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Pocket Edition

Excel® 2010

FOR DUMMIES®



Greg Harvey, PhD

*Bestselling author of
Excel All-in-One For Dummies*

***Excel*[®] 2010**
FOR
DUMMIES[®]
POCKET EDITION

by Greg Harvey, PhD



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Introduction

Excel 2010 For Dummies, Pocket Edition, covers the fundamental techniques you need to know in order to create, edit, format, and print your own spreadsheets. This book concentrates on spreadsheets because spreadsheets are what most regular folks create with Excel.

About This Book

This book isn't meant to be read cover to cover. Although its chapters are loosely organized in a logical order, each topic covered in a chapter is really meant to stand on its own.

In Excel, as with most other sophisticated programs, you usually have more than one way to do a task. For the sake of your sanity, I have purposely limited the choices by usually giving you only the most efficient ways to do a particular task.

Conventions Used in This Book

The following information gives you the lowdown on how things look in this book.

Keyboard and mouse

Throughout the book, you'll find Ribbon command sequences separated by a command arrow, as in:

Home → Copy

You click the Home tab on the Ribbon (if it isn't displayed already) and then click the Copy button.

If the sequence also involves selecting an item from a drop-down menu, it looks like this:

Formulas↔Calculation Options↔Manual

When I ask you to type something in a cell, the part you type generally appears in **bold**.

Occasionally, I give you a *hot key combination* that you can press in order to choose a command from the keyboard rather than clicking buttons on the Ribbon with the mouse. Hot key combinations are written like this: Alt+FS or Ctrl+S. You press the Alt key until the hot key letters appear in little squares all along the Ribbon. At that point, you can release the Alt key and start typing the hot key letters.

Special icons

The following icons are placed in the margins to point out stuff you may or may not want to read.



This icon alerts you to nerdy discussions that you may well want to skip (or read when no one else is around).



This icon alerts you to shortcuts or other valuable hints related to the topic at hand.



This icon alerts you to information to keep in mind if you want to meet with a modicum of success.



This icon alerts you to information to keep in mind if you want to avert complete disaster.

Chapter 1

The Excel 2010 User Experience



In This Chapter

- ▶ Getting familiar with the Excel 2010 program window and Backstage View
 - ▶ Selecting commands from the Ribbon
 - ▶ Customizing the Quick Access toolbar
 - ▶ Surfing an Excel 2010 worksheet and workbook
 - ▶ Methods for starting Excel 2010
 - ▶ Getting some help with using this program
- 

The Excel 2010 user interface incorporates a single strip at the top of the worksheet called the Ribbon that puts the bulk of the Excel commands at your fingertips at all times.

Add to the Ribbon a File tab and a Quick Access toolbar — along with a few task panes (Clipboard, Clip Art, and Research) — and you end up with the handiest way yet to crunch your numbers and produce and print polished financial reports.

Best of all, this new and improved Excel user interface includes all sorts of graphical improvements. Foremost is Live Preview that shows you how your actual worksheet data would appear in a particular font, table formatting, and so on before you actually select it.

Excel's Ribbon User Interface

When you launch Excel 2010, the program opens the first of three new worksheets (named Sheet1) in a new workbook file (named Book1) inside a program window like the one shown in Figure 1-1.

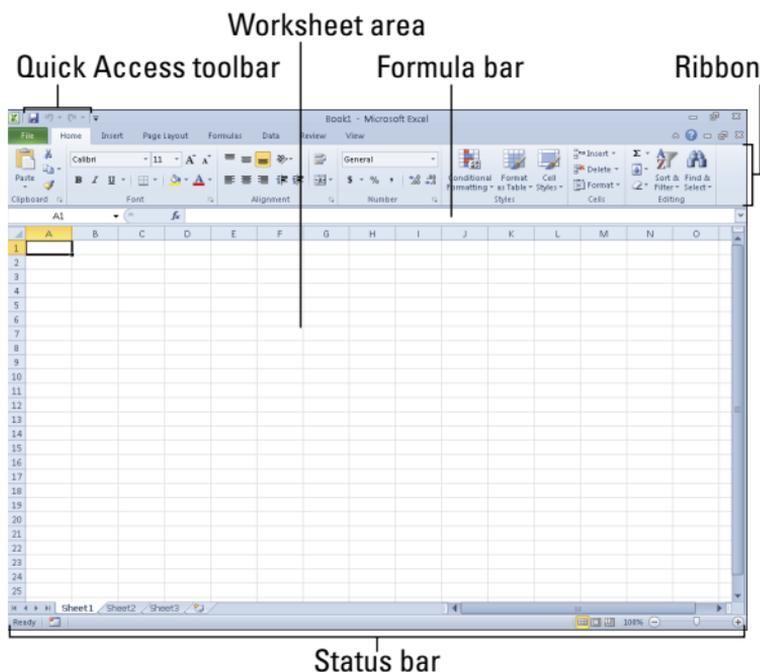


Figure 1-1: The Excel 2010 program window that appears immediately after launching the program.

The Excel program window containing this worksheet of the Book1 workbook file contains these components:

- ✔ **File tab:** When clicked, this tab opens the new Backstage View — a menu on the left that contains all the document- and file-related commands, including Info (selected by default), Save, Save As, Open, Close, Recent, New, Print, and Save & Send. Additionally, there's a Help option with add-ins, an Options item that enables you to change many of Excel's default settings, and an Exit option to quit the program.
- ✔ **Quick Access toolbar:** A customizable bar containing buttons you can click to perform common tasks, such as saving your work and undoing and redoing edits.
- ✔ **Ribbon:** This bar contains the bulk of the Excel commands arranged in a series of tabs from Home through View.
- ✔ **Formula bar:** This bar displays the address of the current cell along with the contents of that cell.
- ✔ **Worksheet area:** This area contains the cells of the worksheet identified by column headings using letters along the top and row headings using numbers along the left edge; tabs for selecting new worksheets; a horizontal scroll bar to move left and right through the sheet; and a vertical scroll bar 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. It also enables you to select a new worksheet view and zoom in and out on the worksheet.

Going Backstage via File

To the immediate left of the Home tab on the Ribbon right below the Quick Access toolbar, you find the File tab. When you click File, the new Backstage View opens. This view contains a menu similar to the one shown in Figure 1-2. When you open the Backstage View, the Info option displays at-a-glance stats about the Excel workbook file you have open and active.

This information panel is divided into two panes. The pane on the left contains large buttons that enable you to modify the workbook's permissions, distribution, and versions. The pane on the right contains a thumbnail of the workbook followed by a list of fields detailing the workbook's various Document Properties, some of which you can change (such as Title, Tags, Categories, and Author), and many of which you can't (such as Size, Last Modified, Created, and so forth).

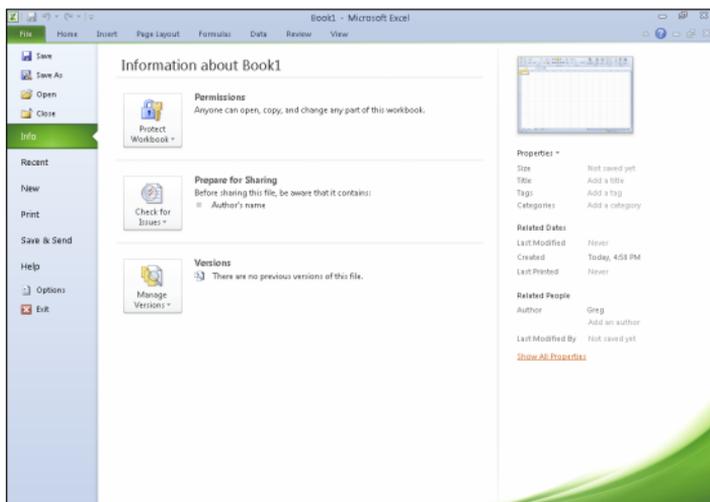


Figure 1-2: Open Backstage View for at-a-glance information about the current file, to access all file-related commands, and to modify the program options.

Above the Info option, you find the commands (Save, Save As, Open, and Close) you commonly need for working with Excel workbook files. Near the bottom, the File tab contains a Help option that, when selected, displays a Support panel in the Backstage View. This panel contains options for getting help on using Excel, customizing its default settings, as well as checking for updates to the Excel 2010 program. Below Help, you find options that you can select to change the program's settings, along with an Exit option that you can select when you're ready to close the program.



Click the Recent option to continue editing an Excel workbook you've worked on of late. When you click the Recent option, Excel displays a panel with a list of all the workbook files recently opened in the program. To re-open a particular file for editing, all you do is click its filename in this list.



To close the Backstage View and return to the normal worksheet view, click the File tab a second time or simply press the Escape key.

Bragging about the Ribbon

The Ribbon (shown in Figure 1-3) shows you the most commonly used options required to perform a particular Excel task.

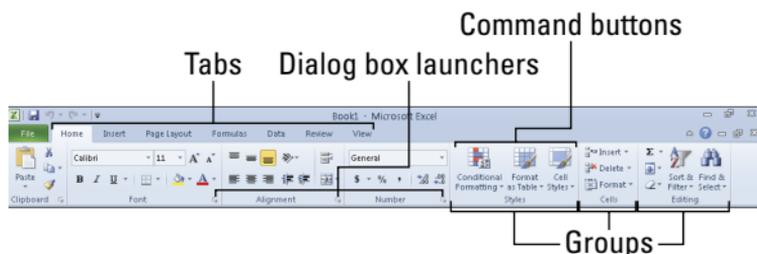


Figure 1-3: Excel's Ribbon consists of a series of tabs containing command buttons arranged into different groups.

The Ribbon contains the following components:

- ✔ **Tabs** for each of Excel's main tasks that bring together and display all the commands commonly needed to perform that core task.
- ✔ **Groups** that organize related command buttons into subtasks normally performed as part of the tab's larger core task.
- ✔ **Command buttons** within each group that you select to perform a particular action or to open a gallery from which you can click a particular thumbnail. **Note:** Some command buttons on certain tabs of the Ribbon are organized into mini-toolbars with related settings.
- ✔ **Dialog box launcher** in the lower-right corner of certain groups that opens a dialog box containing a bunch of additional options you can select.



To display more of the Worksheet area in the program window, you can minimize the Ribbon so that only its tabs display. Simply click the Minimize the Ribbon button, the first button with what looks like a greater than symbol pointing upward in the group of buttons for minimizing, maximizing, and closing the current worksheet window to the right of the Ribbon tabs and to the immediate left of the Help button. To redisplay the entire Ribbon and keep all the command buttons on its tabs displayed in the program window, click the Expand the Ribbon button.

Keeping tabs on the Excel Ribbon

The first time you launch Excel 2010, the Ribbon contains the following tabs from left to right:

- ✔ **Home** tab with the command buttons normally used when creating, formatting, and editing a spreadsheet, arranged into the Clipboard,

Font, Alignment, Number, Styles, Cells, and Editing groups.

- ✔ **Insert** tab with the command buttons normally used when adding particular elements (including graphics, PivotTables, charts, hyperlinks, and headers and footers) to a spreadsheet, arranged into the Tables, Illustrations, Charts, Sparklines, Filter, Links, Text, and Symbols groups.
- ✔ **Page Layout** tab with the command buttons normally used when preparing a spreadsheet for printing or re-ordering graphics on the sheet, arranged into the Themes, Page Setup, Scale to Fit, Sheet Options, and Arrange groups.
- ✔ **Formulas** tab with the command buttons normally used when adding formulas and functions to a spreadsheet or checking a worksheet for formula errors, arranged into the Function Library, Defined Names, Formula Auditing, and Calculation groups. **Note:** This tab also contains a Solutions group when you activate certain add-in programs, such as Analysis ToolPak and Euro Currency Tools.
- ✔ **Data** tab with the command buttons normally used when importing, querying, outlining, and subtotaling the data placed into a worksheet's data list, arranged into the Get External Data, Connections, Sort & Filter, Data Tools, and Outline groups. **Note:** This tab also contains an Analysis group when you activate add-ins, such as Analysis ToolPak and Solver.
- ✔ **Review** tab with the command buttons normally used when proofing, protecting, and marking up a spreadsheet for review by others, arranged into the Proofing, Language, Comments, and Changes groups. **Note:** This tab also contains an Ink group with a sole Start Inking button when

you're running Office 2010 on a Tablet PC or a computer equipped with a digital ink tablet.

- ✔ **View** tab with the command buttons normally used when changing the display of the Worksheet area and the data it contains, arranged into the Workbook Views, Show, Zoom, Window, and Macros groups.



In addition to these standard seven tabs, Excel has an eighth, optional Developer tab that you can add to the Ribbon if you do a lot of work with macros and XML files.

Although these standard tabs are the ones you always see on the Ribbon when it displays in Excel, they aren't the only things that can appear in this area. Excel can display contextual tools when you're working with a particular object that you select in the worksheet, such as a graphic image you've added or a chart or PivotTable you've created. The name of the contextual tools for the selected object appears immediately above the tab or tabs associated with the tools.

For example, Figure 1-4 shows a worksheet after you click the embedded chart to select it. As you can see, clicking the chart adds the contextual tool called Chart Tools to the very end of the Ribbon. The Chart Tools contextual tool has its own three tabs: Design (selected), Layout, and Format. Note, too, that the command buttons on the Design tab are arranged into groups Type, Data, Chart Layouts, Chart Styles, Location, and Mode.



The moment you deselect the object (usually by clicking somewhere outside the object's boundaries), the contextual tool for that object and all its tabs immediately disappear from the Ribbon, leaving only the regular tabs — Home, Insert, Page Layout, Formulas, Data, Review, and View — displayed.