# **Microsoft Excel 2013**

# **Tutorial 1: Getting Started with Excel**

# **A Guide to this Instructor’s Manual:**

We have designed this Instructor’s Manual to supplement and enhance your teaching experience through classroom activities and a cohesive chapter summary.

This document is organized chronologically, using the same heading in **blue**that you see in the textbook. Under each heading you will find (in order): Lecture Notes that summarize the section, Figures and Boxes found in the section (if any), Teacher Tips, Classroom Activities, and Lab Activities. Pay special attention to teaching tips, and activities geared towards quizzing your students, enhancing their critical thinking skills, and encouraging experimentation within the software.

In addition to this Instructor’s Manual, our Instructor’s Resources CD also contains PowerPoint Presentations, Test Banks, and other supplements to aid in your teaching experience.

**For your students:**

Our latest online feature, CourseCasts, is a library of weekly podcasts designed to keep your students up to date with the latest in technology news. Direct your students to <http://coursecasts.course.com>, where they can download the most recent CourseCast onto their mp3 player. Ken Baldauf, host of CourseCasts, is a faculty member of the Florida State University Computer Science Department where he is responsible for teaching technology classes to thousands of FSU students each year. Ken is an expert in the latest technology and sorts through and aggregates the most pertinent news and information for CourseCasts so your students can spend their time enjoying technology, rather than trying to figure it out. Open or close your lecture with a discussion based on the latest CourseCast.

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**Chapter Objectives**

Students will have mastered the material in this tutorial when they can:

* Open and close a workbook
* Navigate through a workbook and worksheet
* Select cells and ranges
* Plan and create a workbook
* Insert, rename, and move worksheets
* Enter text, dates, and numbers
* Undo and redo actions
* Resize columns and rows
* Enter formulas and the SUM and COUNT functions
* Copy and paste formulas
* Move or copy cells and ranges
* Insert and delete rows, columns, and ranges
* Create patterned text with Flash Fill
* Add cell borders and change font size
* Change worksheet views
* Prepare a workbook for printing
* Save a workbook with a new filename

**[EX 4: Introducing Excel and Spreadsheets](#FM2)**

LECTURE NOTES

* Introduce the terminology associated with spreadsheets and Excel
* Show the parts of the Excel window
* Discuss the commands available in Backstage view
* Explain how to open an existing workbook
* Demonstrate how using keyboard shortcuts can help you work faster
* Remind students how to access the Help system
* Review the difference between Touch Mode and Mouse Mode

FIGURES

* Figure 1-1, Figure 1-2, Figure 1-3, Figure 1-4

TEACHER TIP

This first section will familiarize students with the basic parts of Excel and show them a very simple worksheet. Suggest that they think of each worksheet as a large sheet of paper. Just as a book is comprised of sheets of paper, so too, is an Excel workbook comprised of worksheets. Because all sorts of calculations can be made in the Excel spreadsheet, it is much more flexible than a paper spreadsheet.

Have students familiarize themselves with the names of all the parts of the Excel window. These names will be used over and over again throughout the text, so their understanding of key terms such as these will help them to build their knowledge and execute assignments with ease.

CLASSROOM ACTIVITIES

Group Activity: Print a copy of the spreadsheet shown in the Visual Overview on pages EX 2 and3 with the key terms blanked out. Have students work in groups to fill in the key terms in the appropriate places.

Quick Quiz:

1. A(n) \_\_\_\_\_\_\_\_\_\_\_\_ is a collection of text and numbers laid out in a rectangular grid. (Answer: spreadsheet)

2. You press the \_\_\_\_\_\_\_\_\_\_\_\_ key to display the Key tips, which are labels that appear over each tab and command on the ribbon. (Answer: Alt)

**EX 7: Exploring a Workbook**

LECTURE NOTES

* Review the difference between a worksheet and a chart sheet
* Explainhow to change the active sheet
* Demonstrate the various ways to navigate within a worksheet
* Discuss how to select a cell range

BOXES

* TIP: You can move to the previous or next sheet in the workbook by pressing the Ctrl+PgUp or Ctrl+PgDn keys. (EX 9)
* TIP: You can also select a range by clicking the upper-left cell of the range, holding down the Shift key as you click the lower-right cell in the range, and then releasing the Shift key. (EX 11)

FIGURES

* Figure 1-5, Figure 1-6, Figure 1-7, Figure 1-8, Figure 1-9, Figure 1-10

CLASSROOM ACTIVITIES

Quick Quiz:

1. A(n) \_\_\_\_\_ contains a chart that provides a visual representation of worksheet data. (Answer: chart sheet)

Each cell is identified by a(n) \_\_\_\_\_, which is based on the cell’s column and row location. (Answer: cell reference)

**EX 13: Closing a Workbook**

LECTURE NOTES

* Review how to close a workbook

CLASSROOM ACTIVITIES

Quick Quiz:

1. On the ribbon, click the \_\_\_\_\_\_\_\_\_\_\_\_ tab to display Backstage view. (Answer: FILE)

2. What are the shortcut keys to close a file? (Answer: Ctrl+W)

**EX 13: Planning a Workbook**

LECTURE NOTES

* Discuss the purpose of a planning analysis sheet
* Review the questions that help you think about the workbook’s purpose

BOXES

* ProSkills: Written Communication: Creating Effective Workbooks (EX 14)

TEACHER TIP

Be sure to cover the planning process. Students often want to skip the whole planning process. Be sure to emphasize its importance and the fact that it will actually save them time in the long run.

CLASSROOM ACTIVITIES

Class Discussion: Brainstorm with the students to think of examples where a workbook would be beneficial (for example, to keep track of income for a fund drive for their club).

Group Activity: Divide the class into groups. Ask each group to go over the planning and analysis of one of the above examples and prepare a list of questions that need to be answered with the workbook. The list of questions presented on page EX 13–14can serve as a guide. After several minutes, have the groups share their findings with the rest of the class.

**EX 15: Creating a New Workbook**

LECTURE NOTES

* Demonstrate how to create a new workbook
* Discuss what makes a worksheet name descriptive
* Show how to rename a worksheet
* Review how to insert a worksheet
* Demonstrate how to move a worksheet
* Explain how to delete a worksheet
* Remind students what a shortcut menu is and how to use one

BOXES

* TIP: You can also create a new, blank workbook by pressing the Ctrl+N keys. (EX 15)
* TIP: To copy a sheet, hold down the Ctrl key as you drag and drop its sheet tab. (EX 16)

FIGURES

* Figure 1-11

TEACHER TIP

Another way for your students to move a worksheet is to right-click the sheet tab and click Move or Copy. Excel opens the Move or Copy dialog box. From this dialog box students can move the selected sheet to a new location in the current workbook or to a new location in a different workbook.

CLASSROOM ACTIVITIES

Class Discussion: What is good practice with regard to placement of sheets in a workbook? (Answer: Place the most important sheets at the beginning and less important sheets at the end.) As good practice, how often should you save a workbook?(Answer: Every 10 minutes or so.)What is a shortcut menu? (Answer: A list of commands related to a selection that opens when you click the right mouse button.)

Quick Quiz:

1. True or False. When you create a new blank workbook, it is named Sheet1. (Answer: False, it is named Book1)

2. You create new workbooks from the New screen in \_\_\_\_\_\_\_\_\_\_\_\_ view. (Answer: Backstage)

**EX 17: Entering Text, Dates, and Numbers**

LECTURE NOTES

* Discuss the types of content that can be entered into cells
* Show how to enter text into cells
* Demonstrate how to undo and redo an action
* Remind students how to edit cell content
* Be sure students understand the AutoComplete feature
* Describe how to display numbers as text
* Explain how to enter dates
* Discuss how to enter numbers

BOXES

* TIP: To remove a green triangle, click the cell, click the yellow caution icon that appears to the left of the cell, and then click Ignore Error. (EX 22)
* InSight: International Date Formats (EX 23)
* TIP: If a number exceeds its cell size, you see ###### instead of the number. You can display the entire number by increasing the column width. (EX 24)

FIGURES

* Figure 1-12, Figure 1-13, Figure 1-14, Figure 1-15, Figure 1-16, Figure 1-17, Figure 1-18

TEACHER TIPS

Cover the three basic general categories for data: text, numbers, and dates and times. Text datais a combination of letters, numbers, and some symbols. Numeric data is any number that can be used in a mathematical calculation. Date and time dataare commonly recognized formats for date and time values. By default, text is left-aligned in cells, whereas numbers, dates, and times are right-aligned.

Excel will automatically change some dates into a default date format. For example, if your students enter the date “June 4, 2009” Excel will change the date to “4-June-09.” If you enter the date using a two-digit year value such as “6/4/09” Excel will change the date to “6/4/2009.” Excel refers to these date formats as short dates. Your students can control the automatic reformatting of short dates by changing Windows Regional Settings.

As soon as you begin to type a value for a cell, you enter editing mode. Explain that they must complete the edit before they can perform some other operation. Completing the edit is accomplished either by pressing the Enter key or by moving the cursor to another cell.

In addition to undoing and redoing an action, your students can also “repeat” an action. The repeat option is not added to the Quick Access Toolbar by default, but you can add it as follows:

1. Click the Microsoft Office Button and then click Excel Options.  
2. Click Customize.  
3. Under Choose Commands from click Popular Commands.  
4. In the list of commands, click Repeat and then click Add.  
5. Click OK. The repeat button is now available on the Quick Access Toolbar.

Illustrate how students can easily reverse the effect of an action by pressing the Undo button. This is a great “safety net” as long as too many actions have not been completed before you decide you want to reverse an action.

CLASSROOM ACTIVITIES

CriticalThinking Activity: How should Excel categorize telephone numbers:as text, numbers, or dates and times? Why? (Answer: Text. Because they have characters in them (dashes) and cannot be used in calculations.) How should Excel identify social security numbers? Why? (Answer: Text. Because they have other characters in them (like a dash or parentheses) and cannot be used in calculations.) How should Excel categorize dates like April 15, 2013? Why? (Answer: Date and Time. Excel interprets the cell entry “April 15, 2013” as a date and not as text because of the format.)

Quick Quiz:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is any numerical value that can be used in a mathematical calculation. (Answer: Numeric data)

2. What does a green triangle in a cell indicate? (Answer:A potential error)

LAB ACTIVITIES

Walk students through entering some sample values into cells and then have them try their hand at entering telephone numbers, social security numbers, and dates. Have them experiment with different characters (like parentheses) to see how Excel treats this type of data.

**EX 25:Resizing Columns and Rows**

LECTURE NOTES

* Demonstrate how to change column widths
* Review how to use AutoFit
* Discuss how to wrap text in a cell
* Explain how to change row heights
* Show how to change row heights

BOXES

* InSight: Setting Column Widths (EX 25)
* TIP: To select multiple columns, you can also click and drag the pointer over multiple column headings. (EX 26)
* TIP: If the row or column is blank, autofitting restores its default height or width. (EX 27)
* TIP: You can also set the row height by clicking the Format button in the Cells group on the HOME tab and then using the Row Height command. (EX 29)

FIGURES

* Figure 1-19, Figure 1-20, Figure 1-21

CLASSROOM ACTIVITIES

Quick Quiz:

1. A(n) \_\_\_\_\_\_ is a single point on a computer monitor or printout. (Answer: pixel)

2. What is the default column width? (Answer: 8.43 characters)

3. \_\_\_\_\_\_ changes the column width or row height to display the longest or tallest entry within the column or row. (Answer: AutoFit)

4. True/False:When text wraps within a cell, the row height increases. (Answer: True)

**EX 32:Adding Formulas to a Worksheet**

LECTURE NOTES

* Discuss the parts of a formula
* Demonstrate how to enter a formula
* Explain the order of operations
* Show how to copy and paste a formula

FIGURES

* Figure 1-22, Figure 1-23, Figure 1-24, Figure 1-25

TEACHER TIP

Stress to students that a formula always needs to begin with an = sign.

Cover the operations and their operators listed in Figure 1-22. This figure describes the operation and provides an example of each one. It is very important that students understand the kinds of operations used in worksheets. In addition, the order of operations is very important. Students should understand that if they do not follow the rules of the order of operations, they could receive unexpected results. Figure 1-23 will help you explain these concepts.

Excel contains a wealth of keyboard shortcuts designed to work with formulas. Here are a few:

* In a highlighted row, select all the cells that do not match the formula in the active cell (CTRL+\)
* In a highlighted column, select all the cells that do not match the formula in the active cell (CTRL+SHIFT+\)
* Select all of the cells directly referenced by the formula in the active cell (CTRL+[ )
* Select all cells directly or indirectly referenced by formulas in the active cell (CTRL+SHIFT+{ )
* Select cells that contain formulas that directly reference the active cell (CTRL+] )
* Select cells that contain formulas that directly or indirectly reference the active cell (CTRL+SHIFT+} )

Using these keyboard shortcuts is an effective way of displaying the relationship between a formula and the cell it references.

CLASSROOM ACTIVITIES

Quick Quiz:

1. In the order of operation rules, Excel first calculates the value of any operation within parentheses, and then it applies \_\_\_\_\_. (Answer: A)

* 1. exponentiation
  2. addition
  3. multiplication and division
  4. subtraction

2. A(n) \_\_\_\_\_ is a mathematical expression that calculates a value. (Answer: formula)

3. True/False: A worksheet can contain the following type of data: text, numeric values, dates, and calculated values. (Answer: True)

Critical Thinking Activity:

* If you forget to put an = sign at the beginning of a formula, what will appear in the cell? (Answer: The actual data you entered, not the calculation)
* What is the result of the formula =40+10\*4? (Answer:80)
* What is the result of the formula =(40+10)\*4 (Answer: 200)
* What is the result of the formula =40/10-4 (Answer: 0)

**EX 36:Simplifying Formulas with Functions**

LECTURE NOTES

* Introduce function syntax
* Demonstrate how to enter functions with AutoSum

BOXES

* TIP: You can quickly insert the SUM function by pressing the Alt+= keys. (EX 37)
* ProSkills: Problem Solving: Writing Effective Formulas (EX 40)

FIGURE

* Figure 1-26, Figure 1-27

TEACHER TIP

Discuss that a function is a predefined, or built-in, formula for a commonly used calculation. Each Excel function has a name and syntax. The syntax specifies the order in which you must enter the different parts of the function and the location in which you must insert commas, parentheses, and other punctuation.

The AutoSum feature allows you to quickly enter a sum in a cell. Explain that the SUM function is the most widely used function and the AutoSum allows you to automate the process. Explain that when you choose the AutoSum feature, Excel will “guess” which cells should be included in the sum. Caution students to check the AutoSum range to make sure it is really what they want.

Your students can use the AutoSum button to insert any function into the active cell. To select a function, click the AutoSum button and then click More Functions and choose the function from the Insert Function dialog box. Excel will automatically insert the cell reference of the row or column into the function (if appropriate).

CLASSROOM ACTIVITIES

Quick Quiz:

1. Every function follows a set of rules, or \_\_\_\_\_. (Answer: D)

1. operations
2. arguments
3. reference
4. syntax

2. True/False: Functions are used to simplify formulas. (Answer: True)

Group Activity: Divide students into groups of two or three. Assign each group one of the functions. Ask each group to use the help available in the dialog box to research their assigned function. They should learn what the function does, what data is needed, and an example of how to use the function. In addition, have each group try to think of a situation in which they would use their assigned function. After about ten minutes, ask each group to share with the rest of the class what they have learned.

**EX 40:Modifying a Worksheet**

LECTURE NOTES

* Demonstrate how to move and copy a cell or range
* Explain how to use the COUNT function
* Show how to insert a column or row
* Discuss the difference between deleting rows and columns and clearing them
* Review how to insert or delete a range

BOXES

* Reference: Moving or Copying a Cell or Range (EX 41)
* Reference: Inserting or Deleting a Column or Row (EX 44)
* TIP: You can insert multiple columns or rows by selecting that number of column or row headings, and then clicking the Insert button or pressing the Ctrl+Shift+= keys. (EX 44)
* Reference: Inserting or Deleting a Range (EX 46)
* TIP: You can also autofit by double-clicking the bottom border of row 23. (EX 47)
* InSight: Hiding and Unhiding Rows, Columns, and Worksheets (EX 48)

FIGURE

* Figure 1-28, Figure 1-29, Figure 1-30, Figure 1-31, Figure 1-32

TEACHER TIP

Explain that worksheets in a workbook are much like sheets or pages within a book. Think of them as being stacked on top of one another and you just peruse through them like you flip the pages of a book. As with other features in Excel, there is more than one way to move, copy, and work with worksheets.

CLASSROOM ACTIVITIES

Quick Quiz:

1. The \_\_\_\_\_ function calculates how many unique items are include in a range? (Answer: C)

1. NUMBER
2. SUM
3. COUNT
4. ITEMS

2. True/False: Deleting a column or row is not the same as clearing a column or row. (Answer: True)

Class Discussion: To insert a column or row in Excel, what are the steps to follow? (Answer: Select the column(s) or row(s) where you want to insert the new column(s) or row(s); Excel will insert the same number of columns or rows as you select. In the Cells group on the HOMEtab, click the Insert button (or right-click a column or row heading or selected column and row headings), and then click Insert on the shortcut menu.)

**EX 48:Using Flash Fill**

LECTURE NOTES

* Demonstrate how to use Flash Fill

FIGURES

* Figure 1-33, Figure 1-34

CLASSROOM ACTIVITIES

Quick Quiz:

1. When does Flash Fill work best? (Answer: When the pattern is clearly recognized from the values in the data.)

2. True/False: Flash Fill enters formulas, not text. (Answer: False)

**EX 49: Formatting a Worksheet**

LECTURE NOTES

* Discuss how formatting changes a workbook’s appearance
* Demonstrate how to add cell borders
* Show how to change the font size

FIGURES

* Figure 1-35, Figure 1-36

CLASSROOM ACTIVITIES

Quick Quiz:

1. \_\_\_\_\_ changes a workbook’s appearance so that the content of a worksheet is easier to read. (Answer: Formatting)

2. True/False: The default font size for worksheets is 12 points. (Answer:False, the default is 11 points.)

Class Discussion: What is the purpose of adding borders around cells that contain content? (Answer: It makes the worksheet content easier to read.)

**EX 51: Printing a Workbook**

LECTURE NOTES

* Demonstrate how to change worksheet views
* Discuss the difference between portrait orientation and landscape orientation
* Review how to set the scaling options
* Remind students how to set the print options

BOXES

* TIP: You can relocate a page break by dragging the dotted blue border in the Page Break Preview window. (EX 52)
* TIP: To print the gridlines or the column and row headings, click the corresponding Print check box in the Sheet Options group on the PAGE LAYOUT tab. (EX 55)

FIGURES

* Figure 1-37, Figure 1-38, Figure 1-39, Figure 1-40

TEACHER TIP

Remind students that switching views does not change the information in the workbooks, just the way you view it on the screen.

Explain that the Landscape orientation is often used when printing a worksheet because there are often many columns. Printing in landscape allows you to see more columns at once.

CLASSROOM ACTIVITIES

Quick Quiz:

1. What are the three ways to view a spreadsheet?(Answer: Normal view, Page Layout view, and Page Break Preview.)

2.\_\_\_\_\_\_\_\_ a printout reduces the width and the height of the printout to fit the number of pages you specify by shrinking the text size as needed. (Answer:Scaling)

Class Discussion: What is the difference between portrait orientation and landscape orientation? (Answer: In portrait orientation, the page is taller than it is wide. In landscape orientation, the page iswider than it is tall.)

**EX 56: Viewing Worksheet Formulas**

LECTURE NOTES

* Demonstrate how to display formulas instead of results in a worksheet

BOXES

* TIP: You can also display formulas in a worksheet by clicking the Show Formulas button in the Formula Auditing group on the FORMULAS tab. (EX 56)

FIGURES

* Figure 1-41

TEACHER TIP

Explain also that printing the formulas is usually done to check your formulas. As an instructor, you might consider having students print their formulas along with any worksheets they turn in. This way when you see an error in their results you can compare the error with their formulas to see why they are not getting the correct results.

CLASSROOM ACTIVITIES

Quick Quiz:

1. To toggle in and out of formula view, press the \_\_\_\_\_\_\_\_ keys. (Answer: Ctrl+` keys. The ` grave accent symbol is usually located above the Tab key on your keyboard.)

Class Discussion: Why would you want to display the formulas? (Answer: This is useful if you encounter unexpected results and want to examine the underlying formulas, or if you want to discuss your formulas with a colleague.)

**EX 57: Saving a Workbook with a New Filename**

LECTURE NOTES

* Demonstrate how to save a workbook with a new filename

BOXES

* TIP: Save the workbook with the new name before making your changes to avoid inadvertently saving your edits to the wrong file. (EX 58)

CLASSROOM ACTIVITIES

Quick Quiz:

1. To save a copy of a workbook with a new filename or to a different location, you need to use the \_\_\_\_\_\_\_\_ command. (Answer: Save As)

Class Discussion: How does the Save As command differ from the Save command? (Answer: The Save command updates the workbook file to reflect the latest content; when you use the Save As command, the previous version of the workbook remains stored as well.)

**End of Tutorial Material**

* **SAM Assessment, Training, and Projects:** This text is available with SAM 2013 Assessment, Training, and Projects that map directly to the learning objectives covered in each chapter. SAM's active, hands-on training and skill-based assessment help you master Microsoft Office skills. SAM Projects let you apply skills in real-world scenarios using the actual Microsoft Office applications. Immediate feedback and comprehensive study guides give you the practice and support you need to succeed. If you have a SAM account, login at [www.cengage.com/sam2013](http://www.cengage.com/sam2013). To obtain a SAM account, visit [www.cengagebrain.com](http://www.cengagebrain.com) or contact your instructor or bookstore for additional information.
* **Review Assignments:** Review Assignments provide students with additional practice of the skills they learned in the tutorial using the same tutorial case, with which they are already familiar. These assignments are designed as straight practice only and should not include anything of an exploratory nature.
* **Case Problems:** A typical NP tutorial has four Case Problems following the Review Assignments. Short tutorials can have fewer Case Problems (or none at all); other tutorials may have five Case Problems. The Case Problems provide further hands-on assessment of the skills and topics presented in the tutorial, but with new case scenarios. There are four types of Case Problems:
* **Apply**. In this type of Case Problem, students apply the skills that they have learned in the tutorial to solve a problem. Apply Case Problems can include Explore steps, which go a bit beyond what was presented in the tutorial, but should include only one or two Explore steps if any at all.
* **Create**. In a Create Case Problem, students are either shown the end result, such as a finished Word document, and asked to create the document based on the figure provided; or, students are asked to create something from scratch in a more free-form manner.
* **Challenge**. A Challenge Case Problem involves three or more Explore steps. These steps challenge students by having them go beyond what was covered in the tutorial, either with guidance in the step or by using online Help as directed.
* **Troubleshoot**. In this type of Case Problem, certain steps of the exercise require students to identify and correct errors-which are intentionally placed in the files. This is intended to promote problem solving and critical thinking.

A tutorial does not have to include each of the four types of Case Problems; rather, the tutorial’s content should dictate which Case Problems to include. It is possible, therefore, that some tutorials might have three Case Problems of one type and only one Case Problem of a different type. To the extent possible, the first Case Problem in a tutorial should be an Apply so that the Case Problems progress in degree of difficulty.

* **ProSkills Exercises:** ProSkills exercises integrate the technology skills students learn with one or more of the following soft skills: decision-making, problem-solving, teamwork, verbal communication, and written communication. The goal of these exercises is to enhance students’ understanding of the soft skills and how to apply them appropriately in real-world, professional situations that also involve software application skills. ProSkills exercises are offered at various points throughout a text, encompassing the concepts and skills presented in a standalone tutorial or a group of related tutorials.

**Glossary of Key Terms**

* active cell (EX 2)
* active sheet (EX 2)
* arithmetic operators (EX 32)
* AutoComplete (EX 20)
* AutoFit (EX 27)
* AutoSum (EX 31)
* Backstage view (EX 4)
* border (EX 30)
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