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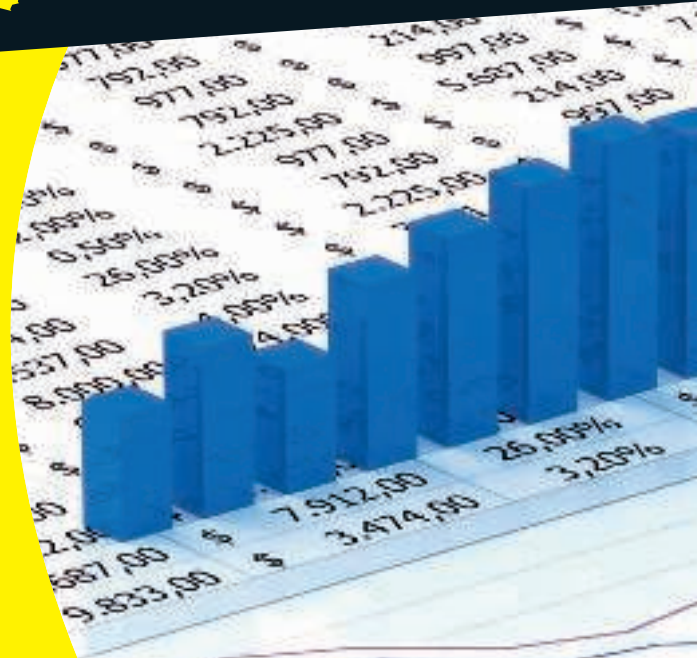
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Diane Koers



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Excel[®] **2010**
Just the Steps[™]
FOR
DUMMIES[®]

by Diane Koers



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Diane and her husband enjoy spending their free time fishing, traveling, and playing with their four grandsons and their Yorkshire Terrier.

Dedication

To Sunshine: You are pup-a-licious!

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We're proud of this book; please send us your comments at <http://dummies.custhelp.com>. For other comments, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

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Welcome to the world of *Microsoft Excel*, the most popular and powerful spreadsheet program in the world. You may ask: “What is a spreadsheet program?” A *spreadsheet program* is a computer program that features a huge grid designed to display data in rows and columns. You can use it to perform mathematical, logical, and other types of operations on the data you enter. You can sort the data, enhance it, and manipulate it in a plethora of ways — including creating powerful charts and graphs from it. Whether you need a list of names and addresses or a document to calculate next year’s sales projections based on prior year’s performance, Excel is the application you want to use.

About This Book

This book provides the tools you need to successfully tackle the potentially overwhelming challenge of figuring out how to use Microsoft Excel. In this book, you discover how to create spreadsheets; however, what you do with them is totally up to you. Your imagination is the only limit!

Why You Need This Book

Time is of the essence, and you probably don’t have the time to read a lot. You just need to complete a task effectively and efficiently. This book is full of concise, easy-to-understand steps designed to get you quickly up and running with Excel. I take you directly to the steps for a desired task without all the jibber-jabber that’s often included in other books.

Even if you’ve used Excel in the past, Excel 2010 brings many new features and major changes to existing features. This book helps ease the transition from earlier Excel versions.



Introduction

Conventions used in this book

- ➔ When you need to type something, I put it in **bold** typeface.
- ➔ For Ribbon commands, I use the ⇔ symbol to separate menu options. For example, “Choose Insert⇔Picture in the Illustrations group” says, “Click the Insert tab and then from the Illustrations group, click the Picture button.”
- ➔ In some figures, you see circled items. This is done to help you locate items mentioned or referred to in the text.



This icon points out tips and helpful suggestions related to the current task.

How This Book Is Organized

This book is divided into 24 chapters broken into 6 convenient parts:

Part I: Putting Excel to Work

In Chapter 1, you uncover the basics of working with Excel files, such as opening, closing, and saving files. In Chapter 2, you work with entering the different types of data into Excel worksheets, and in Chapters 3 and 4, you create various types of formulas and functions to perform worksheet calculations. Chapter 5 shows you how to protect your work with Excel's security features.

Part II: Sprucing Up Your Spreadsheets

Chapters 6 and 7 show you how to dress up the data you enter into a worksheet using data alignment, formatting values, changing fonts or colors, and adding cell borders. In Chapter 8, you work with graphics, such as arrows and Clip Art. In Chapter 9, you use workbooks consisting of multiple worksheets, hyperlinks, and cross-references.

Part III: Viewing Data in Different Ways

This part shows how you can modify the way Excel displays certain workbook options on your screen. Chapter 10 illustrates changing the worksheet views. In Chapter 11, you sort your data to make it easier to locate particular pieces of information. Chapter 12 enables you to create charts to display your data in a superb graphic manner. In Chapter 13, you work with the different output methods, including printing and e-mailing your worksheets. The last chapter in this part, Chapter 14, shows you several timesaving tools included with Excel.

Part IV: Analyzing Data with Excel

Use these chapters to effectively analyze all the data you input into a worksheet. In Chapters 15, 16, and 17, you work with Excel outlines, filters, and PivotTables, respectively. Chapter 18 shows you how you can create macros to save data entry and formatting time.

Part V: Utilizing Excel with Other People and Applications

Chapters 19–22 are all about sharing: sharing Excel with others by using Excel's collaboration features or sharing Excel with other Microsoft Office applications such as Word, PowerPoint, and Access.

Part VI: Practical Applications for Excel

Go to these chapters to save yourself time with a Commission Calculator worksheet (Chapter 23), or a medical-expense tracking worksheet (Chapter 24).

Back Cover: Using Excel Shortcut Keys

This helpful list shows you many shortcut keys that make access to Excel functions faster and easier.

Get Ready To . . .

To get started creating formulas, sorting data, adding a chart, building macros, just flip through this book, pick a task, and dive in. The tasks in this book help you quickly master Excel.

Part I

Putting Excel to Work

The 5th Wave

By Rich Tennant



"I hate when you bring 'Office' with you on camping trips."

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Working with Excel Files

Excel is like a giant accountant ledger sheet composed of a grid made up of columns and rows. At each row and column intersection is a *cell*. A single worksheet contains 16,374 columns across the top (stretching from column A to column XFD) and 1,048,576 rows down the side. That's over 17 *billion* cells in a single worksheet. A *cell address* is the description of the intersection of a column and a row, such as D23 (in this example, D is the column name and 23 is the row).

The Excel interface provides you with the right tools at the right time. In most Windows programs, you see menus and toolbars to select your options from. Instead of the traditional look, Excel provides icon- and button-laden tabs on the Ribbon containing most Excel features.

Throughout the course of this book, you discover methods to use Excel as a spreadsheet, of course; but you also discover how to use it as a database, a calculator, a planner, and even a graphic illustrator. I start with the basics and work into the more advanced Excel actions.

In this chapter, you discover how to

- ➔ Open and close the Excel program.
- ➔ Work in the new Backstage View.
- ➔ Select commands with your keyboard.
- ➔ Change information on your status bar.
- ➔ Create, open, and save Excel workbooks.
- ➔ Convert earlier files to Excel 2010.
- ➔ Delete and rename workbook files.
- ➔ Use workbook properties to better manage your files.

Chapter 1

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Open and Explore Excel

1. Choose Start → All Programs → Microsoft Office → Microsoft Excel 2010. The Microsoft Excel program begins with a new, blank workbook displayed ready for you to enter data. Figure 1-1 illustrates some of the common workbook components.
2. Click any *tabs*, or task-oriented portions, of the Ribbon. The first tab, which is displayed in a color different from the other tabs, is called File. Clicking File displays the Excel Backstage View, which you find more about in the next section. The remainder of the tabs is broken down into subsections, or *groups*. For instance, the Home tab includes the Clipboard, Font, Alignment, Number, Styles, Cells, and Editing groups. Point your mouse over any button, and a description of the tab's features appear.
3. Click the Insert tab. The Ribbon changes to reflect options pertaining to Tables, Illustrations, Charts, Links, and Text groups.



Additional tabs appear when they're useful for the current task.

4. On the Home tab, click the down arrow next to the Format as Table button. A gallery of table styles appears. (Click the arrow again to close the gallery.)
5. On the Home tab, click the dialog box launcher on the bottom-right of the Font group to open a related dialog box (see Figure 1-2). In this example, the Format Cells dialog box opens.



Click the Cancel button to close a dialog box without making any changes.

6. Pause your mouse over any of the three icons above File. By default, the Quick Access toolbar functions include Save, Undo, and Redo.

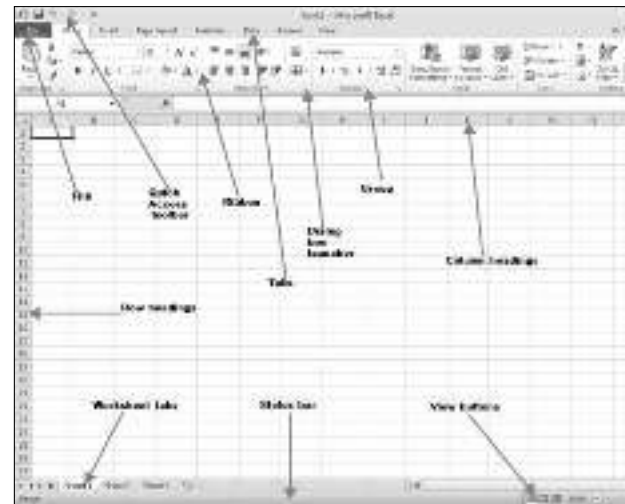


Figure 1-1

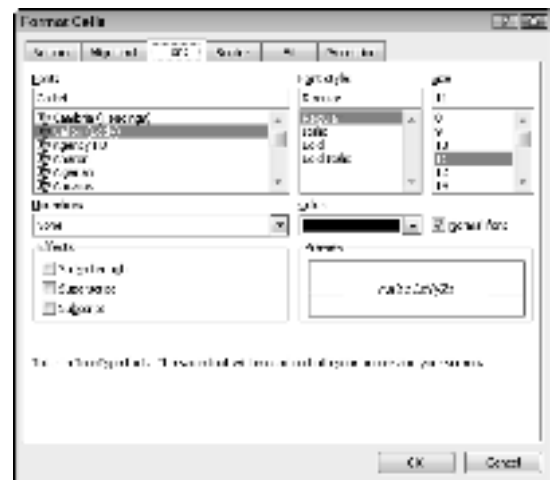


Figure 1-2

Explore Backstage View

1. Click File. Excel Backstage View opens with three columns. The left column represents actions you can select.
2. Choose Print from the left column. The middle column changes to show tasks relative to printing (see Figure 1-3). See Chapter 13 for more information about printing.
3. Choose Recent in the left column. A list of workbooks you worked on recently displays. You can click any workbook to open it. See the steps in the section, "Open an Existing Excel File," later in this chapter.
4. Choose Info in the left column. The middle column represents a second level of tasks related to your current workbook, and the right column displays the workbook properties. See the section, "Specify Workbook Properties," later in this chapter.
5. Click File again. Backstage View closes, and you return to your current workbook.



Figure 1-3

Close Excel

1. Click File, and from Backstage View that appears, choose Exit, as shown in Figure 1-4.



Alternatively, click the Close button (X) in the upper-right corner.

2. Click Save or Don't Save if prompted to save your workbook. (See the section, "Save a Workbook," later in this chapter.)



(Optional) Choose File→Close. The current workbook closes, but the Excel program remains open.



Figure 1-4

Select Commands with the Keyboard

1. Click any cell on the worksheet.
2. Press the Alt key on the keyboard. Shortcut letters appear on the Ribbon, and numbers appear on the Quick Access toolbar (see Figure 1-5).



Numbers control commands on the Quick Access toolbar.

3. Press a letter on your keyboard to select a tab on the Ribbon; for example, press the P key to display the Page Layout tab. Shortcut letters then appear for each command on that tab.
4. Press a letter on your keyboard to select a command. Excel displays options for the command you selected.
5. Press a letter or use the arrow keys and then press Enter on the keyboard to select an option. Excel performs the command you selected, applying the option you chose.



Press the Esc key to step the KeyTips back one step.

Change Status Bar Indicators

1. Right-click anywhere along the status bar at the bottom of the window. Excel opens the Customize Status Bar menu.
2. Active features have a check mark next to them and inactive features do not. To activate an inactive feature, click it. This automatically adds a check mark. In Figure 1-6, the Caps Lock feature is off.
3. To deactivate any active feature, click it to remove the check mark.

4. Click anywhere in the Excel workbook to close the Customize Status Bar menu.



Figure 1-5



Figure 1-6

Create a New Excel File

1. Choose File⇨New. Backstage View shows templates you can choose from in the middle column (see Figure 1-7).
2. Select the Blank Workbook option and then click the Create button. Excel creates a blank workbook based on the default template.



See Chapter 10 for more information about Excel templates.



Press Ctrl+N to create a new workbook without opening the New Workbook dialog box.



Figure 1-7

Save a Workbook

1. Choose File⇨Save or click the Save button on the Quick Access toolbar. The Save As dialog box appears, as shown in Figure 1-8.



The Save As dialog box only appears the first time you save a file.

2. By default, Excel saves your files in the Libraries⇨Documents folder. If you want to save your file in a different folder, select that folder from the folder pane.
3. In the File Name text box, type a descriptive name for the file. Filenames can't contain an asterisk (*), a slash (/), a backslash (\), or a question mark (?) character.
4. Click the Save button. Excel saves the workbook in the location with the name you specified in Step 3.



Figure 1-8

Save a Workbook in a Different Format

1. Click File and, from Backstage View that appears, choose Save As. The Save As dialog box appears.
2. In the File Name text box, type a descriptive name for the file.
3. Click the drop-down arrow on the Save as Type drop-down list to display a list of file formats.
4. Choose 1 of the 27 different file formats (see Figure 1-9). Files saved in Excel 2010 or Excel 2007 format have an .xlsx extension, whereas files created in earlier versions of Excel have an .xls extension.
5. Click the Save button. Depending on the format you choose, Excel may prompt you for additional information.

Open an Existing Excel File

1. Click File and from Backstage View that appears, choose Open. The Open dialog box, as shown in Figure 1-10, appears.



From File, click Recent and then Excel displays recently used files in the middle column of Backstage View. Click any listed filename to quickly open it.

2. If necessary, select the appropriate folder from the folder pane and then select the file you want to open.



Open the file type drop-down list to display files saved in other formats.

3. Click the Open button. The workbook appears in the Excel workspace, ready for you to edit.



If the file you open was created in Excel 2003 or an earlier version of Excel, Compatibility Mode appears on the title bar next to the document name. (See the following section for more information.)



Figure 1-9

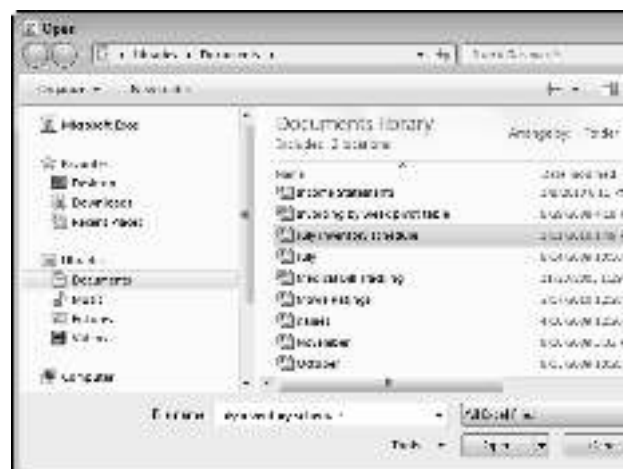


Figure 1-10

Convert a Prior Version File to Excel 2010

1. Open a workbook created in an earlier version of Excel; the title bar indicates that Excel opened the document in Compatibility Mode.
2. Click File and from Backstage View, choose Convert. Excel displays a message indicating you're about to convert the current workbook (see Figure 1-11).
3. Click OK and then another conversion message appears.
4. Click Yes and then Excel saves the file in the new format. Excel replaces the older version of the workbook, using the same name you used for the older version of the document. If the older version was an Excel 97–2003 or earlier document, Excel 2010 changes the extension to .xlsx.



Compatibility Mode disappears from the Excel title bar.

Delete a File

1. Open Excel but do not open the file you want to delete. Click File and choose Open or Save As. Either the Open or Save As dialog box appears.
2. If necessary, in the folder pane, navigate to the folder containing the file you want to delete.
3. Select the unwanted file and choose Organize→Delete (see Figure 1-12). A confirmation message appears.
4. Click the Yes button, and Excel deletes the file.
5. Click the Cancel button to close the Open or Save As dialog box.



Figure 1-11

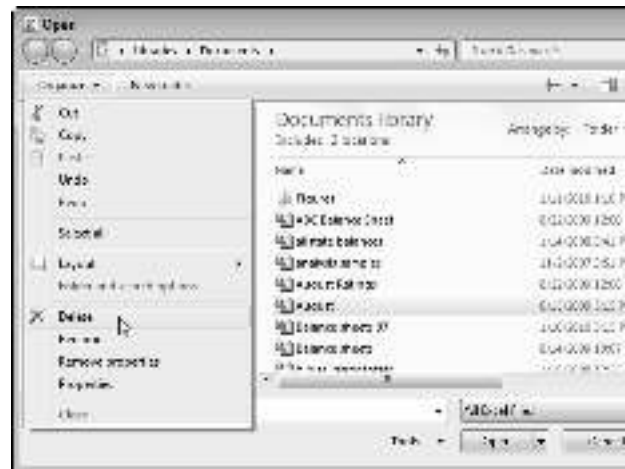


Figure 1-12

Rename a File

1. Open Excel but don't open the file you want to rename. Choose File→Open or Save As. The Open or Save As dialog box appears.
2. If necessary, in the folder pane, navigate to the folder containing the file you want to rename.
3. Select the file you want to rename and choose Organize→Rename. The original filename becomes highlighted. (See Figure 1-13.)
4. Type the new filename. Filenames can't contain an asterisk (*), slash (/), backslash (\), or question mark (?) character.
5. Press Enter when you're finished typing.
6. Click the Cancel button to close the Open or Save As dialog box.



Figure 1-13

Specify Workbook Properties

1. From an open workbook, click File and from the Info panel on the right, choose Properties. A list of options appears.
2. Choose Show Document Panel. The workbook reappears, and the Document Information panel appears.
3. Enter identifying information such as the author's name, subject, or a list of keywords. See Figure 1-14.



Excel automatically adds statistical information, such as the workbook's original creation date, the last time the workbook was printed or modified, and the workbook size.

4. Click the Close (X) button to close the Document Information panel.



Figure 1-14

Entering Spreadsheet Data

Because each Excel worksheet is such a huge grid of columns and rows with over 17 billion cells, you have plenty of places you can enter data. But what kind of data do you enter?

You enter three types of data in the cells:

- ➔ **Labels** are traditionally descriptive pieces of information, such as names, months, or other identifying statistics, and they usually include alphabetic characters.
- ➔ **Values** are generally raw numbers or dates.
- ➔ **Formulas** are instructions for Excel to perform calculations.

In this chapter, I show you how to easily enter labels and values into your worksheet. But alas, you sometimes make mistakes or change your mind. So I also show you how to delete incorrect entries, duplicate data, or move data to another area of the worksheet.

In this chapter, you discover a great timesaving feature — *AutoFill* — that can replicate information or follow a pattern you create, with just a simple mouse click. Another feature, *Range Names*, can save you time and frustration by using easy-to-remember descriptive names for certain areas of your worksheet so you won't have to remember exact cell addresses.

You even discover an Excel feature that prevents worksheet cells from accepting incorrect data. If you're ready . . . time to get started.

Chapter

2

Get ready to . . .

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Change the Active Cell

1. Open an Excel workbook. The Formula bar displays the active cell location. Columns display the letters from A to XFD, and rows display numbers from 1 to 1,048,576. A *cell address* is the intersection of a column and a row, such as D23 (in which D is the column and 23 is the row).
2. Move the focus to an adjacent cell with one of the following techniques:
 - **Down:** Press the Enter key or the down-arrow key.
 - **Up:** Press the up-arrow key.
 - **Right:** Press the right-arrow key.
 - **Left:** Press the left-arrow key.
3. To move to a cell farther away, use one of these techniques:
 - **Click any cell to move the active cell location to that cell.** You can use the scroll bars to see more of the worksheet. In Figure 2-1, the cell focus is in cell E9. Notice the border surrounding cell E9 and the name box that indicates the current cell.
 - **Choose Home → Find & Select → Go To in the Editing group.** The Go To dialog box displays, as shown in Figure 2-2. In the Reference box, enter the address of the cell you want to make active and then click OK.



Press the F5 key to display the Go To dialog box.

- Press **Ctrl+Home**. Excel jumps to cell A1.
- Press **Ctrl+End**. Excel jumps to the lower-right cell of the worksheet.
- Press **Ctrl+PageDown** or **Ctrl+PageUp**. Excel moves to the next or preceding worksheet, respectively, in the workbook.

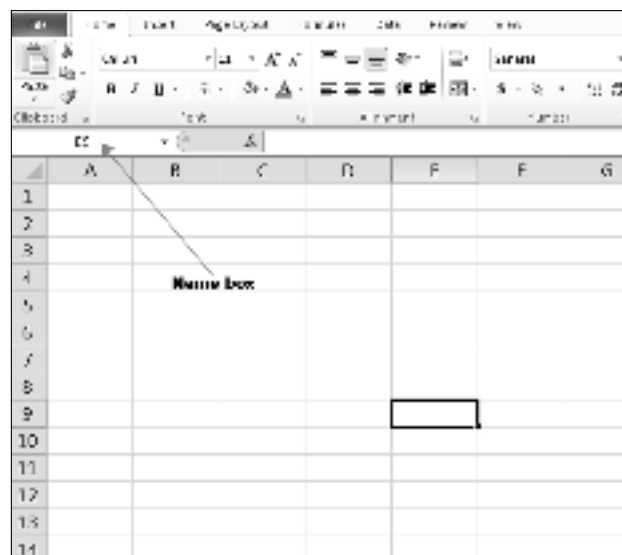


Figure 2-1



Figure 2-2

Select Multiple Cells

1. Click the first cell in the group you want to select.
2. Depending on the cells you want to select, perform one of the following actions:
 - To select **sequential cells**, select a cell, hold down the Shift key, and select the last cell you want included. All cells in the selected area are highlighted, with the exception of the first cell. (Don't worry, it's selected, too; it's just not highlighted.) Figure 2-3 shows a sequential area selected from cells B4:F15. Notice the black border surrounding the selected area.



Click any cell to clear the selection. Alternatively, click and drag the mouse over a group of cells to select a sequential area.

- To select **non-sequential cells**, select a cell, hold down the Ctrl key, and click each additional cell you want to select. Figure 2-4 shows the non-sequential cells A4, C7, and E4:E9, as well as all of row 2, selected.
- To select a **single entire column**, click a column heading.
- To select **multiple columns**, drag across multiple column headings.
- To select a **single entire row**, click the row number.
- To select **multiple rows**, drag across multiple row numbers.



When making non-sequential cell selections, you can include entire rows and entire columns along with individual cells or groups of cells.

- To select the **entire worksheet**, click the small gray box with a triangle located to the left of column A and above row 1. Alternatively, you can select all cells in a worksheet by pressing Ctrl+A.

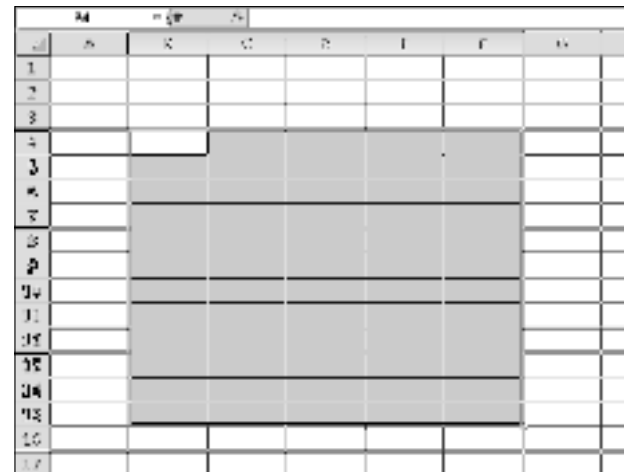


Figure 2-3

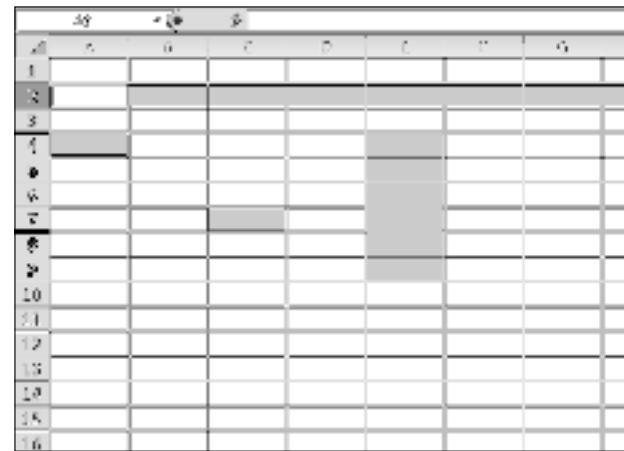


Figure 2-4

Enter Cell Data

1. Type the label or value in the desired cell.
2. Press Enter. The data is entered into the current cell, and Excel makes the next cell down active (see Figure 2-5). How Excel aligns the data depends on what it is:
 - **Label:** Excel aligns the data to the left side of the cell. If the descriptive information is too wide to fit, Excel extends that data past the cell width if the cell to the right is blank. If that cell isn't blank, Excel displays only enough text to fit the display width; however you can widen the column to display additional text.



To enter a value as a label, type an apostrophe before the value.

- **Whole value:** If the data is a whole value, such as 34 or 5763, Excel aligns the data to the right side of the cell.
- **Value with a decimal:** If the data is a decimal value, Excel aligns the data to the right side of the cell, including the decimal point, with the exception of a trailing 0. For example, in Figure 2-6, if you enter 246.75, 246.75 displays; however, if you enter 246.70, 246.7 displays. (See Chapter 6 to change the display appearance, column width, and alignment of your data.)



If a value displays as number signs, or scientific notation (such as 4.3E+09) as shown in Figure 2-6 in cell D8, the value is too long to fit into the cell. You need to widen the column width.

- **Date:** If you enter a date, such 1/11, Jan 11, or 11 Jan, Excel automatically returns 11-Jan in the cell, but the Formula bar displays 1/11/2010. Figure 2-4 also illustrates an example of a date entry. See Chapter 6 to change the date format.

	A	B	C	D
1				
2		Completed		
3				
4				
5				
6				
7				
8				

Figure 2-5

	A	B	C	D	E	F
1						
2		Average	Date			
3	David	395.6	11-Jan			
4	Mary	325.25				
5	Total	720				
6	Sam	668.583				
7						
8				9,739,600		
9						
10						
11						
12						

Figure 2-6

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