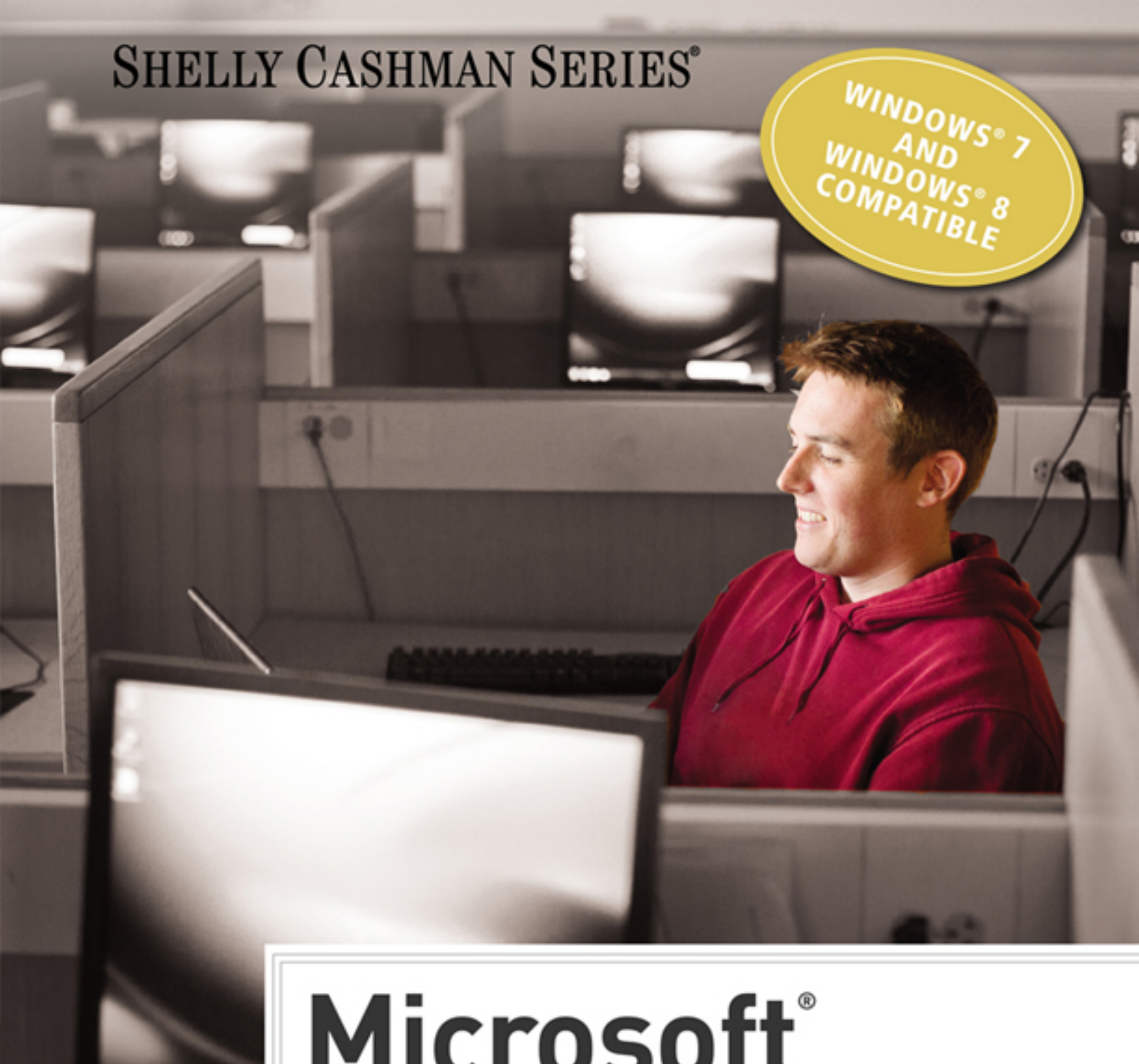


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# Microsoft® **EXCEL® 2013**

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# Microsoft<sup>®</sup> **EXCEL<sup>®</sup> 2013**

## COMPLETE

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**Steven M. Freund, Mali B. Jones, Joy L. Starks**

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# Microsoft<sup>®</sup> EXCEL<sup>®</sup> 2013

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To Add Shapes to a SmartArt Graphic	EX 453		
To Add Text to a SmartArt Graphic	EX 453		
To Add Pictures to a SmartArt Graphic	EX 454		
To Add a Style to a SmartArt Graphic	EX 457		



# Preface

The Shelly Cashman Series® offers the finest textbooks in computer education. We are proud that since Microsoft Office 4.3, our series of Microsoft Office textbooks have been the most widely used books in education. With each new edition of our Office books, we make significant improvements based on the software and comments made by instructors and students. For this Microsoft Excel 2013 text, the Shelly Cashman Series development team carefully reviewed our pedagogy and analyzed its effectiveness in teaching today's Office student. Students today read less, but need to retain more. They need not only to be able to perform skills, but to retain those skills and know how to apply them to different settings. Today's students need to be continually engaged and challenged to retain what they're learning.

With this Microsoft Excel 2013 text, we continue our commitment to focusing on the users and how they learn best.

## Objectives of This Textbook

*Microsoft Excel 2013: Complete* is intended for a six- to nine-month period in a course on Excel 2013. No experience with a computer is assumed, and no mathematics beyond the high school freshman level is required. The objectives of this book are:

- To offer an in depth presentation of Microsoft Excel 2013
- To expose students to practical examples of the computer as a useful tool
- To acquaint students with the proper procedures to create worksheets suitable for coursework, professional purposes, and personal use
- To help students discover the underlying functionality of Excel 2013 so they can become more productive
- To develop an exercise-oriented approach that allows learning by doing

## The Shelly Cashman Approach

### A Proven Pedagogy with an Emphasis on Project Planning

Each chapter presents a practical problem to be solved within a project planning framework. The project orientation is strengthened by the use of the Roadmap, which provides a visual framework for the project. Step-by-step instructions with supporting screens guide students through the steps. Instructional steps are supported by the Q&A, Experimental Step, and BTW features.

### A Visually Engaging Book that Maintains Student Interest

The step-by-step tasks, with supporting figures, provide a rich visual experience for the student. Call-outs on the screens that present both explanatory and navigational information provide students with information they need when they need to know it.

### Supporting Reference Materials (Quick Reference)

With the Quick Reference, students can quickly look up information about a single task, such as keyboard shortcuts, and find page references to where in the book the task is illustrated.

### Integration of the World Wide Web

The World Wide Web is integrated into the Excel 2013 learning experience with (1) BTW annotations; (2) BTW, Q&A, and Quick Reference Summary Web pages; and (3) the Learn Online resources for each chapter.

### End-of-Chapter Student Activities

Extensive end-of-chapter activities provide a variety of reinforcement opportunities for students to apply and expand their skills through individual and group work. To complete some of these assignments, you will be required to use the Data Files for Students. Visit [www.cengage.com/ct/studentdownload](http://www.cengage.com/ct/studentdownload) for detailed access instructions or contact your instructor for information about accessing the required files.

## New to this Edition

### Enhanced Coverage of Critical Thinking Skills

A New Consider This element poses thought-provoking questions throughout each chapter, providing an increased emphasis on critical thinking and problem-solving skills. Also, every task in the project now includes a reason *why* the students are performing the task and *why* the task is necessary.

### Enhanced Retention and Transference

A new Roadmap element provides a visual framework for each project, showing students where they are in the process of creating each project, and reinforcing the context of smaller tasks by showing how they fit into the larger project.

### Integration of Office with Cloud and Web Technologies

A new Lab focuses entirely on integrating cloud and web technologies with Excel 2013, using technologies like blogs, social networks, and SkyDrive.

### More Personalization

Each chapter project includes an optional instruction for the student to personalize his or her solution, if required by an instructor, making each student's solution unique.

### More Collaboration

A new Research and Collaboration project has been added to the Consider This: Your Turn assignment at the end of each chapter.

## Instructor Resources

The Instructor Resources include both teaching and testing aids and can be accessed via CD-ROM or at [www.cengage.com/login](http://www.cengage.com/login).

**Instructor's Manual** Includes lecture notes summarizing the chapter sections, figures and boxed elements found in every chapter, teacher tips, classroom activities, lab activities, and quick quizzes in Microsoft Word files.

**Syllabus** Easily customizable sample syllabi that cover policies, assignments, exams, and other course information.

**Figure Files** Illustrations for every figure in the textbook in electronic form.

**Powerpoint Presentations** A multimedia lecture presentation system that provides slides for each chapter. Presentations are based on chapter objectives.

**Solutions to Exercises** Includes solutions for all end-of-chapter and chapter reinforcement exercises.

**Test Bank & Test Engine** Test banks include 112 questions for every chapter, featuring objective-based and critical thinking question types, and including page number references and figure references, when appropriate. Also included is the test engine, ExamView, the ultimate tool for your objective-based testing needs.

**Data Files for Students** Includes all the files that are required by students to complete the exercises.

**Additional Activities for Students** Consists of Chapter Reinforcement Exercises, which are true/false, multiple-choice, and short answer questions that help students gain confidence in the material learned.

## Learn Online

CengageBrain.com is the premier destination for purchasing or renting Cengage Learning textbooks, eBooks, eChapters, and study tools at a significant discount (eBooks up to 50% off Print). In addition, CengageBrain.com provides direct access to all digital products, including eBooks, eChapters, and digital solutions, such as CourseMate and SAM, regardless of where purchased. The following are some examples of what is available for this product on [www.cengagebrain.com](http://www.cengagebrain.com).

**Student Companion Site** The Student Companion Site reinforces chapter terms and concepts using true/false questions, multiple choice questions, short answer questions, flash cards, practice tests, and learning games, all available for no additional cost at [www.cengagebrain.com](http://www.cengagebrain.com).

**SAM: Skills Assessment Manager** Get your students workplace-ready with SAM, the market-leading proficiency-based assessment and training solution for Microsoft Office! SAM's active, hands-on environment helps students master Microsoft Office skills and computer concepts that are essential to academic and career success, delivering the most comprehensive online learning solution for your course!

Through skill-based assessments, interactive trainings, business-centric projects, and comprehensive remediation, SAM engages students in mastering the latest Microsoft Office programs on their own, giving instructors more time to focus on teaching. Computer concepts labs supplement instruction of important technology-related topics and issues through engaging simulations and interactive, auto-graded assessments. With enhancements including streamlined course setup, more robust grading and reporting features, and the integration of fully interactive MindTap Readers containing Cengage Learning's premier textbook content, SAM provides the best teaching and learning solution for your course.



**MindLinks** MindLinks is a new Cengage Learning Service designed to provide the best possible user experience and facilitate the highest levels of learning retention and outcomes, enabled through a deep integration of Cengage Learning's digital suite into an instructor's Learning Management System (LMS). MindLinks works on any LMS that supports the IMS Basic LTI open standard. Advanced features, including gradebook exchange, are the result of active, enhanced LTI collaborations with industry-leading LMS partners to drive the evolving technology standards forward.

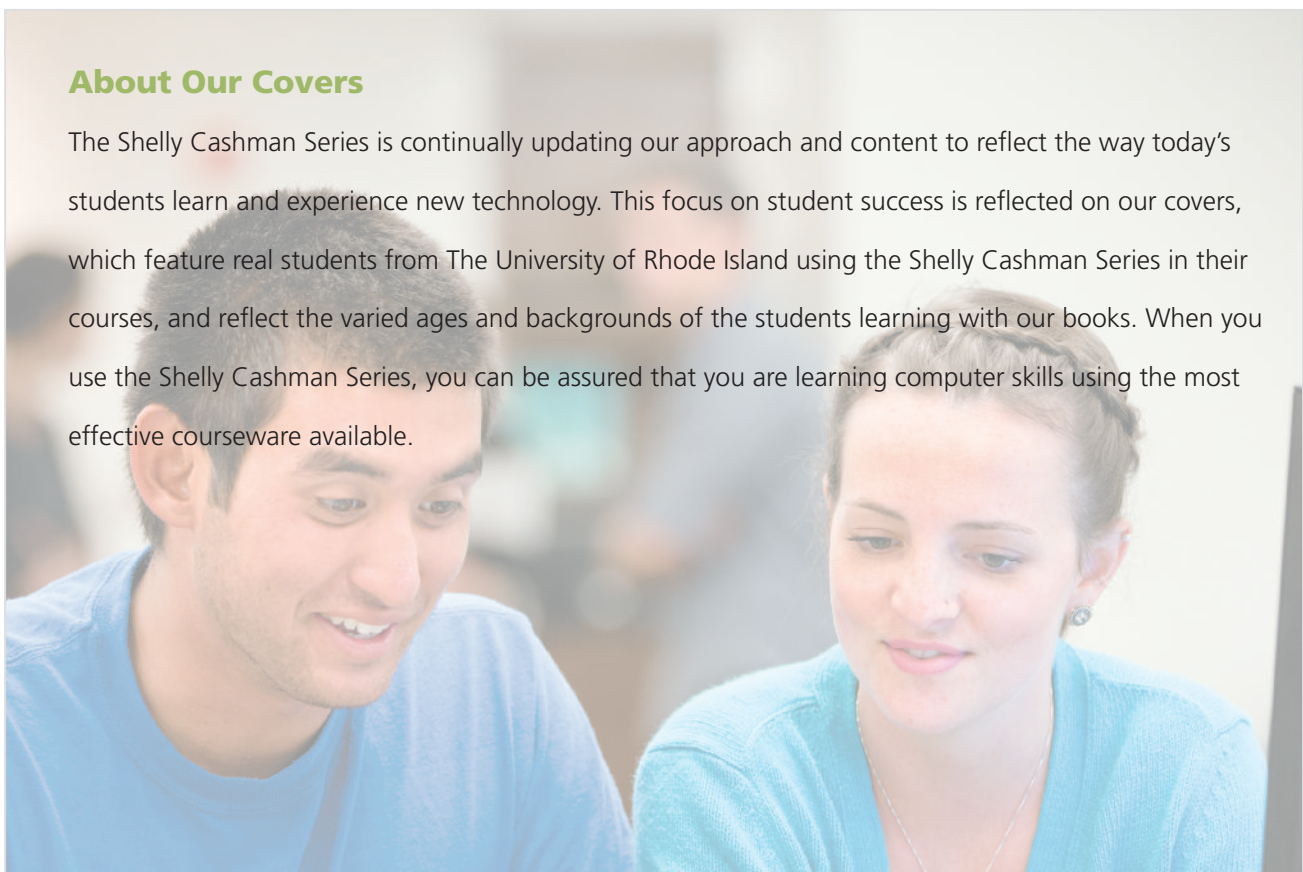


### CourseNotes

Cengage Learning's CourseNotes are six-panel quick reference cards that reinforce the most important and widely used features of a software application in a visual and user-friendly format. CourseNotes serve as a great reference tool during and after the course. CourseNotes are available for software applications, such as Microsoft Office 2013. There are also topic-based CourseNotes available for Best Practices in Social Networking, Hot Topics in Technology, and Web 2.0. Visit [www.cengagebrain.com](http://www.cengagebrain.com) to learn more!

### About Our Covers

The Shelly Cashman Series is continually updating our approach and content to reflect the way today's students learn and experience new technology. This focus on student success is reflected on our covers, which feature real students from The University of Rhode Island using the Shelly Cashman Series in their courses, and reflect the varied ages and backgrounds of the students learning with our books. When you use the Shelly Cashman Series, you can be assured that you are learning computer skills using the most effective courseware available.



# Textbook Walk-Through

The Shelly Cashman Series Pedagogy: Project-Based — Step-by-Step — Variety of Assessments

**Roadmaps** provide a visual framework for each project, showing the students where they are in the process of creating each project.

**Step-by-step** instructions provide a context beyond the point-and-click. Each step provides information on why students are performing each task and what will occur as a result.

EX 4 Excel Chapter 1 Creating a Worksheet and a Chart

## Roadmap

In this chapter, you will learn how to perform basic workbook tasks using Excel. The following roadmap identifies general activities you will perform as you progress through this chapter:

### Descriptive, Overview Roadmap

1. **ENTER TEXT** in a blank worksheet.
2. **CALCULATE SUMS AND USE FORMULAS** in the worksheet.
3. **SAVE** the **WORKBOOK** using the file name, Bob Gleamin Budget.
4. **FORMAT TEXT** in the worksheet.
5. **INSERT** a pie **CHART** into the worksheet.
6. Assign a **NAME** to the worksheet **TAB**.
7. **PREVIEW AND PRINT** the **WORKSHEET**.

At the beginning of step instructions throughout the chapter, you will see an abbreviated form of this roadmap. The abbreviated roadmap uses colors to indicate chapter progress: gray means the chapter is beyond that activity, blue means the task being shown is covered in that activity, and black means that activity is yet to be covered. For example, the following abbreviated roadmap indicates the chapter would be showing a task in the Save Workbook activity.

1 ENTER TEXT | 2 CALCULATE SUMS & USE FORMULAS | 3 SAVE WORKBOOK | 4 FORMAT TEXT  
5 INSERT CHART | 6 NAME TAB | 7 PREVIEW & PRINT WORKSHEET

BEFORE THIS

The key to developing a useful worksheet is careful planning. Careful planning can reduce your effort significantly and result in a worksheet that is accurate, easy to read, flexible, and useful. When analyzing a problem and designing a worksheet solution, what steps should you follow?

... of data, calculations, charting, and web or special requirements.

## To Enter the Worksheet Titles

As shown in Figure 1–4, the worksheet title, Personal Budget Worksheet, identifies the purpose for which the worksheet is being created in Chapter 1. The worksheet subtitle, Monthly Estimates, identifies the type of data contained in the worksheet. *Why? A title and subtitle help the reader to understand clearly what the worksheet contains.*

The following steps enter the worksheet titles in cells A1 and A2. Later in this chapter, the worksheet titles will be formatted so that they appear as shown in Figure 1–4.

1. If necessary, tap or click cell A1 to make cell A1 the active cell (Figure 1–5).

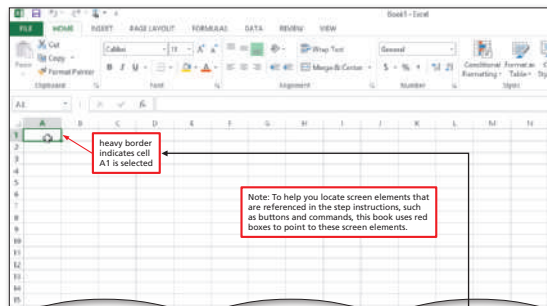


Figure 1–5

2. Type **Personal Budget Worksheet** in cell A1 and then point to the Enter box in the formula bar to prepare to enter text in the active cell (Figure 1–6).

**Q&A** Why did the appearance of the formula bar change? Excel displays the title in the formula bar and in cell A1. When you begin typing a cell entry, Excel displays two additional boxes in the formula bar: the Cancel box and the Enter box. Tapping or clicking the Enter box completes an entry. Tapping or clicking the Cancel box cancels an entry.

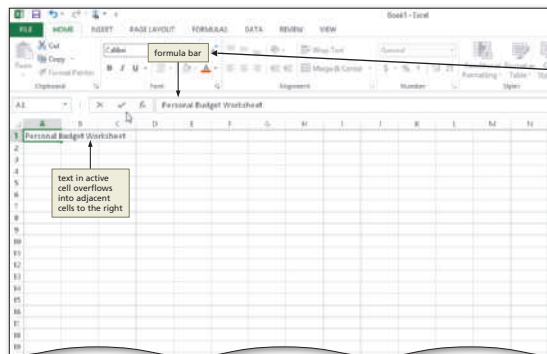


Figure 1–6

**Navigational** callouts in red show students where to click.

**Explanatory** callouts summarize what is happening on screen.

# Textbook Walk-Through

**Q&A** boxes anticipate questions students may have when working through the steps and provide additional information about what they are doing right where they need it.

**Experiment Steps** within the step-by-step instructions encourage students to explore, experiment, and take advantage of the features of the Office 2013 user interface. These steps are not necessary to complete the projects, but are designed to increase confidence with the software and build problem-solving skills.

## EX 24 Excel Chapter 1 Creating a Worksheet and a Chart

### To Change a Cell Style

Excel includes the capability of changing several characteristics of a cell, such as the font, font size, and font color, all at once by assigning a predefined cell style to a cell. *Why?* Using the predefined styles that Excel includes provides a consistent appearance to common portions of your worksheets, such as worksheet titles, worksheet subtitles, column headings, and total rows. The following steps assign the Title cell style to the worksheet title in cell A1.

- 1 Tap or click cell A1 to make cell A1 the active cell.
- 2 Tap or click the Cell Styles button (HOME tab | Styles group) to display the Cell Styles gallery (Figure 1–30).

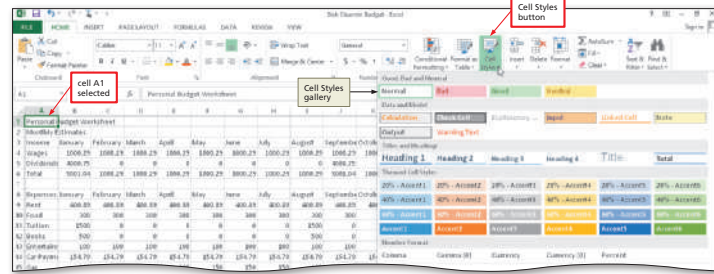


Figure 1–30

- 2 If you are using a mouse, point to the Title cell style in the Titles and Headings area of the Cell Styles gallery to see a live preview of the cell style in the active cell (Figure 1–31).

Can I use live preview on a touch screen?  
Live preview is not available on a touch screen.

#### Experiment

- If you are using a mouse, point to several other cell styles in the Cell Styles gallery to see a live preview of other cell styles in cell A1.

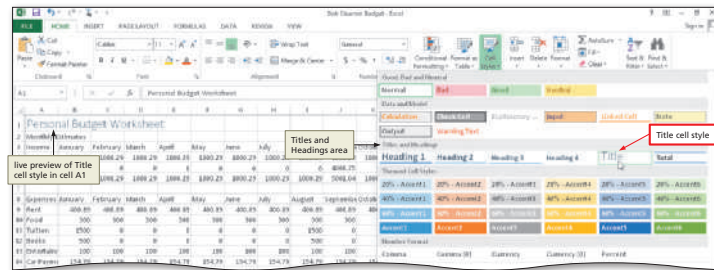


Figure 1–31

## EX 22 Excel Chapter 1 Creating a Worksheet and a Chart

- 1 Tap or click the Save button on the Quick Start task pane to save the workbook. Excel will display either the Save As gallery in the Backstage view or the Save As dialog box, depending on the save location you select.
- 2 To save on a hard disk or other storage medium, tap or click the Save As button in the Backstage view. To save on SkyDrive, proceed to Step 2b.
- 2a If your screen opens the Backstage view at your computer, tap or click Computer in the right pane related to saving on your computer. To save on SkyDrive, tap or click SkyDrive in the right pane.
- 2b If your screen opens the Backstage view at SkyDrive in the left pane to display SkyDrive, tap or click SkyDrive in the left pane. The Sign In button will appear in the right pane. Tap or click the Sign In button.
- 3 Tap or click the Browse button in the right pane associated with the selected save location.
- 4 Type **Bob Gleamin Budget** in the File name text box. Do not press the ENTER key after typing the file name. To close the dialog box at this time, tap or click the Save button.
- 5 Navigate to the desired save location (in the File Explorer on your computer or SkyDrive).
- 6 Tap or click the Save button (Save As dialog box) to save the workbook in the selected folder on the selected save location with the entered file name.

**Break Point:** If you wish to take a break, this is a good place to do so. You can exit Excel. To resume at a later time, run Excel, open the file called Bob Gleamin Budget, and continue following the steps from this location forward.

### Formatting the Worksheet

The text, numeric entries, and functions for the worksheet now are complete. The next step is to format the worksheet. You **format** a worksheet to emphasize certain entries and make the worksheet easier to read and understand.

Figure 1–29a shows the worksheet before formatting. Figure 1–29b shows the worksheet after formatting. As you can see from the two figures, a worksheet that is formatted not only is easier to read but also looks more professional.



The key to formatting a worksheet is to consider the ways you can enhance the worksheet so that it appears professional. When formatting a worksheet, what steps should you consider?

- Identify how to format various elements of the worksheet.
- Increase the font size of cells.
- Change the font color of cells.
- Center the worksheet titles, subtitles, and column headings.
- Modify column widths to best fit text in cells.
- Change the font style of cells.

To change the unformatted worksheet in Figure 1–29a so that it appears like the formatted worksheet in Figure 1–29b, the following tasks must be completed:

1. Change the font, change the font style to bold, increase the font size, and change the font color of the worksheet titles in cells A1 and A2.
2. Center the worksheet titles in cells A1 and A2 across columns A through N.

**Consider This** boxes pose thought-provoking questions with answers throughout each chapter, promoting critical thought along with immediate feedback.



**Chapter Summary** A listing of the tasks completed within the chapter, grouped into major task categories in an outline format.

**Consider This: Plan Ahead** box presents a single master planning guide that students can use as they create documents on their own.

## Chapter Summary

In this chapter you have learned how to enter text and numbers to create a worksheet, select a range, use the Sum button, format cells, insert a chart, and preview and print a worksheet. The items listed below include all the new Excel skills you have learned in this chapter, with the tasks grouped by activity.

### Clear Cells

- Clear Cell Entries Using the Fill Handle (EX 52)
- Clear Cell Entries Using the Shortcut Menu (EX 52)
- Clear Cell Entries Using the DELETE Key (EX 52)
- Clear Cell Entries and Formatting Using the Clear Button (EX 52)
- Clear Cell Formatting Using the Cell Styles Button (EX 52)
- Clear the Entire Worksheet (EX 52)

### Display AutoCalculate Functions

- Use the AutoCalculate Area to Determine a Maximum (EX 48)

### Enter Data

- Enter the Worksheet Titles (EX 7)
- Enter Column Titles (EX 9)
- Enter Row Titles (EX 11)
- Enter Numbers (EX 12)

### Enter Functions and Formulas

- Sum a Column of Numbers (EX 14)
- Copy a Cell to Adjacent Cells in a Row (EX 16)
- Determine Multiple Totals at the Same Time (EX 18)
- Enter a Formula Using the Keyboard (EX 20)

### File Management

- Change Document Properties (EX 44)

### Format a Worksheet

- Change a Cell Style (EX 24)
- Change the Font (EX 25)
- Bold a Cell (EX 26)
- Increase the Font Size of a Cell Entry (EX 27)
- Change the Font Color of a Cell Entry (EX 28)
- Center Cell Entries across Columns by Merging Cells (EX 29)
- Format Rows Using Cell Styles (EX 30)
- Format Numbers in the Worksheet (EX 32)
- Adjust the Column Width (EX 34)
- Use the Name Box to Select a Cell (EX 35)

### Insert a Chart

- Add a 3-D Pie Chart (EX 38)
- Apply a Style to a Chart (EX 40)

### Manage Worksheets

- Move a Chart to a New Sheet (EX 41)
- Change the Worksheet Tab Name (EX 42)

### Preview and Print Worksheets

- Preview and Print a Worksheet in Landscape Orientation (EX 46)

### CONSIDER THIS

#### What decisions will you need to make when creating workbooks and charts in the future?

1. Determine the workbook structure.
  - a) Determine the data you will need for your workbook.
  - b) Sketch a layout of your data and your chart.
2. Create the worksheet.
  - a) Enter titles, subtitles, and headings.
  - b) Enter data, functions, and formulas.
3. Format the worksheet.
  - a) Format the titles, subtitles, and headings using styles.
  - b) Format the totals.
  - c) Format the numbers.
  - d) Format the text.
4. Create the chart.
  - a) Determine the type of chart to use.
  - b) Determine the chart title and data.
  - c) Format the chart.

#### How should you submit solutions to questions in the assignment?

Every assignment in this book contains one or more questions identified beyond the assigned file. Present your solutions to the questions in the assignment by using one or more of these options: write the answer; create a document; discuss your answer in a group; record the answer as audio or video; or post answers on a blog, wiki, or website.

## Apply Your Knowledge

Reinforce the skills and apply the concepts you learned in this chapter.

### Changing the Values in a Worksheet

**Note:** To complete this assignment, you will be required to download the file from [www.cengage.com/ct/studentdownload](http://www.cengage.com/ct/studentdownload) for detailed instructions about accessing the required files.

**Instructions:** Run Excel. Open the workbook Apply 1-1 Treagle Market (Figure 1-73a on the next page).


1. Make the changes to the worksheet described in Table 1-6 so that the worksheet appears as shown in Figure 1-73b on the next page. As you edit the values in the cells containing numeric data, watch the totals in row 8, the totals in column G, and the chart change.
2. Change the worksheet title in cell A1 to the Title cell style and then merge and center it across columns A through G. Use buttons in the Font group on the HOME tab on the ribbon to change the worksheet subtitle in cell A2 to 14-point font and then center it across columns A through G. Use the Aqua, Accent 5 color (column 9, row 1 in the Font Color gallery) for the aqua font color.
3. Apply the worksheet name, Yearly Analysis, to the sheet tab and apply the Aqua, Accent 5 theme color to the sheet tab.
4. Move the chart to a new sheet called Sales Analysis Chart. Apply the Style 2 chart style to the chart (Figure 1-73c on the next page). Change the chart title to SALES ANALYSIS.
5. Replace Treagle in cell A1 with your last name. Save the workbook using the file name, Apply 1-1 Treagle Market Sales Analysis. Submit the revised workbook as specified by your instructor.
6. Exit Excel.
7.  Besides the styles used in the worksheet, what other changes could you make to enhance the worksheet?

Table 1-6 New Worksheet Data

Cell	Change Cell Contents To
A2	Yearly Sales Analysis
B7	3895.23
C5	26125.75
D6	30589.14
E7	35450.82
F6	6352.78

Continued >

**Apply Your Knowledge** This exercise usually requires students to open and manipulate a file that parallels the activities learned in the chapter.

# Textbook Walk-Through

## Extend Your Knowledge

Extend the skills you learned in this chapter and experiment with new skills. You may need to use Help to complete the assignment.

### Creating Styles and Formatting a Worksheet

**Note:** To complete this assignment, you will be required to use the Data Files for Students. Visit [www.cengage.com/ct/studentdownload](http://www.cengage.com/ct/studentdownload) for detailed instructions or contact your instructor for information about accessing the required files.

**Instructions:** Run Excel. Open the workbook Extend 1–1 Kaseey Vehicles (Figure 1–74). Perform the following tasks to create styles and format a worksheet using them.

1. Select cell A4. Use the New Cell Style command in the Cell Styles gallery to create a style that fills only cell A4 using the Orange, Accent 2, Lighter 40% color (row 4, column 6). Name the style, MyHeadings.
2. Select cell A5. Use the New Cell style dialog box to create a style that fills only cell A5 using the Orange, Accent 2, Lighter 80% color. Name the style, MyRows.

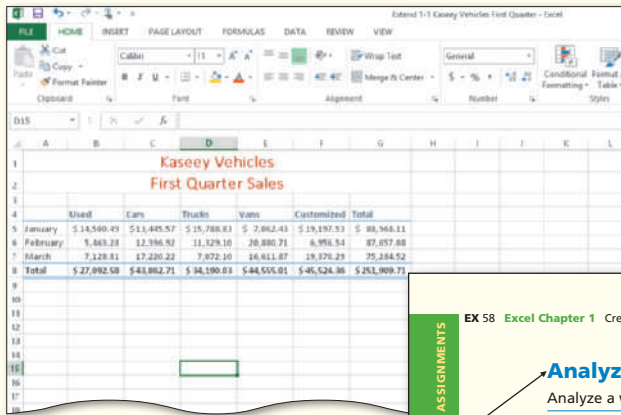


Figure 1–74

3. Select cell ranges B4:G4 and A5:A8. Apply the MyHeadings style.
4. Select cell ranges B5:G5 and B7:G7. Apply the MyRows style.
5. Apply a worksheet name to the sheet tab and apply a color to the sheet tab.
6. Change the font color for the text in cells A1 and A2 to the color of the sheet tab using the file name, Extend 1–1 Kaseey Vehicles First Quarter Sales, in the workbook as specified by your instructor.
7. Exit Excel.
8. What other styles would you create to improve the workbook?

## Extend Your Knowledge

projects at the end of each chapter allow students to extend and expand on the skills learned within the chapter. Students use critical thinking to experiment with new skills to complete each project.

## Analyze, Correct, Improve

Analyze a workbook and correct all errors and/or improve the design.

### Fixing Formatting Problems and Data Errors in a Worksheet

**Note:** To complete this assignment, you will be required to use the Data Files for Students. Visit [www.cengage.com/ct/studentdownload](http://www.cengage.com/ct/studentdownload) for detailed instructions or contact your instructor for information about accessing the required files.

**Instructions:** Run Excel. Open the workbook Analyze 1–1 CPJ Clothing. Correct the following formatting problems and data in the worksheet, while keeping in mind the guidelines presented in this chapter. Your worksheet should look like Figure 1–75 when it is corrected.

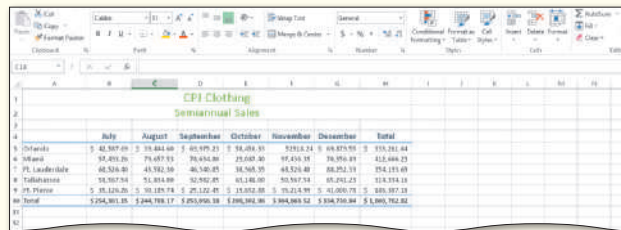


Figure 1–75

### 1. Correct

- a. Correct the spelling mistake in cell A2 by changing Semiannul to Semiannual. Correct the spelling mistake in cell A5 by changing Orlnodo to Orlando.
- b. The SUM function in cell H7 does not sum all of the numbers in the column. Correct this error by editing the range for the SUM function in the cell.

### 2. Improve

- a. Merge and center the worksheet title and subtitle appropriately.
- b. Format the worksheet title and subtitle with appropriate cell styles. Change the font size of the subtitle to 16.
- c. Apply the Green, Accent 6 color to the title and subtitle and bold them.
- d. Add a title for totals row 10 and create the necessary totals in row 10.
- e. Apply proper formatting to the column headers and total row, including centering the column headers.
- f. Adjust the column sizes so that all data in each column is visible.
- g. Create the grand total for the annual cost of goods.
- h. Apply a worksheet name to the sheet tab and apply the Green, Accent 6 color to the sheet tab.
- i. Change the document properties as specified by your instructor. Save the workbook using the file name, Analyze 1–1 CPJ Clothing Sales. Submit the revised workbook as specified by your instructor.
- j. Change the city in cell A5 to the city you were born.

3. If you were going to create a pie chart of the expenses for each city, what data would you use?

**Analyze, Correct, Improve** projects call on the students to analyze a file, discover errors in it, fix the errors, and then improve upon the file using the skills they learned in the chapter.

# Office 2013 and Windows 8: Essential Concepts and Skills



## Objectives

You will have mastered the material in this chapter when you can:

- Use a touch screen
- Perform basic mouse operations
- Start Windows and sign in to an account
- Identify the objects in the Windows 8 desktop
- Identify the apps in and versions of Microsoft Office 2013
- Run an app
- Identify the components of the Microsoft Office ribbon
- Create folders
- Save files
- Change screen resolution
- Perform basic tasks in Microsoft Office apps
- Manage files
- Use Microsoft Office Help and Windows Help

# Office 2013 and Windows 8: Essential Concepts and Skills

This introductory chapter uses Excel 2013 to cover features and functions common to Office 2013 apps, as well as the basics of Windows 8.

## Roadmap

In this chapter, you will learn how to perform basic tasks in Windows and Excel. The following roadmap identifies general activities you will perform as you progress through this chapter:

1. **SIGN IN** to an account
2. **USE WINDOWS**
3. **USE** features in Excel that are common across Office **APPS**
4. **FILE** and folder **MANAGEMENT**
5. **SWITCH** between **APPS**
6. **SAVE** and manage **FILES**
7. **CHANGE SCREEN RESOLUTION**
8. **EXIT APPS**
9. **USE ADDITIONAL** Office **APP FEATURES**
10. **USE** Office and Windows **HELP**

At the beginning of the step instructions throughout the chapter, you will see an abbreviated form of this roadmap. The abbreviated roadmap uses colors to indicate chapter progress: gray means the chapter is beyond that activity, blue means the task being shown is covered in that activity, and black means that activity is yet to be covered. For example, the following abbreviated roadmap indicates the chapter would be showing a task in the 3 USE APPS activity.

1 SIGN IN | 2 USE WINDOWS | 3 USE APPS | 4 FILE MANAGEMENT | 5 SWITCH APPS | 6 SAVE FILES  
7 CHANGE SCREEN RESOLUTION | 8 EXIT APPS | 9 USE ADDITIONAL APP FEATURES | 10 USE HELP

Use the abbreviated roadmap as a progress guide while you read or step through the instructions in this chapter.

## Introduction to the Windows 8 Operating System

**Windows 8** is the newest version of Microsoft Windows, which is a popular and widely used operating system. An **operating system** is a computer program (set of computer instructions) that coordinates all the activities of computer hardware,

such as memory, storage devices, and printers, and provides the capability for you to communicate with the computer.

The Windows operating system simplifies the process of working with documents and apps by organizing the manner in which you interact with the computer. Windows is used to run apps. An **app** (short for application) consists of programs designed to make users more productive and/or assist them with personal tasks, such as using spreadsheets or browsing the web.

The Windows 8 interface begins with the **Start screen**, which shows tiles (Figure 1). A **tile** is a shortcut to an app or other content. The tiles on the Start screen include installed apps that you use regularly. From the Start screen, you can choose which apps to run using a touch screen, mouse, or other input device.

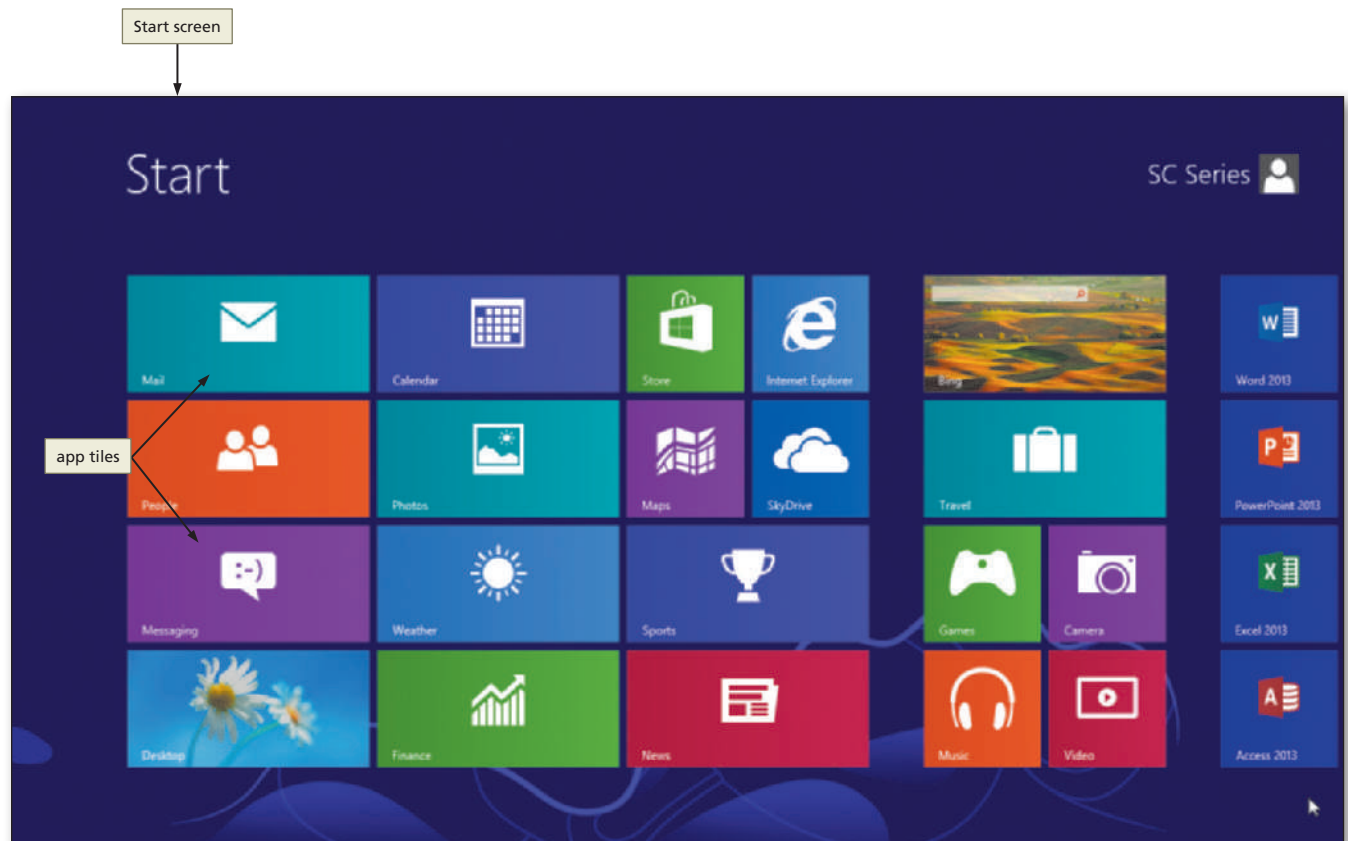




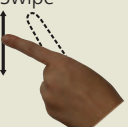




Figure 1

## Using a Touch Screen and a Mouse

Windows users who have computers or devices with touch screen capability can interact with the screen using gestures. A **gesture** is a motion you make on a touch screen with the tip of one or more fingers or your hand. Touch screens are convenient because they do not require a separate device for input. Table 1 on the next page presents common ways to interact with a touch screen.

If you are using your finger on a touch screen and are having difficulty completing the steps in this chapter, consider using a stylus. Many people find it easier to be precise with a stylus than with a finger. In addition, with a stylus you see the pointer. If you still are having trouble completing the steps with a stylus, try using a mouse.

Table 1 Touch Screen Gestures		
Motion	Description	Common Uses
 <p>Tap</p>	Quickly touch and release one finger one time.	<ul style="list-style-type: none"> <li>Activate a link (built-in connection)</li> <li>Press a button</li> <li>Run a program or an app</li> </ul>
 <p>Double-tap</p>	Quickly touch and release one finger two times.	<ul style="list-style-type: none"> <li>Run a program or an app</li> <li>Zoom in (show a smaller area on the screen, so that contents appear larger) at the location of the double-tap</li> </ul>
 <p>Press and hold</p>	Press and hold one finger to cause an action to occur, or until an action occurs.	<ul style="list-style-type: none"> <li>Display a shortcut menu (immediate access to allowable actions)</li> <li>Activate a mode enabling you to move an item with one finger to a new location</li> </ul>
 <p>Drag, or slide</p>	Press and hold one finger on an object and then move the finger to the new location.	<ul style="list-style-type: none"> <li>Move an item around the screen</li> <li>Scroll</li> </ul>
 <p>Swipe</p>	Press and hold one finger and then move the finger horizontally or vertically on the screen.	<ul style="list-style-type: none"> <li>Select an object</li> <li>Swipe from edge to display a bar such as the Charms bar, App bar, and Navigation bar (all discussed later)</li> </ul>
 <p>Stretch</p>	Move two fingers apart.	Zoom in (show a smaller area on the screen, so that contents appear larger)
 <p>Pinch</p>	Move two fingers together.	Zoom out (show a larger area on the screen, so that contents appear smaller)

**BTW**

**BTWs**

For a complete list of the BTWs found in the margins of this book, visit the BTW resource on the Student Companion Site located on [www.cengagebrain.com](http://www.cengagebrain.com). For detailed instructions about accessing available resources, visit [www.cengage.com/ct/studentdownload](http://www.cengage.com/ct/studentdownload) or contact your instructor for information about accessing the required files.

**BTW**

**Touch Screen Differences**

The Office and Windows interfaces may vary if you are using a touch screen. For this reason, you might notice that the function or appearance of your touch screen differs slightly from this chapter's presentation.



**CONSIDER THIS**

**Will your screen look different if you are using a touch screen?**

The Windows and Microsoft Office interface varies slightly if you are using a touch screen. For this reason, you might notice that your Windows or Excel screens look slightly different from the screens in this book.

Windows users who do not have touch screen capabilities typically work with a mouse that has at least two buttons. For a right-handed user, the left button usually is the primary mouse button, and the right mouse button is the secondary mouse button. Left-handed people, however, can reverse the function of these buttons.

Table 2 explains how to perform a variety of mouse operations. Some apps also use keys in combination with the mouse to perform certain actions. For example, when you hold down the CTRL key while rolling the mouse wheel, text on the screen may become larger or smaller based on the direction you roll the wheel. The function of the mouse buttons and the wheel varies depending on the app.

Table 2 Mouse Operations

Operation	Mouse Action	Example
Point	Move the mouse until the pointer on the desktop is positioned on the item of choice.	Position the pointer on the screen.
Click	Press and release the primary mouse button, which usually is the left mouse button.	Select or deselect items on the screen or run an app or app feature.
Right-click	Press and release the secondary mouse button, which usually is the right mouse button.	Display a shortcut menu.
Double-click	Quickly press and release the primary mouse button twice without moving the mouse.	Run an app or app feature.
Triple-click	Quickly press and release the primary mouse button three times without moving the mouse.	Select a paragraph.
Drag	Point to an item, hold down the primary mouse button, move the item to the desired location on the screen, and then release the mouse button.	Move an object from one location to another or draw pictures.
Right-drag	Point to an item, hold down the right mouse button, move the item to the desired location on the screen, and then release the right mouse button.	Display a shortcut menu after moving an object from one location to another.
Rotate wheel	Roll the wheel forward or backward.	Scroll vertically (up and down).
Free-spin wheel	Whirl the wheel forward or backward so that it spins freely on its own.	Scroll through many pages in seconds.
Press wheel	Press the wheel button while moving the mouse.	Scroll continuously.
Tilt wheel	Press the wheel toward the right or left.	Scroll horizontally (left and right).
Press thumb button	Press the button on the side of the mouse with your thumb.	Move forward or backward through webpages and/or control media, games, etc.

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## Scrolling

A **scroll bar** is a horizontal or vertical bar that appears when the contents of an area may not be visible completely on the screen (Figure 2). A scroll bar contains **scroll arrows** and a **scroll box** that enable you to view areas that currently cannot be seen on the screen. Tapping or clicking the up and down scroll arrows moves the screen content up or down one line. You also can tap or click above or below the scroll box to move up or down a section, or drag the scroll box up or down to move to a specific location.

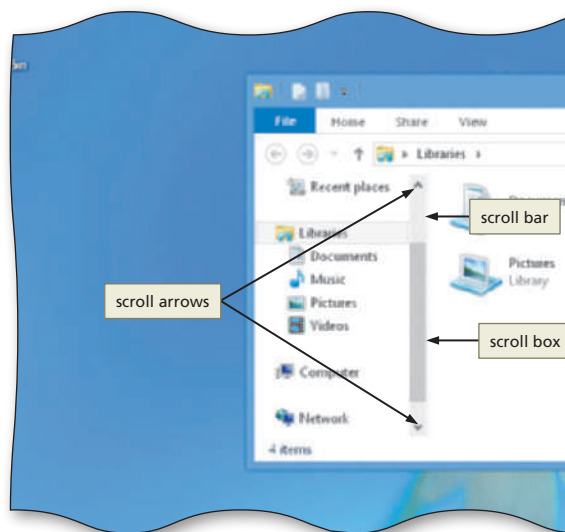


Figure 2

### BTW

#### Pointer

If you are using a touch screen, the pointer may not appear on the screen as you perform touch gestures. The pointer will reappear when you begin using the mouse.

### BTW

#### Minimize Wrist Injury

Computer users frequently switch between the keyboard and the mouse during a spreadsheet session; such switching strains the wrist. To help prevent wrist injury, minimize switching. For instance, if your fingers already are on the keyboard, use keyboard keys to scroll. If your hand already is on the mouse, use the mouse to scroll. If your hand is on the touch screen, use touch gestures to scroll.

### What should you do if you are running Windows 7 instead of Windows 8?

Although Windows 8 includes several user interface and feature enhancements, many of the steps in this book work in both Windows 7 and Windows 8. If you have any questions about differences between the two operating systems or how to perform tasks in an earlier version of Windows, contact your instructor.



CONSIDER THIS

## Keyboard Shortcuts

In many cases, you can use the keyboard instead of the mouse to accomplish a task. To perform tasks using the keyboard, you press one or more keyboard keys, sometimes identified as a **keyboard shortcut**. Some keyboard shortcuts consist of a single key, such as the F1 key. For example, to obtain help in many apps, you can press the F1 key. Other keyboard shortcuts consist of multiple keys, in which case a plus sign separates the key names, such as CTRL+ESC. This notation means to press and hold down the first key listed, press one or more additional keys, and then release all keys. For example, to display the Start screen, press CTRL+ESC, that is, hold down the CTRL key, press the ESC key, and then release both keys.

## Starting Windows

It is not unusual for multiple people to use the same computer in a work, educational, recreational, or home setting. Windows enables each user to establish a **user account**, which identifies to Windows the resources, such as apps and storage locations, a user can access when working with the computer.

Each user account has a user name and may have a password and an icon, as well. A **user name** is a unique combination of letters or numbers that identifies a specific user to Windows. A **password** is a private combination of letters, numbers, and special characters associated with the user name that allows access to a user's account resources. An icon is a small image that represents an object, thus a **user icon** is a picture associated with a user name.

When you turn on a computer, Windows starts and displays a **lock screen** consisting of the time and date (Figure 3a). To unlock the screen, swipe up or click the lock screen. Depending on your computer's settings, Windows may or may not display a sign-in screen that shows the user names and user icons for users who have accounts on the computer (Figure 3b). This **sign-in screen** enables you to sign in to your user account and makes the computer available for use. Tapping or clicking the user icon begins the process of signing in, also called logging on, to your user account.

At the bottom of the sign-in screen is the 'Ease of access' button and a Shut down button. Tapping or clicking the 'Ease of access' button displays the Ease of access menu, which provides tools to optimize a computer to accommodate the needs of the mobility, hearing, and vision impaired users. Tapping or clicking the Shut down



Figure 3a



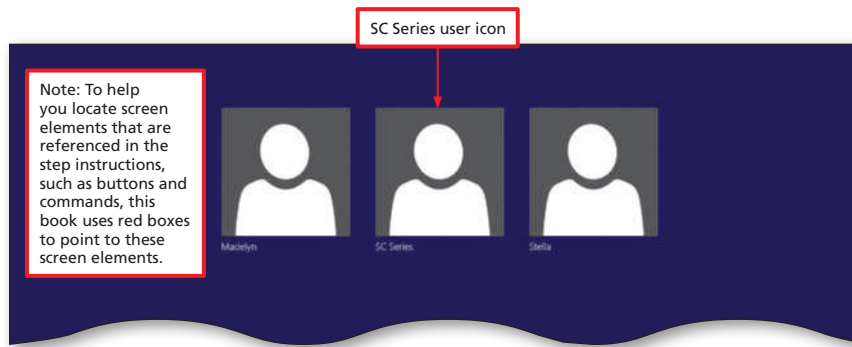


Figure 3b

button displays a menu containing commands related to restarting the computer, putting it in a low-power state, and shutting it down. The commands available on your computer may differ.

- The Sleep command saves your work, turns off the computer fans and hard disk, and places the computer in a lower-power state. To wake the computer from sleep mode, press the power button or lift a laptop's cover, and sign in to your account.
- The Shut down command exits running apps, shuts down Windows, and then turns off the computer.
- The Restart command exits running apps, shuts down Windows, and then restarts Windows.

## BTW

## Q&amp;As

For a complete list of the Q&As found in many of the step-by-step sequences in this book, visit the Q&A resource on the Student Companion Site located on [www.cengagebrain.com](http://www.cengagebrain.com). For detailed instructions about accessing available resources, visit [www.cengage.com/ct/studentdownload](http://www.cengage.com/ct/studentdownload) or contact your instructor for information about accessing the required files.

## To Sign In to an Account

1 SIGN IN | 2 USE WINDOWS | 3 USE APPS | 4 FILE MANAGEMENT | 5 SWITCH APPS | 6 SAVE FILES  
7 CHANGE SCREEN RESOLUTION | 8 EXIT APPS | 9 USE ADDITIONAL APP FEATURES | 10 USE HELP

The following steps, which use SC Series as the user name, sign in to an account based on a typical Windows installation. *Why?* After starting Windows, you might be required to sign in to an account to access the computer's resources. You may need to ask your instructor how to sign in to your account. If you are using Windows 7, skip these steps and instead perform the steps in the yellow box that immediately follows these Windows 8 steps.

1

- Swipe up or click the lock screen (shown in Figure 3a) to display a sign-in screen (shown in Figure 3b).
- Tap or click the user icon (for SC Series, in this case) on the sign-in screen, which depending on settings, either will display a second sign-in screen that contains a Password text box (Figure 4) or will display the Windows Start screen (shown in Figure 5 on the next page).

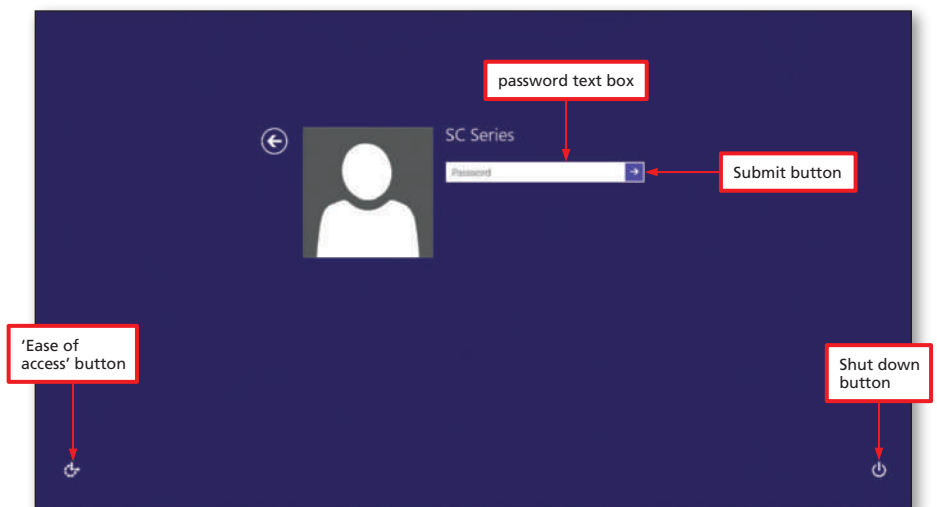


Figure 4

Q&amp;A

Why do I not see a user icon?  
Your computer may require you to type a user name instead of tapping or clicking an icon.

What is a text box?  
A text box is a rectangular box in which you type text.

Why does my screen not show a password text box?  
Your account does not require a password.

- If Windows displays a sign-in screen with a Password text box, type your password in the text box.

2

- Tap or click the Submit button (shown in Figure 4 on the previous page) to sign in to your account and display the Windows Start screen (Figure 5).

**Q&A** Why does my Start screen look different from the one in Figure 5? The Windows Start screen is customizable, and your school or employer may have modified the screen to meet its needs. Also, your screen resolution, which affects the size of the elements on the screen, may differ from the screen resolution used in this book. Later in this chapter, you will learn how to change screen resolution.

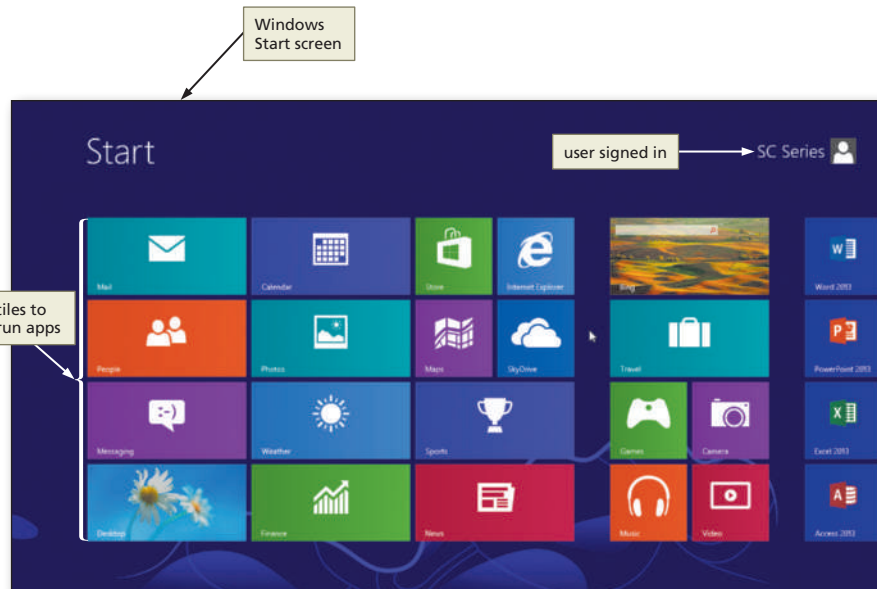


Figure 5

How do I type if my tablet has no keyboard?

You can use your fingers to press keys on a keyboard that appears on the screen, called an on-screen keyboard, or you can purchase a separate physical keyboard that attaches to or wirelessly communicates with the tablet.

### TO SIGN IN TO AN ACCOUNT USING WINDOWS 7

If you are using Windows 7, perform these steps to sign in to an account instead of the previous steps that use Windows 8.

1. Click the user icon on the Welcome screen; depending on settings, this either will display a password text box or will sign in to the account and display the Windows 7 desktop.
2. If Windows 7 displays a password text box, type your password in the text box and then click the arrow button to sign in to the account and display the Windows 7 desktop.

## The Windows Start Screen

BTW

### Modern UI

The new Windows 8 user interface also is referred to as the Modern UI (user interface).

The Windows Start screen provides a scrollable space for you to access apps that have been pinned to the Start screen (shown in Figure 5). Pinned apps appear as tiles on the Start screen. In addition to running apps, you can perform tasks such as pinning apps (placing tiles) on the Start screen, moving the tiles around the Start screen, and unpinning apps (removing tiles) from the Start screen.

If you swipe up from the bottom of or right-click an open space on the Start screen, the App bar will appear. The **App bar** includes a button that enables you to display all of your apps. When working with tiles, the App bar also provides options for manipulating the tiles, such as resizing them.



**CONSIDER THIS**

### How do you pin apps, move tiles, and unpin apps?

- To pin an app, swipe up from the bottom of the Start screen or right-click an open space on the Start screen to display the App bar, tap or click the All apps button on the App bar to display the Apps list, swipe down on or right-click the app you want to pin, and then tap or click the 'Pin to Start' button on the App bar. One way to return to the Start screen is to swipe up from the bottom or right-click an open space in the Apps list and then tap or click the All apps button again.
- To move a tile, drag the tile to the desired location.
- To unpin an app, swipe down on or right-click the app to display the App bar and then tap or click the 'Unpin from Start' button on the App bar.

## Introduction to Microsoft Office 2013

**Microsoft Office 2013** is the newest version of Microsoft Office, offering features that provide users with better functionality and easier ways to work with the various files they create. These features include enhanced design tools, such as improved picture formatting tools and new themes, shared notebooks for working in groups, mobile versions of Office apps, broadcast presentations for the web, and a digital notebook for managing and sharing multimedia information.

### Microsoft Office 2013 Apps

Microsoft Office 2013 includes a wide variety of apps such as Word, PowerPoint, Excel, Access, Outlook, Publisher, OneNote, InfoPath, SharePoint Workspace, and Lync:

- **Microsoft Word 2013**, or Word, is a full-featured word processing app that allows you to create professional-looking documents and revise them easily.
- **Microsoft PowerPoint 2013**, or PowerPoint, is a complete presentation app that enables you to produce professional-looking presentations and then deliver them to an audience.
- **Microsoft Excel 2013**, or Excel, is a powerful spreadsheet app that allows you to organize data, complete calculations, make decisions, graph data, develop professional-looking reports, publish organized data to the web, and access real-time data from websites.
- **Microsoft Access 2013**, or Access, is a database management system that enables you to create a database; add, change, and delete data in the database; ask questions concerning the data in the database; and create forms and reports using the data in the database.
- **Microsoft Outlook 2013**, or Outlook, is a communications and scheduling app that allows you to manage email accounts, calendars, contacts, and access to other Internet content.
- **Microsoft Publisher 2013**, or Publisher, is a desktop publishing app that helps you create professional-quality publications and marketing materials that can be shared easily.
- **Microsoft OneNote 2013**, or OneNote, is a note taking app that allows you to store and share information in notebooks with other people.
- **Microsoft InfoPath Designer 2013**, or InfoPath, is a form development app that helps you create forms for use on the web and gather data from these forms.
- **Microsoft SharePoint Workspace 2013**, or SharePoint, is a collaboration app that allows you to access and revise files stored on your computer from other locations.
- **Microsoft Lync 2013** is a communications app that allows you to use various modes of communications, such as instant messaging, videoconferencing, and sharing files and apps.

### Microsoft Office 2013 Suites

A **suite** is a collection of individual apps available together as a unit. Microsoft offers a variety of Office suites, including a stand-alone desktop app (boxed software), Microsoft Office 365, and Microsoft Office Web Apps. **Microsoft Office 365**, or Office 365, provides plans that allow organizations to use Office in a mobile setting while also being able to communicate and share files, depending upon the type of plan selected by the organization. **Microsoft Office Web Apps**, or Web Apps, are apps that allow you to edit and share files on the web using the familiar Office interface. Table 3 on the next page outlines the differences among these Office suites.

Table 3 Office Suites

Apps/ Licenses	Office 365 Home Premium	Office 365 Small Business Premium	Office Home & Student	Office Home & Business	Office Professional
Word	✓	✓	✓	✓	✓
PowerPoint	✓	✓	✓	✓	✓
Excel	✓	✓	✓	✓	✓
Access	✓	✓			✓
Outlook	✓	✓		✓	✓
Publisher	✓	✓			✓
Lync		✓			
OneNote			✓	✓	✓
InfoPath		✓			
Licenses	5	5	1	1	1

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During the Office 365 installation, you select a plan, and depending on your plan, you receive different apps and services. Office Web Apps do not require a local installation and are accessed through SkyDrive and your browser. **SkyDrive** is a cloud storage service that provides storage and other services, such as Office Web Apps, to computer users.



CONSIDER THIS

#### How do you sign up for a SkyDrive account?

- Use your browser to navigate to skydrive.live.com.
- Create a Microsoft account by tapping or clicking the 'Sign up now' link (or a similar link) and then entering your information to create the account.
- Sign in to SkyDrive using your new account or use it in Excel to save your files on SkyDrive.

Apps in a suite, such as Microsoft Office, typically use a similar interface and share features. Once you are comfortable working with the elements and the interface and performing tasks in one app, the similarity can help you apply the knowledge and skills you have learned to another app(s) in the suite. For example, the process for saving a file in Excel is the same in Word, PowerPoint, and the other Office apps. While briefly showing how to use Excel, this chapter illustrates some of the common functions across the Office apps and identifies the characteristics unique to Excel.

## Running and Using an App

To use an app, such as Excel, you must instruct the operating system to run the app. Windows provides many different ways to run an app, one of which is presented in this section (other ways to run an app are presented throughout this chapter). After an app is running, you can use it to perform a variety of tasks. The following pages use Excel to discuss some elements of the Office interface and to perform tasks that are common to other Office apps.

### Excel

**Excel** is a powerful spreadsheet app that allows users to organize data, complete calculations, make decisions, graph data, develop professional-looking reports (Figure 6), publish organized data to the web, and access real-time data from websites. The four major parts of Excel are as follows:

- **Workbooks and worksheets:** A workbook is like a notebook. Inside the workbook are sheets, each of which is called a worksheet. Thus, a workbook is

a collection of worksheets. Worksheets allow users to enter, calculate, manipulate, and analyze data such as numbers and text. The terms worksheet and spreadsheet are interchangeable.

- **Charts:** Excel can draw a variety of charts such as column charts and pie charts.
- **Tables:** Tables organize and store data within worksheets. For example, once a user enters data into a worksheet, an Excel table can sort the data, search for specific data, and select data that satisfies defined criteria.
- **Web support:** Web support allows users to save Excel worksheets or parts of a worksheet in a format that a user can view and manipulate the worksheet using a browser. Excel web support also provides access to real-time data, such as stock quotes, using web queries.

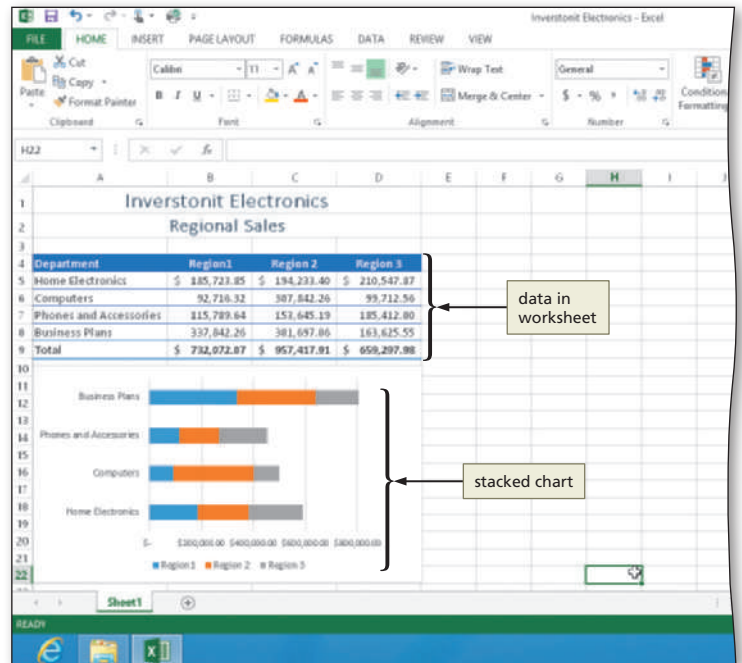


Figure 6

## To Run an App from the Start Screen

1 SIGN IN | 2 USE WINDOWS | 3 USE APPS | 4 FILE MANAGEMENT | 5 SWITCH APPS | 6 SAVE FILES  
7 CHANGE SCREEN RESOLUTION | 8 EXIT APPS | 9 USE ADDITIONAL APP FEATURES | 10 USE HELP

The Start screen contains tiles that allow you to run apps, some of which may be stored on your computer. *Why? When you install an app, for example, tiles are added to the Start screen for the various Office apps included in the suite.*

The following steps, which assume Windows is running, use the Start screen to run Excel based on a typical installation. You may need to ask your instructor how to run Excel on your computer. Although the steps illustrate running the Excel app, the steps to run any Office app are similar. If you are using Windows 7, skip these steps and instead perform the steps in the yellow box that immediately follows these Windows 8 steps.

- 1 If necessary, scroll to display the Excel tile on the Start screen (Figure 7).

**Q&A** Why does my Start screen look different?  
It may look different because of your computer's configuration. The Start screen may be customized for several reasons, such as usage requirements or security restrictions.

What if the app I want to run is not on the Start screen?  
You can display all installed apps by swiping up from the bottom of the Start screen or right-clicking an open space on the Start screen and then tapping or clicking the All apps button on the App bar.

How do I scroll on a touch screen?  
Use the slide gesture; that is, press and hold your finger on the screen and then move your finger in the direction you want to scroll.



Figure 7

2

- Tap or click the Excel 2013 tile to run the Excel app and display the Excel start screen (Figure 8).

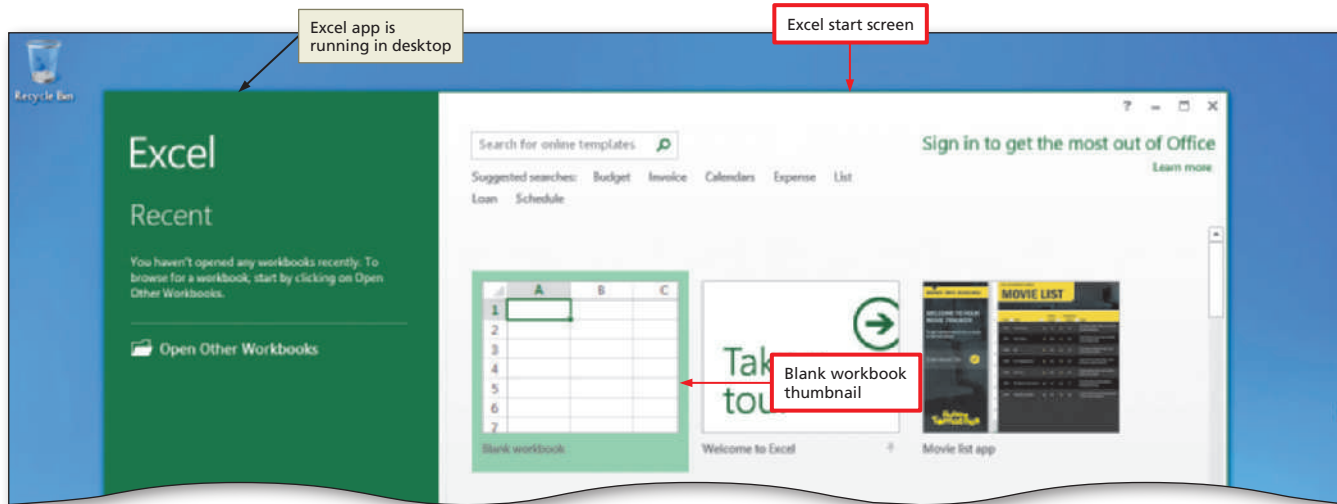


Figure 8

3

- Tap or click the Blank workbook thumbnail on the Excel start screen to create a blank Excel workbook in the Excel window (Figure 9).

**Q&A** What happens when you run an app?  
 Some apps provide a means for you to create a blank file, as shown in Figure 8; others immediately display a blank file in an app window, such as the Excel window shown in Figure 9. A **window** is a rectangular area that displays data and information. The top of a window has a **title bar**, which is a horizontal space that contains the window's name.

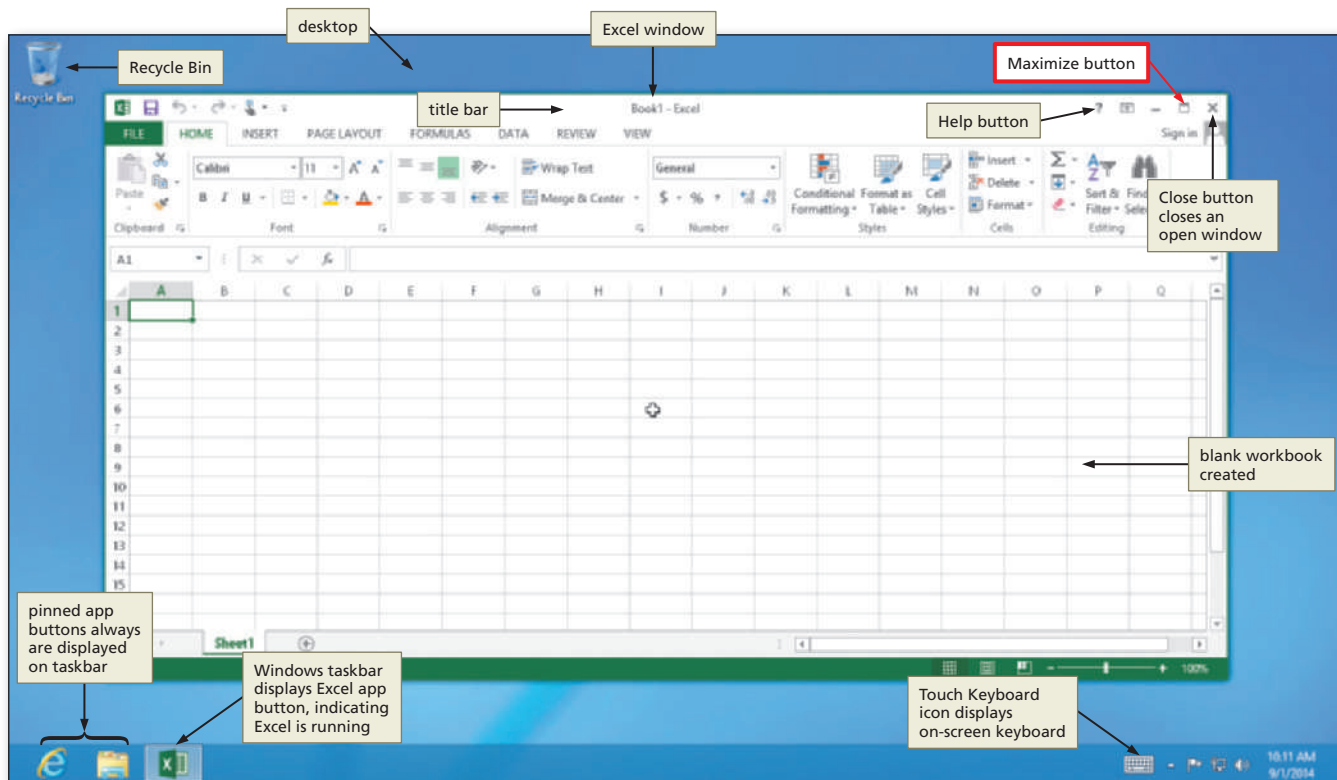


Figure 9

**Other Ways**

1. Tap or click Search charm on Charms bar, type app name in search box, tap or click app name in results list
2. Double-tap or double-click file created in app you want to run