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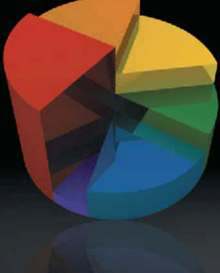

Excel 2010

Made Simple

Abbott Katz

Apress®

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Apress®

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About the Author

Abbott Katz A New Yorker living in London, Abbott Katz has introduced Excel to thousands of students in both university and corporate settings. The author of *Beginning Microsoft Excel 2010* (Apress), he has a doctorate in sociology and has contributed to numerous publications on a range of topics.

About the Technical Reviewer

Greg Kettell is a professional software engineer with a diverse career that has covered everything from game programming to enterprise business applications. He has written and contributed to several books about software applications, operating systems, web design, and programming. Greg, his wife Jennifer, and their two children currently reside in upstate New York.

Acknowledgments

The Made Simple series sports two sets of authors: the ones whose names make it to the books' covers, and the ones whose labors earn their appreciations in sections such as these.

Thus, many thanks go to an international coterie of helpers, including development editor Matthew Moodie for his spot-on tweaks and knowing recommendations, coordinating editor Kelly Moritz for her redoubtable coordination of the publication process, technical editor Greg Kettell for his sage commentaries, and what is doubtless a set of literally silent partners—the able players on Apress's production team. And thanks to Dominic Shakeshaft for encouraging this project's inception. A Made Simple book isn't so simple.

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Quick Start Guide

Believe it or not, you're looking at a book about one of the most widely owned—but underused—programs on the planet: Microsoft Excel, the 2010 edition. Underused? Yep, because even though millions of people around the globe apply Excel to a vast range of daily tasks, most users still don't appreciate the even wider range of things Excel can do—once they nail down its basics and begin to glimpse the huge potential that lurks behind all those cells and buttons.

What makes Excel is interesting, and even exciting, is that once you learn those basics you can start to *make things happen* onscreen*.* It's true—enter a number here, and something happens over there; change the values contributing to a chart, and the chart changes. Write some formulas, and you'll suddenly see something there that wasn't there before—and that something can make your work easier and more productive.

Is it worth learning about? You bet; and this Quick Start Guide will introduce you to Excel and point you to the places in this book where you can learn more about the things you have to know in order to get the most you can out of the software. So let's get started.

The Excel Worksheet: What You're Looking At

Click your way into Excel, and you'll be brought face to face with a screen that looks like Figure 1 (minus the descriptive captions, of course).

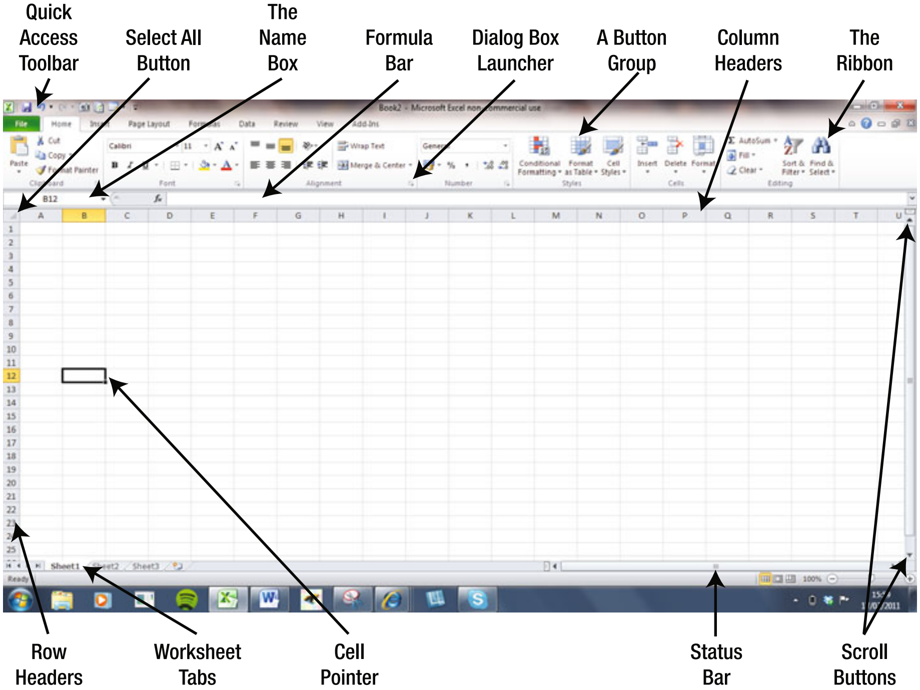
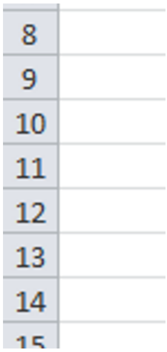

Quick Access Toolbar
Select All Button
The Name Box
Formula Bar
Dialog Box Launcher
A Button Group
Column Headers
The Ribbon
Row Headers
Worksheet Tabs
Cell Pointer
Status Bar
Scroll Buttons

Figure 1. *The Excel worksheet*

What you're looking at is a large grid called a *worksheet*—and there's a lot more of it than you can see at one time. Don't confuse the worksheet with the *workbook***,** which is the name for the whole Excel file; just as Word speaks of a *document*, Excel uses the term *workbook*. Think of a worksheet, then, as a page in the larger workbook.

The worksheet is bordered by a collection of buttons, icons, and fields that may not make all that much sense to you yet, so I'll offer a few introductory words about them and what's behind them. And don't worry, I'll explain in more detail as we move on.

- *Row headers*: These are the row numbers lining the far left of the grid. You need to know row numbers in order to determine a cell's *address*. A *cell* is the name given to all those rectangles making up the grid; each cell has an address, formed by the intersection of a row header and a column header.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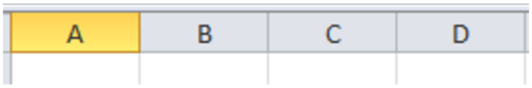
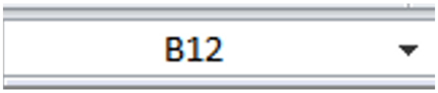


- *Column headers*: These are the letters bordering the top of the grid. Cells have addresses such as E34, A279, and the like (the letter always come first—e.g., there's no cell 34E, which sounds like a seat on an airplane). It's in those cells where you'll be entering your spreadsheet data.



- *Name box:* Among other things, the Name box records the current address of the cell pointer, that thick rectangle that highlights the cell to which you've traveled. In the accompanying screenshot, the Name box lets us know we're in cell B12.

- *Formula bar*: This white strip reveals the data you've entered in a cell (see Figure 2). If you think you can already tell that simply by looking at the actual cell, you'll soon learn that that's not always the case.

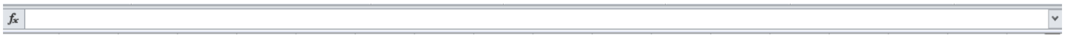
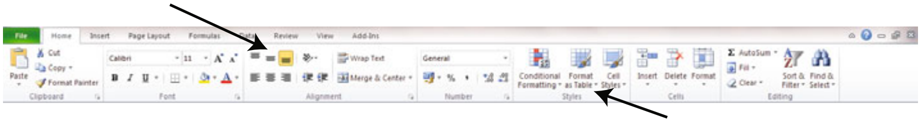


Figure 2. *The formula bar*

- *Ribbon*: This is a strip of buttons that, when clicked, carry out a wide variety of actions on the spreadsheet (see Figure 3). For example, the ribbon is responsible for formatting (i.e., changing the appearance of numbers in cells to look like, say, $45.00 instead 45, or turning any cell containing a number greater than 100 orange). Click any of the headings above the ribbon—the *command tabs*—and the contents of the ribbon changes, revealing a new set of buttons. Note that the command tabs are subdivided into Home, Insert, Page Layout, Formulas, Data, Review, View, and Add-Ins, as shown in Figure 3.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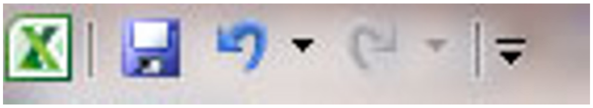
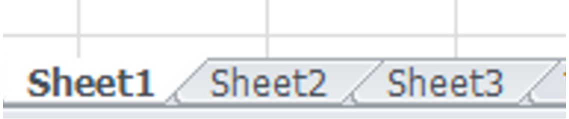
Conditional Formatting
Format as Table
Cell Styles
Styles
Insert
Delete
Format
Cells
AutoSum
Fill
Clear
Sort & Filter
Find & Select
Editing

Figure 3. *The ribbon*

- *Button groups*: These are clusters of buttons that perform related tasks. Figure 3 shows the contents of the **Home** tab, which contains the button groups **Clipboard**, **Font**, **Alignment**, and so on. The arrows in the figure point to the **Alignment** and **Styles** button groups.



- *Quick Access toolbar*: This is a set of buttons—sort of a mini-ribbon—that contains important basic commands you're likely to use often. The advantage of the Quick Access toolbar is that it remains onscreen even if the contents of the ribbon beneath it change, and it can be customized so that you can add buttons to represent other commands you often use.



- *Worksheet tabs*: Back to the worksheet concept, those three inserts entitled Sheet1, Sheet2, and Sheet3 tucked in the lower left of the screen are worksheet tabs, representing the three worksheets that make up an Excel workbook for starters. Clicking any of these three will reveal another worksheet just like the others, affording you another batch of all those cells. When you start Excel, you'll be brought to Sheet1 by default. You can add many more new worksheets to the workbook if you need more space in which to store still more information.
- *Scroll buttons*: These are four arrow-shaped buttons holding down the lower right and far right of the worksheet screen (see Figure 4). Clicking these moves the worksheet right/left and up/down on the screen. Try them and you'll see what they do.

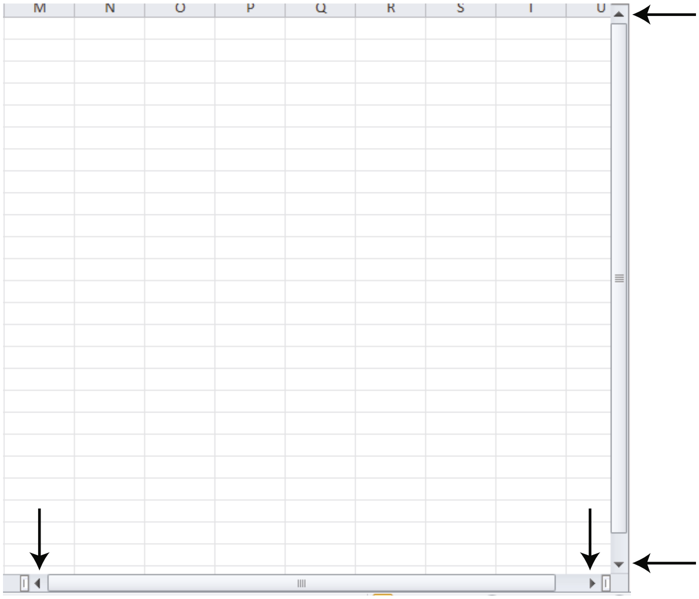
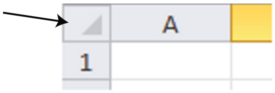


Figure 4. *Scroll buttons*



- **Select All** *button*: Clicking that rectangle wedged between the A and the 1 in the upper left of the screen will select, or highlight, all the cells in your worksheet—and why that might matter will be discussed soon.
- *Status bar*: This is the lower border of the worksheet, which contains buttons enabling you to modify ways in which the worksheet can be viewed, and which reports information about selected cells (see Figure 5). Note the mode indicator at the left of the status bar, a caption that reports the activity you're currently performing on the worksheet—Enter (for data entry), Edit, Ready, and so forth. You'll see what all that means soon.

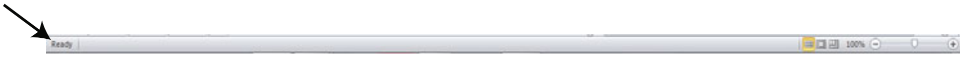
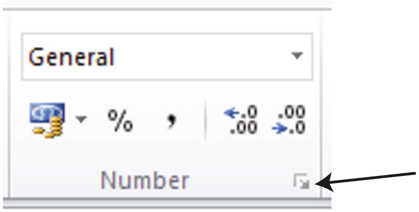


Figure 5. *The status bar, at the bottom of the worksheet. The arrow points to the mode indicator*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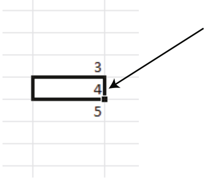
- *Dialog box launchers*: These are the small arrows pinned to the lower-right corner of some of the button groups. Clicking a launcher opens a dialog box that offers command options additional to the ones shown in the group.



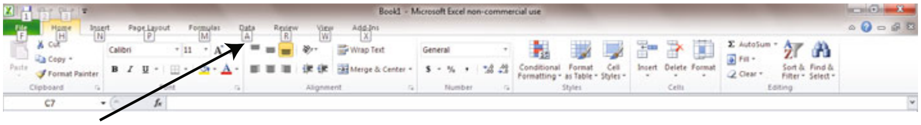
- *Cell pointer*: This is the bold rectangle that indicates your current position on the spreadsheet.

Key Tips: Accessing Buttons with the Keyboard

The standard way to access all those buttons filling Excel's ribbon is simply to click your mouse on the button you want.

NOTE: Unless otherwise stated, all mouse clicks utilize the left button.

But there's a keyboard alternative to this technique, called *key tips*. If you press the Alt key once, you'll introduce a collection of initialed minibuttons—the key tips—to the screen (see Figure 6).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Paste
Clipboard
Calibri
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Font
Wrap Text
Merge & Center
Alignment
General
Number
Conditional Formatting
Format as Table
Cell Styles
Styles
Insert
Delete
Format
Cells
AutoSum
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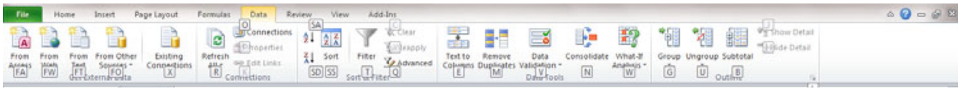
Figure 6. *Note the letters that now accompany each tab.*

By typing any of the letters (or numbers, in some cases) shown, you'll be brought to the tab associated with that letter. Thus, if you press A, you'll call up the **Data** tab, as shown in Figure 7.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From Text FT
From Other Sources FO
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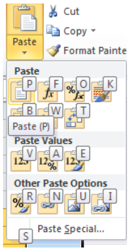
Get External Data
Refresh All R
Connections O
Properties
Edit Links K
Connections
SA
Sort
SD SS
Filter T
Clear C
Reapply
Advanced Q
Sort & Filter
Text to Columns E
Remove Duplicates M
Data Validation V
Consolidate N
What-If Analysis W
Data Tools
Group G
Ungroup U
Subtotal B
Show Detail J
Hide Detail
Outline

Figure 7. *Take a letter: Accessing the Data tab with key tips*

As shown, once you've accessed a tab, its button options can also be accessed via the key tips, some of which require tapping two keys in sequence. Thus, in Figure 7, pressing T will activate the **Filter** option (something you'll learn about in Chapter 7).

Moreover, if the button command you've selected fires up a drop-down menu, those menu commands can likewise be accessed with key tips. Thus, if you first tap H to access the **Home** tab and then press V to trigger the **Paste** button, its drop-down menu options will also be accompanied by key tips, as shown in the illustration.


Cut
Copy
Format Painte
Paste
Paste
P F O K
B W T
Paste (P)
Paste Values
V A E
Other Paste Options
R N U I
Paste Special...
S

NOTE: Clicking any button that features a small arrow will reveal a drop-down menu.

And each time you press the Esc key, you move back up one key tip level. That means that in the preceding screenshot, pressing Esc will close the drop-down menu and return you to all the **Home** tab key tips; pressing Esc again will take you back to the original key tips pinned to each tab, and pressing Esc still once more will turn off the key tips altogether.

Contextual Tabs

There's another set of tabs that may suddenly materialize on the screen. Called *contextual tabs*, these appear only when you've clicked certain objects, such as charts (see Chapter 6) or PivotTables (Chapter 8), and bring along tabs containing buttons specific to that object (see Figure 8).

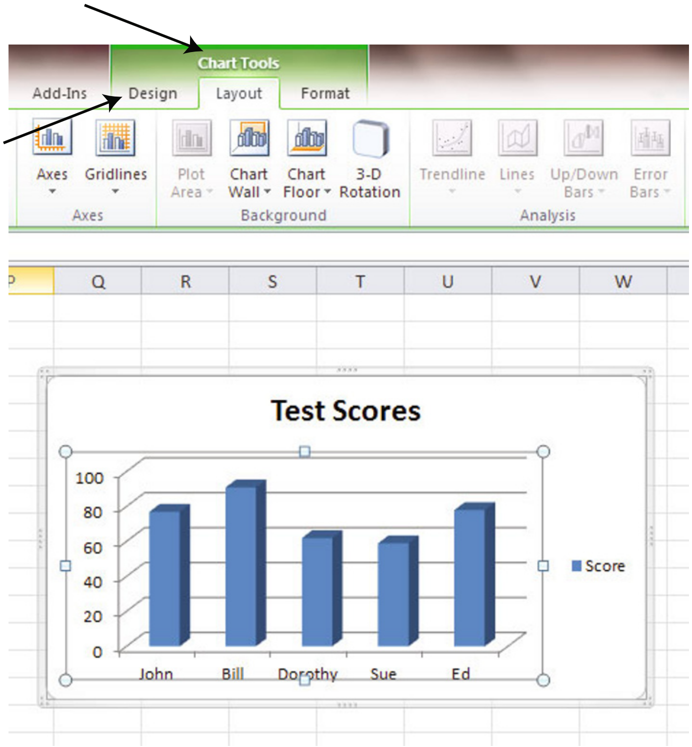


Chart Tools
Add-Ins
Design
Layout
Format
Axes
Gridlines
Plot Area
Chart Wall
Chart Floor
3-D Rotation
Trendline
Lines
Up/Down Bars
Error Bars
Axes
Background
Analysis
P
Q
R
S
T
U
V
W
Test Scores
100
80
60
40
20
0
John
Bill
Dorothy
Sue
Ed
Score

Figure 8. *The Chart Tools contextual tab (see the arrow at the top) and the Chart Tools tabs (see the lower arrow): Design, Layout, and Format*

The **Chart Tools** tab only appears when you click the chart. Click away from the chart and the **Chart Tools** contextual tab disappears, to return only when you click back on the chart. That's what makes it contextual.

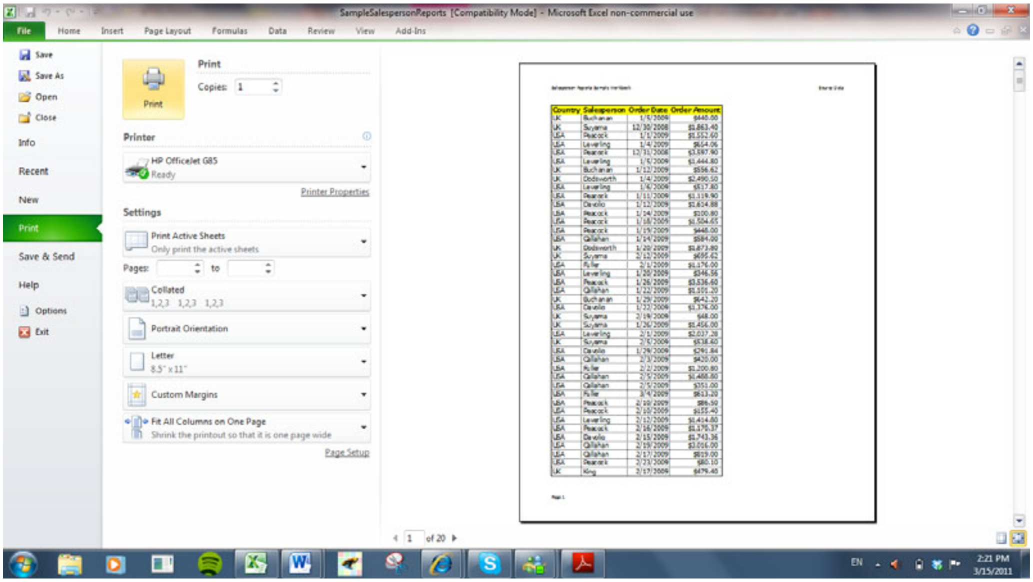
A Visit Backstage

Beginning with the 2010 release of Excel, a new green tab called **File** has been added.

The **File** tab was introduced to replace the Office 2007 button, that rather ambiguous circular object that was stationed at the upper left of Excel's screen.

Click the **File** tab and you'll be brought to what's called the *Backstage*—a large behind-the-scenes area that houses commands that impact the workbook as a whole—including printing (including a print preview), saving, and sending the workbook, as well as sharing it with others (see Figure 9). It also offers numerous default settings that you can change if you want (e.g., how many worksheets a new workbook will start with). The

Backstage also lists the workbooks you've recently accessed, so that you can click any one on the list and open it again.


SampleSalespersonReports [Compatibility Mode] - Microsoft Excel non-commercial use
File
Home
Insert
Page Layout
Formulas
Data
Review
View
Add-Ins
Save
Save As
Open
Close
Info
Recent
New
Print
Save & Send
Help
Options
Exit
Print
Printer
Printer Properties
Settings
Page Setup
1 of 20

Copies: 1

HP OfficeJet G85
Ready

Print Active Sheets
Only print the active sheets

Pages: to

Collated
1,2,3 1,2,3 1,2,3

Portrait Orientation

Letter
8.5" x 11"

Custom Margins

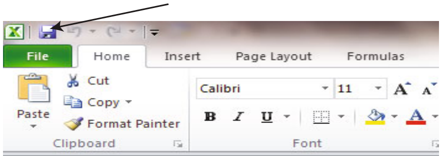
Fit All Columns on One Page
Shrink the printout so that it is one page wide

Figure 9. *A print preview as displayed in the Backstage. Note the other Backstage options in the left columns.*

TIP: To exit the Backstage and return to the worksheet, press the Esc key or just click any other tab.

Customizing the Quick Access Toolbar

Now let's get back to the Quick Access toolbar, that downsized ribbon assigned to the upper left of the worksheet screen.


File
Home
Insert
Page Layout
Formulas
Paste
Cut
Copy
Format Painter
Clipboard
Calibri
11
B
I
U
Font

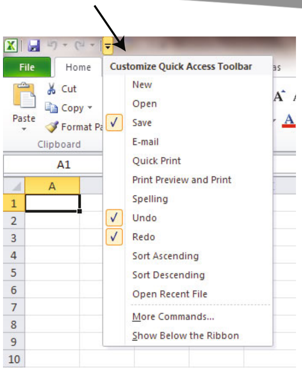
To repeat, the Quick Access toolbar stores frequently used buttons—and again, what makes the Quick Access toolbar so handy is that, unlike the larger tabs sitting beneath it, it's always there, along with its buttons, of course.

What makes the Quick Access toolbar even handier is that you can post *additional* buttons there, so they too will always remain in view and available.

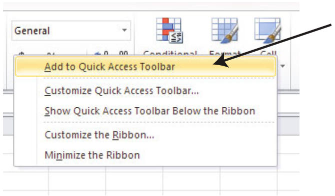
There are several ways in which you can customize the Quick Access toolbar with additional buttons.

For one, you can click the small arrow at the far right of the Quick Access toolbar, revealing the menu shown in the accompanying screenshot.

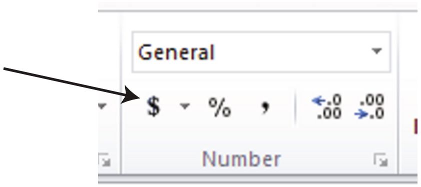
The menu offers just a small sample of all of Excel's commands, but these are among the more popular ones. Just click the commands you want to install, and buttons representing your selections will appear on the Quick Access toolbar.


File
Home
Cut
Copy
Format Pa
Paste
Clipboard
A1
A
Customize Quick Access Toolbar
New
Open
✓ Save
E-mail
Quick Print
Print Preview and Print
Spelling
✓ Undo
✓ Redo
Sort Ascending
Sort Descending
Open Recent File
More Commands...
Show Below the Ribbon

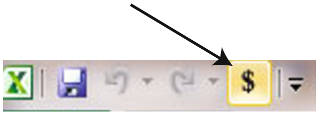
You can right-click virtually any button on any Excel tab, calling up the menu shown here.


General
Add to Quick Access Toolbar
Customize Quick Access Toolbar...
Show Quick Access Toolbar Below the Ribbon
Customize the Ribbon...
Minimize the Ribbon

In this case the currency format button has been clicked, which gives numbers a currency-like appearance (e.g., 45.23 might be changed into $45.23).


General
$
%
,
Number

Now that button will also show up in the Quick Access toolbar.



If you click the **File** tab to enter the Backstage, and then click **Options ➤ Quick Access Toolbar**, you'll see the dialog shown in Figure 10.

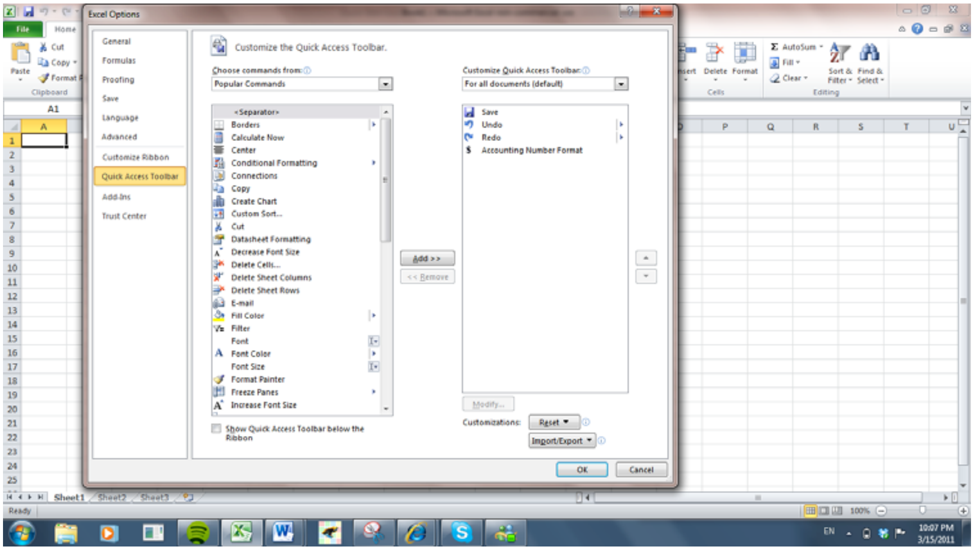

Excel Options
General
Formulas
Proofing
Save
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
Customize the Quick Access Toolbar.
Choose commands from:
Popular Commands
Customize Quick Access Toolbar:
For all documents (default)
<Separator>
Borders
Calculate Now
Center
Conditional Formatting
Connections
Copy
Create Chart
Custom Sort...
Cut
Datasheet Formatting
Decrease Font Size
Delete Cells...
Delete Sheet Columns
Delete Sheet Rows
E-mail
Fill Color
Filter
Font
Font Color
Font Size
Format Painter
Freeze Panes
Increase Font Size
Save
Undo
Redo
Accounting Number Format
Add >>
<< Remove
Modify...
Customizations:
Reset
Import/Export
Show Quick Access Toolbar below the Ribbon
OK
Cancel

Figure 10. *Another route to adding buttons to the Quick Access toolbar—via the Backstage*

Figure 10 shows a very long list of Excel commands, any of which you can select with your mouse and then click Add in order to install it onto the Quick Access toolbar. Figure 11 shows the **Spelling...** command being selected and added it to the Quick Access toolbar, which is done by clicking the **Add** button.

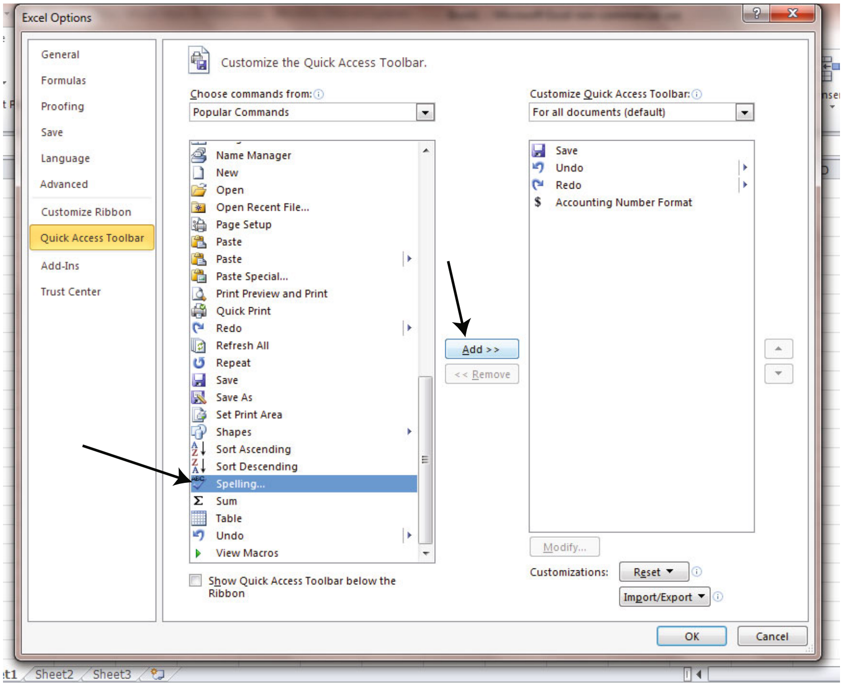
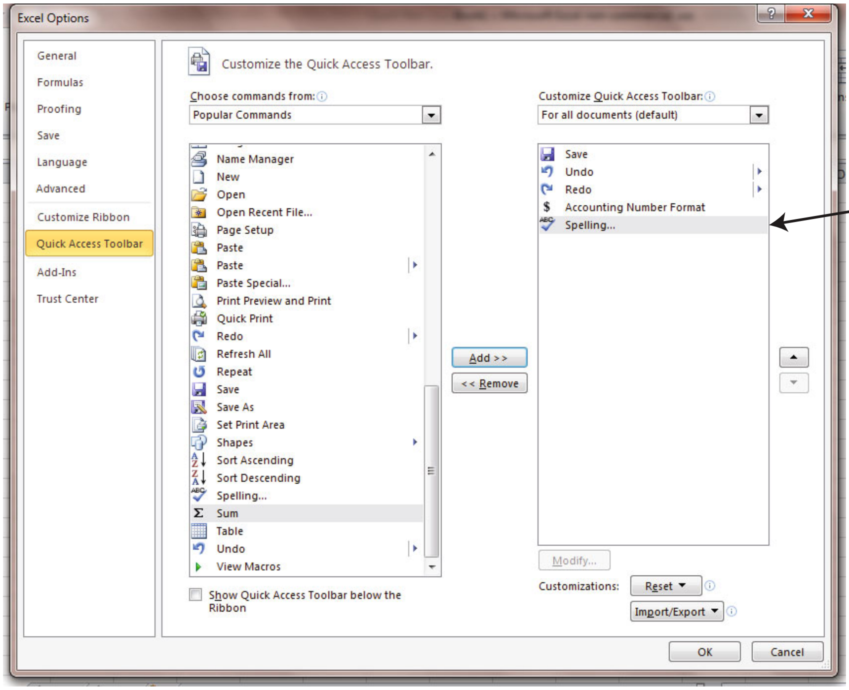

Excel Options
General
Formulas
Proofing
Save
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
Customize the Quick Access Toolbar.
Choose commands from:
Popular Commands
Customize Quick Access Toolbar:
For all documents (default)
Name Manager
New
Open
Open Recent File...
Page Setup
Paste
Paste
Paste Special...
Print Preview and Print
Quick Print
Redo
Refresh All
Repeat
Save
Save As
Set Print Area
Shapes
Sort Ascending
Sort Descending
Spelling...
Sum
Table
Undo
View Macros
Save
Undo
Redo
Accounting Number Format
Add >>
<< Remove
Modify...
Customizations:
Reset
Import/Export
Show Quick Access Toolbar below the Ribbon
OK
Cancel
Sheet2
Sheet3

Figure 11. *Adding the Spelling... button to the Quick Access toolbar*

Try it yourself. Select **Spelling...** and click **Add**, and the **Spelling...** button will be added to the right-hand **Customize Quick Access Toolbar** column, as shown in Figure 12.



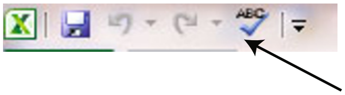
Choose commands from: Popular Commands

Customize Quick Access Toolbar: For all documents (default)

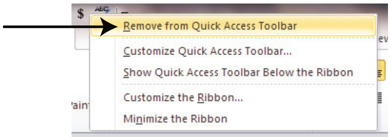
Excel Options
General
Formulas
Proofing
Save
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
Customize the Quick Access Toolbar.
Name Manager
New
Open
Open Recent File...
Page Setup
Paste
Paste
Paste Special...
Print Preview and Print
Quick Print
Redo
Refresh All
Repeat
Save
Save As
Set Print Area
Shapes
Sort Ascending
Sort Descending
Spelling...
Sum
Table
Undo
View Macros
Add >>
<< Remove
Save
Undo
Redo
Accounting Number Format
Spelling...
Show Quick Access Toolbar below the Ribbon
Modify...
Customizations:
Reset
Import/Export
OK
Cancel

Figure 12. *There it is!*

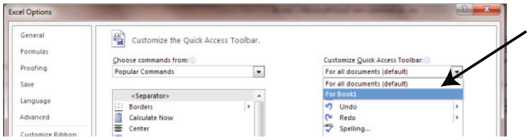
Click **OK**, and the button will take its place in the Quick Access toolbar , as shown in the accompanying illustration.



To remove a button from the Quick Access toolbar , just right-click the button and select the first option on the resulting menu, as shown in the illustration to the right.


Remove from Quick Access Toolbar
Customize Quick Access Toolbar...
Show Quick Access Toolbar Below the Ribbon
Customize the Ribbon...
Minimize the Ribbon

NOTE: By default, adding a button to the Quick Access toolbar makes that button available on the Quick Access toolbar in all your workbooks. If you want to restrict the button's appearance to the Quick Access toolbar of the current workbook only, you need to click the drop-down arrow by the Customize Quick Access field and click the name of the particular workbook (see Figure 13).


Excel Options
General
Formulas
Proofing
Save
Language
Advanced
Customize Ribbon
Customize the Quick Access Toolbar.
<Separator>
Borders
Calculate Now
Center
For all documents (default)
For Book1
Undo
Redo
Spelling...

Choose commands from: Popular Commands

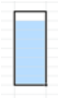
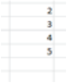
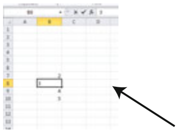
Customize Quick Access Toolbar: For all documents (default)

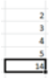
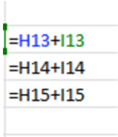
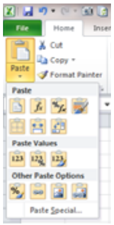
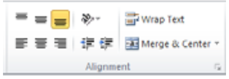
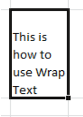
Figure 13. *Adding a button to the Quick Access toolbar for a particular workbook only*

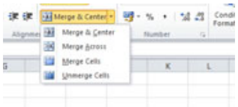
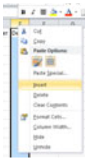
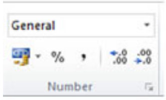
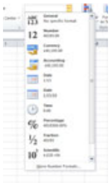
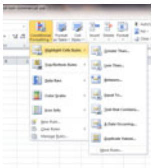
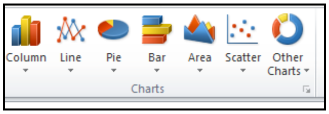
Where to Learn More

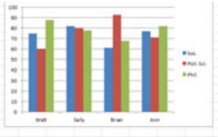
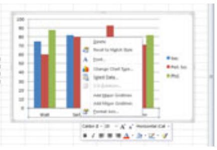
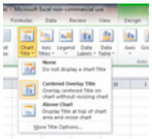
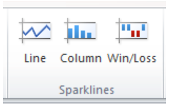
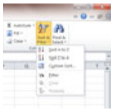
Table1 lists the major Excel topics you'll find discussed in this book, and where to find them.

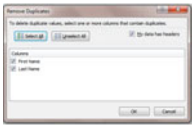
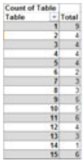
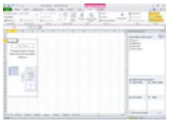
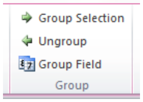
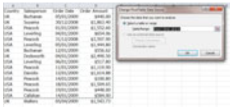
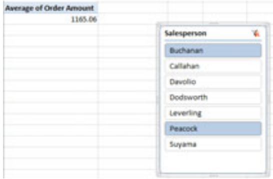
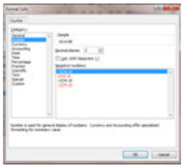
Table 1. *Major Excel Topics*

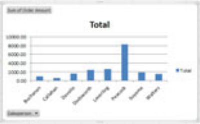
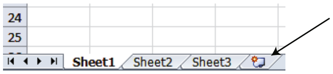
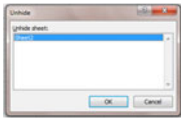
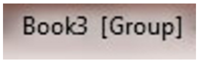
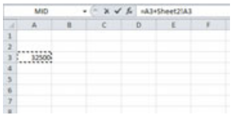
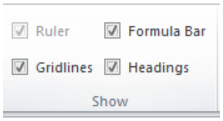
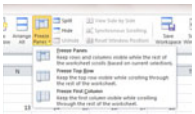
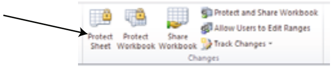
Topic	Illustration	Where to Learn More (Chapter and Section)
Navigating the worksheet		Chapter 2, "Getting Around a Worksheet"
Entering text data in cells	Apress New York London	Chapter 2, "Entering Text and Data"
Selecting (or highlighting) cells		Chapter 2, "Selecting Multiple Cells"
Getting text to fit in columns		Chapter 2, "Widening and Narrowing Columns"
Entering numerical data	 2 3 4 5	Chapter 2, "Entering Numerical Data: How It's Different"
Validating data		Chapter 2, "Data Validation: Bringing Quality Control to the Worksheet"
Constructing a drop-down menu	Quincy Zachary HR Marketing Sales VP 75,400.00	Chapter 2, "Making a List: Personalizing a Drop-Down Menu"
Making changes to data in cells		Chapter 3, "Changing Your Data"

Topic	Illustration	Where to Learn More (Chapter and Section)
Copying and moving data	 Apress New York London Apress New York London	Chapter 3, "Copying and Moving: Duplicating and Relocating Your Data"
Writing formulas	 2 3 4 5 14	Chapter 4, "Customizing the Worksheet with Formulas"
Using functions		Chapter 4, "Automatic Calculations with Functions"
Copying and moving formulas	 =H13+I13 =H14+I14 =H15+I15	Chapter 4, "Copying Formulas: More Than Just Duplication"
Working with relative and absolute cell references	$N6*A2  File Home Inser Cut Copy Format Painter Paste Paste Paste Values Other Paste Options Paste Special...	Chapter 4, "Keeping a Cell Reference Constant with Absolute Addressing"
Pasting values		Chapter 4, "Copying a Formula's Result Only"
Changing font appearances		Chapter 5, "Basic Formatting"
Changing cell alignment	 Wrap Text Merge & Center Alignment	Chapter 5, "Aligning (and Realigning) Your Data"
Wrapping text in its cell	 This is how to use Wrap Text	Chapter 5, "Wrapping Text"

Topic	Illustration	Where to Learn More (Chapter and Section)
Merging and centering cells		Chapter 5, “Adding a Title with Merge and Center”
Inserting columns and rows		Chapter 5, “Inserting, Deleting, and Hiding Columns and Rows”
Formatting numeric data		Chapter 5, “Formatting Values: Making the Numbers Look Good”
Working with dates		Chapter 5, “Working with Dates: Dates Are Numbers Too”
Using the format painter		Chapter 5, “Copying Formats (Not Data) with the Format Painter”
Using cell styles		Chapter 5, “Applying Ready-Made Formats with Styles”
Working with conditional formatting		Chapter 5, “Conditional Formatting”
Understanding chart types		Chapter 6, “Choosing a Chart Type”

Topic	Illustration	Where to Learn More (Chapter and Section)
Constructing a chart		Chapter 6, “Creating a Column Chart”
Changing a chart		Chapter 6, “Changing a Chart”
Changing the default chart		Chapter 6, “Changing the Default Chart”
Changing chart formatting		Chapter 6, “Formatting Charts”
Adding a chart title		Chapter 6, “Adding Extra Chart Elements with the Layout Tab”
Working with sparklines		Chapter 6, “Introducing Sparklines: Mini-Charts Placed in Cells”
Sorting data		Chapter 7, “Sorting Data: Instilling Order in Your Data”
Filtering data		Chapter 7, “Finding What You Want with Filters”
Using tables		Chapter 7, “Tables: Adding User-Friendliness to Your Database”

Topic	**Illustration**	**Where to Learn More (Chapter and Section)**
Formatting and styling tables		Chapter 7, “Tables: Adding User-Friendliness to Your Database”
Removing duplicate records in a table		Chapter 7, “Finding Duplicate Records in the Table (and Removing Them)”
Learning what PivotTables can do	 Count of Table Table Total 1 9 2 4 3 4 4 4 5 4 6 2 7 3 8 3 9 5 10 5 11 6 12 4 13 3 14 1 15 6	Chapter 8, “Looking at Some PivotTables”
Constructing a PivotTable		Chapter 8, “Creating a PivotTable”
Grouping PivotTable data	 Group Selection Ungroup Group Field Group	Chapter 8, “Grouping PivotTable Data: Organizing Your Time(s)”
Adding new records to the PivotTable		Chapter 8, “Refreshing the PivotTable: Changing the Data”
Learning how to use the Slicer	 Average of Order Amount 1165.06 Salesperson Buchanan Callahan Davolio Dodsworth Leverling Peacock Suyama	Chapter 8, “Viewing which Records Are Filtered: Using the Slicer”
Formatting a PivotTable		Chapter 8, “Formatting the PivotTable”

Topic	Illustration	Where to Learn More (Chapter and Section)
Devising a PivotChart		Chapter 8, "Creating Charts from PivotTables Using PivotCharts"
Adding and moving new worksheets		Chapter 9, "Adding and Moving New Worksheets"
Hiding and unhiding worksheets		Chapter 9, "Hiding Sheets"
Grouping sheets	 Book3 [Group]	Chapter 9, "Grouping Sheets: Changing Multiple Sheets at the Same Time"
Writing formulas with cells in different worksheets		Chapter 9, "Referring to Cells in Other Worksheets: Using Them in Formulas"
Displaying or hiding gridlines, headings, and formulas	 ☑ Ruler ☑ Formula Bar ☑ Gridlines ☑ Headings Show	Chapter 9, "Using the View Context Tab to Show and Hide Basic Screen Elements"
Freezing screen panes		Chapter 9, "Keeping Important Data in View with the Freeze Panes Option"
Protecting worksheets and workbooks		Chapter 9, "Protecting the Worksheet and the Workbook"
Printing the entire worksheet		Chapter 10, "Printing the Entire Worksheet"
Printing a selected range of the worksheet		Chapter 10, "Printing a Selection"