

Getting Started with Excel Essentials

New to Excel or just need a solid foundation? This chapter walks you through the basics of navigating the Excel interface, understanding how columns and rows are organized, and working with touch and click-based devices. Whether you're opening Excel for the first time or refreshing your skills, you'll come away with the confidence to move around a spreadsheet efficiently and understand the core concepts that everything else in Excel builds upon.

CREDIT HOURS 2 | FIELD OF STUDY BUSINESS | EXAM QUESTIONS 10

[Start Course ↓](#)[Final Exam Copy ↓](#)

LEARNING ASSIGNMENTS AND OBJECTIVES

Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

Course Objectives

- Recognize how to maneuver through an Excel worksheet and workbook.

Copyright Notice

© 2026 Pacific CPE, LP. All rights reserved.

The materials in this course — including the text, illustrations, exhibits, examples, exam questions, and review questions — are the copyrighted property of Pacific CPE, LP. No portion of this course may be reproduced, stored in a retrieval system, distributed, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise) without the prior written permission of Pacific CPE, LP, except for the personal, non-commercial use of the registered learner.

Pacific CPE, LP grants the registered learner a single-seat, non-transferable license to access this course for the purpose of completing the associated continuing professional education credit. Account credentials may not be shared. Group access requires a separate enterprise license.

This course is provided "as is" for educational purposes. While Pacific CPE, LP makes a reasonable effort to ensure the content is current and accurate, the materials should not be relied upon as a substitute for professional advice. Pacific CPE, LP disclaims all liability for any error, omission, or loss arising from the use of, or reliance on, the course content.

Questions about reproduction, licensing, or use of these materials should be directed to support@pacificcpe.com.

Publication Date: June 2026

TABLE OF CONTENTS

CHAPTER

01

Excel: The 50-Cent Tour..... 4

1.01 A Bird'S-Eye View Of Excel 4

1.02 ***Figure 1-1: The Excel Start Screen With The Home Tab Selected That
Appears Immediately After Launching The Program.*** 5

1.03 ***Figure 1-2: The Excel Program Window As It Appears After First
Opening A Blank Workbook.*** 7

1.04 ***Figure 1-5: When You Select A Ribbon Tab By Pressing Alt And The
Keytip Letter Assigned To That Tab, Excel Displays The Keytips For Its
Command Buttons.*** 17

1.05 Getting Help 28

1.06 Launching And Quitting Excel 31

Test Your Knowledge..... 36

Final Exam Copy..... 47

Glossary..... 45

Index 45

Chapter 1: EXCEL: THE 50-CENT TOUR

Chapter Objective

After completing this chapter, you should be able to:

- Recognize how to maneuver through an Excel worksheet and workbook.

If you're new to Excel, launching the program for the first time can be headache-inducing. So many icons! So many lines! So little guidance! The problem is that you've been catapulted into what appears to be a strange and exotic landscape without a map, a guidebook, or even a "You are here" sign. You wouldn't travel to Upper Volta or lower Manhattan without these tools in your travel kit, so why are you visiting Excel that way?

Ah, but your purchase of this course shows that you are, indeed, a savvy and sophisticated traveler. Now you've got the guidebook you need to learn the language, customs, and tourist hotspots of Excel. And the map? That's what this chapter is all about. Here you take a guided tour that points out the main features of the Excel landscape; shows you the best ways to navigate from the spreadsheet equivalent of Point A to Point B; and tells you how to call for help should the need arise.

Oh, and by the way: You are *here*. Let's go!

A BIRD'S-EYE VIEW OF EXCEL

Excel relies primarily on the onscreen element called the Ribbon, which is how you select the vast majority of Excel commands. In addition, Excel offers a single toolbar (the Quick Access toolbar, which is hidden by default), some context-sensitive buttons and command bars in the form of the Quick Analysis tool and mini-bar, contextual tabs that only appear on the Ribbon when you select certain Excel elements (such as a table or image), along with a number of task panes (such as Clipboard, Research, Thesaurus, and Selection to name a few).

Among the features supported when selecting certain style and formatting commands is the Live Preview, which shows you how your actual worksheet data will appear in a particular font, table formatting, and so on before you actually apply it. Excel also supports an honest-to-goodness Page Layout view that displays rulers and margins along with headers and footers for every worksheet. Page Layout view has a zoom slider at the bottom of the screen that enables you to zoom in and out on the spreadsheet data instantly. The Backstage view attached to the File tab on the Excel Ribbon enables you to get at-a-glance information about your spreadsheet files as well as save, share, preview, and print them. Last but not least, Excel is full of pop-up galleries that make spreadsheet formatting and charting a real breeze, especially with the program's Live Preview.

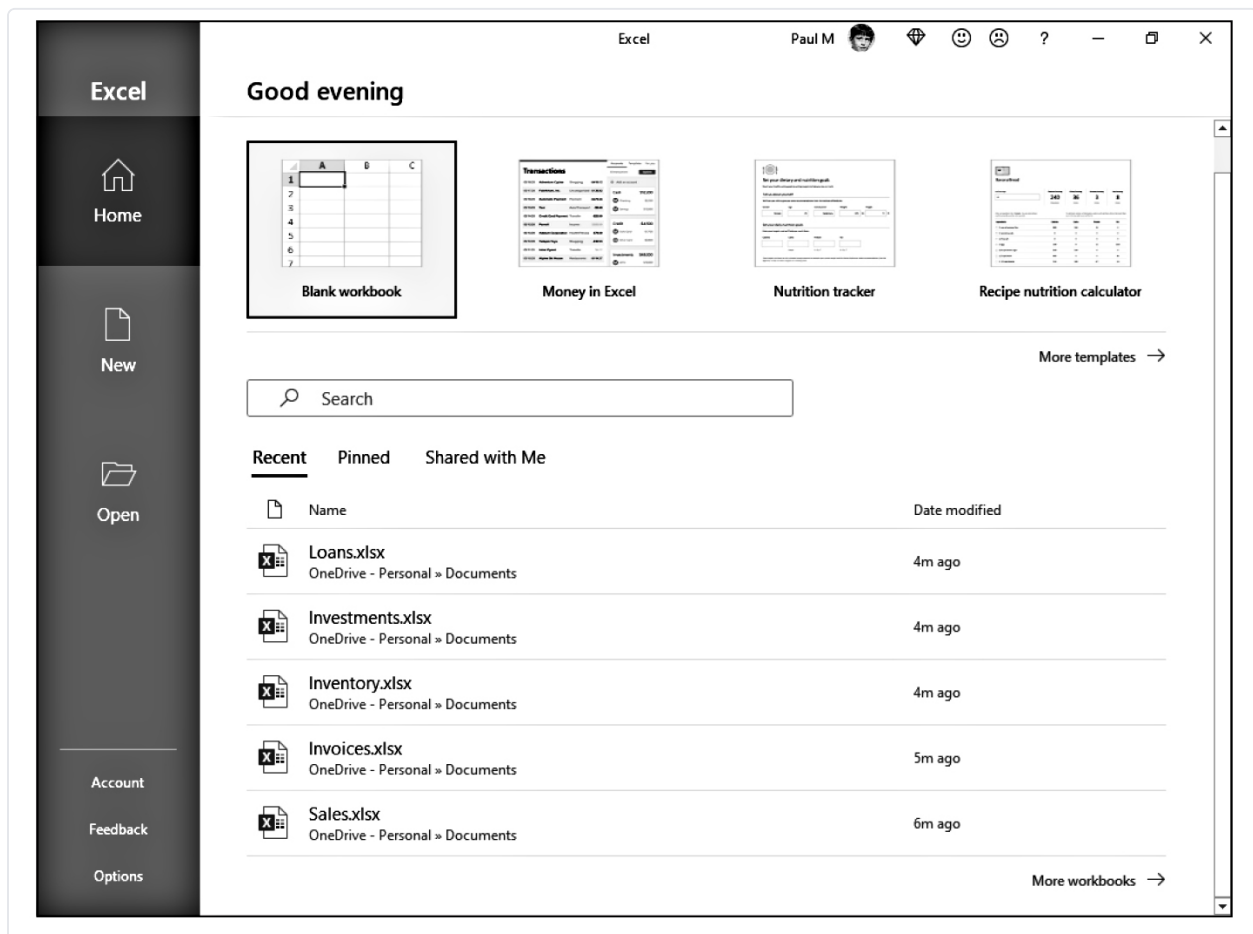
Before moving on, take a second to understand the difference between two terms that you see over and over in this course:

- **Worksheet:** This is Excel's work area. That is, it's the part of the Excel window where you enter text and data, create formulas, and much more. Note that, in this book, the words worksheet, spreadsheet, and sheet are synonymous.
- **Workbook:** This is an Excel file and it's a collection of one or more worksheets. Each worksheet appears separately in its own tab, as you discover a bit later in the "Surfing the sheets in a workbook" section.

CHECKING OUT EXCEL'S START SCREEN

When you first launch Excel, the program welcomes you with an Excel Start screen similar to the one shown in Figure 1-1. This screen is divided into two panes.

FIGURE 1-1: THE EXCEL START SCREEN WITH THE HOME TAB SELECTED THAT APPEARS IMMEDIATELY AFTER LAUNCHING THE PROGRAM.



The left green navigation pane with the Home icon selected contains New and Open items at the top and Account, Feedback, and Options at the bottom.

The right pane displays a single row of thumbnails showing some of the different templates you can use to create a new workbook at the top with a list of some of the most recently opened workbooks shown below. To see more templates to use in creating a new workbook, you can click either the More Templates link on the right side of the Home screen or the New icon in the navigation pane on the left.

If none of the Excel templates shown in the Home screen fit the bill, click More Templates (or click New in the Navigation pane) to open the New screen displaying a whole host of standard templates that you can select to use as the *basis* for new workbooks. These templates enable you to create a budget, track a project, create an invoice, and more.

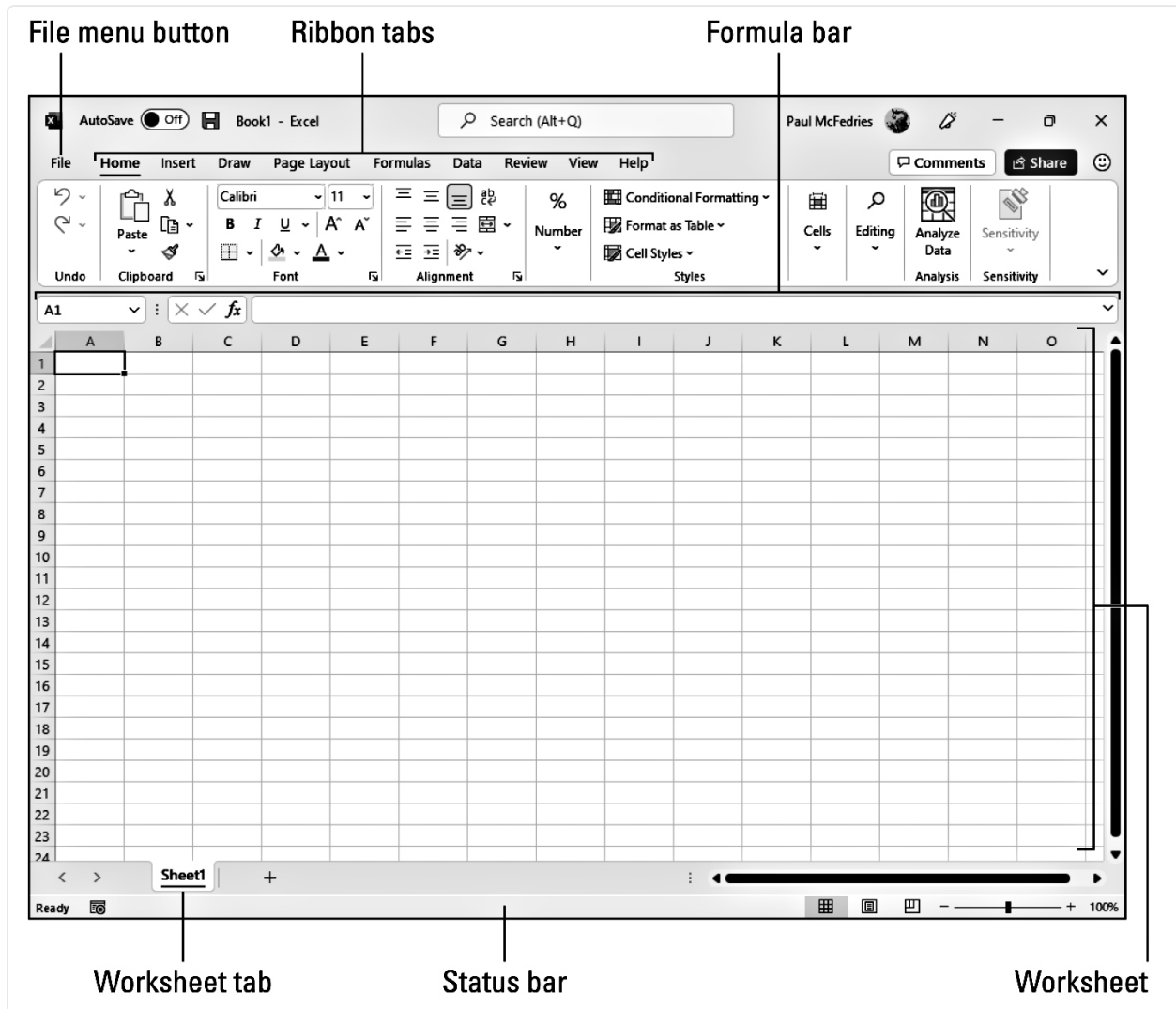
To open an existing Excel workbook not displayed in the Recent list, click either the More Workbooks link on the lower-right side of the Home screen or the Open icon in the navigation pane on the left.

The first template thumbnail displayed on the top row of the Home tab on the Start screen is called Blank Workbook, and you select this thumbnail to start a new workbook of your own design.

GETTING COMFY WITH THE EXCEL USER INTERFACE

When you first open a new, blank workbook by clicking the Blank Workbook thumbnail in the Home screen, Excel opens a single worksheet (with the generic name, Sheet1) in a new workbook file (with the generic filename, Book1) inside a program window such as the one shown in Figure 1-2.

FIGURE 1-2: THE EXCEL PROGRAM WINDOW AS IT APPEARS AFTER FIRST OPENING A BLANK WORKBOOK.



The Excel program window is made up of the following components:

- **File menu button:** When clicked, Excel opens the Backstage view, which contains a bunch of file-related commands: Home, New, Open, Save, Save As (or Save a Copy), Print, Share, Export, Publish, Close. You also see Account, which gives you information and tasks related to your Microsoft account; as well as Options, which enables you to change Excel's default settings.
- **Ribbon:** Most Excel commands are contained on the Ribbon. They're arranged into a series of tabs ranging from Home through Help.

- **Formula bar:** This displays the address of the active cell along with the contents of that cell. You can also use it to enter and edit cell data and formulas.
- **Worksheet:** This is your Excel work area, which consists of a series of columns (identified by the letters along the top: A, B, C, and so on) and a series of rows (identified by the numbers running down the left: 1, 2, 3, and so on). The intersection of each column and row is called a cell and you enter your Excel data and formulas into these cells. You also see a tab for each worksheet (although the default new workbook comes with just one worksheet). You use a horizontal scroll bar on the bottom to move left and right through the sheet and a vertical scroll bar on the right edge to move up and down through the sheet.
- **Status bar:** This bar keeps you informed of the program's current mode and any special keys you engage, and it enables you to select a new worksheet view and to zoom in and out on the worksheet.

Tip

When using Excel on a touchscreen device, the Ribbon Display Options are automatically set to Show Tabs Only (so that associated commands appear only when you tap a tab). To make it easier to select Ribbon commands with your finger or a stylus, click Ribbon Display Options (pointed out later in Figure 1-4) and then click Touch Spacing. With touch spacing engaged, Excel spreads out the tabs and their command buttons on the Ribbon. That way you have a fighting chance of correctly selecting them with your finger or stylus. On a touchscreen tablet, Excel automatically adds a Draw tab to the Ribbon containing loads of inking options that enable you to modify settings for drawing with your finger, a stylus, or a digital pen.

Going behind the scenes to Excel's Backstage view

In the upper-left corner of the Excel program window, you find the File menu button, pointed out in Figure 1-2. When you click the File menu button or press Alt+F, the Excel Backstage view appears with the Home command selected. Backstage view contains a menu of file-related commands running down a column on the left side and, depending upon which option is selected, some panels containing both at-a-glance information and further command options.

Remember

At first glance, the File menu button may appear to you like a Ribbon tab — especially in light of its location immediately left of the Ribbon's initial Home tab. However, this important file control is technically a command button that, when clicked, leads directly to a totally different screen: the Backstage view. This screen has its own menu options but contains no Ribbon command buttons whatsoever.

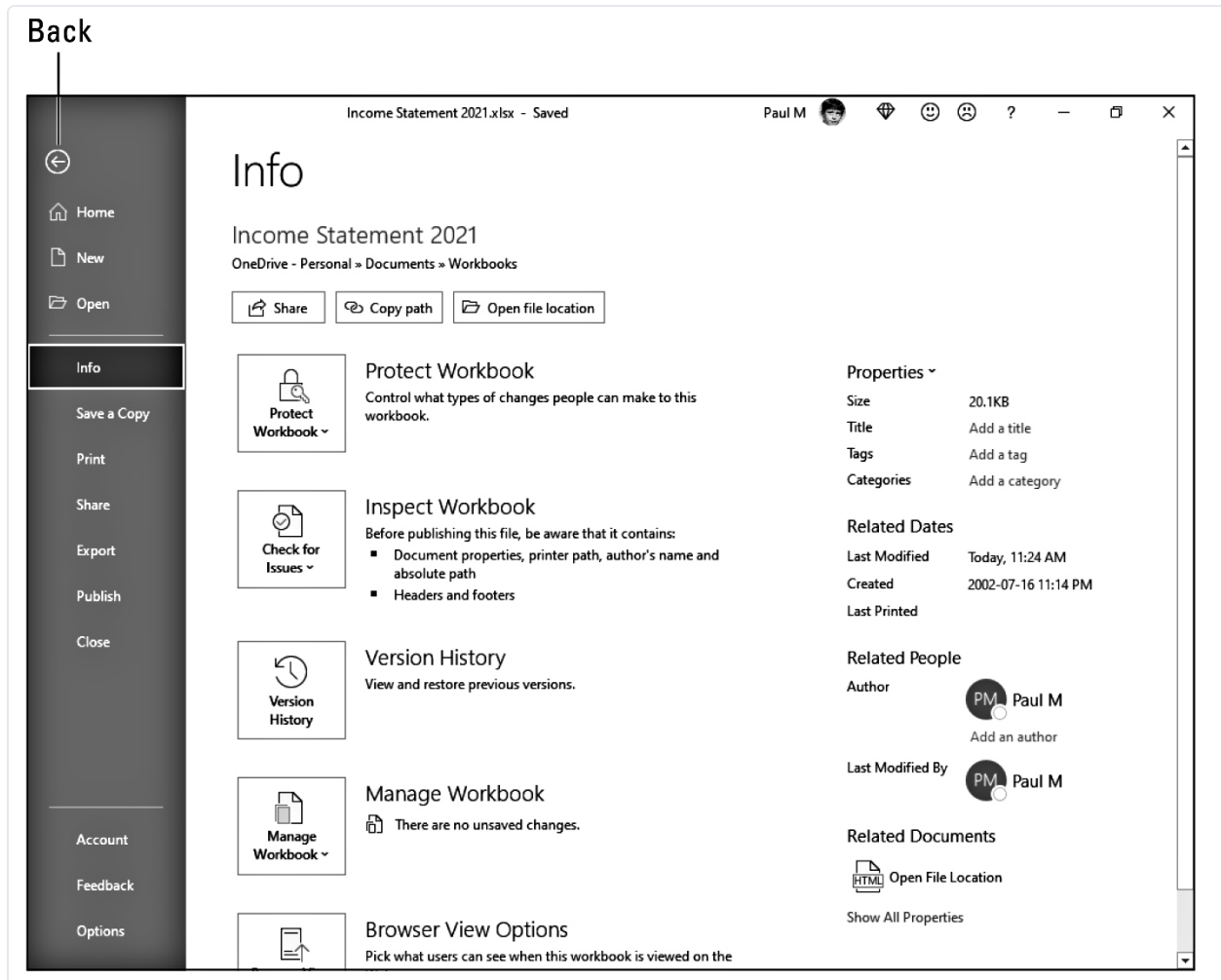
Tip

After you click the File menu button to switch to the Backstage view, you can then click the Back button (with the left-pointing arrow; see Figure 1-3) or press the Esc key to return to the normal worksheet view.

Getting the lowdown on the Info screen

When you choose File→Info to select the Backstage view's Info command, an Info screen similar to the one shown in Figure 1-3 appears.

FIGURE 1-3: THE EXCEL BACKSTAGE VIEW DISPLAYING THE INFO SCREEN WITH PERMISSIONS, DISTRIBUTION, VERSION COMMANDS, AND MORE.



On the left side of this Info screen, you find the following five command buttons:

- **Protect Workbook:** Encrypt the Excel workbook file with a password, protect its contents, or verify the contents of the file with a digital signature.
- **Inspect Workbook:** Inspect the document for hidden metadata (data about the file) and check the file's accessibility for folks with disabilities and compatibility with earlier versions of Excel.
- **Version History:** View previous versions of the workbook and restore an older version.
- **Manage Workbook:** Recover or delete draft versions saved with Excel's AutoRecover feature.