the Ribbon .....	11
Working with the Quick Access toolbar .....	15
Fooling around with the Formula bar .....	15
What’s up with the Worksheet area? .....	16
Taking a tour of the Status bar .....	20
Getting Help .....	20
Show-and-tell help with the Tell Me feature .....	21
Getting Help from the Help tab on the Ribbon .....	21
Launching and Quitting Excel .....	23
Starting Excel from the Windows Start menu .....	23
Starting Excel from the Windows Search text box .....	24
Telling Cortana to Start Excel for you .....	24
Starting Excel from the Windows Metro view in Tablet mode .....	24
When it’s quitting time .....	24
Review Questions .....	26
Review Answers .....	29
<b>Chapter 2 – Customizing Excel .....</b>	<b>35</b>
Learning Objectives .....	35
Introduction .....	35
Tailoring the Quick Access Toolbar to Your Tastes .....	35
Adding Ribbon commands to the Quick Access toolbar .....	36
Adding non-Ribbon commands to the Quick Access toolbar .....	37
Exercising Your Options .....	38
Changing some of the more universal settings on the General tab .....	38
Changing common calculation options on the Formulas tab .....	41
Digging the options on the Data tab .....	43
Changing correction options on the Proofing tab .....	44
Changing save options on the Save tab .....	45
Changing the Office language preferences .....	47
Setting some accessibility options .....	48
Changing a whole lot of other common options on the Advanced tab .....	48
Customizing the Excel Ribbon .....	52
Using Office Add-ins .....	55
Using Excel’s Own Add-Ins .....	57
Managing the standard Excel add-ins .....	58
Managing Excel COM add-ins .....	59
Purchasing third-party add-ins .....	59
Review Questions .....	60
Review Answers .....	62

## Table of Contents

<b>Chapter 3 – Building Worksheets .....</b>	<b>65</b>
Learning Objectives .....	65
Introduction.....	65
Creating Fresh Workbooks.....	65
Take it from a template .....	65
Designing a workbook from scratch.....	70
Getting to Know Excel's Data Types .....	72
What's in a label? .....	72
What's the value? .....	74
Data Entry 101.....	77
Data entry keyboard style .....	77
Doing data entry with the Touch keyboard.....	78
You AutoComplete me.....	80
You AutoCorrect me .....	81
Constraining data entry to a cell range .....	82
Getting Excel to put in the decimal point.....	83
You AutoFill me .....	83
Flash Fill to the rescue.....	88
Linking to Other Documents.....	92
Hyperlinks: the basics .....	93
Inserting links.....	93
Follow that link!.....	95
Editing links .....	96
Using the HYPERLINK Function .....	97
Saving the Data .....	97
Saving workbooks in other commonly used file formats.....	100
Changing the default file location .....	101
Saving a new workbook in the old file format.....	101
Document Recovery to the Rescue .....	102
Review Questions.....	103
Review Answers .....	105
<b>Chapter 4 – Formatting Worksheets .....</b>	<b>109</b>
Learning Objectives .....	109
Introduction.....	109
Selecting Cells and Ranges .....	109
Selecting cells with the mouse .....	110
Selecting cells by touch.....	111
Selecting cells with the keyboard .....	111
Selecting cells with AutoSelect.....	112
Selecting cells with Go To.....	114
Name that range!.....	115
Adjusting Columns and Rows .....	115
Fitting the column to its contents automatically.....	116
Adjusting columns the old fashioned way .....	116
Setting a new standard width .....	117
Hiding out a column or two.....	117
Rambling rows.....	118
Formatting Tables from the Ribbon .....	119
Formatting Tables with the Quick Analysis Tool .....	121
Formatting Cells from the Ribbon.....	121
Formatting Cell Ranges with the Mini-Toolbar .....	124
Using the Format Cells Dialog Box.....	125
Assigning number formats .....	125
Altering the alignment .....	131
Fancy fonts and colors.....	134
Basic borders, fills, and patterns .....	136
Hiring Out the Format Painter .....	139

## Table of Contents

Easier Formatting with Cell Styles .....	139
Using the Number Format cell styles .....	140
Defining a custom cell style by example .....	140
Creating a new cell style from scratch .....	141
Merging styles into other workbooks .....	142
Analyzing Data with Conditional Formatting .....	142
Graphical conditional formatting .....	143
Conditional formatting with the Quick Analysis tool .....	144
Identifying particular values or text entries in a cell range .....	144
Highlighting duplicate values in a cell range .....	146
Creating your own conditional formatting rules .....	147
Managing conditional formatting rules .....	148
Review Questions .....	149
Review Answers .....	151
<b>Chapter 5 – Editing and Proofing Worksheets .....</b>	<b>155</b>
Learning Objectives .....	155
Introduction .....	155
Opening a Workbook .....	155
Using the Open screen in the Backstage view .....	155
Opening more than one workbook at a time .....	158
Finding misplaced workbooks .....	159
Using the other Open options .....	159
Editing a Cell .....	159
Changing your mind with Undo and Redo .....	160
Clearing cells .....	162
Inserting cells .....	163
A Worksheet with a View .....	164
Zooming in and zooming back out again .....	165
Freezing window panes .....	166
Saving custom views .....	168
Copying and Moving Stuff Around .....	170
Copying and moving with drag-and-drop .....	170
Copying and moving with copy, cut, and paste .....	171
Finding and Replacing Worksheet Data .....	177
Finding data .....	177
Finding and replacing stuff .....	179
Getting It Right: Spell Checking Your Worksheets .....	180
Changing the spelling options .....	181
Adding words to the custom dictionary .....	182
Looking Up and Translating Stuff .....	183
Marking Invalid Data .....	183
Review Questions .....	185
Review Answers .....	187
<b>Chapter 6 – Managing Worksheets .....</b>	<b>189</b>
Learning Objectives .....	189
Introduction .....	189
Reorganizing the Worksheet .....	189
Being cautious when deleting and inserting columns and rows .....	189
Deleting columns and rows .....	190
Adding new columns and rows .....	191
Splitting the worksheet into panes .....	191
Outlining worksheets .....	193
Reorganizing the Workbook .....	200
Renaming a worksheet .....	200
Designer sheets .....	201
Adding worksheets .....	202

## Table of Contents

Deleting worksheets.....	202
Changing the sheets.....	203
Editing and formatting multiple worksheets as a group.....	203
Hiding worksheets.....	204
Opening windows on different sheets.....	204
Viewing workbook stats.....	207
Working with Multiple Workbooks.....	207
Comparing windows on different workbooks.....	208
Transferring data between open windows.....	208
Moving or copying sheets from one workbook to another.....	208
Consolidating Worksheets.....	209
Consolidating by position.....	211
Consolidating by category.....	213
Linking consolidated data.....	213
Review Questions.....	214
Review Answers.....	216
<b>Chapter 7 – Printing Worksheets.....</b>	<b>219</b>
Learning Objectives.....	219
Introduction.....	219
Printing from the Backstage View.....	219
Selecting the printer to use.....	221
Previewing the printout.....	221
Quick Printing the Worksheet.....	224
Working with the Page Setup Options.....	225
Using the buttons in the Page Setup group.....	225
Using the buttons in the Scale to Fit group.....	230
Using the Print Options on the Sheet tab of the Page Setup dialog box.....	230
Headers and Footers.....	231
Adding a ready-made header or footer.....	232
Creating a custom header or footer.....	233
Solving Page Break Problems.....	235
Printing the Formulas in a Report.....	237
Review Questions.....	239
Review Answers.....	240
<b>Glossary.....</b>	<b>243</b>
<b>Index.....</b>	<b>247</b>