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- Create and edit worksheets, format cells, and enter formulas
- Design database forms and add database records
- Add hyperlinks and save worksheets as Web pages
- Share worksheets via e-mail

Greg Harvey

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



Excel® 2010 For Dummies®

Table of Contents

[Introduction](#)

[About This Book](#)

[How to Use This Book](#)

[What You Can Safely Ignore](#)

[Foolish Assumptions](#)

[How This Book Is Organized](#)

[Part I: Getting In on the Ground Floor](#)

[Part II: Editing without Tears](#)

[Part III: Getting Organized and Staying That Way](#)

[Part IV: Digging Data Analysis](#)

[Part V: Life beyond the Spreadsheet](#)

[Part VI: The Part of Tens](#)

[Conventions Used in This Book](#)

[Icons Used in This Book](#)

[Where to Go from Here](#)

[Part I: Getting In on the Ground Floor](#)

[Chapter 1: The Excel 2010 User Experience](#)

[Excel's Ribbon User Interface](#)

[Going Backstage via File](#)

[Bragging about the Ribbon](#)

[Customizing the Quick Access toolbar](#)

[Having fun with the Formula bar](#)

[What to do in the Worksheet area](#)

[Showing off the Status bar](#)

[Launching and Quitting Excel](#)

[Starting Excel from the Start menu](#)

[Starting Excel from the Windows XP Start menu](#)

[Pinning a Microsoft Excel 2010 option on your Windows Start menu](#)

[Adding a Microsoft Excel 2010 shortcut to your Windows desktop](#)

[Adding Excel to the Windows Quick Launch toolbar](#)

[Pinning an Excel icon to the Windows 7 taskbar](#)

[Exiting Excel](#)

[Help Is on the Way](#)

[Migrating to Excel 2010 from Earlier Versions Using Pull-down Menus](#)

[Cutting the Ribbon down to size](#)

[Finding the Standard toolbar buttons equivalents](#)

[Finding the Formatting toolbar buttons equivalents](#)

[Putting the Excel Quick Access toolbar to good use during the transition](#)

[Getting good to go with Excel 2010](#)

[Chapter 2: Creating a Spreadsheet from Scratch](#)

[So What Ya Gonna Put in That New Workbook of Yours?](#)

[The ins and outs of data entry](#)

[You must remember this . . .](#)

[Doing the Data-Entry Thing](#)

[It Takes All Types](#)

[The telltale signs of text](#)

[How Excel evaluates its values](#)

[Fabricating those fabulous formulas!](#)

[If you want it, just point it out](#)

[Altering the natural order of operations](#)

[Formula flub-ups](#)

[Fixing Those Data Entry Flub-Ups](#)

[You really AutoCorrect that for me](#)

[Cell editing etiquette](#)

[Taking the Drudgery out of Data Entry](#)

[I'm just not complete without you](#)

[Fill 'er up with AutoFill](#)

[Inserting special symbols](#)

[Entries all around the block](#)

[Data entry express](#)

[How to Make Your Formulas Function Even Better](#)

[Inserting a function into a formula with the Insert Function button](#)

[Editing a function with the Insert Function button](#)

[I'd be totally lost without AutoSum](#)

[Making Sure That the Data Is Safe and Sound](#)

[The Save As dialog box in Windows 7 and Windows Vista](#)

[The Save As dialog box in Windows XP](#)

[Changing the default file location](#)

[The difference between the XLSX and XLS file format](#)

[Saving the Workbook as a PDF File](#)

[Document Recovery to the Rescue](#)

Part II: Editing without Tears

Chapter 3: Making It All Look Pretty

Choosing a Select Group of Cells

Point-and-click cell selections

Keyboard cell selections

Having Fun with the Format as Table Gallery

Cell Formatting from the Home Tab

Formatting Cells Close to the Source with the Mini-Toolbar

Using the Format Cells Dialog Box

Getting comfortable with the number formats

The values behind the formatting

Make it a date!

Ogling some of the other number formats

Calibrating Columns

Rambling rows

Now you see it, now you don't

Futzing with the Fonts

Altering the Alignment

Intent on indents

From top to bottom

Tampering with how the text wraps

Reorienting cell entries

Shrink to fit

Bring on the borders!

Applying fill colors, patterns, and gradient effects to cells

Do It in Styles

[Creating a new style for the gallery](#)

[Copying custom styles from one workbook into another](#)

[Fooling Around with the Format Painter](#)

[Conditional Formatting](#)

[Conditionally formatting values with sets of graphic scales and markers](#)

[Highlighting cells according to what ranges the values fall into](#)

[Chapter 4: Going Through Changes](#)

[Opening the Darned Thing Up for Editing](#)

[Operating the Open dialog box](#)

[Opening more than one workbook at a time](#)

[Opening recently edited workbooks](#)

[When you don't know where to find them](#)

[Opening files with a twist](#)

[Much Ado about Undo](#)

[Undo is Redo the second time around](#)

[What ya gonna do when you can't Undo?](#)

[Doing the Old Drag-and-Drop Thing](#)

[Copies, drag-and-drop style](#)

[Insertions courtesy of drag and drop](#)

[Formulas on AutoFill](#)

[Relatively speaking](#)

[Some things are absolutes!](#)

[Cut and paste, digital style](#)

[Paste it again, Sam . . .](#)

[Keeping pace with Paste Options](#)

[Paste it from the Clipboard task pane](#)

[So what's so special about Paste Special?](#)

[Let's Be Clear about Deleting Stuff](#)

[Sounding the all clear!](#)

[Get these cells outta here!](#)

[Staying in Step with Insert](#)

[Stamping Out Your Spelling Errors](#)

[Stamping Out Errors with Text to Speech](#)

[Chapter 5: Printing the Masterpiece](#)

[Taking a Gander at the Pages in Page Layout View](#)

[Checking and Printing a Report from the Print Panel](#)

[Printing Just the Current Worksheet](#)

[My Page Was Set Up!](#)

[Using the buttons in the Page Setup group](#)

[Using the buttons in the Scale to Fit group](#)

[Using the Print buttons in the Sheet Options group](#)

[From Header to Footer](#)

[Adding an Auto Header or Auto Footer](#)

[Creating a custom header or footer](#)

[Solving Page Break Problems](#)

[Letting Your Formulas All Hang Out](#)

[Part III: Getting Organized and Staying That Way](#)

[Chapter 6: Maintaining the Worksheet](#)

[Zeroing In with Zoom](#)

[Splitting the Difference](#)

[Fixed Headings Courtesy of Freeze Panes](#)

Electronic Sticky Notes

[Adding a comment to a cell](#)

[Comments in review](#)

[Editing the comments in a worksheet](#)

[Getting your comments in print](#)

The Cell Name Game

[If I only had a name . . .](#)

[Name that formula!](#)

[Naming constants](#)

[Seek and Ye Shall Find . . .](#)

[You Can Be Replaced!](#)

[Do Your Research](#)

[You Can Be So Calculating](#)

[Putting on the Protection](#)

Chapter 7: Maintaining Multiple Worksheets

Juggling Worksheets

[Sliding between the sheets](#)

[Editing en masse](#)

[Don't Short-Sheet Me!](#)

[A worksheet by any other name . . .](#)

[A sheet tab by any other color . . .](#)

[Getting your sheets in order](#)

[Opening Windows on Your Worksheets](#)

[Comparing Two Worksheets Side by Side](#)

[Moving and Copying Sheets to Other Workbooks](#)

[To Sum Up . . .](#)

Part IV: Digging Data Analysis

Chapter 8: Doing What-If Analysis

Playing What-If with Data Tables

Creating a one-variable data table

Creating a two-variable data table

Playing What-If with Goal Seeking

Examining Different Cases with Scenario Manager

Setting up the various scenarios

Producing a summary report

Chapter 9: Playing with Pivot Tables

Pivot Tables: The Ultimate Data Summary

Producing a Pivot Table

Formatting a Pivot Table

Refining the Pivot Table style

Formatting the values in the pivot table

Sorting and Filtering the Pivot Table Data

Filtering the report

Filtering individual column and row fields

Filtering with slicers

Sorting the pivot table

Modifying a Pivot Table

Modifying the pivot table fields

Pivoting the table's fields

Modifying the table's summary function

Get Smart with a Pivot Chart

Moving a pivot chart to its own sheet

[Filtering a pivot chart](#)

[Formatting a pivot chart](#)

[Part V: Life beyond the Spreadsheet](#)

[Chapter 10: Charming Charts and Gorgeous Graphics](#)

[Making Professional-Looking Charts](#)

[Creating a new chart](#)

[Moving and resizing an embedded chart in a worksheet](#)

[Moving an embedded chart onto its own chart sheet](#)

[Customizing the chart type and style from the Design tab](#)

[Customizing chart elements from the Layout tab](#)

[Editing the titles in a chart](#)

[Formatting chart elements from the Format tab](#)

[Adding Great Looking Graphics](#)

[Sparkling up the data with sparklines](#)

[Telling all with a text box](#)

[The wonderful world of clip art](#)

[Inserting pictures from graphics files](#)

[Editing clip art and imported pictures](#)

[Formatting clip art and imported pictures](#)

[Adding preset graphic shapes](#)

[Working with WordArt](#)

[Make mine SmartArt](#)

[Screenshots anyone?](#)

[Theme for a day](#)

[Controlling How Graphic Objects Overlap](#)

[Reordering the layering of graphic objects](#)

[Grouping graphic objects](#)

[Hiding graphic objects](#)

[Printing Just the Charts](#)

[Chapter 11: Getting on the Data List](#)

[Creating a Data List](#)

[Adding records to a data list](#)

[Sorting Records in a Data List](#)

[Sorting records on a single field](#)

[Sorting records on multiple fields](#)

[Filtering the Records in a Data List](#)

[Using ready-made number filters](#)

[Using ready-made date filters](#)

[Getting creative with custom filtering](#)

[Importing External Data](#)

[Querying an Access database table](#)

[Performing a New Web query](#)

[Chapter 12: Linking, Automating, and Sharing Spreadsheets](#)

[Using Add-Ins in Excel 2010](#)

[Adding Hyperlinks to a Worksheet](#)

[Automating Commands with Macros](#)

[Recording new macros](#)

[Running macros](#)

[Assigning macros to the Ribbon and the Quick Access toolbar](#)

[Sharing Worksheets](#)

[Sending a workbook via e-mail](#)

[Sharing a workbook on a SharePoint Web site](#)

[Uploading workbooks to your SkyDrive and editing them with the Excel Web App](#)

[Part VI: The Part of Tens](#)

[Chapter 13: Top Ten Features in Excel 2010](#)

[Chapter 14: Top Ten Beginner Basics](#)

[Chapter 15: The Ten Commandments of Excel 2010](#)

Excel[®] 2010 For Dummies[®]

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Wiley Publishing, Inc.

Excel[®] 2010 For Dummies[®]

Published by

Wiley Publishing, Inc.

111 River St.

Hoboken, NJ 07030-5774

www.wiley.com

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Indianapolis, Indiana

Published simultaneously in Canada

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Library of Congress Control Number: 2010923559

ISBN: 978-0-470-48953-6

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1



About the Author

Greg Harvey has authored tons of computer books, the most recent being *Excel Workbook For Dummies* and *Roxio Easy Media Creator 8 For Dummies*, and the most popular being *Excel 2003 For Dummies* and *Excel 2003 All-in-One Desk Reference For Dummies*. He started out training business users on how to use IBM personal computers and their attendant computer software in the rough and tumble days of DOS, WordStar, and Lotus 1-2-3 in the mid-80s of the last century. After working for a number of independent training firms, Greg went on to teach semester-long courses in spreadsheet and database management software at Golden Gate University in San Francisco.

His love of teaching has translated into an equal love of writing. For Dummies books are, of course, his all-time favorites to write because they enable him to write to his favorite audience: the beginner. They also enable him to use humor (a key element to success in the training room) and, most delightful of all, to express an opinion or two about the subject matter at hand.

Greg received his doctorate degree in Humanities in Philosophy and Religion with a concentration in Asian Studies and Comparative Religion last May. Everyone is glad that Greg was finally able to get out of school before he retired.

Dedication

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Author's Acknowledgments

Let me take this opportunity to thank all the people, both at Wiley Publishing, Inc., and at Mind over Media, Inc., whose dedication and talent combined to get this book out and into your hands in such great shape.

At Wiley Publishing, Inc., I want to thank Andy Cummings and Katie Feltman for their encouragement and help in getting this project underway and their ongoing support every step of the way. These people made sure that the project stayed on course and made it into production so that all the talented folks on the production team could create this great final product.

At Mind over Media, I want to thank Christopher Aiken for his review of the updated manuscript and invaluable input and suggestions on how best to restructure the book to accommodate all the new features and, most importantly, present the new user interface.

Publisher's Acknowledgments

We're proud of this book; please send us your comments through our online registration form located at www.dummies.com/register/.

Some of the people who helped bring this book to market include the following:

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Introduction

I'm very proud to present you with *Excel 2010 For Dummies*, the latest version of everybody's favorite book on Microsoft Office Excel for readers with no intention whatsoever of becoming spreadsheet gurus.

Excel 2010 For Dummies covers all the fundamental techniques you need to know in order to create, edit, format, and print your own worksheets. In addition to showing you around the worksheet, this book also exposes you to the basics of charting, creating data lists, and performing data analysis. Keep in mind, though, that this book just touches on the easiest ways to get a few things done with these features — I don't attempt to cover charting, data lists, or data analysis in the same definitive way as 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 (progressing as you might when studying Excel in a classroom situation), each topic covered in a chapter is really meant to stand on its own.

Each discussion of a topic briefly addresses the question of what a particular feature is good for before launching into how to use it. 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. Later, if you're so tempted, you can experiment with alternative ways of doing a task. For now, just concentrate on performing the task as I describe.

As much as possible, I've tried to make it unnecessary for you to remember anything covered in another section of the book. From time to time, however, you will come across a cross-reference to another section or chapter in the book. For the most part, such cross-references are meant to help you get more complete information on a subject, should you have the time and interest. If you have neither, no problem. Just ignore the cross-references as if they never existed.

How to Use This Book

This book is similar to a reference book. You can start by looking up the topic you need information about (in either the Table of Contents or the index) and then refer directly to the section of interest. I explain most topics conversationally (as though you were sitting in the back of a classroom where you can safely nap). Sometimes, however, my regiment-commander mentality takes over, and I list the steps you need to take to accomplish a particular task in a particular section.

What You Can Safely Ignore

When you come across a section that contains the steps you take to get something done, you can safely ignore all text accompanying the steps (the text that isn't in bold) if you have neither the time nor the inclination to wade through more material.

Whenever possible, I have also tried to separate background or footnote-type information from the essential facts by exiling this kind of junk to a sidebar (look for blocks of text on a gray background). Often, these sections are flagged with icons that let you know what type of information you will encounter there. You can easily disregard text marked this way. (I'll scoop you on the icons I use in this book a little later.)

Foolish Assumptions

I'm going to make only one assumption about you (let's see how close I get): You have access to a PC (at least some of the time) that is running Windows 7, Windows Vista, or Windows XP and on which Microsoft Office Excel 2010 is installed. Having said that, I don't assume that you've ever launched Excel 2010, let alone done anything with it.



This book is intended for users of Microsoft Office Excel 2010. If you're using Excel for Windows version Excel 97 through 2003, the information in this book will only confuse and confound you because only Excel 2007 works similar to the 2010 version that this book describes.

If you're working with a version of Excel earlier than Excel 2007, please put this book down slowly and pick up a copy of *Excel 2003 For Dummies* instead.

How This Book Is Organized

This book is organized in six parts (which gives you a chance to see at least six of those great Rich Tennant cartoons!). Each part contains two or more chapters (to keep the editors happy) that more or less go together (to keep you happy). Each chapter is divided further into loosely related sections that cover the basics of the topic at hand. However, don't get hung up on following the structure of the book; ultimately, it doesn't matter whether you find out how to edit the worksheet before you learn how to format it, or whether you figure out printing before you learn editing. The important thing is that you find the information — and understand it when you find it — when you need to perform a particular task.

In case you're interested, a synopsis of what you find in each part follows.

Part I: Getting In on the Ground Floor

As the name implies, in this part I cover such fundamentals as how to start the program, identify the parts of the screen, enter information in the worksheet, save a document, and so on. If you're starting with

absolutely no background in using spreadsheets, you definitely want to glance at the information in Chapter 1 to discover the secrets of the Ribbon interface before you move on to how to create new worksheets in Chapter 2.

Part II: Editing without Tears

In this part, I show you how to edit spreadsheets to make them look good, including how to make major editing changes without courting disaster. Peruse Chapter 3 when you need information on formatting the data to improve the way it appears in the worksheet. See Chapter 4 for rearranging, deleting, or inserting new information in the worksheet. Read Chapter 5 for the skinny on printing your finished product.

Part III: Getting Organized and Staying That Way

Here I give you all kinds of information on how to stay on top of the data that you've entered into your spreadsheets. Chapter 6 is full of good ideas on how to keep track of and organize the data in a single worksheet. Chapter 7 gives you the ins and outs of working with data in different worksheets in the same workbook and gives you information on transferring data between the sheets of different workbooks.

Part IV: Digging Data Analysis

This part consists of two chapters. Chapter 8 introduces performing various types of what-if analysis in Excel,

including setting up data tables with one and two inputs, performing goal seeking, and creating different cases with Scenario Manager. Chapter 9 introduces Excel's vastly improved pivot table and pivot chart capabilities that enable you to summarize and filter vast amounts of data in a worksheet table or data list in a compact tabular or chart format.

Part V: Life beyond the Spreadsheet

In Part V, I explore some of the other aspects of Excel besides the spreadsheet. In Chapter 10, you find out just how ridiculously easy it is to create a chart using the data in a worksheet. In Chapter 11, you discover just how useful Excel's data list capabilities can be when you have to track and organize a large amount of information. In Chapter 12, you find out about using add-in programs to enhance Excel's basic features, adding hyperlinks to jump to new places in a worksheet, to new documents, and even to Web pages, as well as how to record macros to automate your work.

Part VI: The Part of Tens

As is the tradition in *For Dummies* books, the last part contains lists of the top ten most useful and useless facts, tips, and suggestions. In this part, you find three chapters. Chapter 13 provides my top ten list of the best new features in Excel 2010 (and boy was it hard keeping it to just ten). Chapter 14 gives you the top ten beginner basics you need to know as you start using this program. Chapter 15 gives you the King James Version of the Ten

Commandments of Excel 2010. With this chapter under your belt, how canst thou goest astray?

Conventions Used in This Book

The following information gives you the lowdown on how things look in this book. Publishers call these items the book's *conventions* (no campaigning, flag-waving, name-calling, or finger-pointing is involved, however).

Throughout the book, you'll find Ribbon command sequences (the name on the tab on the Ribbon and the command button you select) separated by a command arrow, as in:

Home⇒Copy

This shorthand is the Ribbon command that copies whatever cells or graphics are currently selected to the Windows Clipboard. It means that you click the Home tab on the Ribbon (if it isn't displayed already) and then click the Copy button (that sports the traditional side-by-side page icon).

Some of the Ribbon command sequences involve not only selecting a command button on a tab but then also selecting an item on a drop-down menu. In this case, the drop-down menu command follows the name of the tab and command button, all separated by command arrows, as in:

Formulas⇒Calculation Options⇒Manual

This shorthand is the Ribbon command sequence that turns on manual recalculation in Excel. It says that you click the Formulas tab (if it isn't displayed already) and then click the Calculation Options button followed by the Manual drop-down menu option.

Although you use the mouse and keyboard shortcut keys to move your way in, out, and around the Excel worksheet, you do have to take some time to enter the data so that you can eventually mouse around with it. Therefore, this book occasionally encourages you to type something specific into a specific cell in the worksheet. Of course, you can always choose not to follow the instructions. When I tell you to enter a specific function, the part you should type generally appears in **bold** type. For example, **=SUM(A2:B2)** means that you should type exactly what you see: an equal sign, the word **SUM**, a left parenthesis, the text **A2:B2** (complete with a colon between the letter-number combos), and a right parenthesis. You then, of course, have to press Enter to make the entry stick.

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 (both of these hot key combos save workbook changes).

With the Alt key combos, 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 (by the way, you type all lowercase hot key letters — I only put them in caps to make them stand out in the text).

Hot key combos that use the Ctrl key are of an older vintage and work a little bit differently. You have to hold down the Ctrl key while you type the hot key letter (though again, type only lowercase letters unless you see the Shift key in the sequence, as in Ctrl+Shift+C).

Excel 2010 uses only one pull-down menu (File) and one toolbar (the Quick Access toolbar). You open the File pull-down menu by clicking the File tab or pressing Alt+F. The Quick Access toolbar with its four buttons appears to the immediate right of the File tab.

Finally, if you're really observant, you may notice a discrepancy in how the names of dialog box options (such as headings, option buttons, and check boxes) appear in the text and how they actually appear in Excel on your computer screen. I intentionally use the convention of capitalizing the initial letters of all the main words of a dialog box option to help you differentiate the name of the option from the rest of the text describing its use.

Icons Used in This Book

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.

Where to Go from Here

If you've never worked with a computer spreadsheet, I suggest that, right after getting your chuckles with the cartoons, you first go to Chapter 1 and find out what you're dealing with. If you're someone with some experience with earlier versions of Excel, I want you to head directly to the section, "Migrating to Excel 2010 from Earlier Versions Using Pull-down Menus" in Chapter 1, where you find out how to stay calm as you become familiar and, yes, comfortable with the Ribbon user interface.

Then, as specific needs arise (such as, "How do I copy a formula?" or "How do I print just a particular section of my worksheet?"), you can go to the Table of Contents or the index to find the appropriate section and go right to that section for answers.

Part I

Getting In on the Ground Floor



In this part . . .

In this part, I break down the Excel user interface and make sense of the tabs and command buttons you're going to face day after day after day. Of course, it does you no good just to know what's what onscreen; you need to be able to use all these bells and whistles (or buttons and boxes in this case). Therefore, I also show you how to use some of the more prominent buttons and boxes to enter your