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Greg Harvey, PhD

Bestselling author of Excel All-in-One For Dummies

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PORTABLE EDITION

by Greg Harvey, PhD

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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.

Dedication

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Author's Acknowledgments

Let me take this opportunity to thank all the people, both at John Wiley & Sons, 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.

Publisher’s Acknowledgments

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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Introduction

I'm very proud to present you with *Excel 2010 For Dummies,* Portable Edition, 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, Portable Edition, covers all 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 (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.

WARNING!

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.

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).

Keyboard and mouse

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.

Special icons

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

TECHNICAL STUFF

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

TIP

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

REMEMBER

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

WARNING!

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 you first go to Chapter 1 and find out what you're dealing with. 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.

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
- Methods for starting Excel 2010
- Surfing an Excel 2010 worksheet and workbook
- Getting some help with using this program

The Excel 2010 user interface, like Excel 2007, scraps its reliance on a series of pull-down menus, task panes, and multitudinous toolbars. Instead, it uses a single strip at the top of the worksheet called the Ribbon that puts the bulk of the Excel commands you use at your fingertips at all times.

Add to the Ribbon a File tab and a Quick Access toolbar — along with a few remaining task panes (Clipboard, Clip Art, and Research) — and you end up with the handiest way to crunch your numbers, produce and print polished financial reports, as well as organize and chart your data. In other words, to do all the wonderful things for which you rely on Excel.

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. Additionally, Excel 2010 supports an honest to goodness Page Layout View that displays rulers and margins along with headers and footers for every worksheet and has a zoom slider at the bottom of the screen that enables you to zoom in and out on the spreadsheet data instantly. Finally, Excel 2010 is full of pop-up galleries that make spreadsheet formatting and charting a real breeze, especially in tandem with Live Preview.

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.

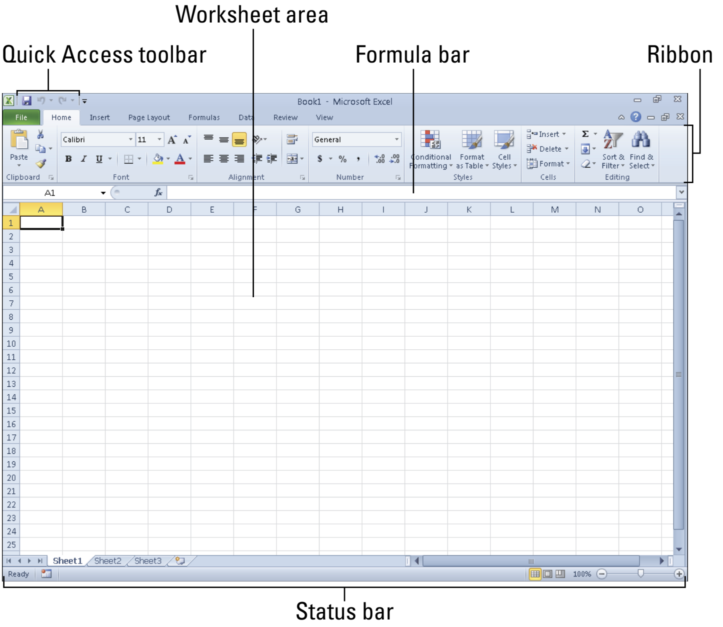

Worksheet area
Quick Access toolbar
Formula bar
Ribbon
Book1 - Microsoft Excel
File
Home
Insert
Page Layout
Formulas
Data
Review
View
Paste
Clipboard
Calibri
11
Font
Alignment
General
Number
Conditional Formatting
Format as Table
Cell Styles
Styles
Insert
Delete
Format
Cells
Sort & Filter
Find & Select
Editing
A1
Sheet1
Sheet2
Sheet3
Ready
100%
Status bar

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

The Excel program window containing this worksheet of the workbook contains the following components:

- **File tab** that when clicked 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.
- Customizable **Quick Access toolbar** that contains buttons you can click to perform common tasks, such as saving your work and undoing and redoing edits.
- **Ribbon** that contains the bulk of the Excel commands arranged into a series of tabs ranging from Home through View.
- **Formula bar** that displays the address of the current cell along with the contents of that cell.
- **Worksheet area** that 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** that keeps you informed of the program's current mode and any special keys you engage, and enables you to select a new worksheet view and to zoom in and out on the worksheet.

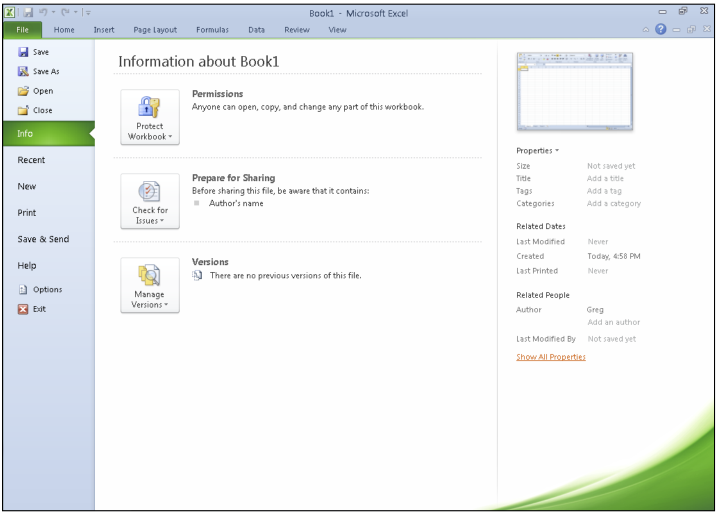
Going Backstage via File

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 opened and active in the program.

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).

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.


Book1 - Microsoft Excel
File
Home
Insert
Page Layout
Formulas
Data
Review
View
Save
Save As
Open
Close
Info
Recent
New
Print
Save & Send
Help
Options
Exit
Protect Workbook
Check for Issues
Manage Versions
Show All Properties

Information about Book1

Permissions
Anyone can open, copy, and change any part of this workbook.

Prepare for Sharing
Before sharing this file, be aware that it contains:
- Author's name

Versions
There are no previous versions of this file.

Properties

Size	Not saved yet
Title	Add a title
Tags	Add a tag
Categories	Add a category

Related Dates

Last Modified	Never
Created	Today, 4:58 PM
Last Printed	Never

Related People

Author	Greg Add an author
Last Modified By	Not saved yet

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

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, you can click the File tab a second time or simply press the Escape key.

Bragging about the Ribbon

The Ribbon (shown in Figure 1-3) changes the way you work in Excel 2010. Instead of having to memorize (or guess) on which pull-down menu or toolbar Microsoft put the particular command you want to use, their designers and engineers came up with the Ribbon that shows you the most commonly used options needed to perform a particular Excel task.

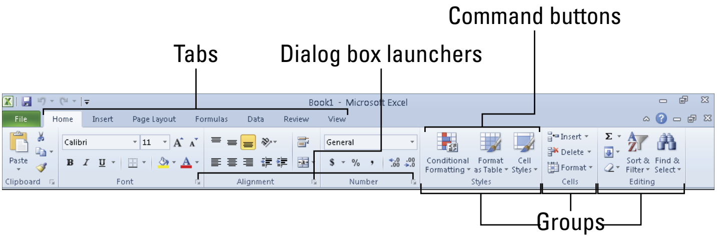

Command buttons
Tabs
Dialog box launchers
Book1 - Microsoft Excel
File
Home
Insert
Page Layout
Formulas
Data
Review
View
Calibri
11
General
Paste
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
Sort & Filter
Find & Select
Clipboard
Font
Alignment
Number
Styles
Cells
Editing
Groups

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:*** Many 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.

TIP

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. You can also double-click any one of the Ribbon's tabs, or just press Ctrl+F1. 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, double-click one of the tabs, or press Ctrl+F1 a second time.

REMEMBER

When you work in Excel with the Ribbon minimized, the Ribbon expands each time you click one of its tabs to show its command buttons, but that tab stays open only until you select one of the command buttons. The moment you select a command button, Excel immediately minimizes the Ribbon again and just displays its tabs.

Keeping tabs on the Excel Ribbon

The first time you launch Excel 2010, its 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.