

FREE SAMPLE

Microsoft Excel Essentials

Core Textbook — Book 1 · Chapter 1: Getting to Know Excel

This free sample is the complete Chapter 1 of the Core Textbook — Book 1 of the Microsoft Excel Essentials Complete Learning System by Dr. Ramzy Baroodi (CFCS Press).

The full book: 12 chapters, 185 pages. The BUILD · CALCULATE · VERIFY · INTERPRET · DECIDE way, with Excel on a Mac notes and supervised AI help in every chapter.

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CHAPTER 1

Getting to Know Excel

Build, edit, organize, and save a basic workbook

Chapter Scenario

The Office of Student Engagement is preparing its fall event calendar. The coordinator, Maya, inherits a hand-written list of five campus events — names, dates, rooms, capacities, and registration rates scribbled in whatever order they were announced. Her director wants one clean workbook she can update weekly, share with the events team, and trust: every event listed once, dates that sort correctly, capacities she can total at a glance, and a backup copy stored safely in case the working file is ever damaged.

Nothing in Maya's task requires a formula yet. It requires something more fundamental: getting information into Excel accurately, arranging it so the software can work with it, correcting it without damaging it, and saving it so it can be found and trusted tomorrow. Those are the skills of this chapter, and every later chapter in this book assumes them. By the end of the chapter you will have built Maya's workbook yourself.

Learning Objectives

After completing this chapter, you will be able to:

1. Identify the Ribbon, worksheet grid, Name Box, Formula Bar, and Status Bar, and state what each is used for. (Section 1.1)
2. Recognize cells, rows, columns, ranges, cell references, and the active cell, and select any of them reliably. (Section 1.1)
3. Enter and revise text, numbers, dates, and percentages, and explain how Excel stores each type. (Section 1.2)
4. Use the Fill Handle to copy a value and to continue a series, and verify which behavior Excel applied. (Section 1.3)
5. Cut, copy, paste, move, find, and replace worksheet data without damaging entries you did not intend to change. (Section 1.4)
6. Insert and delete rows and columns, and resize them manually or with AutoFit. (Section 1.5)
7. Rename, insert, move, copy, group, and delete worksheets. (Section 1.6)
8. Save a workbook, distinguish Save from Save As, and preserve a separate backup copy. (Section 1.7)

Chapter Roadmap

Section	What you will learn	Workbook practice
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1.1 The Excel Workspace	Grid anatomy; cells, ranges, references; selecting with confidence	Workbook Ch. 1, Skill Drills 1–2
1.2 Entering and Editing Data	Data types and how Excel stores them; editing in place; Undo/Redo	Workbook Ch. 1, Skill Drill 3
1.3 The Fill Handle	Copying values; continuing series; verifying Excel's inference	Workbook Ch. 1, Skill Drill 4
1.4 Moving and Reusing Data	Cut/Copy/Paste; drag-and-drop; Find and Replace safely	Workbook Ch. 1, Skill Drill 5
1.5 Structuring the Worksheet	Insert/delete; clear vs. delete; AutoFit and manual sizing	Workbook Ch. 1, Guided Project
1.6 Managing Worksheets	Sheet tabs; grouping and its risks	Workbook Ch. 1, Guided Project
1.7 Saving and Backups	Save vs. Save As; .xlsx vs. .csv; backup discipline	Workbook Ch. 1, Independent Project

1.1 The Excel Workspace

When Excel opens a blank workbook, nearly all of your work takes place in the worksheet grid: a framework of columns identified by letters (A, B, C, ...) and rows identified by numbers (1, 2, 3, ...). The intersection of one column and one row is a cell — the smallest unit of a worksheet and the place where every value, label, and formula lives. A cell is named by its cell reference, the combination of its column letter and row number, so the cell where column B meets row 4 is B4.

The cell you have selected is the active cell, outlined with a heavier border. Two parts of the window always report on it. The Name Box, at the left of the Formula Bar, shows the active cell's reference — and, as you will see shortly, can also be used to jump to a cell or select a range. The Formula Bar shows the active cell's actual contents, which are not always what the cell displays; that distinction becomes critical when formulas arrive in Chapter 3. Commands are organized on the Ribbon across the top of the window, grouped into tabs such as Home, Insert, and Data. At the bottom, the Status Bar reports on the current selection and can display running summaries such as Average, Count, and Sum for selected numbers — a quiet verification tool you will use throughout this book.

[Figure 1.1 — Anatomy of the Excel Workspace. Production note: place existing Figure 1.1 artwork here.]

Interface element	What it does	Why it matters to you
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Ribbon	Organizes commands into tabs and groups	Where every command in this book is found
Worksheet grid	The cells where data is entered and edited	Your working surface; structure here decides everything later
Name Box	Shows the active-cell reference; selects cells/ranges by name	Fastest way to select an exact range such as B2:E6
Formula Bar	Displays and edits the active cell's true contents	Where you verify what a cell really contains
Status Bar	Selection information; optional Average/Count/Sum	Instant spot-checks without writing a formula
Sheet tabs	Identify and navigate worksheets	How multi-sheet workbooks stay organized

Table 1.1 — The parts of the Excel window you will use in every chapter.

A range is a group of cells treated as a unit. An adjacent range is a rectangle, written with a colon between its corner references — B2:E6 means every cell from B2 through E6. A nonadjacent selection gathers cells that do not touch, built by holding Ctrl (Windows) or Command (Mac) while selecting. Ranges are how Excel thinks: nearly every command in this book, from formatting to functions, is applied to a selected range, so selecting accurately is not a preliminary skill — it is the skill underneath all the others.

CHECK YOURSELF. Select any single cell and read its reference in the Name Box. Then click the Name Box, type B2:E6, and press Enter. Excel selects the whole rectangle — proof that a reference is an instruction, not just a label.

1.2 Entering and Editing Data

A useful worksheet begins with accurate data. Excel recognizes several kinds of entry, and it treats each differently. Text (labels such as event names) is stored exactly as typed and aligns left by default. Numbers are stored as quantities and align right; only numbers can be calculated. Dates and times are stored as numbers underneath — a date is a count of days — which is why dates can be sorted, filtered, and later subtracted from one another. Percentages are decimals in disguise: 75% is stored as 0.75 and merely displayed with a percent sign. When you enter data, press Enter to commit the entry and move down, or Tab to commit and move right. Table 1.2 summarizes the four types you will use in this chapter.

Data type	Example entry	What Excel stores	Default alignment
Text	Career Panel	The characters exactly as typed	Left
Number	120	The quantity 120	Right
Date	9/18/2026	A day-count number, displayed as a date	Right
Percentage	75%	The decimal 0.75, displayed as 75%	Right

Table 1.2 — The four basic data types. Display and storage are not the same thing — a theme of this book.

PRACTICAL RULE. Enter one kind of information in each column: event names in one column, dates in another, attendance in another, rates in another. Mixed columns defeat sorting, filtering, and every calculation that follows.

Maya's event list, entered with one kind of information per column, looks like Table 1.3. Notice that the Registration Rate column holds true percentages and the Date column holds true dates — if either had been typed as text ("75 percent", "Sept 18"), Excel could display it but could never sort or compute with it reliably.

Event	Date	Expected Attendance	Registration Rate
Career Panel	9/18/2026	80	75%
Business Club Fair	9/25/2026	120	60%
Excel Workshop	10/2/2026	36	90%

Table 1.3 — The starting event list (Guided Practice 2 builds this table).

Editing is where accuracy is defended. To replace an entry entirely, select the cell and type the correct value. To change part of an entry, double-click the cell and edit within it, or select the cell and edit in the Formula Bar. Pressing Delete clears a cell's contents while leaving the cell — and the worksheet's structure — in place. Undo (Ctrl+Z / Command+Z) reverses your most recent actions and Redo restores them; used deliberately, they make experimentation safe. A habit worth forming now: after any edit, glance at the Formula Bar to confirm the cell contains what you intended, not merely something that looks similar.

DO NOT CONFUSE THESE ACTIONS. Clearing a cell removes its contents. Deleting a row or column removes structure and shifts everything that follows. Section 1.5 returns to this distinction — confusing the two is the most common beginner accident in Excel.

1.3 Copy Values and Continue a Series with the Fill Handle

The Fill Handle is the small square at the lower-right corner of the active cell or selected range. Dragging it extends the selection's content into neighboring cells, and what Excel does with the drag depends on what you gave it. A single ordinary value — the word Pending, or the number 7 — is simply copied into every cell you drag across. Two numeric starting values, however, establish a pattern: enter 1 and 2, select both, and drag, and Excel continues 3, 4, 5, inferring the step from your two examples. Recognized text patterns behave the same way — January continues to February, March — because Excel keeps built-in lists of months and weekdays. After a drag, the Auto Fill Options button lets you switch between copying the cells and continuing the series if Excel guessed the other way.

What you select	Example	Dragging the Fill Handle...
Single text value	Pending	Copies Pending into each cell
Single number	7	Copies 7 into each cell
Two numbers	1, 2	Continues the pattern: 3, 4, 5, ...
Recognized list item	January	Continues: February, March, ...
Two dates	9/18/2026, 9/25/2026	Continues weekly: 10/2/2026, ...

Table 1.4 — Fill Handle behavior depends on the starting selection.

The professional habit here is verification, not trust. Excel's inference is usually right, but it is an inference: it cannot know whether 1 and 2 meant "count upward" or were simply the first two room numbers on your list. Always look at the final filled cell before you move on. Figure 1.2 contrasts the two outcomes.

[Figure 1.2 — Fill Handle: Copy or Continue a Pattern. Production note: place existing Figure 1.2 artwork here.]

1.4 Select, Move, and Reuse Data

Once data exists, you will constantly reuse it. Copy preserves the original and places a duplicate elsewhere; Cut marks the original to be moved when you paste. You can also move a selected range by dragging its border to a new location — quick for short distances. Table 1.5 collects the editing shortcuts used in this chapter for both platforms;

you will use them thousands of times, so they are worth learning now rather than eventually.

Command	Windows	Mac	Result
Copy	Ctrl+C	Command+C	Duplicates the selection to the Clipboard
Cut	Ctrl+X	Command+X	Marks the selection to be moved
Paste	Ctrl+V	Command+V	Places copied or cut content
Undo	Ctrl+Z	Command+Z	Reverses the most recent action
Redo	Ctrl+Y	Command+Y	Restores an action that was undone
Save	Ctrl+S	Command+S	Saves the current workbook

Table 1.5 — Core editing shortcuts, Windows and Mac.

Find and Replace are the power tools of this family — and the dangerous ones. Find locates matching content so you can inspect it; Replace substitutes new content for old. The risk lives in Replace All: every matching entry in the searched scope changes at once, including entries you never looked at. If Maya replaces "Fair" with "Expo" across the whole workbook, the Business Club Fair becomes the Business Club Expo — intended — but so does every other cell containing those letters. The safe routine is: Find first, review the matches, then replace, and keep Undo in mind until you have verified the result.

1.5 Insert, Delete, and Resize Rows and Columns

Worksheets grow. Maya's list needs an Event ID column in front of the event names and a title row above the headings — structural changes, made by inserting entire rows and columns. Deleting is the mirror operation, and it is where the distinction from Section 1.2 becomes urgent. Clearing (Delete key) empties cells but leaves the grid untouched; deleting rows or columns removes them and pulls everything below or to the right into the vacated space. Deleting the wrong column does not leave a blank — it leaves different data where your data used to be, which is far harder to notice. Confirm what you intend before you confirm the command.

Action	What happens	Use it when...
Clear contents (Delete)	Cells empty; grid unchanged	Entries are wrong but the

		structure is right
Delete rows/columns	Structure removed; remaining data shifts	A row/column itself should no longer exist
Insert rows/columns	Blank structure added; data shifts aside	New information needs its own row or column

Table 1.6 — Clear, delete, insert: three different operations that beginners often merge into one.

Readability is adjusted with column width and row height. Drag a column's right boundary for manual control, or double-click the boundary to AutoFit — Excel sizes the column to its longest visible entry. AutoFit is the right default for data columns; a manual height is often better for a title row, where you want deliberate visual presence. Figure 1.3 shows the before and after.

[Figure 1.3 — AutoFit: Make the Data Fit the Column. Production note: place existing Figure 1.3 artwork here.]

1.6 Manage Worksheets

A workbook is a container of worksheets, identified by the sheet tabs along the bottom. Maya's finished file will hold an Event Plan sheet, a Contacts sheet, and a backup copy of the plan — three tabs, each with a clear name. Worksheets can be renamed (double-click the tab), inserted, moved by dragging, copied, given a tab color, and deleted. Clear names and a sensible tab order are not cosmetics: in a workbook someone else must use at 8 a.m. under deadline, they are the difference between navigation and archaeology.

CAUTION — GROUPED WORKSHEETS. Selecting several sheet tabs at once groups them, and an edit made on one grouped sheet is repeated at the same location on every sheet in the group. Grouping is genuinely useful for stamping identical headings across sheets — and genuinely dangerous when forgotten, because you can overwrite data on sheets you cannot see. Group deliberately, ungroup immediately (click any unselected tab), and never enter data while the title bar shows a grouped selection.

1.7 Save and Preserve a Backup

Saving is the chapter's least glamorous skill and its most consequential. Save (Ctrl+S / Command+S) updates the current file in place. Save As — labeled Save a Copy in some versions and storage locations — writes the workbook to a new name or location, leaving the original untouched. The file type matters just as much. An .xlsx file preserves everything a workbook can hold: multiple worksheets, formatting, formulas, charts. A .csv file is plain delimited text — one table of values, nothing else — which makes it the right

format for exchanging raw data (Chapter 12 builds on this) and the wrong format for storing a workbook you care about.

Choice	Effect	Right use
Save	Updates the current file	Routine work on the file you mean to keep
Save As / Save a Copy	Creates a new file; original unchanged	New version, new name, or a backup
.xlsx	Preserves sheets, formats, formulas	Your working and finished workbooks
.csv	Values only, as delimited text	Handing raw data to another program or chapter

Table 1.7 — Saving choices and what each one preserves.

Finally, the backup discipline this book will repeat until it is reflex: a backup sheet inside the same file protects you against a bad edit, but not against a damaged or deleted file. A separate backup file — Maya's Chapter1_CampusEvents_Backup.xlsx, in a separate approved location — protects against both. Save the original, save the backup, and reopen the original once to prove the save worked. Two minutes of discipline, once, is cheaper than rebuilding a workbook the night before it is due.

Excel for Mac

EXCEL FOR MAC. Core workbook actions in this chapter are the same on Mac. Where Windows uses Ctrl, Mac generally uses Command (⌘) — Command+S to save, Command+C/V/X to copy, paste, and cut, Command held down to build nonadjacent selections. Menu placement for a few commands differs slightly by build; the required outcome, not the exact path, is what matters.

AI + Excel: Ask, Test, Verify

AI + EXCEL. Ask: "I am organizing a de-identified campus event workbook with columns for Event ID, Date, Event, Capacity, and Status. Suggest a clear worksheet structure and an editing checklist using basic navigation, entry, and worksheet management." Test: compare the suggestion against Sections 1.1–1.7 — accept what matches, reject what invents features or skips the backup step. Verify: build the structure in Excel yourself and confirm each checklist item against your real workbook. Document one limitation of the AI's answer. AI proposes; Excel verifies — and never paste confidential or personally identifiable data into a public AI tool.

Guided Practice

Guided Practice 1: Navigate and Select

9. Open a blank workbook and select C4; confirm C4 in the Name Box.
10. Use the Name Box to select B2:E6.
11. Create one adjacent and one nonadjacent selection.
12. Select an entire row, an entire column, and the full worksheet.

Guided Practice 2: Edit and Fill the Event List

13. Enter the event dataset from Table 1.3, beginning in A1.
14. Change Career Panel attendance to 85 and rename Business Club Fair to Student Organization Fair.
15. In a blank area, use the Fill Handle to continue a month or numeric series.
16. Enter Pending once and verify that dragging the Fill Handle copies the ordinary text value.

Guided Practice 3: Organize and Save

17. Insert an Event ID column and a title row.
18. AutoFit the data columns and adjust the title-row height.
19. Rename the worksheet Event Plan; add a Contacts sheet; create an Event Plan Backup sheet.
20. Save Chapter1_CampusEvents.xlsx and a separate Chapter1_CampusEvents_Backup.xlsx.

Independent Practice: Campus Event Planning Workbook

Work independently, using only Chapter 1 skills — no formulas and no font, border, or fill formatting yet; those arrive in later chapters. Build the workbook for the Office of Student Engagement from the starting data in Table 1.8.

Event	Date	Location	Capacity	Registration Rate
New Student Mixer	9/10/2026	Student Center	150	72%
Internship Prep Session	9/17/2026	Business Building	60	85%
Community Service Day	9/24/2026	Campus Green	200	64%
Leadership Workshop	10/1/2026	Conference Room A	40	95%
Faculty-Student	10/8/2026	Auditorium	120	78%

Forum				
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Table 1.8 — Independent Practice starting data.

21. Enter the starting data in a new worksheet and rename the sheet Event Schedule.
22. Insert a column to the left of Event labeled Event ID; enter E-101 and E-102, then use the Fill Handle to continue through E-105.
23. Insert a row above the headings and enter Fall 2026 Campus Events.
24. Edit Internship Prep Session so it reads Internship Preparation Session.
25. Replace Conference Room A with Seminar Room A (Find first; verify the match before replacing).
26. Copy the Event and Location columns to a blank area, move the copy elsewhere, then clear the temporary copy without damaging the original list.
27. Add a worksheet named Event Contacts with headings Event, Contact Name, Status; copy in the five event names and Fill Handle Pending beside each.
28. Copy Event Schedule as Schedule Backup at the end of the workbook; color the Event Schedule tab blue and Schedule Backup gold.
29. AutoFit all data columns; increase the title-row height; use the Name Box to select A1:F7.
30. Save as LastName_FirstName_Chapter1.xlsx, then create LastName_FirstName_Chapter1_Backup.xlsx in a separate approved location. Close and reopen the original to verify the save.

Completion check: Event Schedule, Event Contacts, and Schedule Backup present; five events accurate; Event IDs run E-101–E-105; the edit and the replacement are correct; temporary copies cleared; tabs named, ordered, and colored as specified; the original reopens successfully.

Chapter Summary

Excel work stands or falls on what happens before the first calculation. In this chapter you learned the anatomy of the workbook — grid, cells, ranges, and references — and how the Name Box, Formula Bar, and Status Bar report on your work. You entered the four basic data types and saw that what Excel stores is not always what it displays; you edited safely, used the Fill Handle while verifying its inferences, and moved data with Copy, Cut, Find, and Replace. You reshaped the worksheet itself with inserts, deletes, and AutoFit, organized multiple worksheets without falling into the grouping trap, and finished with the save-and-backup discipline that protects everything else in this book.

- The Ribbon holds commands; the grid holds cells; the Formula Bar shows what a cell truly contains.
- One kind of information per column — structure is what makes later analysis possible.

- Verify Excel's inferences (Fill Handle, Replace All) instead of trusting them.
- Clearing removes contents; deleting removes structure. Know which one you mean.
- Save updates a file; Save As preserves a separate copy. Keep both.

Key Terms

Term	Definition
Active cell	The currently selected cell; its contents appear in the Formula Bar.
Cell	The intersection of one column and one row; the smallest unit of a worksheet.
Cell reference	A cell's address: column letter + row number (e.g., B4).
Column / Row	Vertical / horizontal divisions of the grid, labeled by letters / numbers.
Fill Handle	The square at the active cell's lower-right corner; dragging copies values or continues series.
Formula Bar	The bar displaying (and allowing editing of) the active cell's true contents.
Grouped worksheets	Multiple sheet tabs selected at once; edits repeat on every grouped sheet.
Name Box	Shows the active-cell reference; also selects cells and ranges typed into it.
Range	A group of cells treated as a unit; adjacent ranges are written A1:D8.
Ribbon	The tabbed command bar across the top of the Excel window.
Status Bar	The bottom bar reporting selection information and optional quick summaries.
Workbook / Worksheet	The Excel file / one grid (sheet) inside it, identified by a sheet tab.

Review Questions

31. In your own words, what is the difference between what a cell displays and what it contains? Which window element shows the truth?

32. Why does this book insist on one kind of information per column? Name two later operations that fail or mislead when columns are mixed.
33. You type 75% into a cell. What value does Excel actually store, and why does the distinction matter?
34. Describe the two different results the Fill Handle can produce and how you control — and verify — which one you get.
35. A classmate deletes a column when they meant to clear it. What happens to the data to the right, and why is the mistake hard to spot?
36. When is Replace All safe to use? Describe the routine this chapter recommends before confirming any replacement.
37. What is the risk of entering data while worksheets are grouped, and how do you know grouping is active?
38. Save and Save As produce the same file on disk in the end — so why does the distinction matter? Give a scenario for each.
39. Why is a backup sheet inside the same file not a complete backup strategy?
40. Maya's director asks for the events sorted by date. Which property of the Date column, established in this chapter, makes that possible? (Sorting itself arrives in Chapter 4.)

Chapter Skills Check

Skill	I can do this	Needs practice
Identify the major parts of the Excel workspace	☐	☐
Select cells, ranges, rows, columns, and entire worksheets	☐	☐
Enter and edit text, numbers, dates, and percentages	☐	☐
Use the Fill Handle and verify its results	☐	☐
Copy, cut, paste, move, find, and replace data safely	☐	☐
Insert, delete, resize, and AutoFit rows and columns	☐	☐
Manage, group, and ungroup worksheet tabs	☐	☐
Save an original workbook and a separate backup copy	☐	☐

IN THE WORKBOOK. Student Workbook & Project Manual, Chapter 1, applies every skill in this chapter: knowledge check, five skill drills, the Guided and Independent Projects, an AI and Excel activity, and the chapter's Excel Under Pressure decision challenge. Complete the Independent Project above before moving to Chapter 2.

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