



51A Middle Street, Newburyport, MA 01950

Phone: 800-588-7039

[contact@bhfe.com](mailto:contact@bhfe.com)

[www.bhfe.com](http://www.bhfe.com)

## Course Information

---

**Course Title:** *Introduction to Excel*

#374024

**Number of continuing education credit hours recommended for this course:**

**CPA: 3** (All states)

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

National Registry of CPE Sponsors ID Number: 107615.

Sponsor numbers for states requiring sponsor registration

Florida Division of Certified Public Accountancy: 0004761 (Ethics #0011467)

Hawaii Board of Accountancy: 14003

New York State Board of Accountancy: 002146

Ohio State Board of Accountancy: CPE .51PSR

Pennsylvania Board of Accountancy: PX178025

Texas State Board of Accountancy: 009349

### Course Description

Excel is one of the primary tools of the accountant. It is needed for many accounting activities, such as tracking the contents of accounts and conducting financial analyses. However, Excel is a massive program with hundreds of commands and quirky formatting options. In *Introduction to Excel*, we cover the basics of setting up and populating an Excel worksheet, as well as producing well-organized outputs. Topics covered include the menu system, formatting, named styles, templates, and a variety of printing options.

### Course Content

Publication/Revision date: 3/29/2022.

Author: Steven M. Bragg, CPA.

Final exam (online): Fifteen questions (multiple-choice).

**Program Delivery Method:** NASBA QAS Self-Study (interactive)

## Subject Codes/Field of Study

NASBA (CPA): Computer Software & Applications

## Course Level, Prerequisites, and Advance Preparation Requirements

Program level: Overview

Prerequisites: None

Advance Preparation: None

## Instructions for Taking This Course

- Log in to your secure account at [www.bhfe.com](http://www.bhfe.com). Go to "My Account."
- You must complete this course within one year of purchase (If the course is "Expired," contact us and we will add the latest edition of the course to your account (no charge).
- **To retain the course-PDF after completion (for future reference) and to enable enhanced navigation:** From "My Account," Download and save the course-PDF to your computer. This will enable the search function (Menu: Edit>Find) and bookmarks (icon on left side of document window).
- Complete the course by following the learning objectives listed for the course, studying the text, and, if included, studying the review questions at the end of each major section (or at the end of the course).
- Once you have completed studying the course and you are confident that the learning objectives have been met, answer the final exam questions (online).

## Instructions for Taking the Online Exam

- Log in to your secure account at [www.bhfe.com](http://www.bhfe.com). Go to "My Account."
- A passing grade of at least **70%** is required on the exam for this course.
- You will have three attempts to pass the exam (call or email us after three unsuccessful attempts for instructions).
- The exam is not timed, and it does not need to be completed in one session.
- For a printed copy of the exam questions, open the exam and press "Print Exam."
- Once you pass the exam, the results (correct/incorrect answers) and certificate of completion appear in "My Account." A confirmation email is also sent.
- CFP Board and IRS credit hours, if applicable, are reported on Tuesdays and at the end of the month.

**Have a question?** Call us at 800-588-7039 or email us at [contact@bhfe.com](mailto:contact@bhfe.com).

# Learning Assignment & Objectives

---

- Explain how the ribbon system works.
- Describe cells and ranges.
- Identify how keystrokes can replace the mouse to trigger menu commands.
- Specify where high-volume commands are located on the screen.
- Describe the different uses of a table within a worksheet.
- Explain the differences between the Autocomplete and Autofill functions.
- Describe how cell and range formatting can be accomplished.
- Identify the warnings used when column widths are too narrow.
- Specify the more common Ctrl-letter combinations used to trigger worksheet commands.
- Identify the different variations on the Paste command.
- Explain how range naming works within a worksheet.
- Describe the uses to which the undo function can (and cannot) be put.
- Specify how named styles and themes are used.

## About the Author

---

**Steven Bragg, CPA**, has been the chief financial officer or controller of four companies, as well as a consulting manager at Ernst & Young. He received a master's degree in finance from Bentley College, an MBA from Babson College, and a Bachelor's degree in Economics from the University of Maine. He has been a two-time president of the Colorado Mountain Club, and is an avid alpine skier, mountain biker, and certified master diver. Mr. Bragg resides in Centennial, Colorado. He has written more than 250 books and courses, including *New Controller Guidebook*, *GAAP Guidebook*, and *Payroll Management*.

Copyright © 2023 by AccountingTools, Inc. All rights reserved.

Published by AccountingTools, Inc., Centennial, Colorado.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to Steven M. Bragg, 6727 E. Fremont Place, Centennial, CO 80112.

**Limit of Liability/Disclaimer of Warranty:** While the publisher and author have used their best efforts in preparing this book, they make no representations or warranties with respect to the accuracy or completeness of the contents of this book and specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor author shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

# Table of Contents

---

<b>Introduction to Excel</b> .....	<b>1</b>
Introduction .....	1
Conventions used in this Course .....	1
Worksheets and Workbooks.....	2
Worksheet Navigation.....	3
The Worksheet Ribbon.....	3
Shortcut Menus .....	8
Creating a Workbook .....	11
Worksheet Data.....	16
Numeric Formatting .....	20
Working with Worksheets.....	22
Adjusting Rows and Columns.....	25
Range-Related Activities.....	26
Range Names.....	32
Cell-Related Activities .....	34
Table Functions.....	38
Worksheet Formatting.....	43
Number Formatting.....	45
Alignment Formatting.....	46
Font Formatting .....	48
Border Formatting.....	50
Fill Formatting .....	52
Cell Protection .....	53
Conditional Formatting .....	54
Named Styles.....	57
Themes .....	59
Workbook Topics.....	61
The File Tab.....	61
Opening a Workbook.....	61
Saving a Workbook .....	62
Protected View.....	63
Password Protection.....	63
Workbook Inspection.....	64
Closing a Workbook .....	64
Excel Templates .....	64
Printing an Excel Document.....	66
Print Settings Screen Options .....	67
Page Layout Tab Options.....	69
Page Setup Dialog Box .....	70
Hiding Confidential Information in Printouts .....	73
Printing PDF Documents.....	73
Summary .....	73
Review Questions.....	74
<b>Answers to Review Questions</b> .....	<b>76</b>
<b>Glossary</b> .....	<b>79</b>
<b>Index</b> .....	<b>80</b>