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Digital Skills · Book 2

# Excel for Beginners

From your first cell to tidy tables, formulas, charts and a simple budget

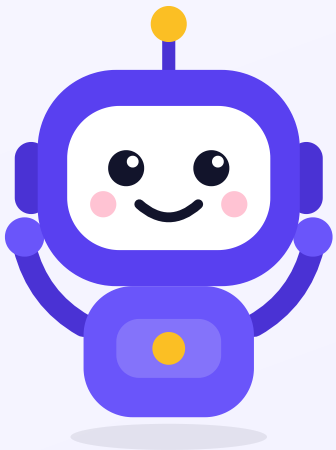
Total beginner · ages 13 and up

About 85 minutes

10 chapters with quizzes

Free

A spreadsheet is just a smart grid. Type your numbers once — and let it do the math for you!



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# Excel for Beginners

From your first cell to tidy tables, formulas, charts and a simple budget
Digital Skills, Book 2 · First edition, November 2026

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# What you will learn

- What a spreadsheet is and what Excel can do for school, work, home and small business
- Free and paid ways to get Excel — and which one you need
- How to make a tidy table that formulas, sorting and charts can understand
- Your first formulas: adding, multiplying, SUM, AVERAGE, MIN and MAX
- Smart formulas: IF, COUNTIF, SUMIF and XLOOKUP
- How to sort, filter, make charts, print, share and use AI safely

This is **Book 2** of the **Digital Skills** series. You don't need to be good at math. If you can use a calculator and type a number, you can follow this book. Excel does the hard math — you tell it what to do.

**Our honest promise**

Excel has thousands of features. You don't need most of them. This book teaches the **20% of Excel that does 80% of everyday work**. Excel also changes often and comes in different versions, so a button may look a little different on your screen. Look for the same idea.

**Age rule**

This series is for ages 13 and up. A Microsoft account needs a parent's or guardian's permission if you are under the age Microsoft sets for your country. Many students use Excel through a **school account** their school manages.

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## What you need

| Item | Why |
|---|---|
| A laptop or computer (best) | A bigger screen and a keyboard make spreadsheets much easier |
| A free Microsoft account (or a school account) | To use Excel for the web and save files to OneDrive |
| Internet | Excel for the web works in your browser |
| Some real numbers | Your budget, sales, grades or attendance — real data teaches faster |
| About 30 minutes a day | Short, regular practice builds the habit |

## How to use this book

**1** **Keep Excel open while you read**

Type every example yourself. Your fingers learn faster than your eyes.

**2** **Copy formulas exactly**

Formulas are shown in boxes like this one. Every symbol matters — including the = sign at the start.

**3** **Do the quiz and the task**

Every chapter ends with key takeaways, 3 quiz questions with answers, and a practice task.

A FORMULA LOOKS LIKE THIS

```
=SUM(B2:B8)
```

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WHAT'S NEXT Your Next Learning Path

EXTRA Free ToolsKo Tools for This Book

EXTRA Words to Know (Glossary)

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CHAPTER 1

# Why Excel Skills Matter

Almost every office, school and business uses spreadsheets. Learning one well can save you hours every week.

Think of all the lists in your life: expenses, store sales, class grades, attendance, inventory, savings. On paper, you add them up with a calculator — and start again when one number changes. In a spreadsheet, you type the numbers once, and the totals update by themselves.

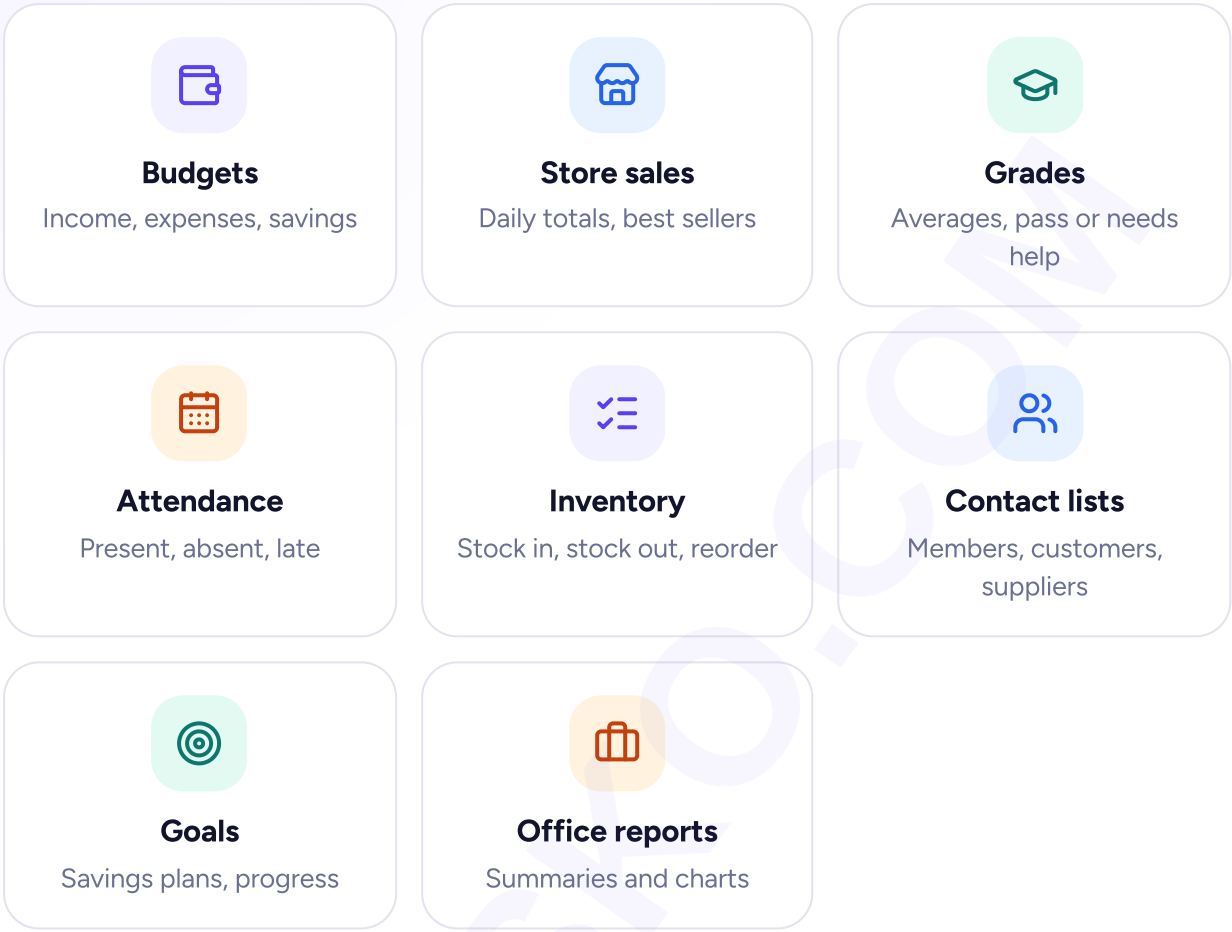
**New word: spreadsheet**

A **spreadsheet** is a grid of boxes for numbers and words — like a notebook with lines going both down and across. **Excel** is Microsoft's spreadsheet app. Each box can hold a number, a word, or a **formula** that calculates something for you.

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PICTURE 1 **What people use Excel for**




If you can write it as a list, Excel can probably sort it, add it up or chart it.

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# Myth vs truth

PICTURE 2 **Excel myths vs truths**

**MYTH**

**What people fear**

- "I'm bad at math."
- "Excel is only for accountants."
- "I must learn every feature."
- "One mistake breaks everything."

**TRUTH**

**What's really true**

- Excel does the math for you
- Students, shops and families use it
- A few skills cover most work
- Undo and saved versions protect you

You don't need to be a math person. You need to know how to ask Excel to do the math.

**The big idea of this book**

**Tidy table first, formulas second.** Most Excel problems are not formula problems — they are messy-table problems. When your table is tidy, formulas, sorting, filters and charts just work.

## A real-world example

Aling Nena writes her sari-sari store sales in a notebook every night and adds them with a calculator. It takes 20 minutes, and sometimes the total is wrong. Her daughter set up a simple Excel table: date, item, quantity, price. A formula multiplies quantity by price, and another adds the whole day. Now the total appears as soon as the last sale is typed.

**QUICK RECAP**

A spreadsheet is a grid of boxes for numbers, words and formulas. Excel can total, sort and chart your lists. You don't need to be good at math. Big idea: tidy table first, formulas second.

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TRY IT NOW

### Find your first list

1. Think of one list you keep (expenses, sales, grades, attendance).
2. Write its columns on paper (for example: Date, Item, Amount).
3. Circle the number you always need to add up.

## Key takeaways

- A spreadsheet is a smart grid.
- Type numbers once; formulas update the totals.
- Excel is for everyone, not just accountants.
- Big idea: tidy table first, formulas second.

## Quiz: 3 quick questions

**1. What is a spreadsheet?**

A. A grid of boxes for numbers, words and formulas
B. A kind of bed sheet
C. A photo editor

**2. Do you need to be good at math to use Excel?**

A. Yes, very good
B. No — Excel does the math; you tell it what to do
C. Only for printing

**3. What is the big idea of this book?**

A. Formulas first
B. Tidy table first, formulas second
C. Colors first

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**Answers**

1. **A. A grid of boxes for numbers, words and formulas** — Rows and columns of boxes that can calculate.
2. **B. No — Excel does the math; you tell it what to do** — Formulas do the calculating.
3. **B. Tidy table first, formulas second** — A tidy table makes everything else work.

PRACTICE TASK

### Your spreadsheet wish list

Write 3 lists you would like to turn into spreadsheets. For each one, write the columns you need and the one answer you want Excel to give you (for example, “total spent this month”).

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CHAPTER 2

# Beginner Basics: Getting Excel and Knowing the Screen

Let's find the right way to get Excel for you, then learn the names of everything on the screen.

## Ways to get Excel

| Option | Cost | Good for |
|---|---|---|
| Excel for the web (free Microsoft account) | Free | Learning, budgets, school and most everyday work — in your browser, with 5 GB of OneDrive storage |
| Excel mobile app | Free editing on phones and tablets up to 10.1 inches | Quick checks and small edits on the go |
| Office 365 Education (school email) | Free for eligible students and teachers | Students whose school gives them a school email |
| Microsoft 365 Personal | ₱489/month or ₱4,899/year (Philippines) | The full desktop app, offline use, 1 TB storage and Copilot |
| One-time Office purchase | One payment for one computer | People who don't want a subscription (fewer new features) |

Prices from microsoft.com (Philippines), checked November 21, 2026. Subscriptions renew automatically unless you cancel.

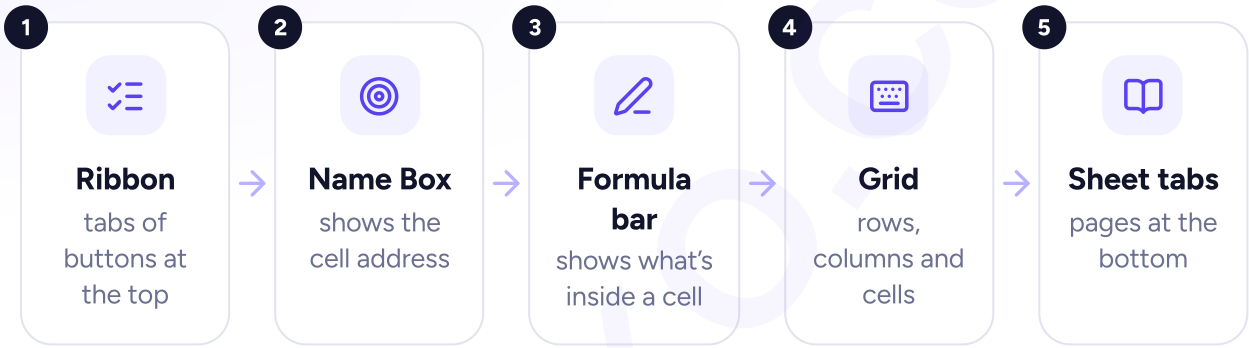
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**Start free**

Everything in Chapters 3 to 7 works in **free Excel for the web**. Sign in at office.com with a free Microsoft account and choose a **blank workbook**. Upgrade only when you need something the free version doesn't have.

## The parts of the screen

PICTURE 3 **Five parts of the Excel screen**




Click any cell. The Name Box tells you where you are; the formula bar tells you what's really inside.

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## Words you will use

| Word | What it means | Example |
|---|---|---|
| Workbook | The whole Excel file | Budget 2026.xlsx |
| Worksheet (sheet) | One page inside the workbook | A sheet for January, one for February |
| Column | A line of cells going down, named by letters | Column B |
| Row | A line of cells going across, named by numbers | Row 5 |
| Cell | One box where a column and row meet | Cell B5 |
| Range | A group of cells | B2:B8 means B2 down to B8 |
| Formula | A calculation that starts with = | =B2*C2 |
| Function | A ready-made formula with a name | SUM, AVERAGE, IF |

**New word: cell address**

Every cell has an address, like a seat in a cinema: **column letter + row number**. B5 is column B, row 5. Formulas use these addresses to find numbers — like telling someone “the snacks are in seat B5”.

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# Moving around

| Keys | What it does |
|---|---|
| Enter | Save what you typed and move down |
| Tab | Save and move right |
| Arrow keys | Move one cell at a time |
| Ctrl + Z | Undo |
| Ctrl + Home | Jump to cell A1 |
| F2 (or double-click) | Edit what's inside a cell |
| Esc | Cancel what you are typing |

**QUICK RECAP**

Start with free Excel for the web. A workbook has sheets; sheets have columns (letters), rows (numbers) and cells (like B5). Formulas start with =. Enter moves down, Tab moves right, Ctrl + Z undoes.

**TRY IT NOW**

## Open and explore

1. Open a blank workbook in Excel for the web.
2. Click cell C4 and check the Name Box says C4.
3. Type your name in A1, press Enter, then rename the sheet tab to "Practice".

## Key takeaways

- Free Excel for the web is enough to learn.
- Workbook → sheets → cells.
- A cell address is column letter + row number.

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Formulas always start with =.

## Quiz: 3 quick questions

**1. What is cell D7?**

A Column D, row 7

B Row D, column 7

C Sheet 7

**2. What does B2:B8 mean?**

A Cells B2 down to B8

B Only B2 and B8

C B2 times B8

**3. Which option is free?**

A Excel for the web with a free Microsoft account

B Microsoft 365 Personal

C None

**Answers**

1. **A. Column D, row 7** — Letter for the column, number for the row.
2. **A. Cells B2 down to B8** — The colon means “through”.
3. **A. Excel for the web with a free Microsoft account** — Excel for the web is free with a Microsoft account.

PRACTICE TASK

### Your first workbook

Make a workbook named “My Practice”. Add three sheets: Budget, Sales and Grades. In each, type 3 column headings in row 1. You will fill them in the next chapters.

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CHAPTER 3 · LESSON 1

# Type, Fill and Tidy: Make a Table Excel Understands

A tidy table is the secret behind every good spreadsheet. Let's learn to type data quickly and keep it clean.

PICTURE 4 **The tidy-table recipe: H-R-C-N**

**H**

**Header row**

One row of clear names on top: Date, Item, Qty, Price

**R**

**Record per row**

Each row is one sale, one student or one expense

**C**

**Column = one kind**

Only dates in Date; only numbers in Price

**N**

**No blanks or merges**

No empty rows in the middle; no merged cells

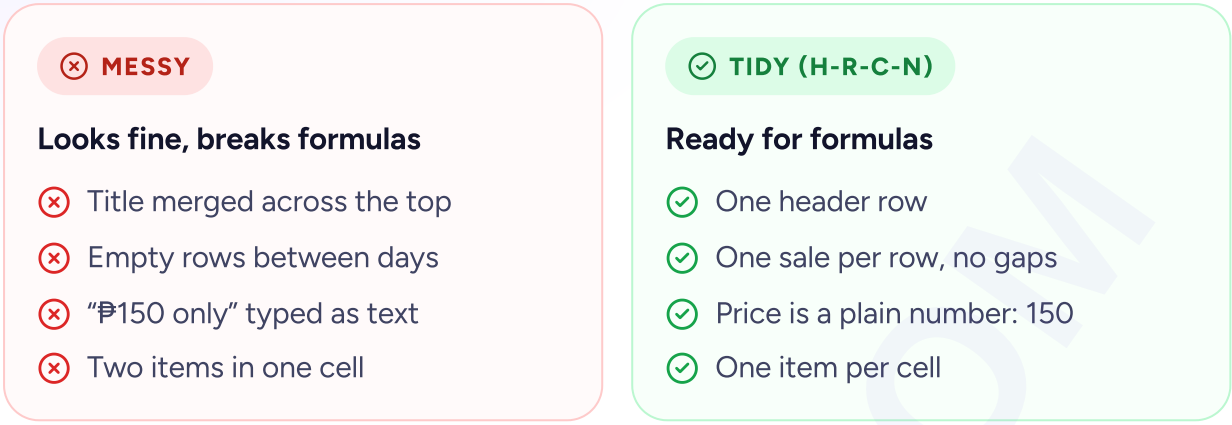
PUT TOGETHER, YOU TYPE:

A table that formulas, sorting, filters and charts all understand.

Check these four things before you write a single formula.

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PICTURE 5 **Messy vs tidy**




Excel can only add numbers it recognizes as numbers. Text like "₱150 only" is invisible to SUM.

## Typing fast

1. **Type across with Tab**
   Type a value, press Tab to go right. At the end of the row, press Enter to jump to the start of the next row.

2. **Use the fill handle**
   Select a cell and drag the tiny square at its bottom-right corner. Type 1 and 2, select both, and drag — Excel continues 3, 4, 5. It also continues Mon, Tue… and Jan, Feb…

3. **Double-click to fill down**
   Double-click the fill handle to copy a formula down to the end of your table.

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## Make numbers look right (without changing them)

| Format | Typed | Shows as | Tip |
|---|---|---|---|
| Currency / Accounting | 150 | ₱150.00 | Choose the peso sign (₱) in the number format |
| Date | 11/21/2026 | Nov 21, 2026 | Type dates the way your computer expects (check one) |
| Percentage | 0.12 | 12% | Or type 12% directly |
| Number with commas | 1250000 | 1,250,000 | Easier to read big numbers |

**Formatting is a costume**

Formatting changes how a number **looks**, not what it **is**. The cell still holds 150, even when it shows ₱150.00. So type plain numbers, then format them — never type "₱150 only".

## Small tricks that help every table

- **Column width:** double-click the line between two column letters to fit the text.
- **Wrap text:** for long text, so it stays inside the column.
- **Freeze panes:** View → Freeze Top Row, so headers stay visible while you scroll.
- **Bold header row:** and a light fill color, so people see it's the header.

**Try it now**

On your Sales sheet, type the headers Date, Item, Qty, Price. Add 8 rows of real or made-up sales. Format Price as pesos and freeze the top row.

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QUICK RECAP

Tidy tables follow H-R-C-N: header row, one record per row, one kind per column, no blanks or merged cells. Type with Tab and Enter, fill series with the fill handle, and format numbers instead of typing symbols.

TRY IT NOW

### Build a tidy sales table

1. Type headers: Date, Item, Qty, Price.
2. Add 8 sales, one per row, no empty rows.
3. Format Price as pesos; freeze the top row.

## Key takeaways

- H-R-C-N makes tables formula-ready.
- Tab moves right, Enter moves down.
- The fill handle continues series and copies formulas.
- Format numbers; don't type "₱" or words into number cells.

## Quiz: 3 quick questions

**1. Which value can SUM add?**

A 150
B "₱150 only"
C "one fifty"

**2. What does H-R-C-N stand for?**

A Header row, Record per row, Column = one kind, No blanks or merges
B Hide, Remove, Copy, New
C Home, Row, Cell, Name

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**3. How do you keep the header visible when scrolling?**

A Freeze the top row

B Make it red

C Merge it

**Answers**

1. **A. 150** — Only real numbers count. Format them to show pesos.
2. **A. Header row, Record per row, Column = one kind, No blanks or merges** — The four tidy-table rules.
3. **A. Freeze the top row** — View → Freeze Top Row.

PRACTICE TASK

### Tidy a messy list

Take a real list from a notebook or chat (expenses, orders, attendance). Rebuild it as a tidy table using H-R-C-N. Write down every change you made to make it tidy.

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CHAPTER 4 · LESSON 2

# Your First Formulas: Let Excel Do the Math

Formulas are where Excel becomes magic. Start with simple math, then learn the five functions you will use every day.

## Rule 1: every formula starts with =

Type = first, then the math. Use cell addresses instead of numbers, so the answer updates when a number changes.

| Math | Symbol | Example formula |
|---|---|---|
| Add | + | =B2+C2 |
| Subtract | - | =B2-C2 |
| Multiply | * | =B2*C2 |
| Divide | / | =B2/C2 |
| Group first | ( ) | =(B2+C2)*D2 |

## Example: total for each sale

In your Sales sheet, add a header **Total** in E1. In E2, multiply quantity by price:

TYPE IN E2

```
=C2*D2
```

Press Enter, then double-click the fill handle of E2. Excel copies the formula down and **changes the row number for each row**: E3 becomes =C3*D3, E4 becomes =C4*D4. This is called a **relative reference** — the formula moves with its row.

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## The five everyday functions

| Function | What it does | Example |
|---|---|---|
| SUM | Adds a range | =SUM(E2:E9) |
| AVERAGE | Finds the average | =AVERAGE(B2:B31) |
| MIN | Finds the smallest | =MIN(E2:E9) |
| MAX | Finds the biggest | =MAX(E2:E9) |
| COUNT | Counts cells with numbers | =COUNT(E2:E9) |

**AutoSum shortcut**

Click the cell under a column of numbers and press **Alt + =** (Windows). Excel writes the SUM for you and guesses the range. Check the range, then press Enter.

## Locking a cell with $ (absolute reference)

Sometimes every row must use the **same** cell — like a 12% VAT rate typed once in G1. If you copy =E2*G1 down, Excel moves G1 to G2, G3… and the answers break. Add $ signs to lock it:

TYPE IN F2, THEN FILL DOWN

```
=E2*$G$1
```

**New word: absolute reference**

A **$** in front of the column letter and row number "nails" the address in place, like a pin on a map. **$G$1** always means G1, no matter where you copy the formula. Press **F4** after clicking an address to add the $ signs quickly.

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## When Excel shows an error

| You see | What it means | Usual fix |
|---|---|---|
| ##### | The column is too narrow | Make the column wider |
| #DIV/0! | Dividing by zero or an empty cell | Check the number you divide by |
| #NAME? | Excel doesn't know a word in the formula | Check spelling; your version may not have that function |
| #VALUE! | Text where a number should be | Remove words or symbols from number cells |
| #REF! | The formula points to a deleted cell | Undo, or rewrite the formula |
| #N/A | A lookup didn't find a match | Check spelling and extra spaces |

**Errors are messages, not disasters**

Each error tells you what went wrong. Click the cell, read the formula bar, and fix one thing at a time.

QUICK RECAP

Formulas start with =. Use + - * / and parentheses with cell addresses. Fill formulas down with relative references. Use SUM, AVERAGE, MIN, MAX and COUNT. Lock a cell with $ when every row must use it. Error codes tell you what to fix.

TRY IT NOW

### Add totals to your sales

1. Add Total in E1 and type =C2*D2 in E2; fill it down.
2. Under the totals, add SUM, AVERAGE and MAX.
3. Type 12% in G1 and add VAT in column F using =E2*$G$1.

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## Key takeaways

- Start every formula with =.
- Use cell addresses so answers update.
- SUM, AVERAGE, MIN, MAX, COUNT do most daily math.
- $ locks a cell; F4 adds the $ signs.

## Quiz: 3 quick questions

**1. What does =C2*D2 do?**

A Multiplies C2 by D2

B Adds C2 and D2

C Copies C2 into D2

**2. Why use =E2*$G$1 instead of =E2*G1 when filling down?**

A $G$1 stays fixed on the rate cell

B It looks nicer

C It makes the file smaller

**3. You see #DIV/0!. What happened?**

A You divided by zero or an empty cell

B The column is too narrow

C The file is broken

**Answers**

1. **A. Multiplies C2 by D2** — * means multiply.
2. **A. $G$1 stays fixed on the rate cell** — Without $, the address moves to G2, G3… and breaks.
3. **A. You divided by zero or an empty cell** — Check the cell you are dividing by.

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PRACTICE TASK

### A monthly expense total

On your Budget sheet, list 10 expenses with Date, Category and Amount. Add a total with SUM, the biggest expense with MAX, and the average with AVERAGE. Change one amount and watch all three answers update.

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CHAPTER 5 · LESSON 3

# Smart Formulas: IF, COUNTIF, SUMIF and XLOOKUP

These four functions let Excel make decisions, count what matters and look things up for you.

## IF: let Excel decide

IF checks a condition. If it's true, it shows one answer; if not, another. Example: a passing mark of 75.

TYPE IN C2 (GRADE IS IN B2)

```
=IF(B2>=75,"Passed","Needs help")
```

| Symbol | Means |
|---|---|
| > | greater than |
| < | less than |
| >= | greater than or equal to |
| <= | less than or equal to |
| = | equal to |
| <> | not equal to |

**Words go inside quotation marks**

In formulas, text answers like "Passed" need straight double quotes. Numbers and cell addresses don't.

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## COUNTIF and SUMIF: count and add only what matches

HOW MANY STUDENTS PASSED?

```
=COUNTIF(C2:C41,"Passed")
```

HOW MUCH DID WE SPEND ON FOOD?

```
=SUMIF(B2:B50,"Food",C2:C50)
```

SUMIF reads: “Look in B2:B50 for the word Food. Where you find it, add the matching amount in C2:C50.” The two ranges must be the same size.

## XLOOKUP: find a price automatically

Imagine a Prices sheet with Item in column A and Price in column B. On your Sales sheet, you type an item in B2, and Excel finds its price:

TYPE IN D2

```
=XLOOKUP(B2,Prices!A:A,Prices!B:B,"Not found")
```

PICTURE 6 How XLOOKUP thinks




Like asking a store helper: “Find Coke 1.5L in the price list and tell me its price.”

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**Which Excel has XLOOKUP?**

XLOOKUP works in **Microsoft 365, Excel 2021 and newer, and Excel for the web**. It doesn't work in Excel 2016 or 2019 — there it shows **#NAME?**. If you share files with people on older Excel, use **VLOOKUP** instead: =VLOOKUP(B2,Prices!A:B,2,FALSE).

## Two more helpers

| Function | What it does | Example |
|---|---|---|
| ROUND | Rounds to a number of decimals | =ROUND(F2,2) → 2 decimal places |
| TODAY | Shows today's date (updates daily) | =TODAY() |

QUICK RECAP

IF makes a decision. COUNTIF counts matches. SUMIF adds matching amounts. XLOOKUP finds a value from a list (use VLOOKUP for Excel 2016/2019). Text goes in straight double quotes.

TRY IT NOW

### Make Excel decide and look up

1. On Grades, add =IF(B2>=75,"Passed","Needs help") and fill down.
2. Count passers with COUNTIF.
3. Make a Prices sheet and use XLOOKUP to fill prices on Sales.

### Key takeaways

- IF: condition, answer if true, answer if false.
- COUNTIF counts; SUMIF adds what matches.
- XLOOKUP: find, where to look, what to bring back, if missing.
- Older Excel: use VLOOKUP.

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## Quiz: 3 quick questions

**1. What does =IF(B2>=75,"Passed","Needs help") show for a grade of 80?**

A Passed

B Needs help

C 80

**2. Which function adds only the Food expenses?**

A SUMIF

B COUNT

C MAX

**3. Your coworker's Excel 2019 shows #NAME? for XLOOKUP. Best fix?**

A Use VLOOKUP for shared files

B Delete the column

C Type the prices by hand forever

**Answers**

1. **A. Passed** — 80 is greater than or equal to 75.
2. **A. SUMIF** — SUMIF adds amounts where a condition matches.
3. **A. Use VLOOKUP for shared files** — XLOOKUP isn't available in Excel 2016 or 2019.

PRACTICE TASK

### A smart budget

On your Budget sheet, add a Category column (Food, Transport, Bills, Load, Others). Use SUMIF to total each category in a small summary table. Add an IF that shows "Over budget" when a category is above your limit.

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CHAPTER 6 · LESSON 4

# Sort, Filter, Highlight and Chart Your Data

Now that your table is tidy and has formulas, let's find answers fast and turn numbers into pictures.

## Turn your list into an Excel Table

Click any cell in your data and choose **Format as Table** (or Insert → Table, or press Ctrl + T). Tick "My table has headers". You get stripes, filter buttons on every header, and formulas that fill down by themselves when you add new rows.

## Sort and filter

1. **Sort**
   Click the arrow on a header and choose Sort A to Z (or smallest to largest). The whole row moves together — that's why tidy tables matter.

2. **Filter**
   Click the arrow and untick what you don't want to see. Only matching rows stay visible; the others are hidden, not deleted.

3. **Clear the filter**
   Click the arrow again and choose Clear Filter, so nobody thinks rows are missing.

⚠ **Never sort just one column**

If you select only one column and sort it, the names and numbers get mixed up. Click inside the table (or select the whole table) before sorting.

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## Conditional formatting: let colors warn you

**Home → Conditional Formatting** colors cells that match a rule. Examples: stock below 5 turns red, grades below 75 turn orange, the top 3 sellers turn green. Use one or two rules only — too many colors confuse people.

## Make a chart

| Chart | Best for | Example |
|---|---|---|
| Column or bar | Comparing amounts | Sales per item |
| Line | Change over time | Savings each month |
| Pie | Parts of one whole (few parts) | Budget by 4 categories |

1. **Select the data**
   Select the labels and numbers together (for example, Category and Total).

2. **Insert the chart**
   Insert → choose Column, Line or Pie.

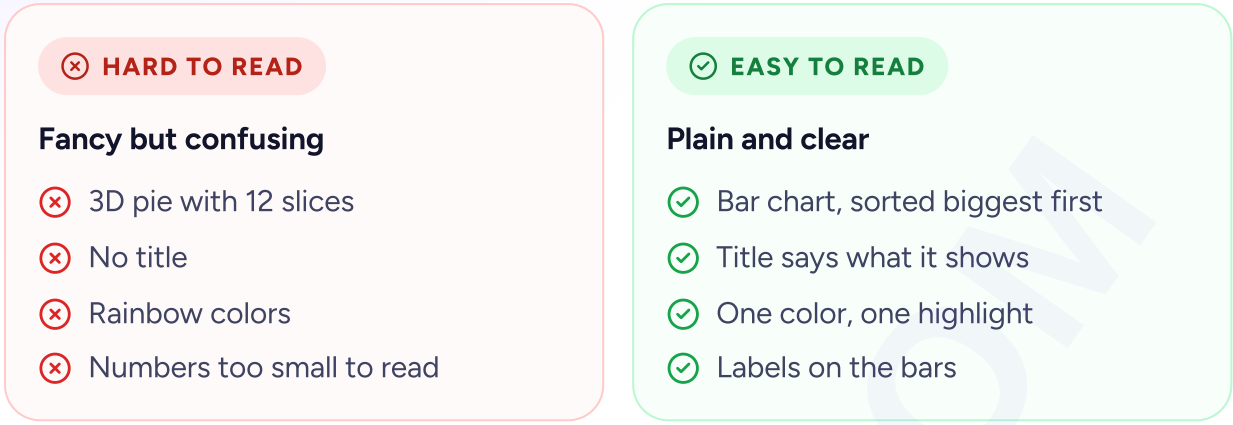
3. **Give it a clear title**
   Say what it shows: “Spending by category, November 2026”.

4. **Remove clutter**
   Delete what doesn’t help: extra lines, 3D effects, legends you don’t need.

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PICTURE 7 **Fancy chart vs clear chart**




A chart should answer one question at a glance. Plain usually wins.

## Peek: PivotTables

A **PivotTable** summarizes a big table in seconds — for example, total sales per item per month — without writing formulas. Click in your table, choose Insert → PivotTable, then drag Item to Rows and Total to Values. Try it once you are comfortable with SUMIF; it does the same job with clicks.

**QUICK RECAP**

Format your list as a Table for filters and auto-filling formulas. Sort the whole table, not one column. Filter to hide, not delete. Use one or two conditional-formatting rules. Choose bar for comparing, line for time, pie for few parts — with a clear title.

**TRY IT NOW**

### Find answers in your sales

1. Format your Sales list as a Table.
2. Sort by Total, biggest first, and filter one item.
3. Make a bar chart of total sales per item with a clear title.

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## Key takeaways

- Tables add filters and auto-filling formulas.
- Sort the whole table, never one column.
- Conditional formatting: one or two rules.
- Pick the chart for the question; keep it plain.

## Quiz: 3 quick questions

**1. What happens to rows you filter out?**

A They are hidden, not deleted

B They are deleted forever

C They move to a new file

**2. Which chart shows savings changing month by month?**

A Line chart

B Pie chart

C No chart

**3. You sorted only the Price column. What went wrong?**

A Prices no longer match their items

B Nothing

C The file got bigger

**Answers**

1. **A. They are hidden, not deleted** — Clear the filter to see them again.
2. **A. Line chart** — Line charts show change over time.
3. **A. Prices no longer match their items** — Always sort the whole table so rows stay together.

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PRACTICE TASK

### A one-glance dashboard

On a new sheet, make a small summary of your budget by category (SUMIF), one bar chart, and a red highlight for any category over your limit. Show it to someone and ask what they learn in 5 seconds.

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CHAPTER 7 · LESSON 5

# Save, Share, Print, Protect — and Use AI Wisely

A great spreadsheet is one people can open, read, print and trust. Here's how to finish your work safely.

## Save and file types

| File type | Use it for | Note |
|---|---|---|
| .xlsx | Normal Excel workbooks | Keeps formulas, sheets and formatting |
| .csv | Moving data between apps | Plain values only: one sheet, no formulas or formatting |
| PDF | Sending a report people shouldn't edit | Looks the same on every device |

**Let OneDrive save for you**

Files saved to OneDrive save automatically (AutoSave) and keep older versions. If something goes wrong, open **Version History** to get back yesterday's file.

## Share and work together

- **Share** with "Can view" for reports and "Can edit" only for people who help you.
- **Comments** let people ask questions on a cell without changing it.
- **Protect Sheet** (Review tab) stops accidental changes to formulas — unlock only the cells people should type in.

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## Print without surprises

1. **Preview first**
   File → Print shows exactly what will come out. Look for columns cut off on a second page.

2. **Fit to one page wide**
   In the print settings, choose to fit all columns on one page.

3. **Landscape for wide tables**
   Turn the page sideways when you have many columns.

4. **Repeat the header row**
   In the desktop app, Page Layout → Print Titles repeats row 1 on every page.

## Protect people's personal data

**Personal information needs care**

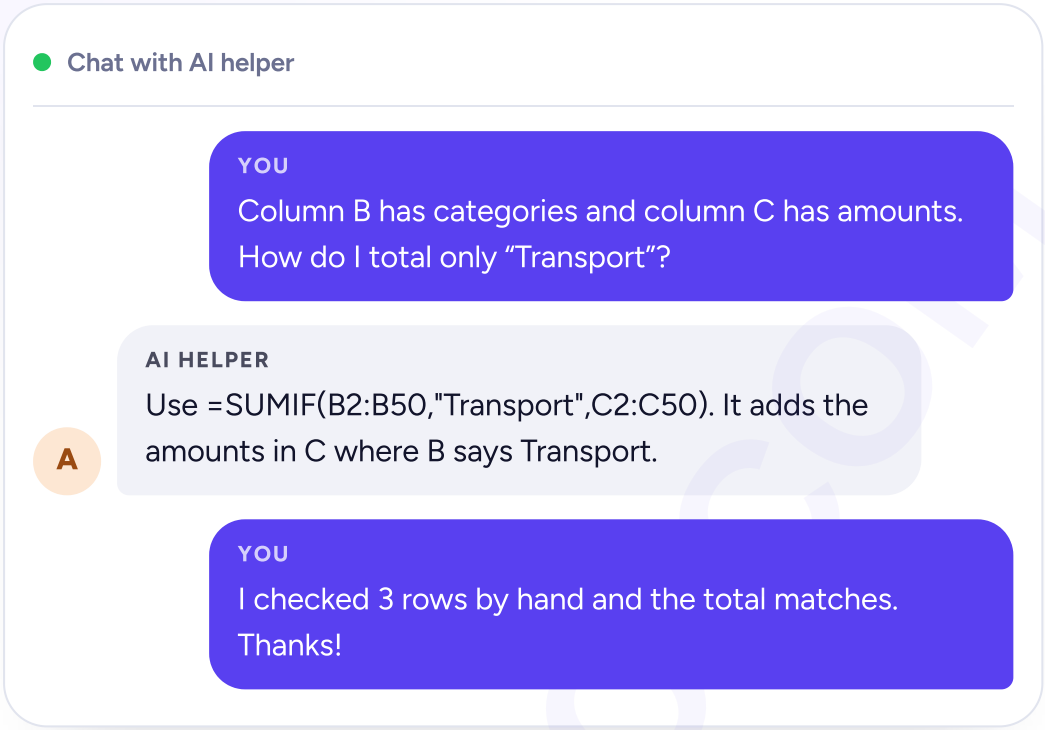
Lists with names, addresses, phone numbers, IDs, salaries or grades are **personal data**. In the Philippines, the **Data Privacy Act of 2012** protects this information. Share only with people who need it, never post it in public groups, remove columns others don't need, and password-protect sensitive files.

## Use AI as a helper, not a boss

Microsoft 365 Personal, Family and Premium include **Copilot** in Excel, with a monthly allowance of AI credits. Free AI chatbots can also explain formulas. AI is great for "How do I…?" questions — but always test its formulas on a few rows you can check by hand.

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PICTURE 8 **Ask, then check**




AI can explain and suggest formulas. You still test them on rows you can check yourself.

**Never paste private data into AI tools you don’t trust**

Before asking an AI about a sheet, remove names, IDs and other personal details — or use made-up sample rows.

QUICK RECAP

Save as .xlsx (CSV for moving data, PDF for reports). Use OneDrive AutoSave and Version History. Share with the right permissions; protect formulas. Preview before printing. Protect personal data (Data Privacy Act). Use AI to learn, then check its formulas.

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TRY IT NOW

### Finish a file properly

1. Save your workbook to OneDrive and open Version History.
2. Share it with one person as “Can view”.
3. Print-preview your Budget sheet and fit it to one page wide.

## Key takeaways

- .xlsx for work, .csv for moving data, PDF for reports.
- AutoSave + Version History protect you.
- Share carefully; protect formulas.
- Protect personal data; check every AI formula.

## Quiz: 3 quick questions

**1. What does a .csv file keep?**

A Plain values from one sheet

B All formulas and charts

C Only pictures

**2. Your employee list has names and salaries. What should you do?**

A Post it in the group chat

B Share only with people who need it and protect the file

C Print copies for everyone

**3. An AI gave you a formula. What next?**

A Trust it completely

B Test it on a few rows you can check by hand

C Delete your data

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**Answers**

1. **A. Plain values from one sheet** — CSV is simple text: no formulas, formatting or extra sheets.
2. **B. Share only with people who need it and protect the file** — Personal data is protected by law and deserves care.
3. **B. Test it on a few rows you can check by hand** — AI can be wrong; checking takes one minute.

PRACTICE TASK

### A report anyone can open

Turn your budget summary into a one-page PDF with a clear title and date. Share the workbook with “Can view” and ask one person if anything is confusing.

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CHAPTER 8

# Your 14-Day Excel Practice Plan

Thirty minutes a day for two weeks. By day 14, you'll have a working budget, a sales tracker and a grade sheet.

Use real numbers from your life whenever you can. Made-up numbers are fine for private things like grades or salaries.

PICTURE 9 **The 14-day Excel plan**




Each block builds on the one before. Keep all three workbooks — they become your portfolio.

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| Day | Task (about 30 minutes) | Done? |
|---|---|---|
| 1 | Open Excel for the web. Name a workbook. Practice moving with Tab, Enter and arrows. | ☐ |
| 2 | Build a tidy Sales table (H-R-C-N) with 10 rows. | ☐ |
| 3 | Format pesos and dates; freeze the header row; fit column widths. | ☐ |
| 4 | Add Total = Qty × Price and fill it down. | ☐ |
| 5 | Add SUM, AVERAGE, MIN, MAX and COUNT under your table. | ☐ |
| 6 | Add a VAT or discount column using a $ locked cell. | ☐ |
| 7 | Make a Grades sheet with IF “Passed” or “Needs help”. | ☐ |
| 8 | Make a Budget sheet with categories and a SUMIF summary. | ☐ |
| 9 | Make a Prices sheet and use XLOOKUP (or VLOOKUP) on Sales. | ☐ |
| 10 | Format your lists as Tables; sort and filter them. | ☐ |
| 11 | Add one conditional-formatting rule to each sheet. | ☐ |
| 12 | Make one clear chart for each sheet. | ☐ |
| 13 | Print-preview, fit to one page and save one sheet as PDF. | ☐ |
| 14 | Share one workbook as “Can view”. Review what you learned. | ☐ |

## Bonus exercises

1. **Break it on purpose**
   Make each error once: divide by an empty cell, misspell SUM, delete a referenced cell. Then fix them.

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**2** **Notebook to table**

Take one page of an old notebook (expenses, sales) and turn it into a tidy table with totals.

**3** **No-mouse minute**

For one minute, use only the keyboard: Tab, Enter, arrows, Ctrl + Z, Alt + =.

**4** **Explain a formula**

Write one of your formulas in plain words, like "add the amounts where the category is Food".

**Stuck on a formula?**

Go back to Chapter 3 first: is the table tidy? Most formula problems are really table problems — a blank row, a merged cell or a number typed as text.

QUICK RECAP

Days 1–3: screen and tidy table. Days 4–6: math, SUM and $. Days 7–9: IF, SUMIF, XLOOKUP. Days 10–12: tables, filters, charts. Days 13–14: print, share and review.

TRY IT NOW

## Start today

1. Copy the 14-day table into your notes.
2. Do Day 1 now.
3. Set a daily 30-minute reminder.

## Key takeaways

- Real numbers teach faster.
- Build three workbooks: sales, grades, budget.

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- Break formulas on purpose to learn the errors.
- Check the table before blaming the formula.

## Quiz: 3 quick questions

**1. What do you build on days 7–9?**

A IF, SUMIF and XLOOKUP sheets
B A new account
C A website

**2. Why break formulas on purpose?**

A So you recognize and fix errors later
B To delete the file
C It's required

**3. Your SUM looks wrong. What should you check first?**

A Whether the table is tidy (no text numbers, blanks or merges)
B Your internet speed
C The font

**Answers**

1. **A. IF, SUMIF and XLOOKUP sheets** — Smart formulas come after the basics.
2. **A. So you recognize and fix errors later** — Knowing errors makes them less scary.
3. **A. Whether the table is tidy (no text numbers, blanks or merges)** — Messy tables cause most formula problems.

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PRACTICE TASK

### Complete the 14 days

Follow the plan and tick each box. On day 14, write: the formula you use most, the error you met most, one thing that still confuses you, and the next list you will turn into a spreadsheet.

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CHAPTER 9

# Common Excel Mistakes (and Easy Fixes)

Most beginner problems come from the same few habits. Fix these, and your spreadsheets will be faster and safer.

Check your three practice workbooks against this table.

| Mistake | Why it hurts | Easy fix |
|---|---|---|
| Typing "₱150 only" in number cells | SUM ignores it | Type 150; format as pesos |
| Typing totals by hand | Wrong when numbers change | Use formulas with cell addresses |
| Numbers inside formulas (=150*3) | Hidden and hard to update | Put numbers in cells; refer to them |
| Blank rows and merged cells | Breaks sorting, filters and formulas | Tidy table: H-R-C-N |
| Sorting one column only | Rows get mixed up | Sort the whole table |
| Forgetting $ on a fixed cell | Copied formulas break | Lock it: $G$1 (press F4) |
| Ignoring error codes | Wrong totals go unnoticed | Read the error; fix one thing at a time |
| One giant sheet for everything | Hard to find and fix things | One sheet per topic; a summary sheet |
| Sharing personal data carelessly | Privacy risk and legal trouble | Share only what's needed; protect files |
| Trusting AI formulas blindly | Silent mistakes | Test on rows you can check by hand |

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PICTURE 10 **Fragile vs solid**

**FRAGILE SHEET**

**Works until something changes**

- Totals typed by hand
- Merged title, blank rows
- Prices with words in them
- One sheet, no labels

**SOLID SHEET**

**Updates itself correctly**

- Formulas everywhere
- Tidy table, one header row
- Plain numbers, formatted
- Clear sheets and a summary

A solid sheet keeps giving the right answer when numbers change. That's the whole point.

### The change test

Change one number in your table. Did every total, chart and summary update correctly? If yes, your sheet is solid.

QUICK RECAP

Common mistakes: text in number cells, hand-typed totals, numbers hidden in formulas, messy tables, sorting one column, missing $, ignored errors, one giant sheet, careless sharing and blind trust in AI. Each has an easy fix.

TRY IT NOW

### Audit your workbooks

1. Run the change test on each sheet.
2. Fix at least two mistakes from the table.
3. Write the mistake you make most often.

### Key takeaways

- Plain numbers, formatted; formulas, not typed totals.

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- Tidy tables; sort the whole table; lock fixed cells.
- Read errors; split big sheets.
- Protect personal data; check AI formulas.

## Quiz: 3 quick questions

**1. What is the change test?**

A Change one number and check everything updates correctly
B Change the font
C Change the file name

**2. Why is =150*3 worse than =C2*D2?**

A The numbers are hidden and don't update
B It's slower to type
C It shows an error

**3. Your filter skips half the data. Likely cause?**

A A blank row in the middle of the table
B The font is too small
C Too many colors

**Answers**

1. **A. Change one number and check everything updates correctly** — It proves your formulas are connected properly.
2. **A. The numbers are hidden and don't update** — Keep numbers in cells so they're visible and easy to change.
3. **A. A blank row in the middle of the table** — Blank rows split a table in two.

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PRACTICE TASK

### Your spreadsheet rules

Write your own 5 spreadsheet rules (for example, “Never type a total”, “One header row only”, “Run the change test before sharing”). Pin them where you work.

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CHAPTER 10

# Real-Life Examples: Spreadsheets That Save Time

These five example stories are based on common beginner projects (names are made up). Look for the habits, not the luck.

N

**Nena, 52**
Sari-sari store owner, Laguna

THE PROBLEM

Adding the day's sales by calculator took 20 minutes and was sometimes wrong.

WHAT NENA TYPED

```
Columns: Date, Item, Qty, Price, Total. Total =C2*D2 filled down.
Day total =SUMIF(A2:A500,TODAY(),E2:E500).
```

THE RESULT

Her daughter set it up once. Now Nena types each sale on the phone app and the day's total appears instantly.

**Lesson:** Type once; let formulas add it up.

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J

**Jessa, 16**

Grade 11 student and class treasurer, Pampanga

THE PROBLEM

She tracked class fund payments in a notebook and lost track of who had paid.

WHAT JESSA TYPED

```
Columns: Name, Amount due, Amount paid, Status. Status
=IF(C2>=B2,"Paid","Balance"). Conditional formatting: Balance in
orange.
```

THE RESULT

At the class meeting, she showed one clear sheet. The adviser could see who still owed at a glance.

**Lesson:** IF plus one color rule answers “who still needs to pay?”

M

**Mike, 29**

Office admin, Makati

THE PROBLEM

Counting each staff member’s absences every month took an afternoon.

WHAT MIKE TYPED

```
Log: Date, Name, Status (Present, Absent or Late). Summary with
each name in column F: =COUNTIFS(B2:B700,F2,C2:C700,"Absent") —
COUNTIF with two conditions, name and status.
```

THE RESULT

The monthly count now takes two minutes, and HR gets the same format every month.

**Lesson:** COUNTIF and a tidy log turn hours into minutes.

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L

**Lorna, 38**
Mom and part-time bookkeeper, Cebu

THE PROBLEM

The family never knew where the money went each month.

WHAT LORNA TYPED

```
Budget table: Date, Category, Amount. Summary
=SUMIF(B:B,"Food",C:C) for each category, and a bar chart sorted
biggest first.
```

THE RESULT

The chart showed food delivery was the second-biggest expense. The family set a weekly limit and saved more by month two.

**Lesson:** SUMIF plus one clear chart shows where money goes.

D

**Dan, 24**
Small online seller, Davao

THE PROBLEM

He typed product prices by hand and sometimes charged the wrong amount.

WHAT DAN TYPED

```
Prices sheet with Item and Price. Orders sheet:
=XLOOKUP(B2,Prices!A:A,Prices!B:B,"Not found"). Stock below 5
turns red.
```

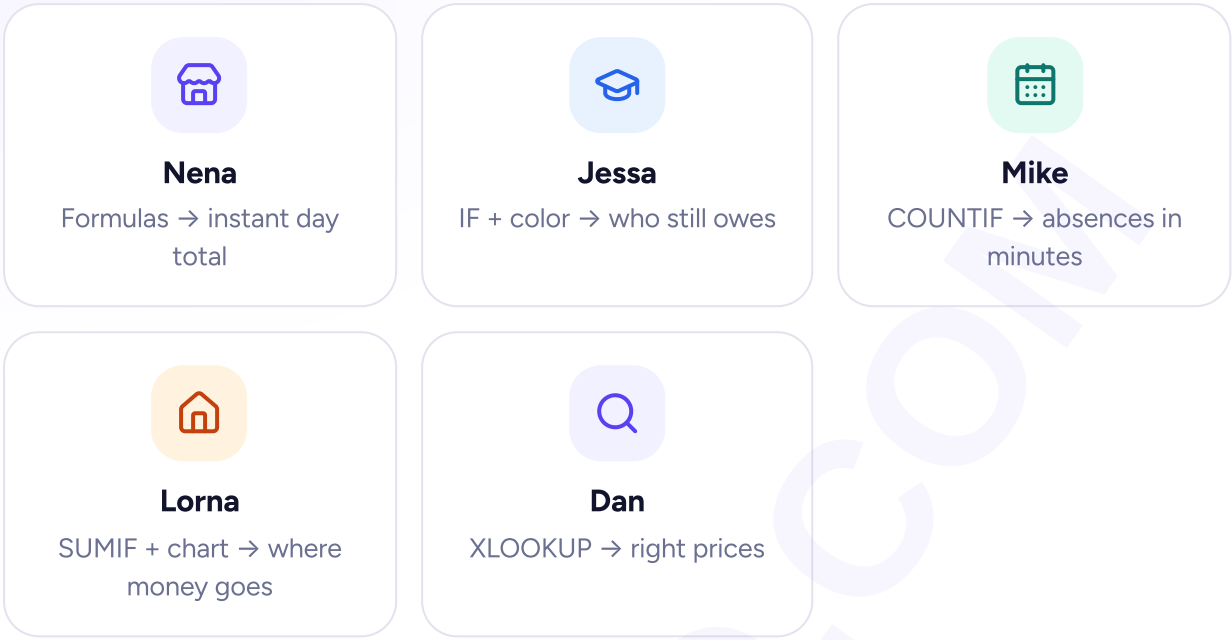
THE RESULT

Wrong prices stopped. When a supplier raised prices, he changed one cell on the Prices sheet and every new order used it.

**Lesson:** Keep prices in one place and look them up.

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**PICTURE 11** **Five spreadsheets, same habits**




All of them started with a tidy table, then added one or two formulas that answered a real question.

### What these stories have in common

They kept tidy tables, used formulas instead of typed totals, kept data like prices in one place, and answered one real question at a time. None of them needed advanced math.

**QUICK RECAP**

Formulas for totals, IF for status, COUNTIF for counts, SUMIF for categories and XLOOKUP for prices — all built on tidy tables — save real time at stores, schools, offices and homes.

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TRY IT NOW

### Your first real spreadsheet

1. Choose one real list that takes you time every week.
2. Build it as a tidy table and add one formula that answers your main question.
3. Run the change test, then use it for a week.

## Key takeaways

- Type once; let formulas add.
- IF and color answer “who” and “what’s wrong”.
- COUNTIF and SUMIF summarize logs.
- Keep prices in one place; look them up.

## Quiz: 3 quick questions

**1. Which function helped Mike count absences?**

A COUNTIF
B MAX
C TODAY

**2. How did Dan stop charging wrong prices?**

A XLOOKUP from one Prices sheet
B Typing prices faster
C Printing the list

**3. What did all five stories start with?**

A A tidy table
B An expensive app
C A long course

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**Answers**

1. **A. COUNTIF** — COUNTIF counts cells that match “Absent”.
2. **A. XLOOKUP from one Prices sheet** — One source of prices, looked up automatically.
3. **A. A tidy table** — Tidy table first, formulas second.

PRACTICE TASK

### Your spreadsheet story card

Write your own story card: the list you turned into a spreadsheet, the formula that helped most, the time it saves, and the lesson you learned.

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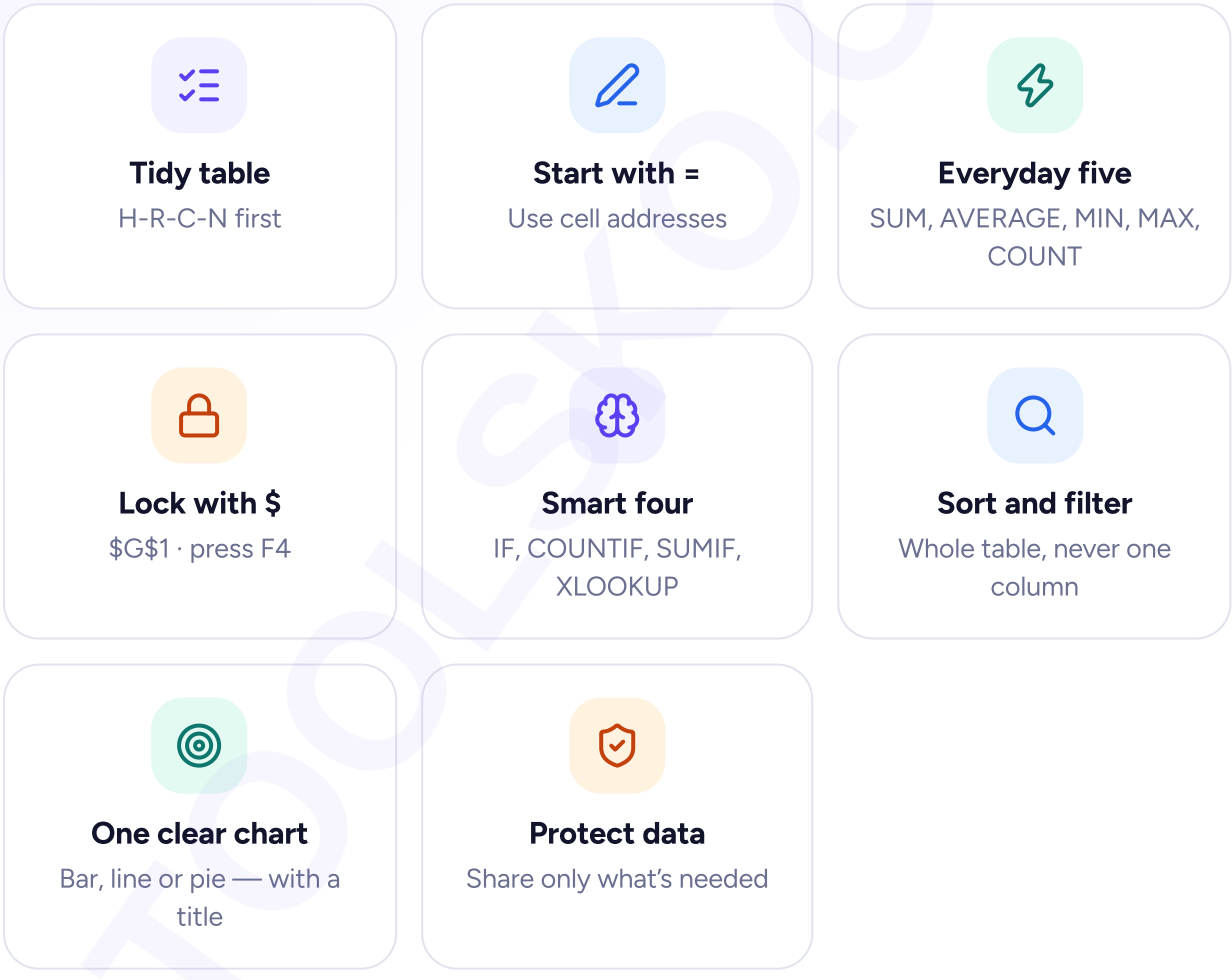
THE END

# Quick Summary

Everything important, on one page.

The whole book on one page. Keep it next to your screen while you work.

PICTURE 12 **Cheat sheet: Excel in 8 cards**




Eight habits that make every spreadsheet correct, clear and safe.

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| Remember | In one line |
|---|---|
| The big rule | Tidy table first, formulas second. |
| Every formula | Starts with = and uses cell addresses. |
| Copying formulas | Relative moves; $ locks. |
| Decisions and summaries | IF, COUNTIF, SUMIF, XLOOKUP (VLOOKUP for old Excel). |
| Before sharing | Run the change test; protect personal data. |
| With AI | Ask, then check on rows you can verify. |

**You are ready to work in Excel**

You can build tidy tables, write everyday and smart formulas, sort, filter, chart, print and share safely. Turn one real list into a spreadsheet this week — and let it save you time every week after.

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WHAT'S NEXT

# Your Next Learning Path

You finished Book 2. Here is where to go from here.

This is **Book 2** of the **Digital Skills** series. Here is your path:

PICTURE 13 **Your Digital Skills path**




Next: Google Sheets — the free spreadsheet you can share and edit with others at the same time.

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## What to do next

| Next step | Why |
|---|---|
| Finish the 14-day plan | Three working spreadsheets build real confidence. |
| Read Book 3: Google Sheets | Most of what you learned here works there too — plus easy teamwork. |
| Make your charts look good | Book 1 (Canva Mastery) teaches contrast and clean layout for reports. |
| Use AI to learn faster | The AI for Beginners series shows how to ask good questions and check answers. |
| Earn with your skill | Spreadsheet help is a common freelance and VA task (Make Money Online series, adults 18+). |

**One last tip**

Versions and buttons change. Tidy tables and clear formulas don't. If your table follows H-R-C-N, you can work in any spreadsheet app.

# Free ToolsKo tools for this book

Put what you learned to work. These tools are free on toolsko.com, need no sign-up, and most work right in your browser.

**Percentage Calculator**
Check percent answers before you build them into formulas.
toolsko.com/percentage-calculator ↗

**Average Calculator**
Double-check an AVERAGE result by hand.
toolsko.com/average-calculator ↗

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### DepEd Grade Calculator

Compare your grade sheet with the official weights.

toolsko.com/deped-grade-calculator

### Days Between Dates

Check date math like days late or days left.

toolsko.com/date-difference-calculator

### Discount Calculator

Check sale prices before adding a discount column.

toolsko.com/discount-calculator

### Loan Calculator

Compare your own loan sheet with a ready-made answer.

toolsko.com/loan-calculator

### Savings Goal Calculator

Plan the monthly savings your budget sheet should track.

toolsko.com/savings-goal-calculator

### CSV Cleaner & Deduper

Clean messy exported lists before opening them in Excel.

toolsko.com/csv-cleaner

### Remove Duplicate Lines

Remove repeated names or items from a pasted list.

toolsko.com/remove-duplicate-lines

### Sort Lines

Sort a quick list before pasting it into a sheet.

toolsko.com/sort-lines

### CSV to HTML / Markdown Table

Turn a small CSV into a neat table for a website or document.

toolsko.com/csv-to-table

## Words to know

| | |
|---|---|
| **Spreadsheet** | A grid of cells for numbers, words and formulas. |
| **Workbook** | A whole Excel file. |
| **Worksheet** | One page (tab) inside a workbook. |

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| | |
|---|---|
| **Cell** | One box where a column and a row meet, like B5. |
| **Range** | A group of cells, like B2:B8. |
| **Formula** | A calculation that starts with =. |
| **Function** | A ready-made formula with a name, like SUM. |
| **Relative reference** | A cell address that changes when you copy the formula. |
| **Absolute reference** | A locked address with $ signs, like $G$1. |
| **Fill handle** | The small square at a cell's corner that you drag to copy or continue a series. |
| **Table (Excel Table)** | A formatted list with filters that grows with new rows. |
| **Filter** | Hiding rows that don't match what you want to see. |
| **Conditional formatting** | Colors that appear automatically when a rule is true. |
| **XLOOKUP** | A function that finds a value in a list and brings back a matching value. |
| **CSV** | A simple text file of values separated by commas. |
| **PivotTable** | A tool that summarizes a big table with drag and drop. |

## Where the facts come from

1. Microsoft: Excel plans (free Excel for the web and Microsoft 365)
2. Microsoft (Philippines): Compare all Microsoft 365 products and prices
3. Microsoft Support: What you can do in the Microsoft 365 apps on mobile devices
4. Microsoft Education: Office 365 Education (free with eligible school email)

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5. Microsoft Support: XLOOKUP function
6. Microsoft Support: Copilot in Microsoft 365 Personal, Family and Premium
7. Microsoft Support: Countries or regions with statutory age limits for children
8. National Privacy Commission (Philippines): Data Privacy Act of 2012

Prices, plan features, app rules and function availability were checked on November 21, 2026. Microsoft updates Excel often, so some buttons may have different names or places on your screen — look for the same idea. Microsoft and Excel are trademarks of Microsoft Corporation; ToolsKo is not connected to Microsoft. This book is general information, not legal or financial advice. Written by ToolsKo Learn · toolsko.com/learn

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DIGITAL SKILLS

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|---|---|
| Book 1 | Canva Mastery |
| Book 2 | **Excel for Beginners — this book** |
| Book 3 | Google Sheets |
| Book 4 | Notion |
| Book 5 | Power BI Basics |

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