Manage Worksheets and Workbook

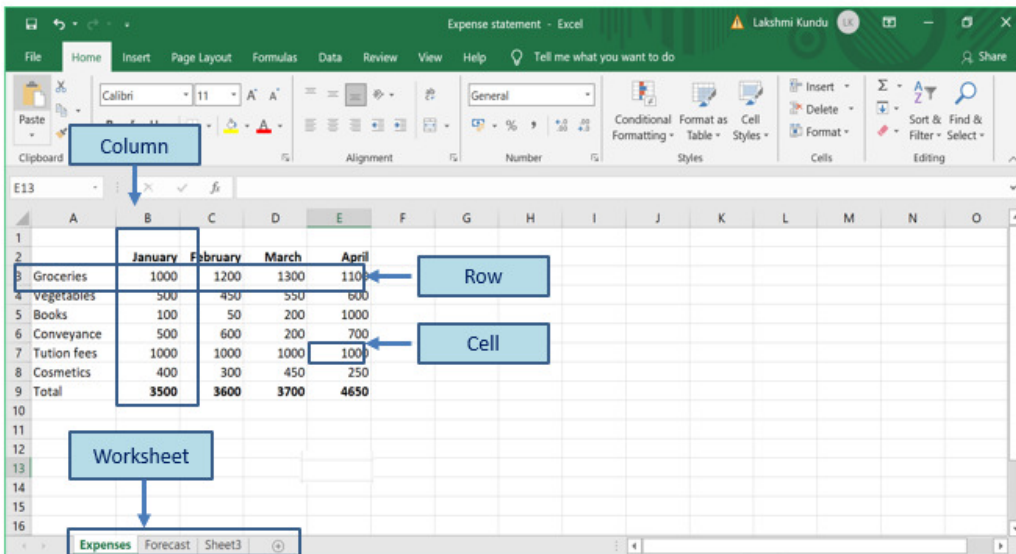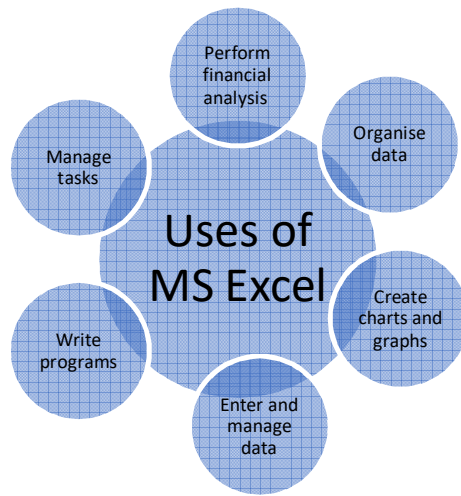|			
MS Excel is a software program developed by Microsoft	MS Excel files are called **workbooks**	They have extensions such as .xls or .xlsx	A new workbook can be created from a blank workbook or a template

Open Files in MS Excel> Key Areas in a Workbook

Open Files in MS Excel>Uses of MS Excel

Open Files in MS Excel> Open MS Excel
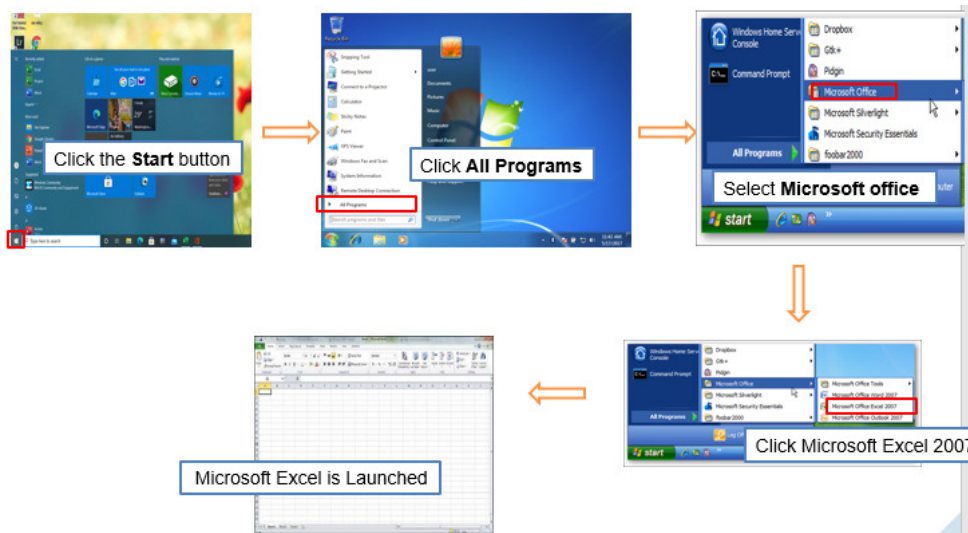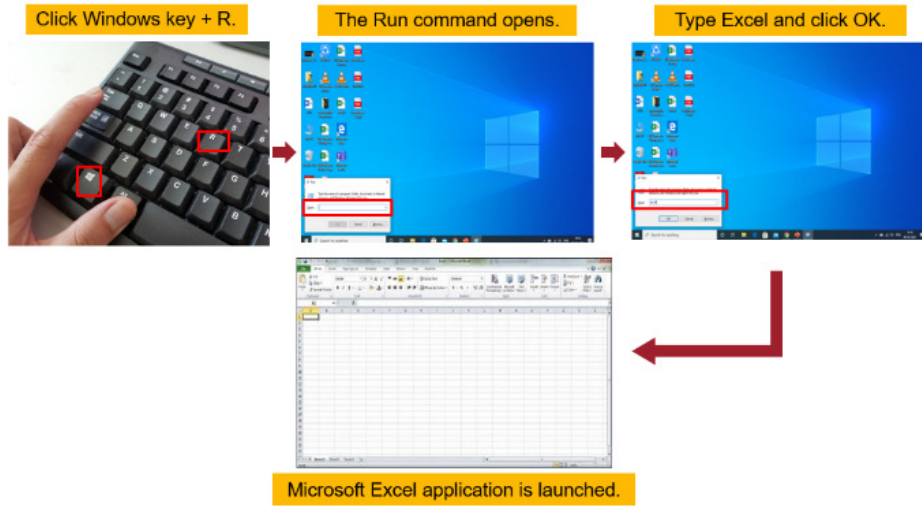
Open Files in MS Excel> Open MS Excel

Open Files in MS Excel> Open MS Excel
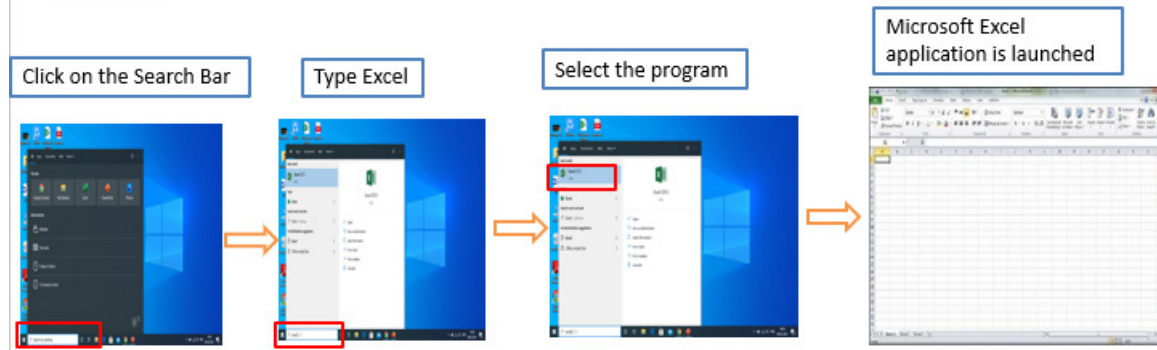
Open Files in MS Excel> Open New/Existing/Recently Opened Files

We can open a new file or an existing file or a recently used workbook.

Open a new Excel file

Open an existing file

Open a recently used workbook
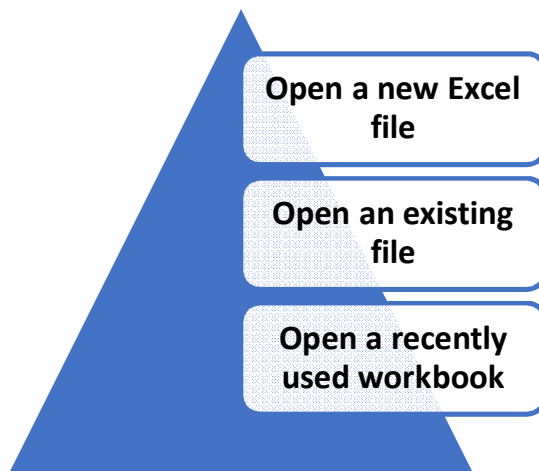
Open Files in MS Excel> Open New/Existing/Recently Opened Files

1. From an open workbook, click **File > New.**
2. Double-click on **Blank workbook.**
3. You can use the shortcut key: **Ctrl + N** to open a new workbook.

1. Click **File> Open.**

2. Select the folder and file you want to open.

3. Click **Open.**

4. Excelwill open the selected workbook.
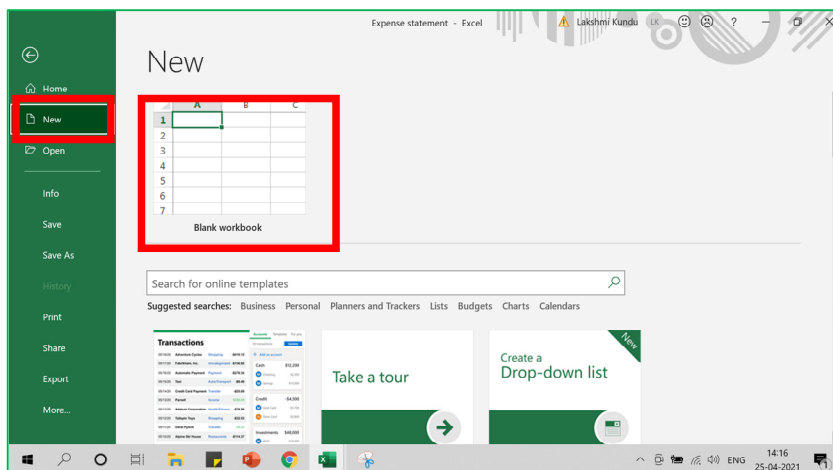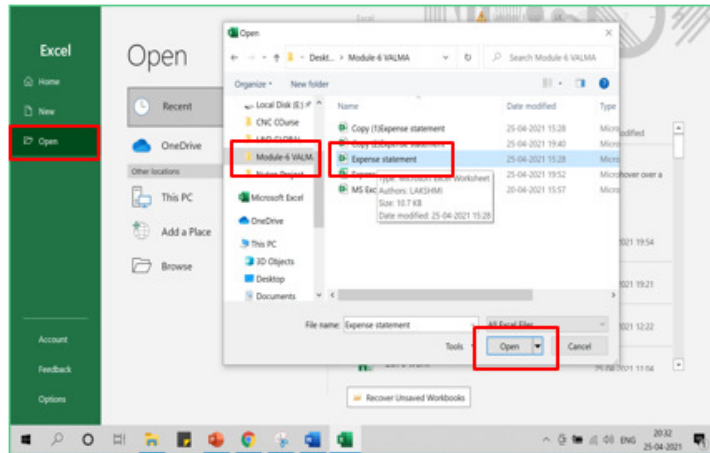
Open Files in MS Excel> Open New/Existing/Recently Opened Files

1. Click **File > Open.**
2. Click on the workbook name under **Recent Workbooks.**
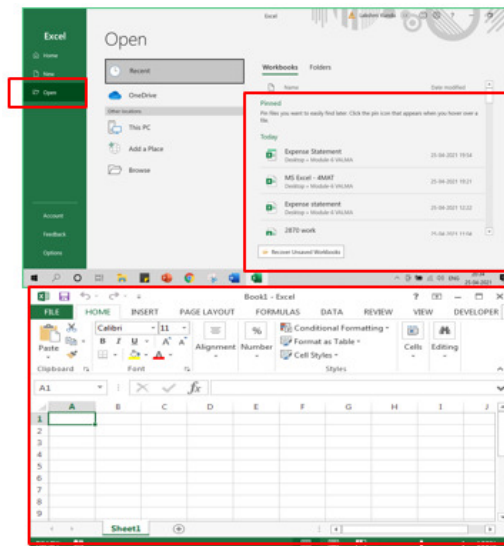3. Excel will open the selected workbook.

Open Files in MS Excel> Change Default Number of Worksheets

1. Select **Options** from **File** menu and click **General Section.**
2. In the General section, select **Number of sheets.**
3. Click **OK.**
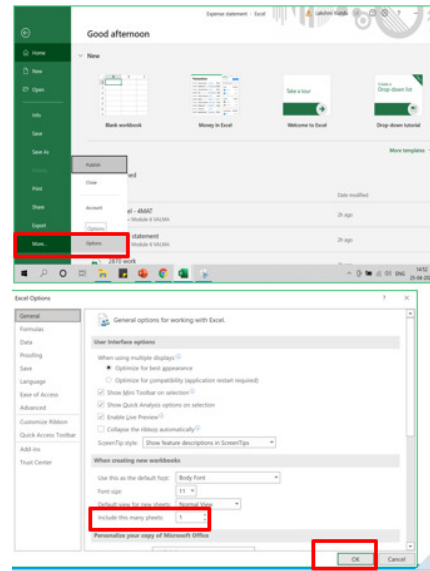
Open Files in MS Excel> Using Template to Create ExcelFile

- A **template** is a **predesigned spreadsheet** used to create new spreadsheets.
- You can use this template to create new spreadsheets with the **same formatting** and **predefined formulas and functions**.
- The only difference between template and workbook is the extension.
- Microsoft Excel allows creating two special templates:
    - ○ Book.xltx
    - ○ Sheet.xltx

Open Files in MS Excel> Using Template to Create ExcelFile

Excel Macro-Enabled Workbook (code) → **.xlsm**

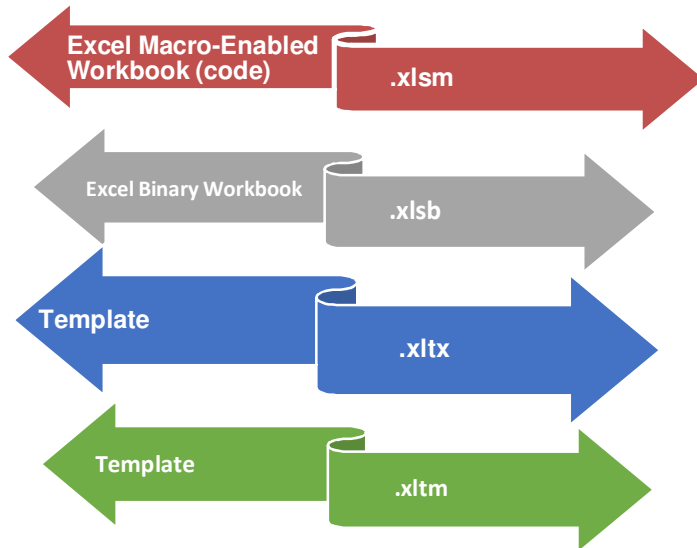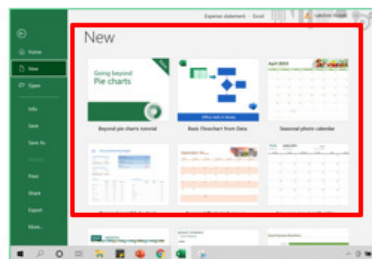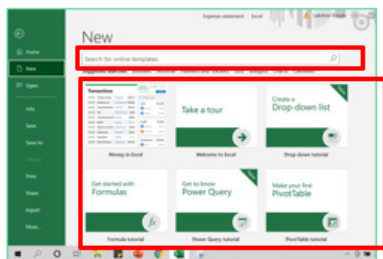**Excel Binary Workbook** → **.xlsb**

Template → **.xltx**

Template → **.xltm**

Open Files in MS Excel> Using Template to Create ExcelFile

1. Click **File** on the main menu and select **New.**
2. Excel connects to online databases with thousands of useful templates.
3. Select any of them.

Open Files in MS Excel> Using Template to Create ExcelFile

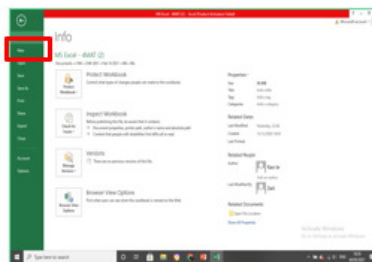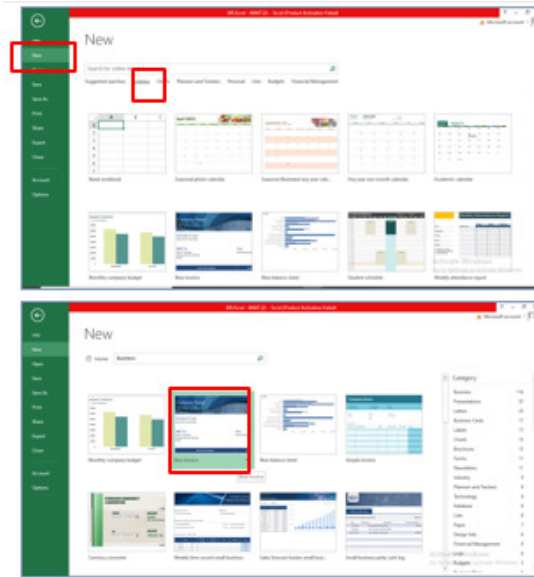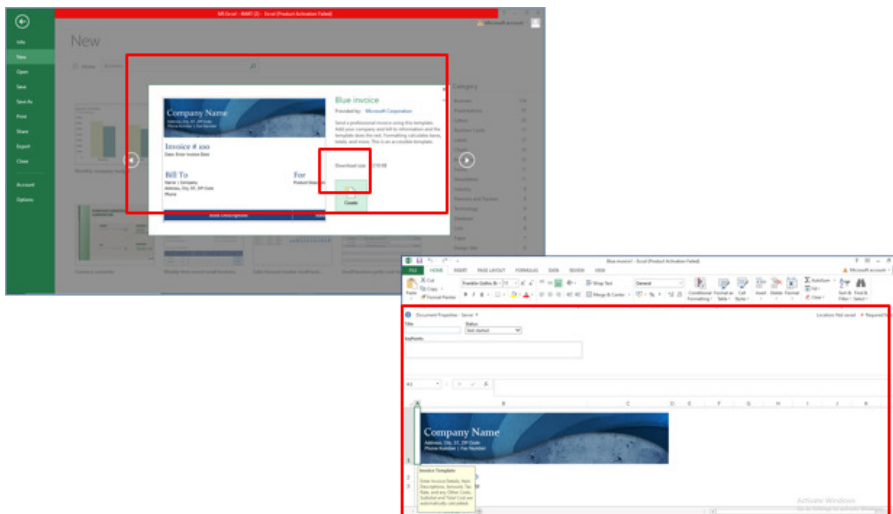1. Click **File** and then **New.**

2. Choose a category. For example, Business.

3. Select the template you desire.

4. Click **Create** icon.

5. The template gets created.

Using Template to Create ExcelFile

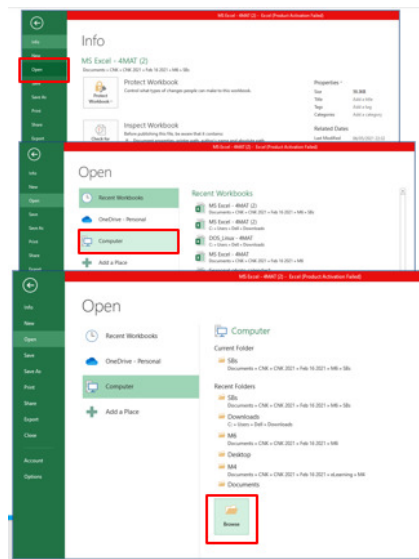**Open Files in MS Excel>Save Workbook as Template**

To turn a saved workbook into a template, make sure to:

Keep column headers, formulas and anything else that will be re-used repeatedly while creating a new workbook.
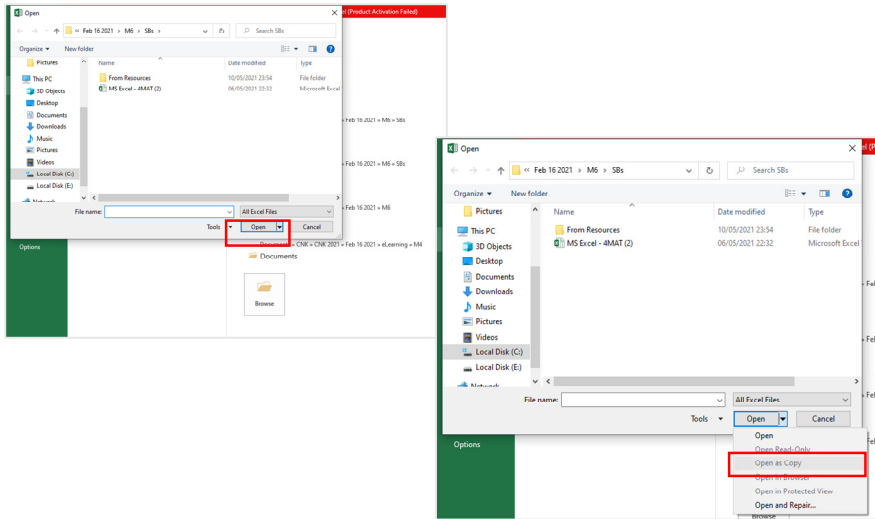
Delete anything you won't need the next time.

Open Files in MS Excel> Save Workbook as Template

1. Click **File > Open > Browse.**

2. Select the file you want to use as basis for your new workbook.

3. Click the drop-down arrow next to the **Open** button.

4. Select **Open as Copy.**

5. You will have a new workbook similar to the one you copied.

Open Files in MS Excel


Open Files in MS Excel> Save Workbook as Template

1. Click **File** > **Export.**
2. Under **Export**, click **Change File Type.**
3. In the **Workbook File Types** box, double-click **Template.**
4. In the **File name** box, type the name you want to use for the template.
5. Then click **Save**, and then close the template.
6. You can view the newly saved template under **Personal.**
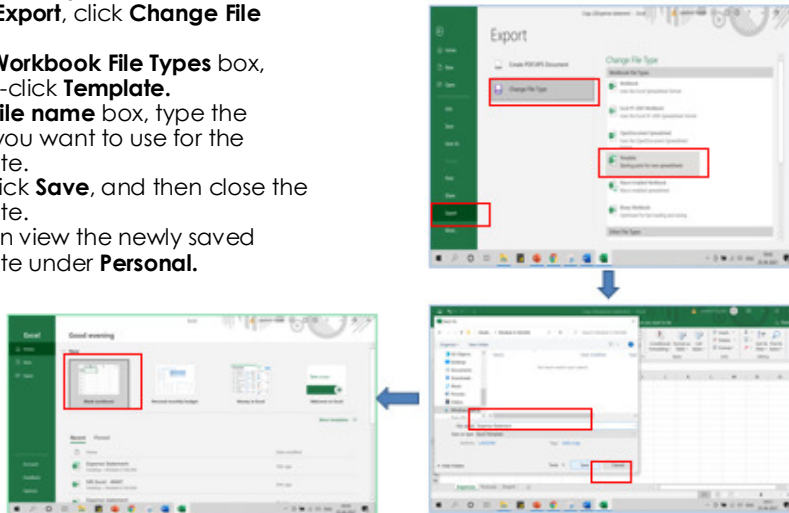
Open Files in MS Excel> Save Workbook as Template

1. Set the **default personal templates location.**

2. Click **File** > **Options.**

3. Excel options dialog box opens.Select **Save.**

4. A list of settings under Save category will be displayed.

5. Under **Save workbooks**, go to **Default personal templates location** andenter the path.

6. Click **OK.**
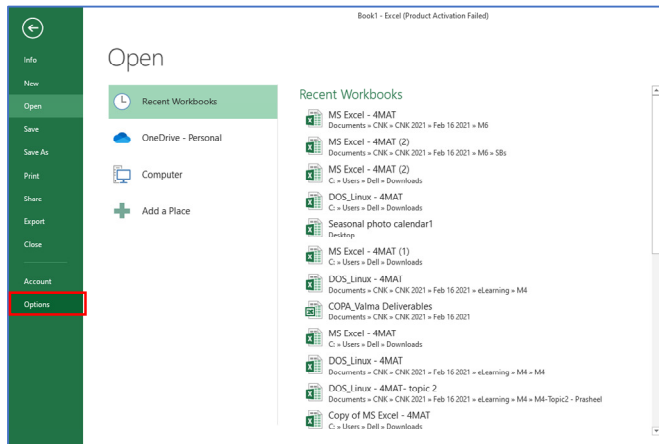
Open Files in MS Excel>
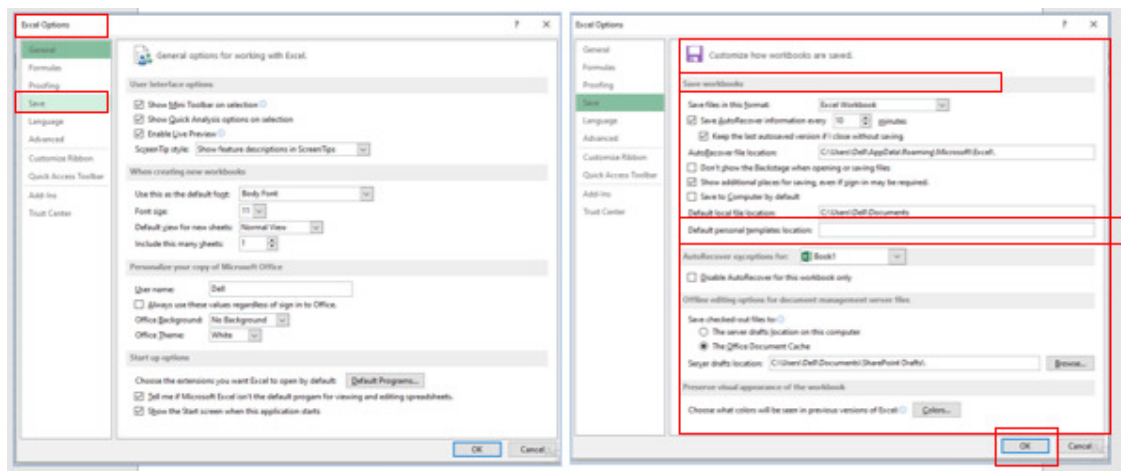
Structure of .txt file
1. There are two types of files from which data can be imported to Excel workbooks - .TXT files and .CSV files.

- Tab character separates each field of text (delimiter) in a .txt file
- It is a standard text document containing plain text
- It can be opened and edited in any text-editing or word-processing program
- It contains little or no formatting
- It is used to store:
  - Notes
  - Step-by-step instructions
  - Manuscripts
  - Other text-based information
- It is also known as flat file or ASCII file

Structure of .csv file   Sample CSV file content

.CSV

- CSV means Comma separated values text files
- Is a delimited text file that uses a comma to separate values
- Can be opened using any editor or spreadsheet program
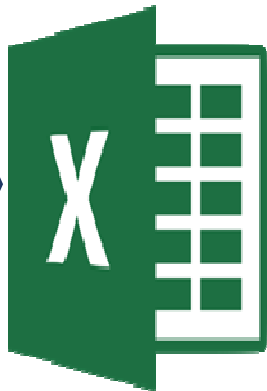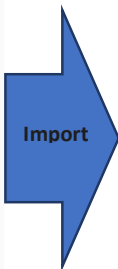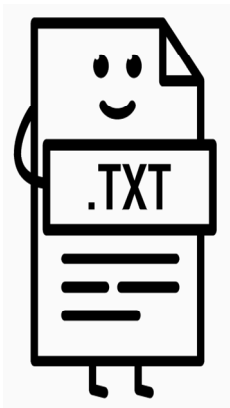- Are often used for exchanging data between different applications

Import Data > Import Data in Excel

Import a TXT/CSV file by opening it in Excel

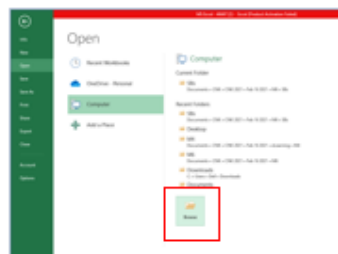Import data from a TXT/CSV file into an existing worksheet

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Import Data > Import Data in Excel

To import a TXT/CSV file by opening it in Excel :

1. Go to **File > Open.**

2. Browse to the location that contains the text file.

3. Select **Text Files** from the drop-down.

4. Locate and double-click the text file.

5. .CSV file opens automatically, but .TXT file goes through **Import Text Wizard.**

Import Data > Import Data in Excel
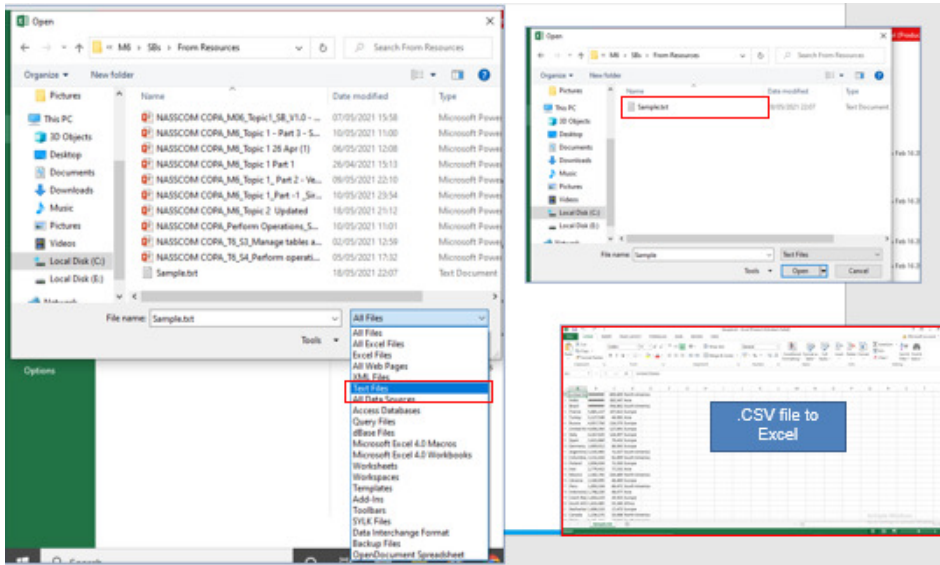
Import Data > Import Data in Excel

Steps to import data from a TXT/CSV file into an existing worksheet:

1. Select **Data.**

2. Click **From Text** optio**n.**

3. **Importfile** dialog box appears.

4. Select the .txt/.csv file.

5. Click the **Import** button.

6. **Text Import Wizard** will be carried out.

7. An **Import Data** dialog box appears.

8. Choose how and where you want to include data in the workbook and click **OK.**

9. The Text or CSV file gets imported successfully.
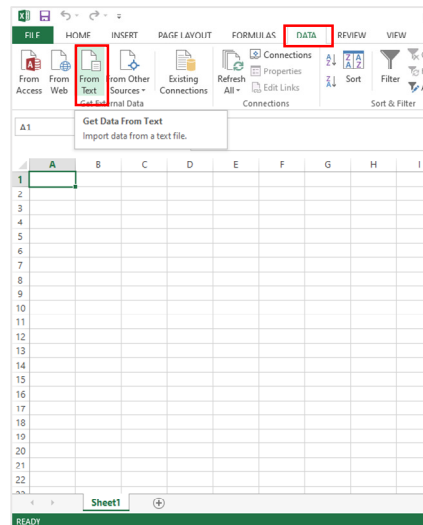
Import Data > Import Data in Excel
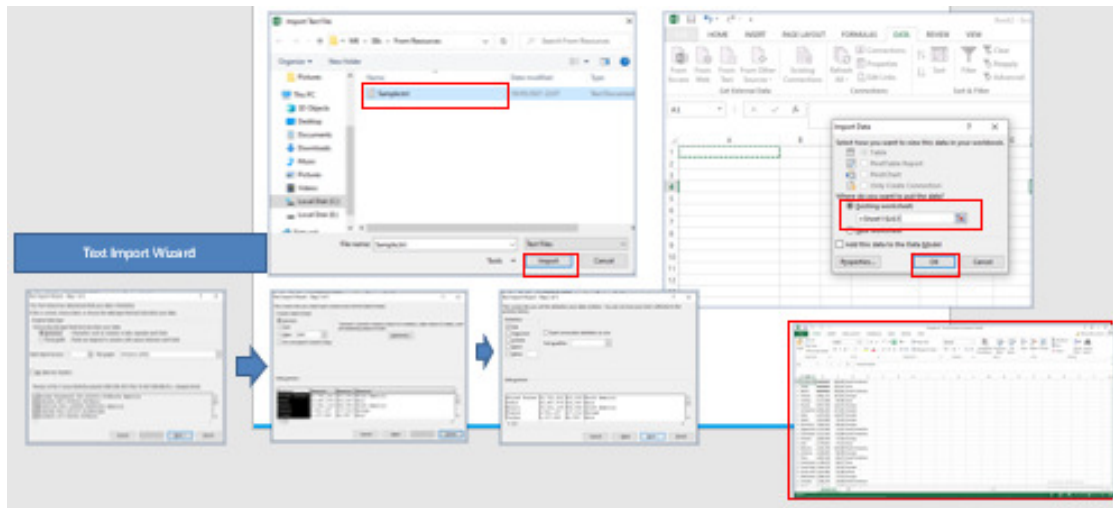
Import Data > Import Data in Excel

Import a TXT/CSV file by opening it in Excel	→	Customise the content after importing to Excel file

1. Customise as per the need.
2. Step-1: Select **Delimited** option and click **Next.**
3. Step-2: Choose **General** option and click **Finish**
4. Step-3: Check **Tab** in the next pop- up and click **Finish** button.
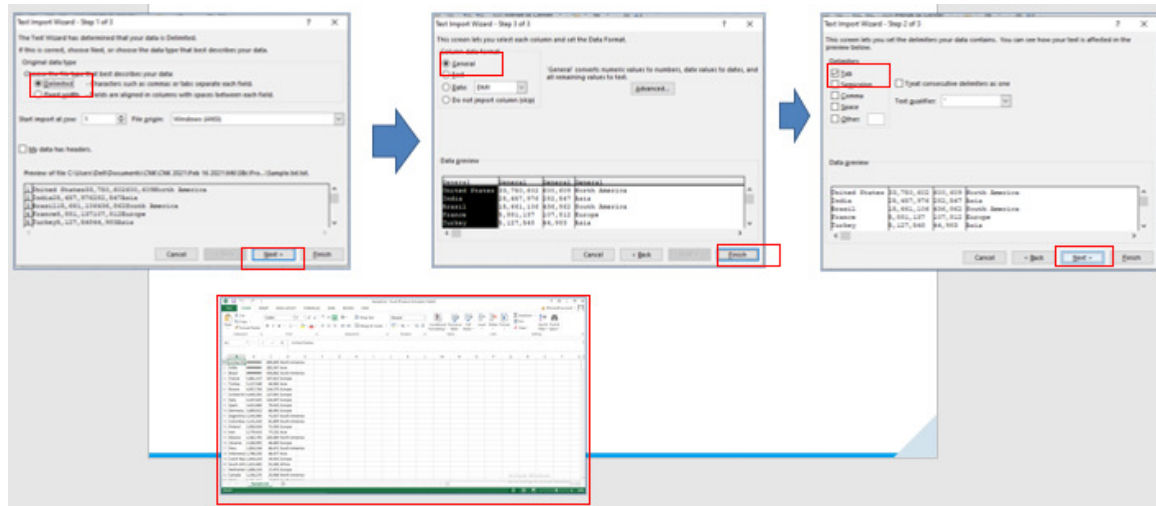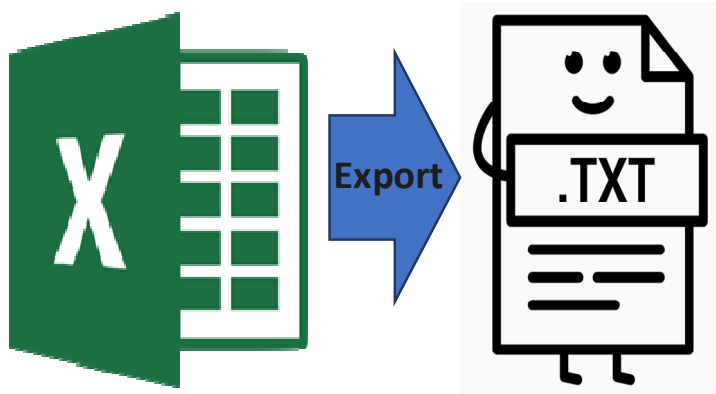5. The file gets imported to Excel workbook.

Import Data > Import Data in Excel

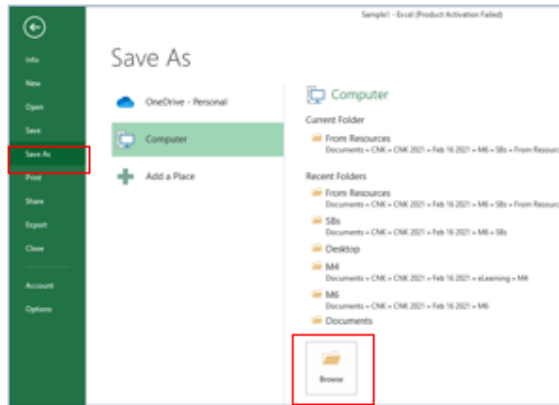## Import Data > Export Data in Excel

Export data from Excel to a text file using **Save As** command.

Import Data > Export Data Using Excel

Steps to export data from Excel to a text file using **Save As** command:

1. Go to **File** and Select **Save As.**

2. Click **Browse.**

3. Choose **Text (Tab delimited)** option from the**Save As Type** drop-down.

4. Browse the file location and enter file name.

5. Click the **Save** button.
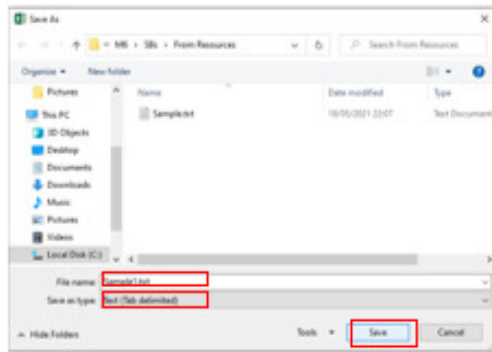
6. The file will be saved as a text file.

Import Data > Export Data Using Excel

Import Data > Check Your Knowledge

Did You Know?

1. You can change the separator character that is used in both delimited and .csv text files.
2. You can import or export up to 1,048,576 rows and 16,384 columns.

Navigate Within Workbooks > Find Data

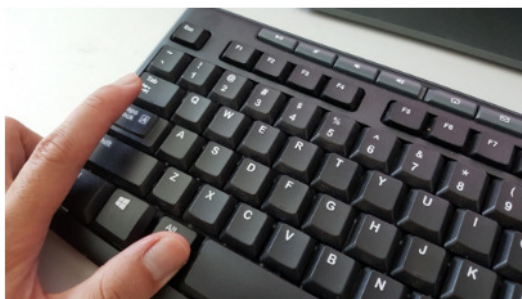- A particular number or text string
- Search item for reference
- Search within worksheets or entire workbooks
- Find ?
- Wildcard characters such as question marks, tildes, and asterisks, or numbers in the search text
- Search within comments or values
- Search by rows and columns
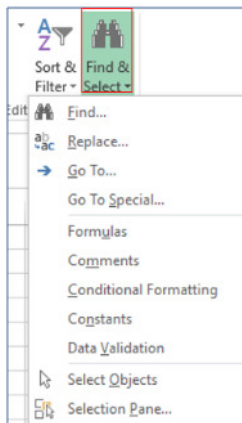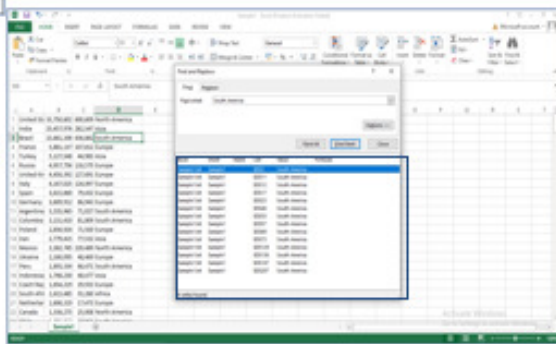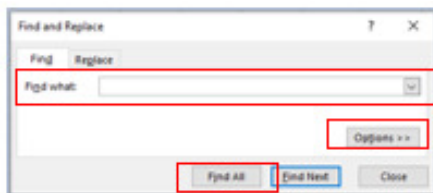
Navigate Within Workbooks > Find Data

Navigate Within Workbooks > Find Data

Navigate Within Workbooks > Find Data

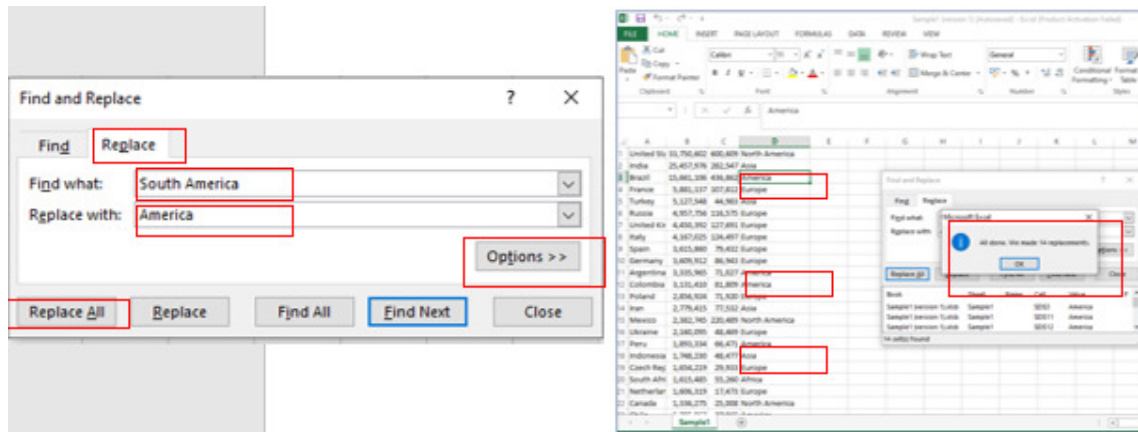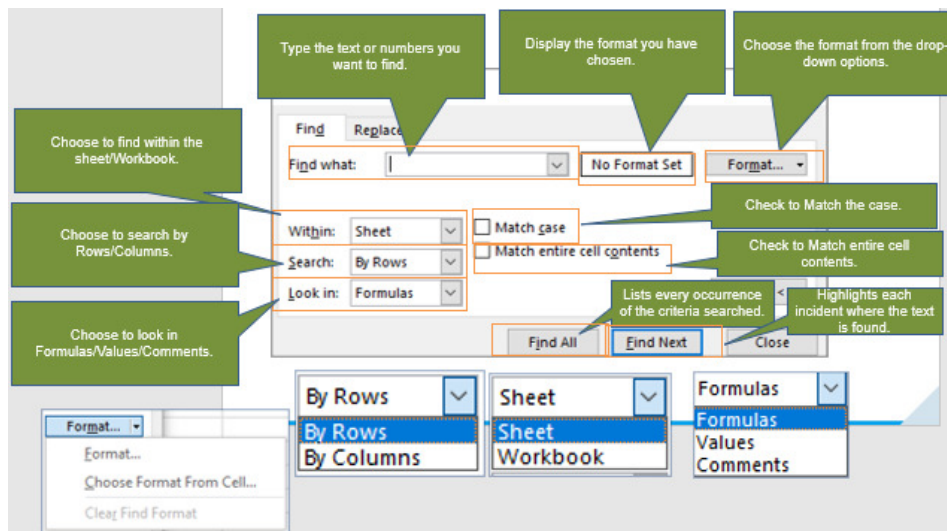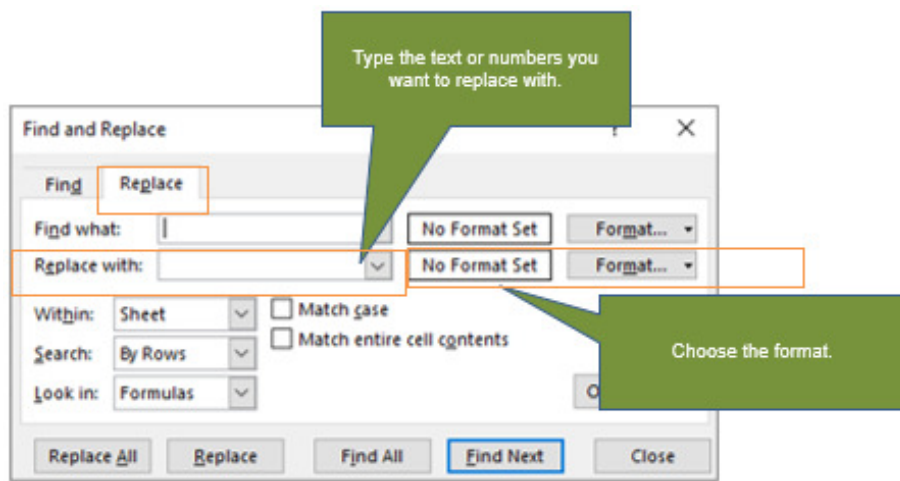## Navigate Within Workbooks > Find Data

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Try it!
To find cell that just matches a specific format: • Delete any criteria in the Find what box   • Select a specific cell format as an example   • Click the arrow next to Format   • Click Choose Format from Cell   • Click the cell that has the formatting that you want to search

Search returns the location of one text string inside another.

Search returns the position of the first character of find text inside or within text.

Unlike **Find**, **Search** allows wildcards, and is not case-sensitive.

Navigate Within Workbooks > Search Data

There are two ways to search data in Excel. They are:

1. Using the global Search bar if there is a massive spreadsheet of data and you need to find a particular data in a cell or group of cells

2. Using search functions like VLOOKUP (Vertical look up)or HLOOKUP (Horizontal look up) that lets you search one sheet for data and output the results in a second cell location or in a different worksheet

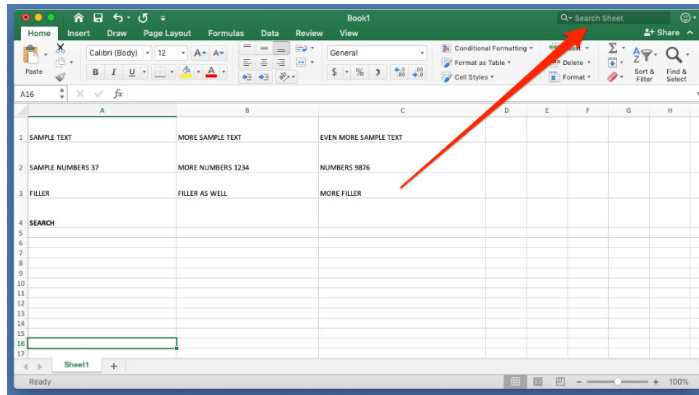**Navigate Within Workbooks > Search Data Using Search Sheet Bar**

1. Click in the task bar with the faint words "Search Sheet" at the top right corner of the spreadsheet and enter the words or number or text you wish to find.

2. Use a "command + F" keyboard shortcut on a Mac or"Control + F" shortcut on a PC.

Navigate Within Workbooks > Search Data Using LOOKUP Functions

Search Data in Excel Using LOOKUP Functions

The most commonly used LOOKUP functions in Excelare VLOOKUP and HLOOKUP.

VLOOKUP allows you to search a data range that is set up vertically.

**HLOOKUP** looks up data that has been formatted by rows (horizontally) instead of columns.

Search Data using VLOOKUP

Suppose you have a large table having the salary details of employees of a company. You want to know the salary of an employee with ID value of 53.

The VLOOKUP function takes the following 4 arguments:

1. Value to be searched.
2. Table Range where the search is to be done.
3. Column No. whose value needs to be arrived at.
4. Boolean value whether an exact match or approximate match is needed.

The VLOOKUP function below looks up the value **53** (first argument). The next argument is the table range (second argument), followed by column number (third argument) and finally Boolean value.
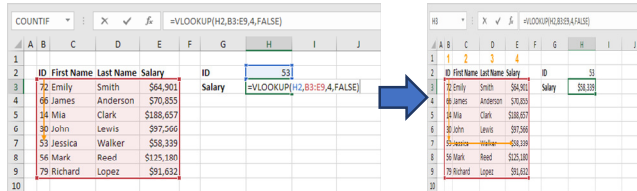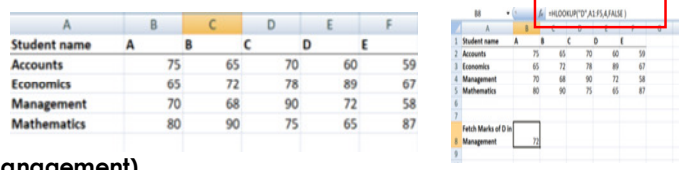

Navigate Within Workbooks

Search Data using HLOOKUP

Suppose you have a table storing the marks of students in 4 subjects. You want to search for the marks of Student D in Management. We could use HLOOKUP for this purpose.

The HLOOKUP function takes the following 4 arguments:

1. Look up value to be searched. Look up value can be cell reference or text string or numerical value.
2. Table Range where the search is to be done.
3. Row Index No. whose value needs to be arrived at.
4. Boolean (True or False) whether an exact match or approximate match is needed.

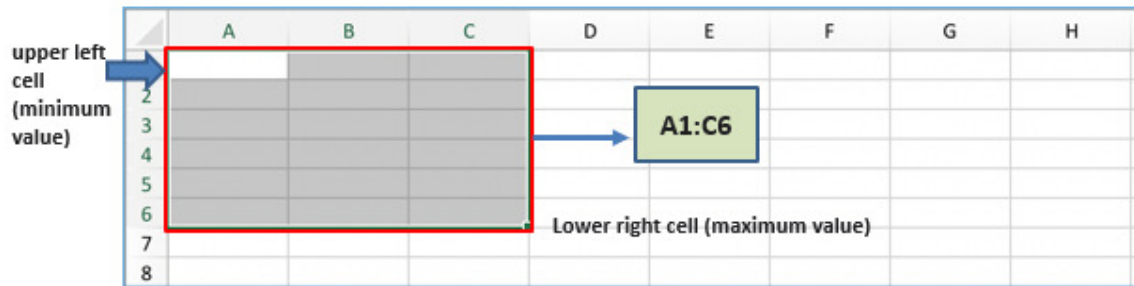Now, if we have to fetch the marks of Student "D" in Management, we can use HLOOKUP as follows:

In our example:
Look up value: **Student name ("D")**
Table cell range: **A1:F5**
Row index no: 4**(We need marks in Management)**
Boolean value: **False (indicates exact match)**

Cell Range

1. A cell range is defined by the **reference** of the **upper left cell (minimum value)** of the range and the reference of **the lower right cell (maximum value)** of the range.
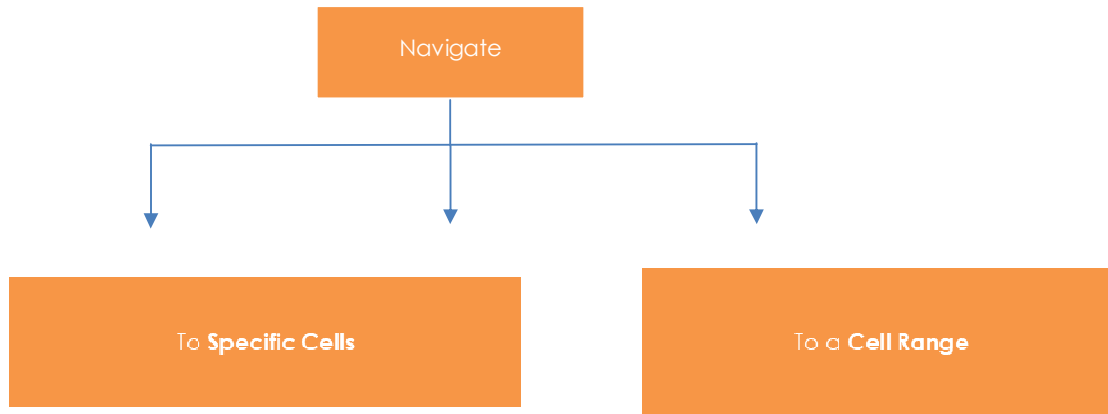
Fact

1. A named range is just a human-readable name for a range of cells in Excel.

2. For example, we can name the range A1:A100 as "data". We can use MAX function to get the maximum value with a simple formula.

"data" is named range = A1:A100

Navigate Within Workbooks > Navigate to Named Cells, Ranges

Navigate Within Workbooks > Navigate to Specific Cells

Steps to navigate to Specific Cells with Go To utility are:

1. Click **Home**>**Find and Select** icon.

2. A drop-down will appear. Click **Go To.**

3. **Go To** dialog box opens.

4. You can press **F5** key to open this dialog box.

5. In the **Reference** entry box, enter the exact cells position.

6. It can be a single cell address such as *C13*, or cell range as *$C$143:$F$161*.

7. Click **OK**. It will locate the specific cell or cell range in the worksheet.

Navigate Within Workbooks >Navigate to Specific Cells

Steps to navigate to specific cells with names are:

1. On the Formula Bar, enter the exact name defined for a formula in the **Name** box.

2. Hold the **Enter key.**

3. It will locate the corresponding named cell range.
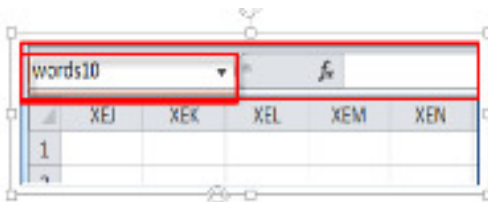
Navigate Within Workbooks >Navigate Using Hyperlinks

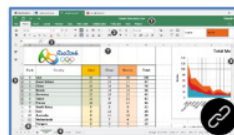A hyperlink is a link to data that a user can access by clicking/tapping it.

| Web page | Whole document | Specific place in a file | Another spreadsheet |
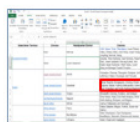
Steps to Create a Hyperlink

Given in this Excelsheet are a list of States and Union Territories, Division, Headquarter District and list of Districts. Let us see how to create a hyperlink.

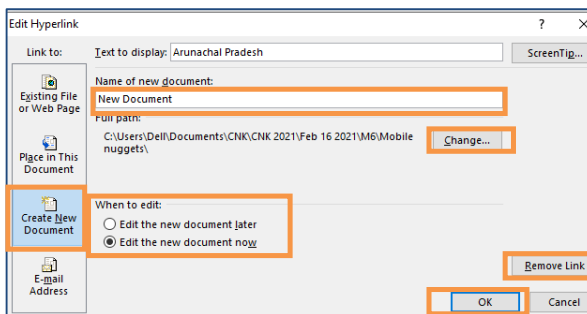**Navigate Within Workbooks > Insert and Remove Hyperlinks**

To place a hyperlink within a document:

1. Select **Place in this Document.**

2. Displays all the **sheets** present in the document and any **Defined Names.**

3. Choose the sheet.

4. Click OK.
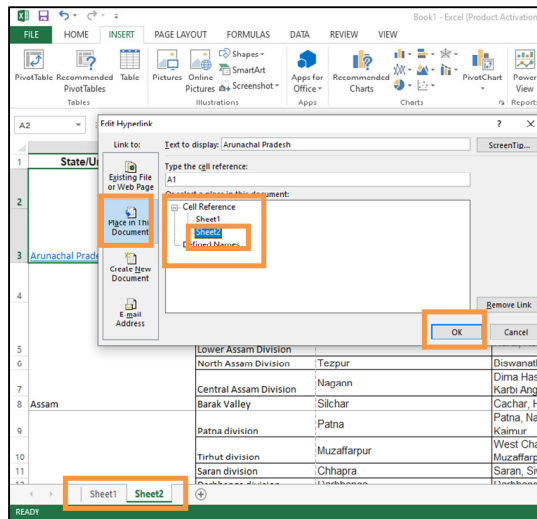
Navigate Within Workbooks > Insert and Remove Hyperlinks

1. Select **Create New Document.**

2. Enter Name of **new document.**

3. Select the **Change.**

4. Choose either to edit the new document later or now.

5. Click **OK.**

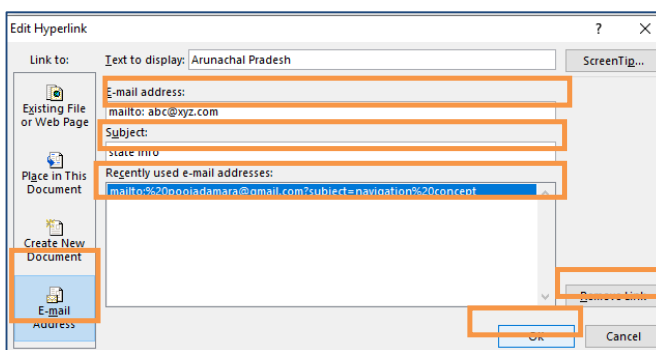6. The **Remove Link** button will remove the existing link to the cell you have selected.

Navigate Within Workbooks > Insert and Remove Hyperlinks

1. Select **E-mail Address.**

2. Enter **the e-mail ID.**

3. Enter **the subject.**

4. Choose from **the recently used e-mail IDs.**

5. Click **OK.**

6. Select **Remove link** to remove the existing hyperlink.

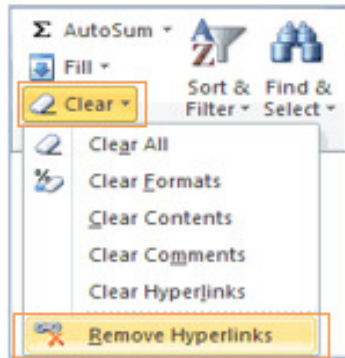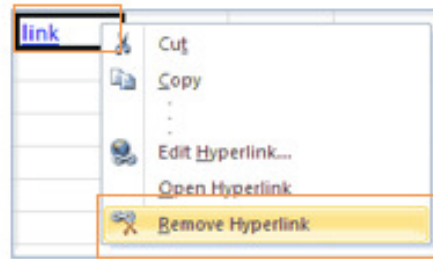**Navigate Within Workbooks > Insert and Remove Hyperlinks**

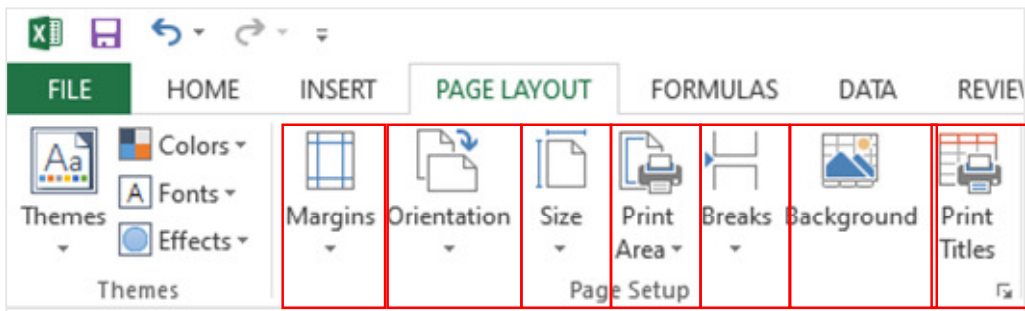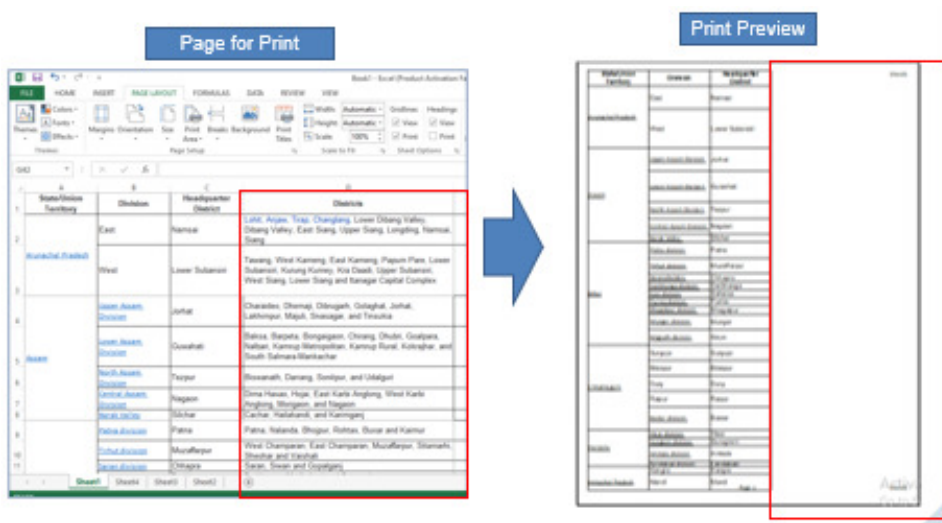**Format Worksheets and Workbooks > Modify Page Setup**
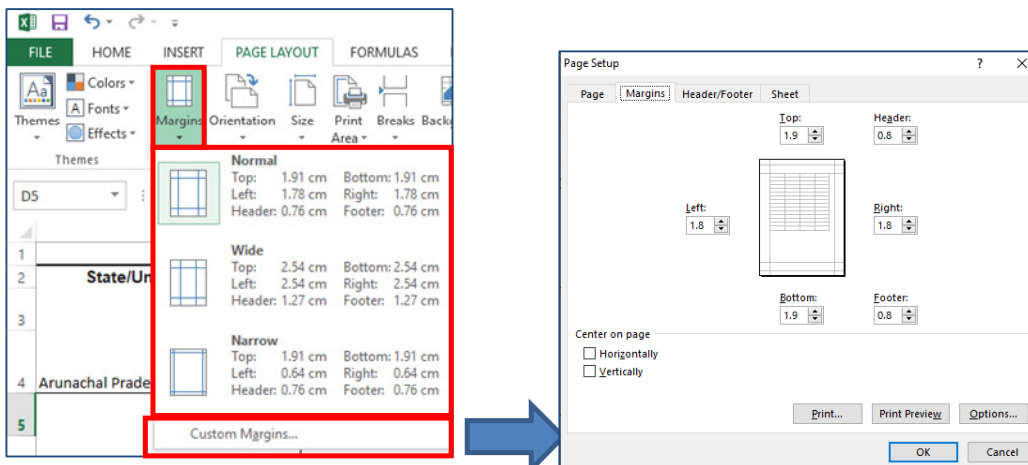
Format Worksheets and Workbooks > Modify Page Setup

Format Worksheets and Workbooks >Modify Page Setup
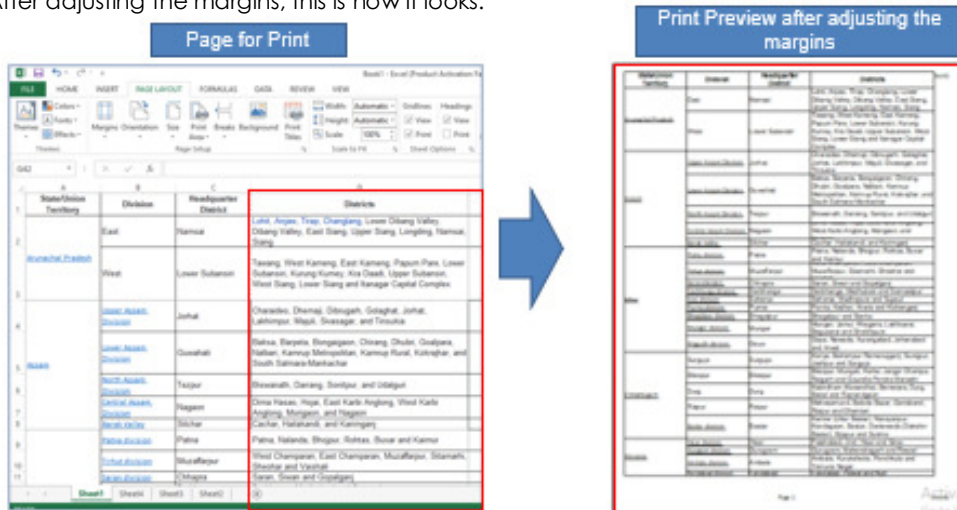
Setting up Margins

Choose the margin measurements as it is or adjust the measurements as per your

Format Worksheets and Workbooks >Modify Page Setup
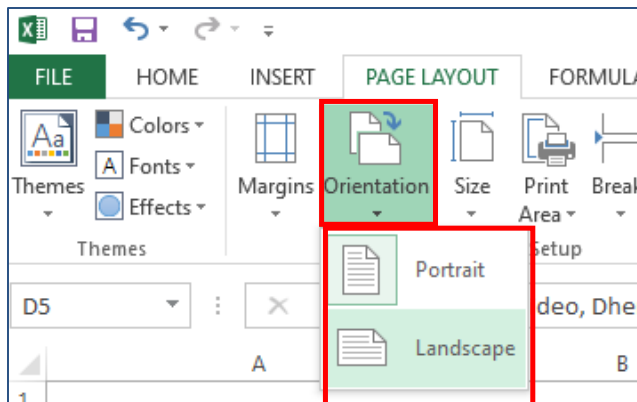
Setting up Margins

After adjusting the margins, this is how it looks.

Format Worksheets and Workbooks >Modify Page Setup
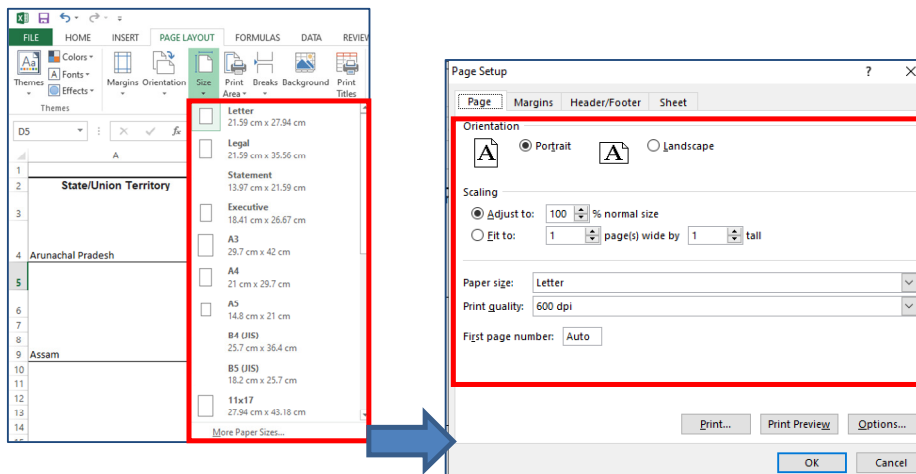
Orientation

Choose whether the document should be displayed in Portrait mode or Landscape mode.

Format Worksheets and Workbooks >Modify Page Setup
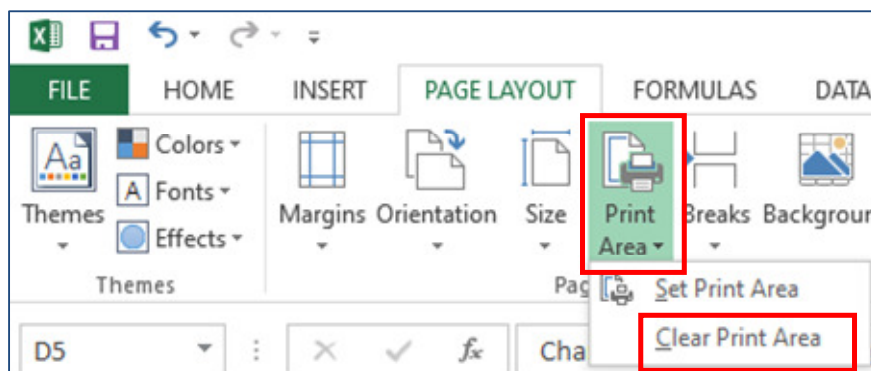
Size

Choose from the list or select **More Paper Sizes** option and modify as per your requirement.

Format Worksheets and Workbooks >Modify Page Setup

Print Area

1. Set Print Area option allows you to choose the area of the page on the sheet that you would like to fit in a single page.
2. Clear Print Area option is used to clear the print area that was set earlier.
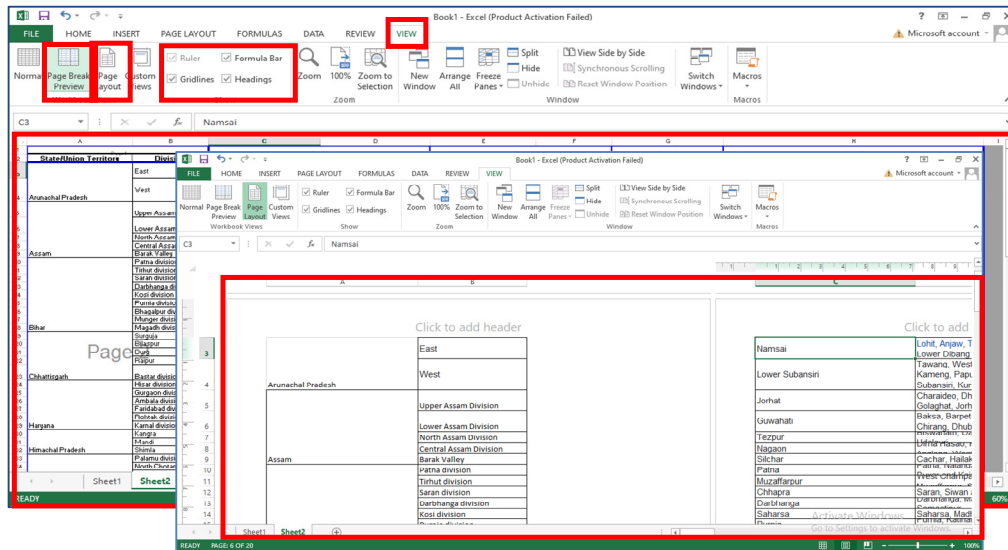
Format Worksheets and Workbooks >Modify Page Setup

Breaks

The Breaks drop-down gives options to insert, remove or reset all page breaks as per your requirements.
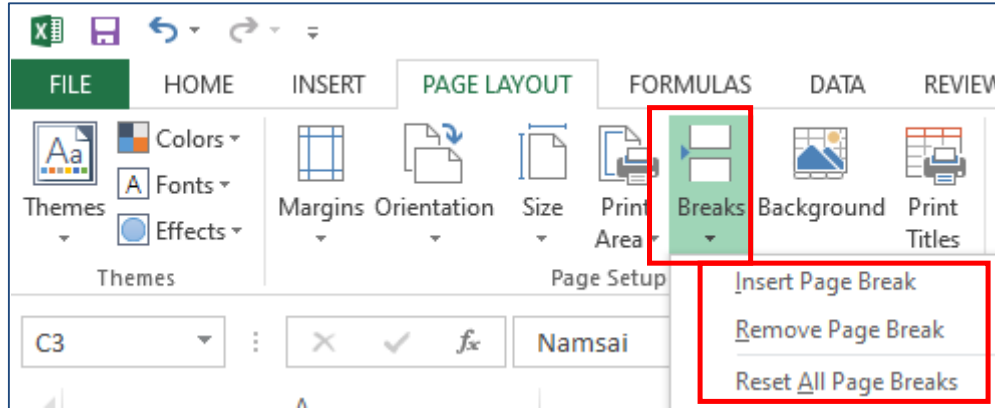
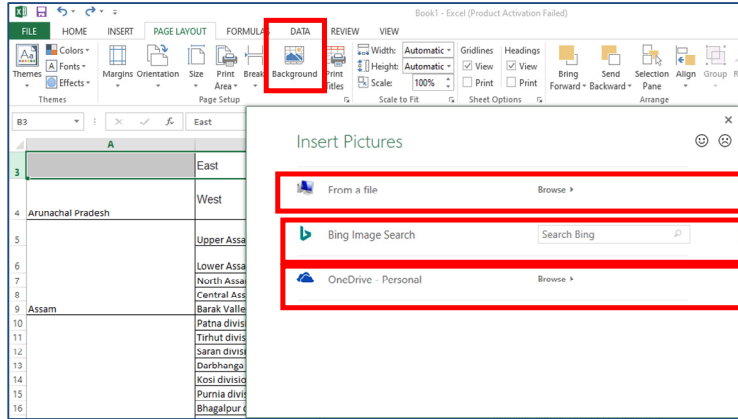**Format Worksheets and Workbooks >Modify Page Setup**

Format Worksheets and Workbooks >Modify Page Setup

Background

Choose a background image from:

- A file in your computer
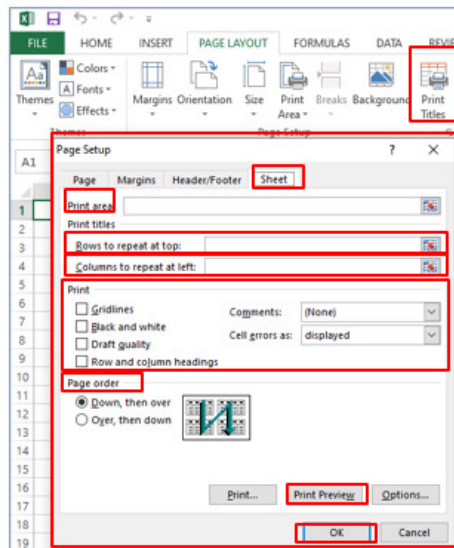- The internet by searching on a browser
- OneDrive

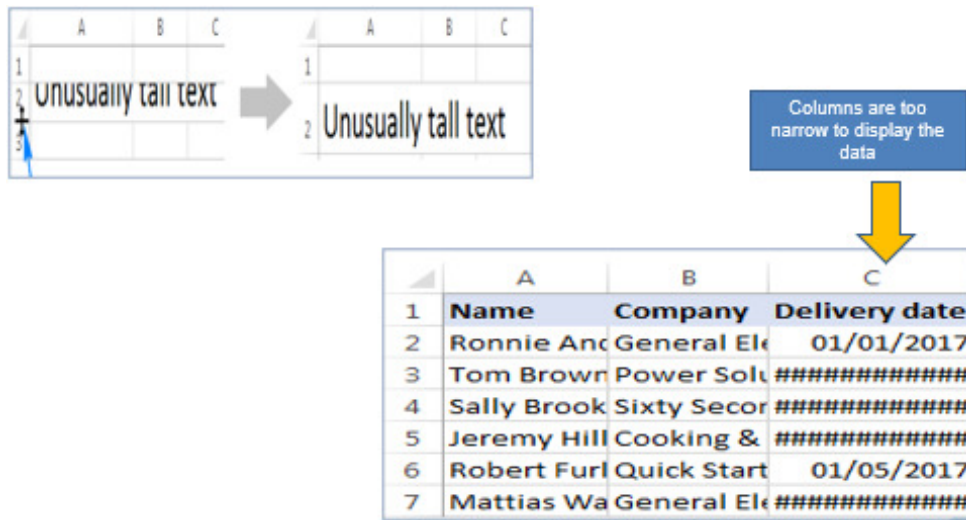**Format Worksheets and Workbooks >Modify Page Setup**

Steps to Print Titles

The steps to print titles are:

1. Go to **Page Layout** tab.
2. Click **Print Titles** option.
3. A **Page Setup** window displays.
4. **Sheet option** is active.
5. Select **Print Area.**
6. Select the **Rows to repeat at the top.**
7. Select the **Columns to repeat at left.**
8. Select other **Print** options.
9. Choose the **Page order.**
10. Select **Print Preview.**
11. Click **OK.**

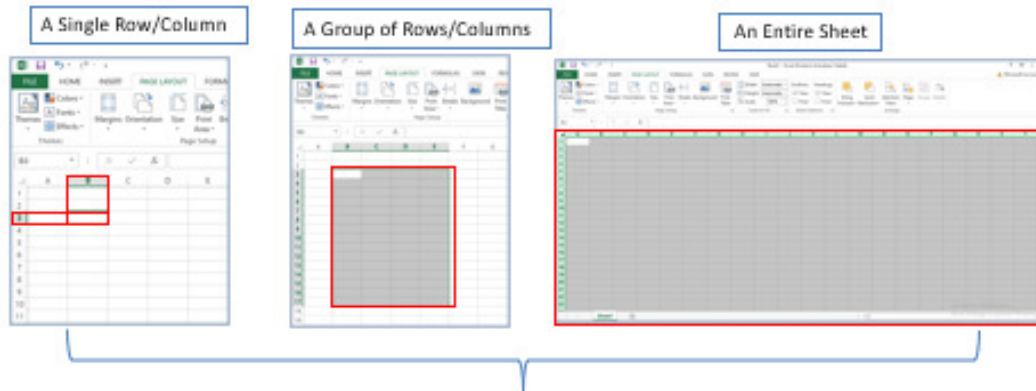**Format Worksheets and Workbooks > Adjust Row Height and Column Width**

_____

_____

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Format Worksheets and Workbooks >Adjust Row Height and Column Width

Steps to Adjust Row Height and Column Width

We can adjust the row height and column width for:

_____

_____

_____

_____

Adjust Row Height and Column Width – Single Row or Column

Steps to adjust row height and column width for a single row or column using a mouse are:

Adjust Row Height and Column Width – Multiple Rows or Columns

The steps to change the height or width of multiple rows or columns are:

Format Worksheets and Workbooks >Adjust Row Height and Column Width
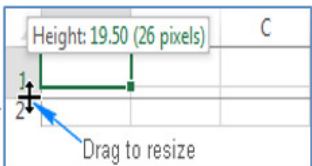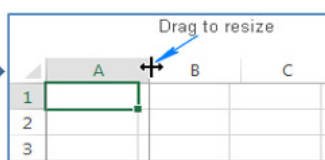
Adjust Row Height and Column Width – Entire Sheet

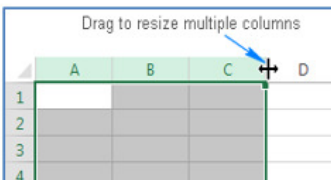The steps to change the height of the rows or columns in the entire sheet:
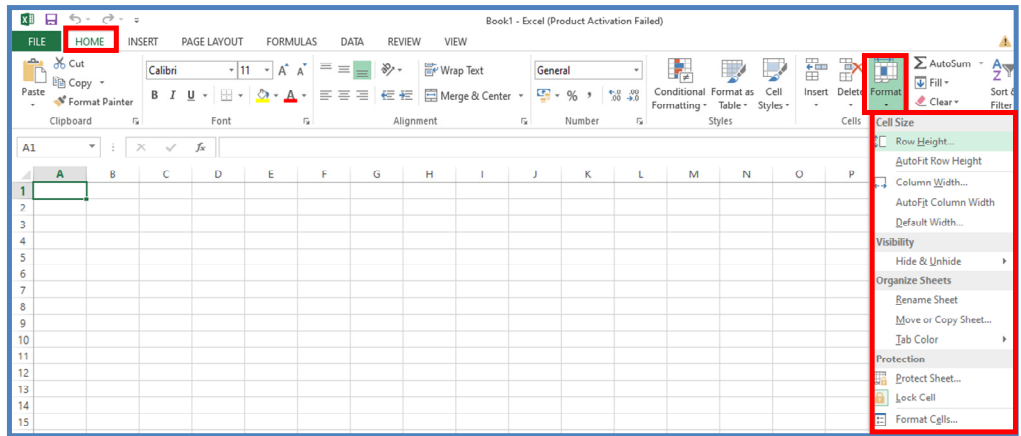
Entire Sheet
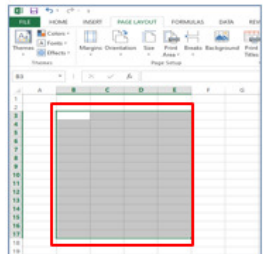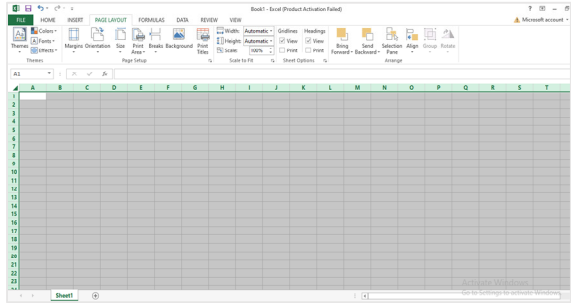
Select the entire sheet by pressing S**hift + Ctrl + A**,or click **Select All** button and drag the lower boundary of any row heading until the desired height is obtained.

Format Worksheets and Workbooks >Adjust Row Height and Column Width

The steps to adjust row height and column width using Format are:

Format Worksheets and Workbooks > Modify Page Setup
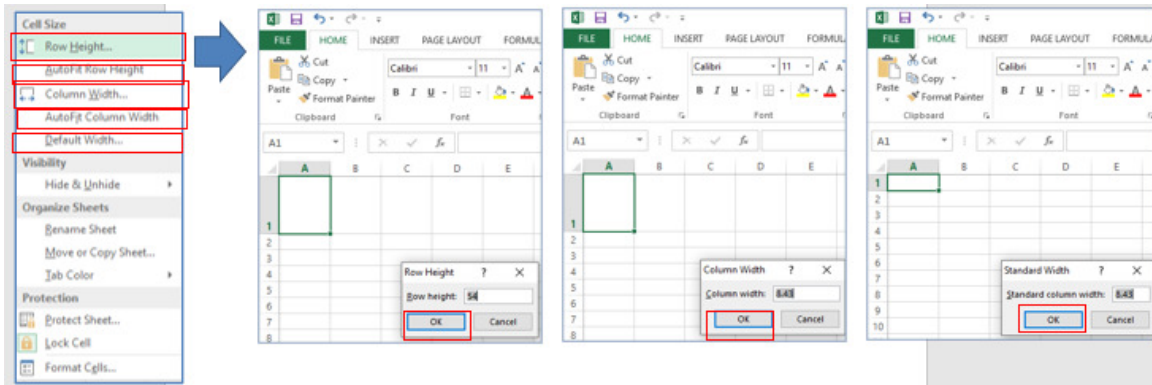
Format Worksheets and Workbooks > View Height and Width of Row and Column

Let us understand how to view the current width and height of arow or column.

Clickon the right boundary of the row or column header and Excel will display the width for the selected row or column.

Do you know?

To view the current height of the Row:

1. To add Header,select **Insert.**
2. Click **Header and Footer** option.
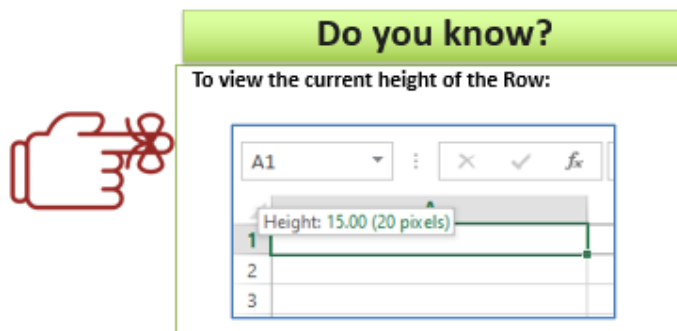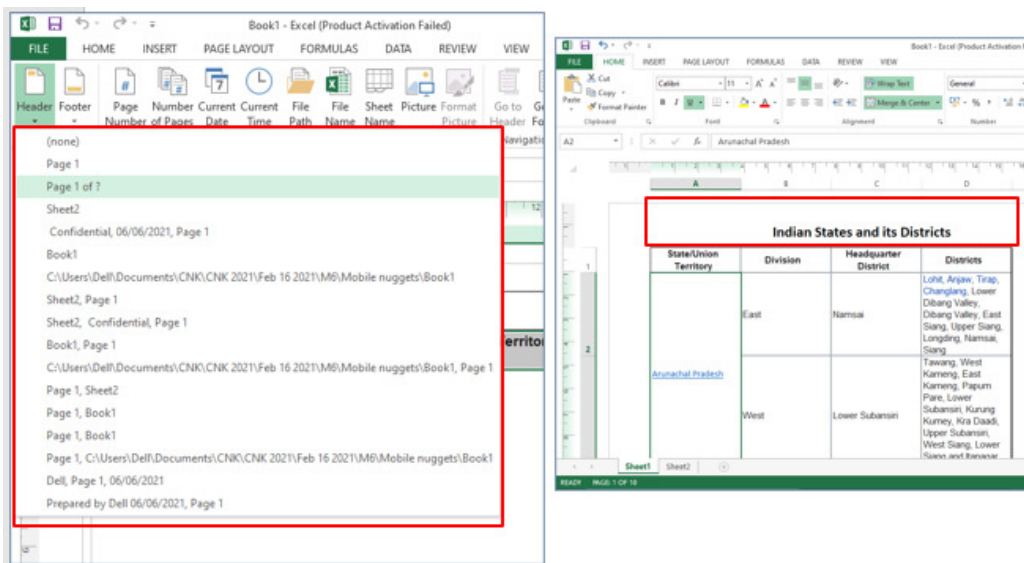3. Header and Footer page layout view will open with **Design options** opened.
4. You can enter the text or insert an image in the space provided for the header.
5. Choose format from the list of options under the header drop-down.
6. Header gets displayed.
7. Similarly, you can type the text or insert image in the space provided for the Footer.
8. Choose a formatfrom the various options listed under the Footer drop-down menu.
9. You will find various options to add page numbers, date, time etc.
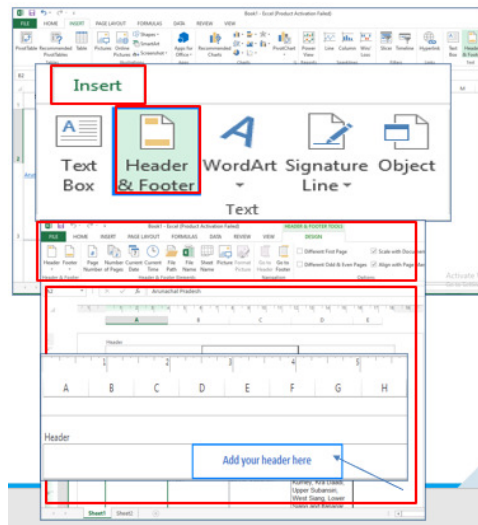
Format Worksheets and Workbooks > Headers and Footers
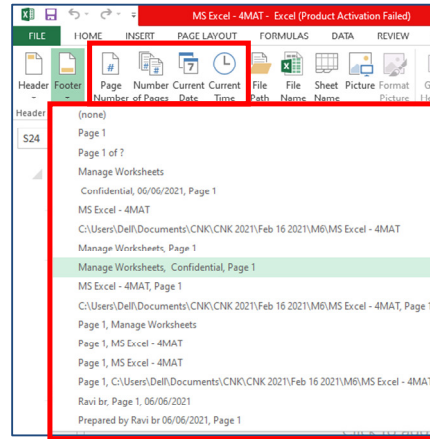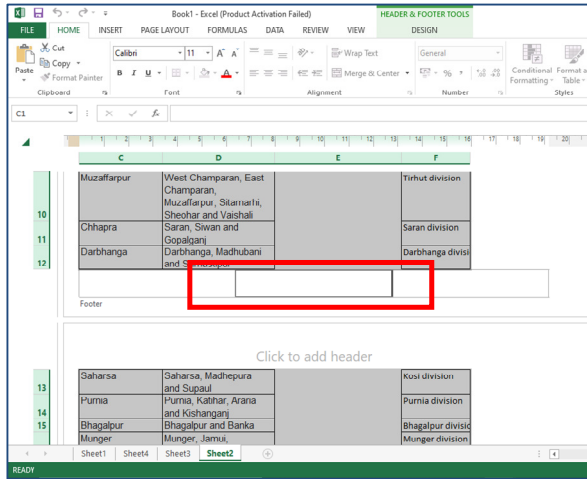
Customise Options and Views > Display and Modify Content in Different Views

Wrap Text

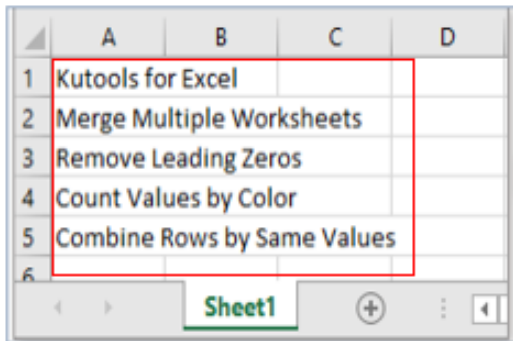Consider the following Excel sheet. The data in each cell of all the rows spill across several columns. How would you address this issue?

The **Wrap Text** function keeps the column width intact and adjusts the row height to display all contents in each cell.

Customise Options and Views >Display and Modify Content in Different Views

1. Select the cells.
2. Select **Home.**
3. Click **Wrap Text.**
4. The text gets wrapped

AutoFit Column Width option under the Format menu, which we discussed in the earlier slides.

Customise Options and Views >Display and Modify Content in Different Views
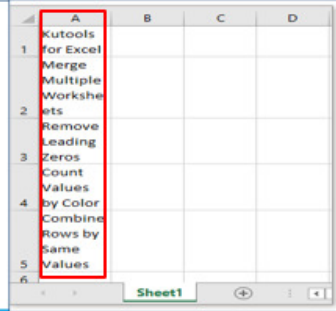

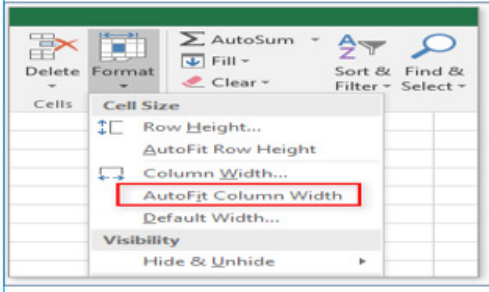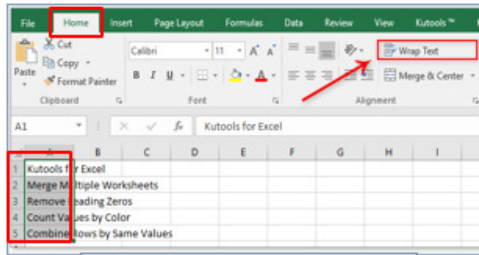Create a Custom View

Apply a Custom View

Delete a Custom View

Customise Options and Views >Display and Modify Content in Different Views

Steps to create a Custom View:

1. **Home**>**View > Custom View.**

2. **Custom Views** dialog box appears.Click **Add** button.

3. **Add View** dialog box appears.

4. Enter a name for the custom view. For example, **Sample-1.**

5. Check the boxes if you want to include **Print settings** and hidden rows, columns and filter settings.

6. Click **OK.**

7. The Custom View is created

Customise Options and Views >Display and Modify Content in Different Views
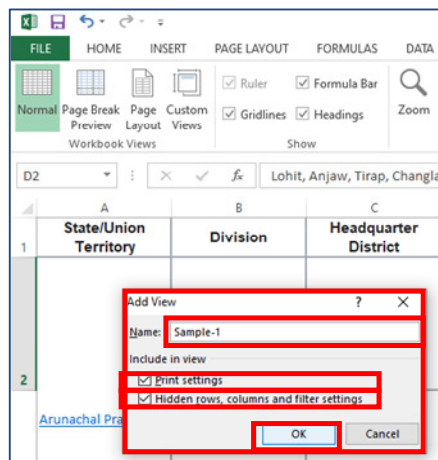
Customise Options and Views >Display and Modify Content in Different Views
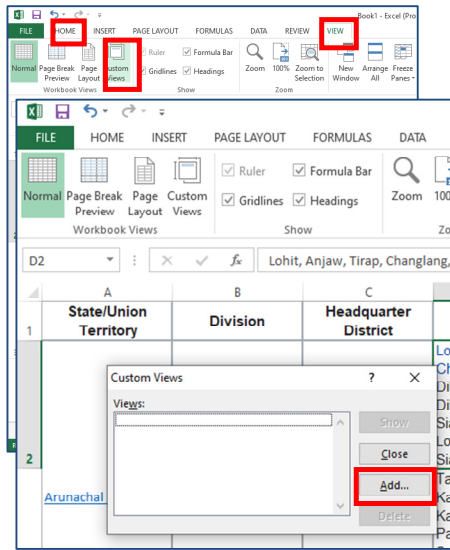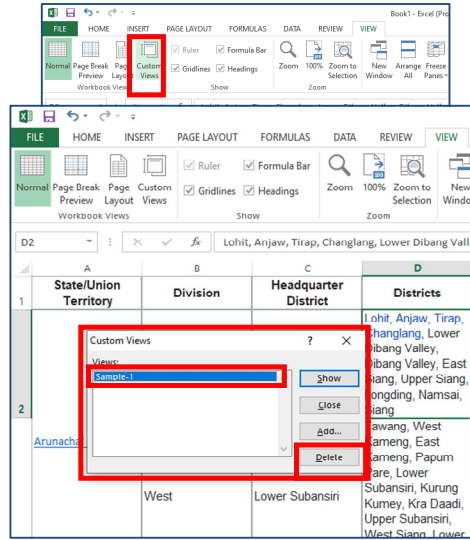
Steps to apply a Custom View/Delete a Custom View:

1. **Home > View >Custom View.**

2. **Custom Views** dialog box is displayed.

3. Click **Show** button to apply the **Custom View** to your document.

4. If you no longer desire to keep the custom view, click the **Delete** button and the Custom view will get deleted.

Customise Options and Views > Freeze Rows and Columns
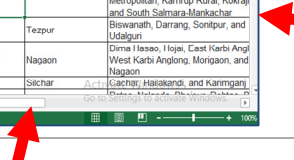
Example:

Consider a worksheet with 100 rows and 100 columns of data.

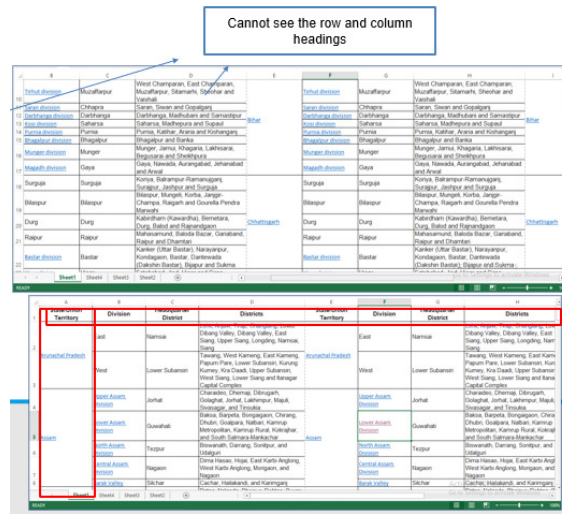| A worksheet with 100 rows and 100 columns of data	We cannot view all the 100 rows and 100 columns on our computer screen.	To go to a particular row or a column, you will have to scroll top to bottom or right to left.

Customise Options and Views > Freeze Rows and Columns

Customise Options and Views > Freeze Rows and Columns

Steps to freeze rows and columns:

1. Select **View > Freeze Panes.**

2. Click the **Freeze Panes** drop-down arrow.
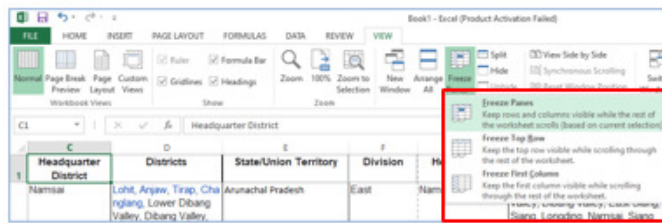
Customise Options and Views > Freeze Rows and Columns
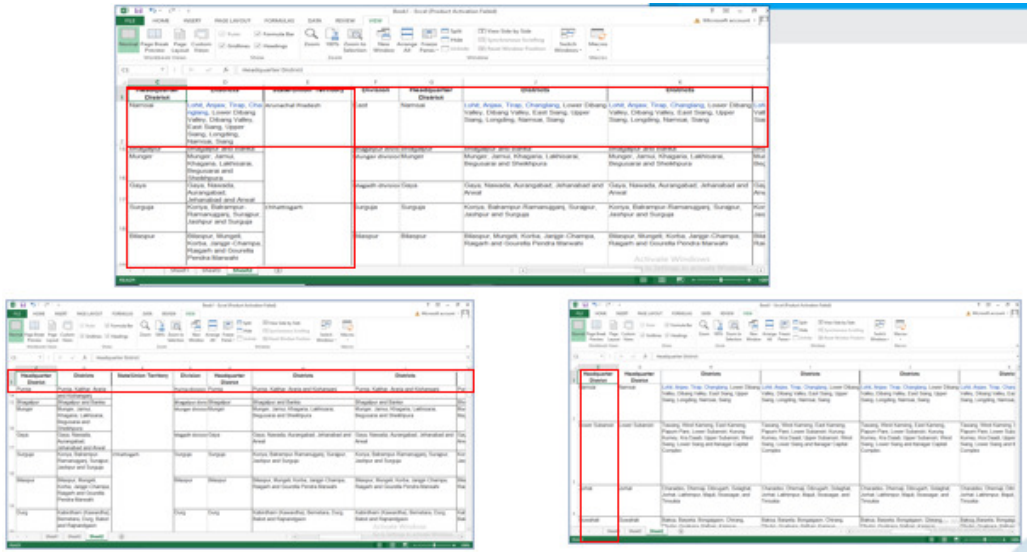
Customise Options and Views > Change Window Views
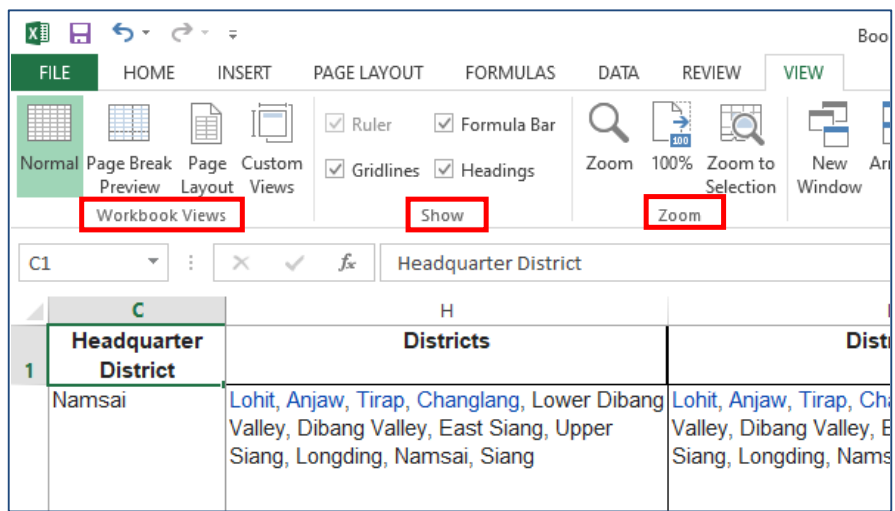
Customise Options and Views > Change Window Views

Workbook Views

Workbook views consist of options, such as:
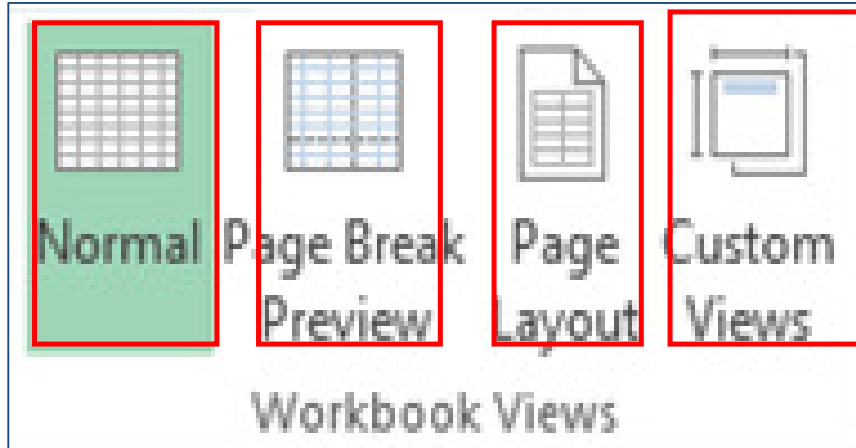
Customise Options and Views > Change Window Views

Show

Under Show, we can see the four options, such as:
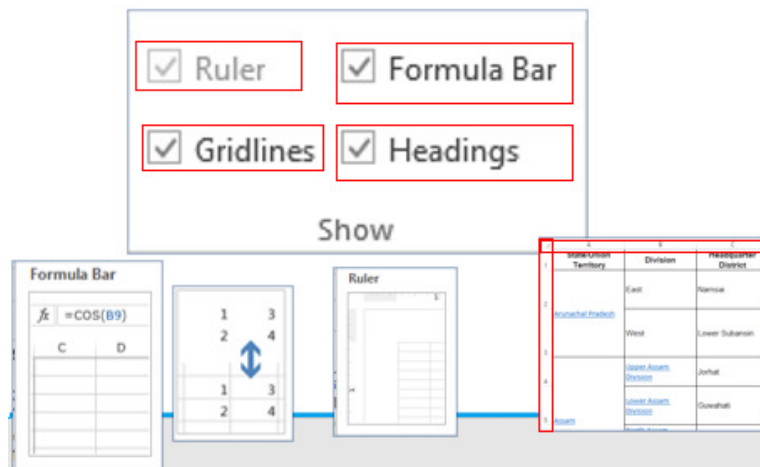
Customise Options and Views > Change Window Views

Zoom

We have the following three options under Zoom.
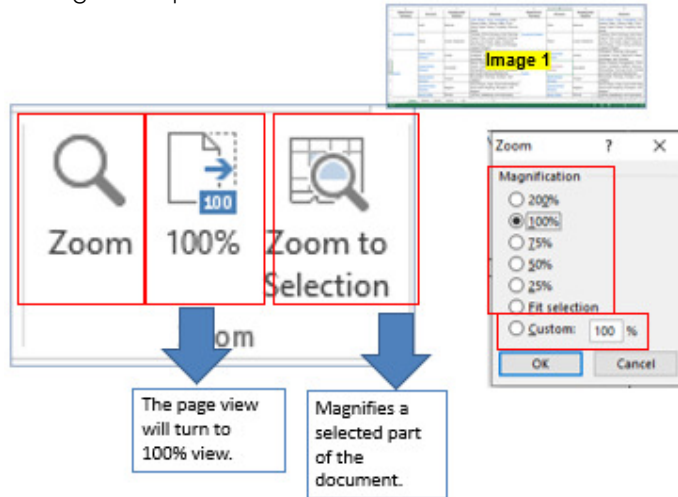
Customise Options and Views > Modify Basic Workbook Properties

1. **File > Info**

2. Displays document related information like:

• Properties

• Related dates

• Related people
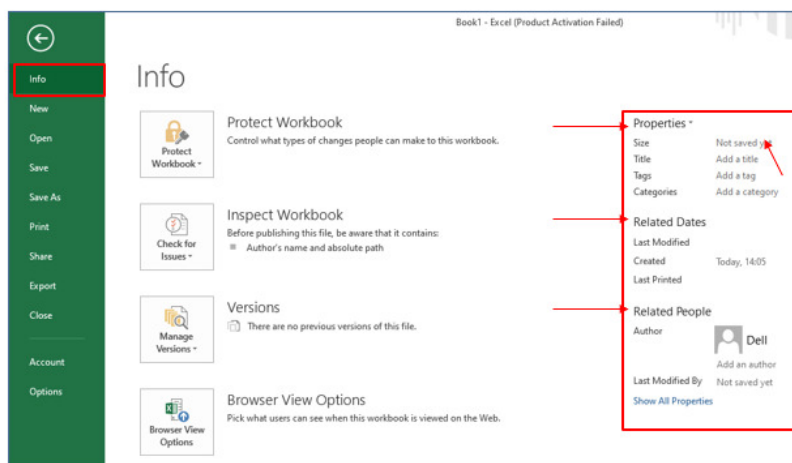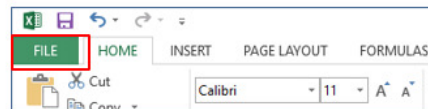
Customise Options and Views > Display Formulas

To study large amounts of data and perform calculations

Use different formulas and get accurate results in less time
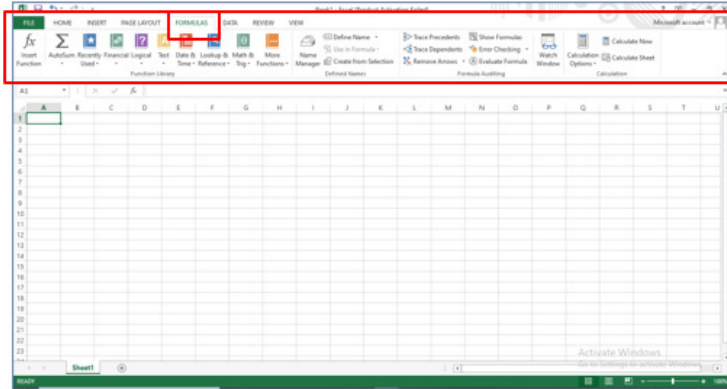
Provides common formulas

Customise Options and Views > Display Formulas

1. **File >Options.**

2. **ExcelOptions** dialog box opens.

3. Select **Advanced.**

4. Scroll down to **Display options for this worksheet.**

5. Check the Show formulas in cells instead of their calculated results.

6. Click **OK.**

7. File >**Formula.**

8. Click **Show Formulas.**

Customise Options and Views > Display Formulas

Customise Options and Views > Display Formulas

Configure Content for Collaboration > Set Print Area

Print Area is a range of cells to be included in the final printout.

Set a print area that includes only selected portion.

Gives control over what each printed page looks like.

Set a print area before sending a worksheet to the printer.

Select multiple print areas in a single worksheet and each area will print on a separate page.

Saving the workbook also saves the print area.

Configure Content for Collaboration > Set Print Area

To set the print area in Excel:

1. Select the part of the worksheet that you want to print.

2. Select **Page Layout.**

3. In the **Page Setup group.**

4. Click**Print Area.**

5. Notice a thin grey highlight around the selected area.This indicates that **Print Area** is set.

6. Press **Ctrl + P.**

7. You can see **Print Preview** of the selected data.
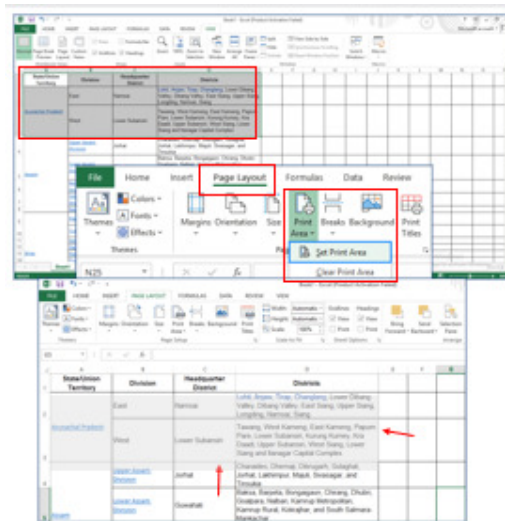
Configure Content for Collaboration > Set Print Area
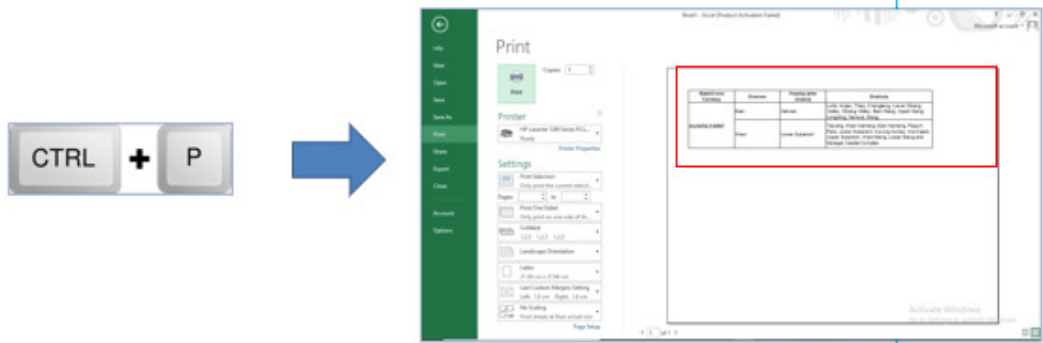
Configure Content for Collaboration > Set Print Area

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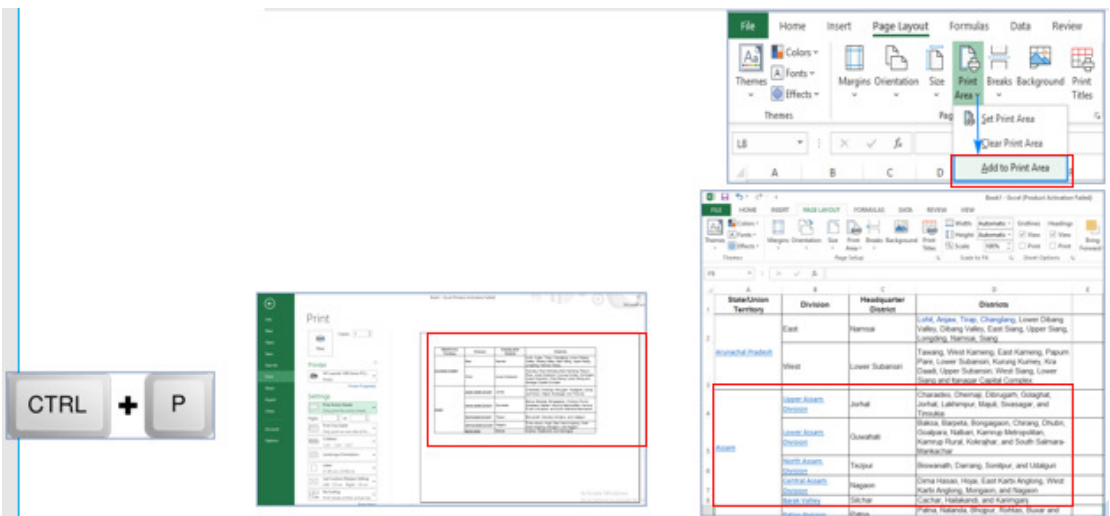
1. **Print Area > Add to Print Area.**
2. Select the cells you would like to add.
3. Press **Ctrl + P.**
4. See **Print Preview** of the selected data.

Configure Content for Collaboration > Set Print Area

Configure Content for Collaboration > Set Print Area

Configure Content for Collaboration > Edit Print Area

1. **Home > Formulas.**
2. **Defined Names group > Name Manage.**
3. Select the **Print Area** you have created.
4. Click **Edit.**
5. Edit Name dialog box appears.
6. Choose to change the Name andedit the selected area.
7. Click **OK.**
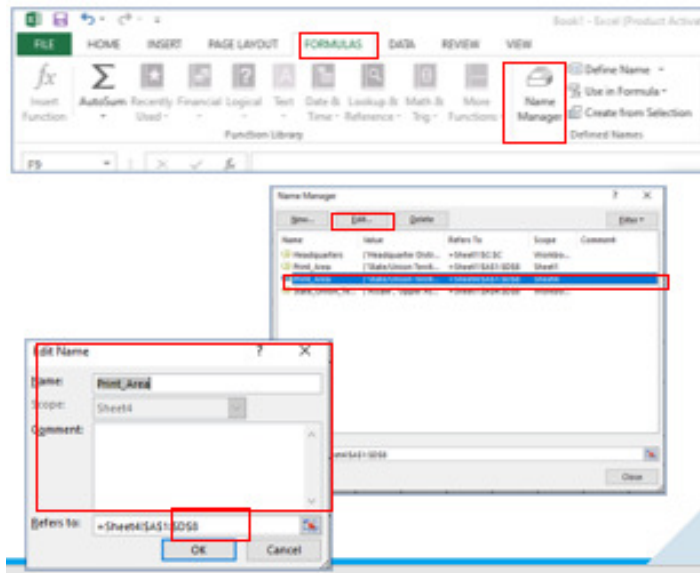
Configure Content for Collaboration > Edit Print Area
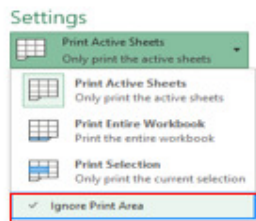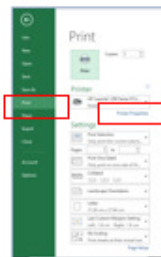
Configure Content for Collaboration > Print Multiple Area

Steps to print multiple areas on one page:

1. The ability to print multiple areas per sheet of paper is controlled by a printer model, not by Excel.

2. File > Print.

3. Click the **Printer Properties** link.

4. Select **Finishing** on the **Printer Properties** dialog box.

5. Under **Pages per Sheet,** select the desired number of sheets.

6. Click **OK.**
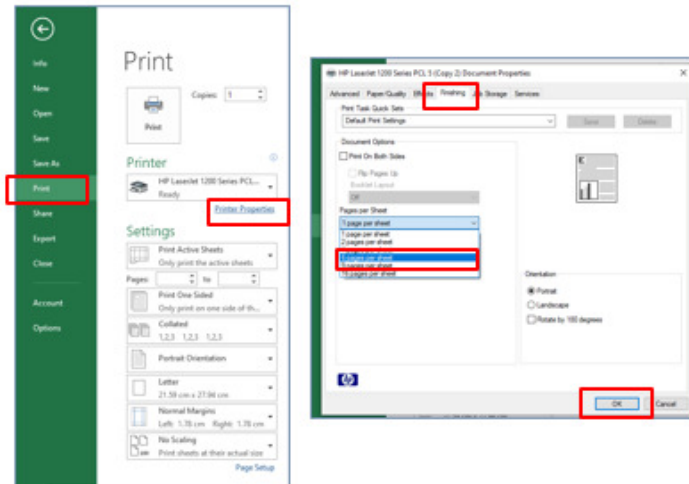
Configure Content for Collaboration > Save Workbooks in Alternative File Formats

Steps to save workbook in other file formats:

1. Open the workbook you want to save.
2. Select **File.**
3. Click **Save As** option.
4. You will get options of various locations where you can save the file.
5. **Save As** pop-up box opens.
6. Enter the file name in the space provided.
7. Select the drop-down under the **Save as file type.**
8. You will find various file formats.
9. Select the desired file format.
10. Click **Save** button.
11. The document will be saved in the format you have chosen.
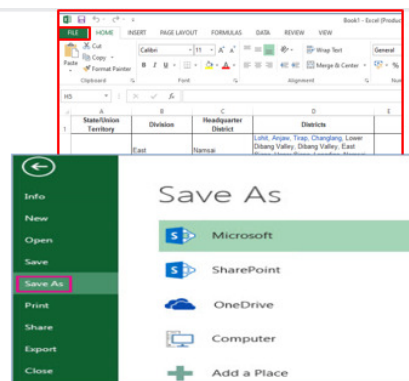
Note: While saving in a different format, sometimes the **formatting, data** and **features** might not be saved properly.

Configure Content for Collaboration > Save Workbooks in Alternative File Formats

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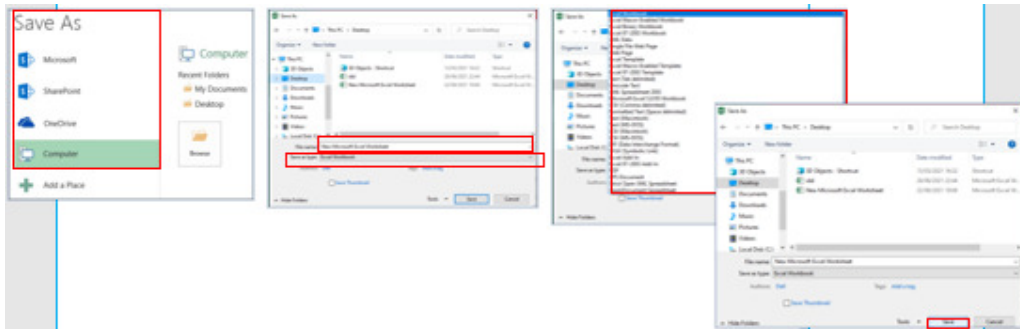
Configure Content for Collaboration > Configure Print Settings

Steps to configure default print settings:

1. Click **Start.**

2. Select **Control Panel.**

3. **Control Panel** page opens.

4. Click **Devices and Printers.**

5. **Devices and Printers** page opens.

6. Search for the printer device and right-click on the mouse.

7. You will see many options to configure the print settings.

8. Choose the desired settings and set the printer as default.

9. The printer will be configured.
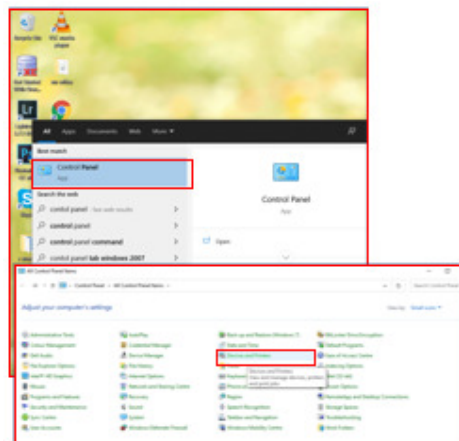
Configure Content for Collaboration > Configure Print Settings

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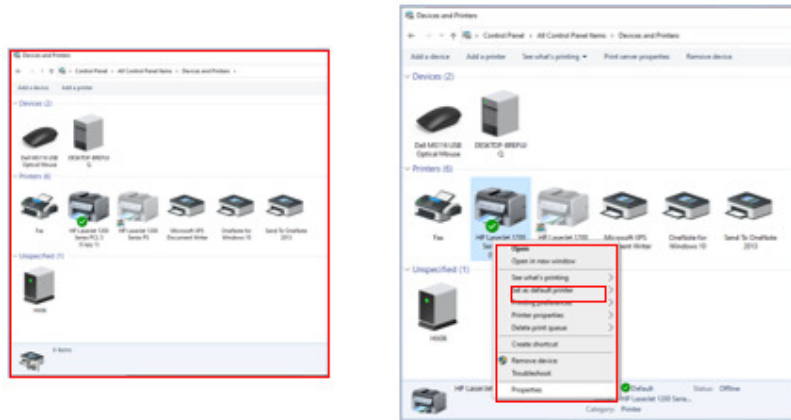
Key Takeaways

In this module, you have learnt that:

- MS Excelfiles are called workbooks, which contain one or more worksheets to organise data.

- A new workbook can be created from a blank workbook or a template.

- MS Excelis used by businesses of all sizes to perform financial and data analysis.

- Worksheet is a work area within a workbook.

- A cell is a rectangle or block housed in a worksheet, where you enter data. It is the intersection of a row and a column.

- The vertical blocks marked as A, B, C, … are columns.

- The horizontal blocks marked as 1, 2, 3, … are called rows.

- Before turning a saved workbook into a template, make sure to keep column headers, formulas and anything else that will be repeated and delete anything you won't need next time.

Key Takeaways

In this module, you have learnt that:

- There are two types of files from which data can be imported to Excelworkbooks - .TXT files and .CSV files

- .TXT file is a standard text document that contains plain text

- .CSV file is a delimited text file that uses a comma to separate values

- CSV files are often used for exchanging data between different applications

- There are two ways in which data can be imported from Excel:

a.Import a text file by opening it in Excel

b.Import data from a text file into an existing worksheet

Key Takeaways

In this module, you have learnt that:

- Find Command is used to search for something in your workbook, such as a particular number or text string

- We have two different ways to access the Find and Replace commands

- Using keyboard, pressControl plus F or on the home menu select the Find and Replace option

- Unlike Find, Search allows wildcards and is not case-sensitive

- A named range is just a human-readable name for a range of cells in Excel

- Navigation can be done to Specific Cells, to a Cell Range and to a Named Cell

- A hyperlink is a link to data that a user can access by clicking or tapping it

- A hyperlink brings you to a Web page, a whole document, to a specific place in a file or another spreadsheet entirely

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Key Takeaways

In this module, you have learnt that:

- The Orientation option allows you to choose whether the document should be displayed in Portrait mode or Landscape mode

- The Size option displays a drop-down with several default paper sizes

- The Breaks drop-down gives options to choose to insert, remove or reset all page breaks as per your requirement

- The Background option enables you to choose a background image either from a file in your computer, search on a browser or from OneDrive

- It is mandatory to have the column titles on each page; else we might not be able to understand the data

Key Takeaways

In this module, you have learnt that:

The Wrap Text function keeps the column width and adjusts the row height to display all contents in each cell.

- There are three types of views, which are frequently used.

- They are Workbook Views, Show and Zoom.

- Page Break Preview shows the page breaks that appear when your document is printed

- Page Layout shows how the printed document will look and also shows how the header and footer will be displayed

- Custom View saves your current display and print settings for future reference

- Ruler shows rulers next to the document. You can see and set tab stops, move table border and line up objects in the document and also view the measurements

- Formula bar shows formulas in cells

- Gridlines shows the lines between rows and columns in the sheet to make the sheet easier to read

- Headings show column headings and row headings

Key Takeaways

In this module, you have learnt that:

- A print area is a range of cells to be included in the final printout

- In case you don't want to print the entire spreadsheet, set a print area that includes only your selection

- Setting up a print area gives you more control over how each printed page looks

- You should always set a print area before sending a worksheet to the printer

- You can select multiple print areas in a single worksheet and each area will print on a separate page

- Saving the workbook also saves the print area