

**Making Everything Easier!™**

# Microsoft® **Excel® 2010** FOR **DUMMIES®**

## **Learn to:**

- Create and edit worksheets, format cells, and enter formulas
- Add data tables and sort and filter records
- Create powerful charts with graphics
- Share worksheets via e-mail and SharePoint®

**Greg Harvey, PhD**

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



# Get More and Do More at Dummies.com®



Start with **FREE** Cheat Sheets

Cheat Sheets include

- Checklists
- Charts
- Common Instructions
- And Other Good Stuff!

To access the Cheat Sheet created specifically for this book, go to  
***[www.dummies.com/cheatsheet/excel2010](http://www.dummies.com/cheatsheet/excel2010)***

## Get Smart at Dummies.com

Dummies.com makes your life easier with 1,000s of answers on everything from removing wallpaper to using the latest version of Windows.

Check out our

- Videos
- Illustrated Articles
- Step-by-Step Instructions

Plus, each month you can win valuable prizes by entering our Dummies.com sweepstakes.\*

Want a weekly dose of Dummies? Sign up for Newsletters on

- Digital Photography
- Microsoft Windows & Office
- Personal Finance & Investing
- Health & Wellness
- Computing, iPods & Cell Phones
- eBay
- Internet
- Food, Home & Garden

## Find out “HOW” at Dummies.com

\*Sweepstakes not currently available in all countries; visit Dummies.com for official rules.



***Excel<sup>®</sup> 2010***

FOR

**DUMMIES<sup>®</sup>**



# ***Excel*<sup>®</sup> 2010**

FOR

# **DUMMIES<sup>®</sup>**

**by Greg Harvey, PhD**



WILEY

Wiley Publishing, Inc.

## Excel® 2010 For Dummies®

Published by  
**John Wiley & Sons, Inc.**  
111 River Street  
Hoboken, NJ 07030-5774

[www.wiley.com](http://www.wiley.com)

Copyright © 2010 by John Wiley & Sons, Inc., Hoboken, New Jersey

Published by John Wiley & Sons, Inc., Hoboken, New Jersey

Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

**Trademarks:** Wiley, the Wiley logo, For Dummies, the Dummies Man logo, A Reference for the Rest of Us!, The Dummies Way, Dummies Daily, The Fun and Easy Way, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates in the United States and other countries, and may not be used without written permission. Excel is a registered trademark of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc. is not associated with any product or vendor mentioned in this book.

**LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.**

For general information on our other products and services, 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.

For technical support, please visit [www.wiley.com/techsupport](http://www.wiley.com/techsupport).

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit [www.wiley.com](http://www.wiley.com).

Library of Congress Control Number: 2010923559

ISBN 978-0-470-48953-6 (pbk); ISBN 978-0-470-63468-4 (ebk); ISBN 978-0-470-63469-1 (ebk); ISBN 978-0-470-63470-7 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5



# 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***

*An Erucolindo melindonya*



# *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 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.

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

### ***Acquisitions and Editorial***

**Project Editor:** Nicole Sholly

**Senior Acquisitions Editor:** Katie Feltman

**Copy Editor:** Brian Walls

**Technical Editors:** Mike Talley,  
Joyce Nielsen

**Editorial Manager:** Kevin Kirschner

**Editorial Assistant:** Amanda Graham

**Senior Editorial Assistant:** Cherie Case

**Cartoons:** Rich Tennant  
([www.the5thwave.com](http://www.the5thwave.com))

### ***Composition Services***

**Project Coordinator:** Patrick Redmond

**Layout and Graphics:** Ashley Chamberlain,  
Joyce Haughey, Christine Williams

**Proofreader:** Linda Seifert

**Indexer:** Sharon Shock

---

## **Publishing and Editorial for Technology Dummies**

**Richard Swadley**, Vice President and Executive Group Publisher

**Andy Cummings**, Vice President and Publisher

**Mary Bednarek**, Executive Acquisitions Director

**Mary C. Corder**, Editorial Director

## **Publishing for Consumer Dummies**

**Diane Graves Steele**, Vice President and Publisher

## **Composition Services**

**Debbie Stailey**, Director of Composition Services

# Contents at a Glance

<b><i>Introduction .....</i></b>	<b><i>1</i></b>
<b><i>Part I: Getting In on the Ground Floor .....</i></b>	<b><i>9</i></b>
Chapter 1: The Excel 2010 User Experience .....	11
Chapter 2: Creating a Spreadsheet from Scratch .....	49
<b><i>Part II: Editing without Tears .....</i></b>	<b><i>95</i></b>
Chapter 3: Making It All Look Pretty .....	97
Chapter 4: Going Through Changes .....	145
Chapter 5: Printing the Masterpiece .....	175
<b><i>Part III: Getting Organized and Staying That Way .....</i></b>	<b><i>199</i></b>
Chapter 6: Maintaining the Worksheet .....	201
Chapter 7: Maintaining Multiple Worksheets .....	229
<b><i>Part IV: Digging Data Analysis .....</i></b>	<b><i>253</i></b>
Chapter 8: Doing What-If Analysis .....	255
Chapter 9: Playing with Pivot Tables .....	267
<b><i>Part V: Life beyond the Spreadsheet .....</i></b>	<b><i>283</i></b>
Chapter 10: Charming Charts and Gorgeous Graphics .....	285
Chapter 11: Getting on the Data List .....	319
Chapter 12: Linking, Automating, and Sharing Spreadsheets .....	345
<b><i>Part VI: The Part of Tens .....</i></b>	<b><i>363</i></b>
Chapter 13: Top Ten Features in Excel 2010 .....	365
Chapter 14: Top Ten Beginner Basics .....	369
Chapter 15: The Ten Commandments of Excel 2010 .....	371
<b><i>Index .....</i></b>	<b><i>373</i></b>



# Table of Contents

## ***Introduction ..... 1***

About This Book .....	1
How to Use This Book.....	2
What You Can Safely Ignore .....	2
Foolish Assumptions .....	2
How This Book Is Organized .....	3
Part I: Getting In on the Ground Floor .....	3
Part II: Editing without Tears .....	3
Part III: Getting Organized and Staying That Way .....	3
Part IV: Digging Data Analysis .....	4
Part V: Life beyond the Spreadsheet.....	4
Part VI: The Part of Tens.....	4
Conventions Used in This Book.....	4
Icons Used in This Book .....	6
Where to Go from Here.....	6

## ***Part I: Getting In on the Ground Floor..... 9***

### **Chapter 1: The Excel 2010 User Experience .....11**

Excel's Ribbon User Interface .....	12
Going Backstage via File.....	13
Bragging about the Ribbon.....	14
Customizing the Quick Access toolbar .....	18
Having fun with the Formula bar .....	22
What to do in the Worksheet area.....	23
Showing off the Status bar .....	27
Launching and Quitting Excel .....	28
Starting Excel from the Start menu.....	28
Starting Excel from the Windows XP Start menu.....	29
Pinning a Microsoft Excel 2010 option on your Windows Start menu .....	29
Adding a Microsoft Excel 2010 shortcut to your Windows desktop .....	30
Adding Excel to the Windows Quick Launch toolbar.....	31

Pinning an Excel icon to the Windows 7 taskbar .....	31
Exiting Excel .....	32
Help Is on the Way.....	32
Migrating to Excel 2010 from Earlier Versions	
Using Pull-down Menus .....	33
Cutting the Ribbon down to size.....	34
Finding the Standard toolbar buttons equivalents.....	39
Finding the Formatting toolbar buttons equivalents .....	42
Putting the Excel Quick Access toolbar	
to good use during the transition .....	43
Getting good to go with Excel 2010 .....	47

## **Chapter 2: Creating a Spreadsheet from Scratch . . . . . 49**

So What Ya Gonna Put in That New Workbook of Yours? .....	50
The ins and outs of data entry .....	50
You must remember this . . . ..	51
Doing the Data-Entry Thing.....	51
It Takes All Types .....	53
The telltale signs of text.....	54
How Excel evaluates its values .....	55
Fabricating those fabulous formulas!.....	62
If you want it, just point it out.....	64
Altering the natural order of operations .....	65
Formula flub-ups .....	66
Fixing Those Data Entry Flub-Ups .....	67
You really AutoCorrect that for me.....	68
Cell editing etiquette .....	69
Taking the Drudgery out of Data Entry.....	71
I'm just not complete without you.....	71
Fill 'er up with AutoFill .....	72
Inserting special symbols .....	78
Entries all around the block .....	79
Data entry express.....	80
How to Make Your Formulas Function Even Better .....	80
Inserting a function into a formula with	
the Insert Function button .....	81
Editing a function with the Insert Function button .....	84
I'd be totally lost without AutoSum.....	85
Making Sure That the Data Is Safe and Sound .....	87
The Save As dialog box in Windows 7 and Windows Vista .....	88
The Save As dialog box in Windows XP .....	89
Changing the default file location .....	90
The difference between the XLSX and XLS file format.....	90
Saving the Workbook as a PDF File .....	91
Document Recovery to the Rescue .....	92

***Part 11: Editing without Tears ..... 95*****Chapter 3: Making It All Look Pretty ..... 97**

Choosing a Select Group of Cells.....	98
Point-and-click cell selections .....	99
Keyboard cell selections.....	102
Having Fun with the Format as Table Gallery.....	105
Cell Formatting from the Home Tab.....	107
Formatting Cells Close to the Source with the Mini-Toolbar.....	111
Using the Format Cells Dialog Box .....	112
Getting comfortable with the number formats .....	113
The values behind the formatting .....	118
Make it a date! .....	120
Ogling some of the other number formats .....	121
Calibrating Columns.....	122
Rambling rows.....	123
Now you see it, now you don't.....	123
Futzing with the Fonts.....	125
Altering the Alignment .....	127
Intent on indents.....	128
From top to bottom .....	129
Tampering with how the text wraps .....	130
Reorienting cell entries .....	132
Shrink to fit .....	134
Bring on the borders! .....	134
Applying fill colors, patterns, and gradient effects to cells.....	136
Do It in Styles .....	137
Creating a new style for the gallery.....	138
Copying custom styles from one workbook into another .....	138
Fooling Around with the Format Painter.....	139
Conditional Formatting.....	140
Conditionally formatting values with sets of graphic scales and markers.....	141
Highlighting cells according to what ranges the values fall into .....	142

**Chapter 4: Going Through Changes.....145**

Opening the Darned Thing Up for Editing.....	146
Operating the Open dialog box.....	146
Opening more than one workbook at a time.....	148
Opening recently edited workbooks .....	149
When you don't know where to find them .....	150
Opening files with a twist.....	151

Much Ado about Undo .....	152
Undo is Redo the second time around.....	152
What ya gonna do when you can't Undo? .....	153
Doing the Old Drag-and-Drop Thing.....	153
Copies, drag-and-drop style .....	155
Insertions courtesy of drag and drop .....	156
Formulas on AutoFill .....	157
Relatively speaking .....	157
Some things are absolutes!.....	158
Cut and paste, digital style .....	161
Paste it again, Sam . . . ..	162
Keeping pace with Paste Options .....	162
Paste it from the Clipboard task pane.....	164
So what's so special about Paste Special?.....	165
Let's Be Clear about Deleting Stuff .....	167
Sounding the all clear! .....	167
Get these cells outta here! .....	168
Staying in Step with Insert.....	169
Stamping Out Your Spelling Errors .....	170
Stamping Out Errors with Text to Speech.....	171

## **Chapter 5: Printing the Masterpiece. . . . .175**

Taking a Gander at the Pages in Page Layout View .....	176
Checking and Printing a Report from the Print Panel.....	177
Printing Just the Current Worksheet .....	180
My Page Was Set Up! .....	181
Using the buttons in the Page Setup group .....	182
Using the buttons in the Scale to Fit group .....	188
Using the Print buttons in the Sheet Options group .....	188
From Header to Footer.....	189
Adding an Auto Header or Auto Footer .....	189
Creating a custom header or footer .....	191
Solving Page Break Problems.....	195
Letting Your Formulas All Hang Out .....	198

## ***Part III: Getting Organized and Staying That Way..... 199***

### **Chapter 6: Maintaining the Worksheet . . . . .201**

Zeroing In with Zoom .....	202
Splitting the Difference .....	204
Fixed Headings Courtesy of Freeze Panes.....	207
Electronic Sticky Notes.....	209
Adding a comment to a cell.....	210
Comments in review.....	211
Editing the comments in a worksheet.....	212
Getting your comments in print.....	213



The Cell Name Game .....	213
If I only had a name . . . ..	214
Name that formula! .....	215
Naming constants .....	216
Seek and Ye Shall Find . . . ..	217
You Can Be Replaced! .....	220
Do Your Research.....	222
You Can Be So Calculating .....	223
Putting on the Protection .....	224

## **Chapter 7: Maintaining Multiple Worksheets .....229**

Juggling Worksheets .....	229
Sliding between the sheets .....	230
Editing en masse .....	233
Don't Short-Sheet Me!.....	234
A worksheet by any other name . . . ..	235
A sheet tab by any other color . . . ..	236
Getting your sheets in order .....	236
Opening Windows on Your Worksheets.....	238
Comparing Two Worksheets Side by Side.....	243
Moving and Copying Sheets to Other Workbooks .....	245
To Sum Up . . . ..	248

## ***Part IV: Digging Data Analysis ..... 253***

### **Chapter 8: Doing What-If Analysis .....255**

Playing What-If with Data Tables .....	255
Creating a one-variable data table.....	256
Creating a two-variable data table.....	259
Playing What-If with Goal Seeking .....	261
Examining Different Cases with Scenario Manager .....	263
Setting up the various scenarios .....	263
Producing a summary report .....	265

### **Chapter 9: Playing with Pivot Tables .....267**

Pivot Tables: The Ultimate Data Summary .....	267
Producing a Pivot Table .....	268
Formatting a Pivot Table .....	271
Refining the Pivot Table style.....	272
Formatting the values in the pivot table.....	272
Sorting and Filtering the Pivot Table Data .....	273
Filtering the report .....	273
Filtering individual column and row fields .....	274
Filtering with slicers .....	275
Sorting the pivot table.....	276

Modifying a Pivot Table .....	277
Modifying the pivot table fields .....	277
Pivoting the table's fields .....	278
Modifying the table's summary function .....	278
Get Smart with a Pivot Chart .....	280
Moving a pivot chart to its own sheet .....	280
Filtering a pivot chart .....	281
Formatting a pivot chart .....	282

## ***Part V: Life beyond the Spreadsheet* ..... 283**

### **Chapter 10: Charming Charts and Gorgeous Graphics ..... 285**

Making Professional-Looking Charts .....	285
Creating a new chart .....	286
Moving and resizing an embedded chart in a worksheet .....	288
Moving an embedded chart onto its own chart sheet .....	288
Customizing the chart type and style from the Design tab .....	289
Customizing chart elements from the Layout tab .....	291
Editing the titles in a chart .....	293
Formatting chart elements from the Format tab .....	294
Adding Great Looking Graphics .....	297
Sparking up the data with sparklines .....	298
Telling all with a text box .....	299
The wonderful world of clip art .....	302
Inserting pictures from graphics files .....	304
Editing clip art and imported pictures .....	305
Formatting clip art and imported pictures .....	305
Adding preset graphic shapes .....	307
Working with WordArt .....	308
Make mine SmartArt .....	310
Screenshots anyone? .....	313
Theme for a day .....	314
Controlling How Graphic Objects Overlap .....	315
Reordering the layering of graphic objects .....	315
Grouping graphic objects .....	316
Hiding graphic objects .....	316
Printing Just the Charts .....	317

### **Chapter 11: Getting on the Data List ..... 319**

Creating a Data List .....	319
Adding records to a data list .....	321
Sorting Records in a Data List .....	329
Sorting records on a single field .....	330
Sorting records on multiple fields .....	331

Filtering the Records in a Data List .....	333
Using ready-made number filters.....	335
Using ready-made date filters.....	336
Getting creative with custom filtering.....	336
Importing External Data.....	340
Querying an Access database table.....	340
Performing a New Web query .....	342
<b>Chapter 12: Linking, Automating, and Sharing Spreadsheets . . . . .</b>	<b>345</b>
Using Add-Ins in Excel 2010.....	346
Adding Hyperlinks to a Worksheet .....	347
Automating Commands with Macros.....	350
Recording new macros.....	351
Running macros .....	355
Assigning macros to the Ribbon and the Quick Access toolbar .....	356
Sharing Worksheets .....	358
Sending a workbook via e-mail.....	358
Sharing a workbook on a SharePoint Web site .....	359
Uploading workbooks to your SkyDrive and editing them with the Excel Web App .....	360
<b><i>Part VI: The Part of Tens.....</i></b>	<b><i>363</i></b>
<b>Chapter 13: Top Ten Features in Excel 2010 . . . . .</b>	<b>365</b>
<b>Chapter 14: Top Ten Beginner Basics . . . . .</b>	<b>369</b>
<b>Chapter 15: The Ten Commandments of Excel 2010. . . . .</b>	<b>371</b>
<b><i>Index .....</i></b>	<b><i>373</i></b>



# 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

The 5<sup>th</sup> Wave

By Rich Tennant



"According to your current physical symptoms, you'll be bald well before you're fat."

## *In this part . . .*

**I**n 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 spreadsheet data. From this humble beginning, it's a quick trip to total screen mastery.