

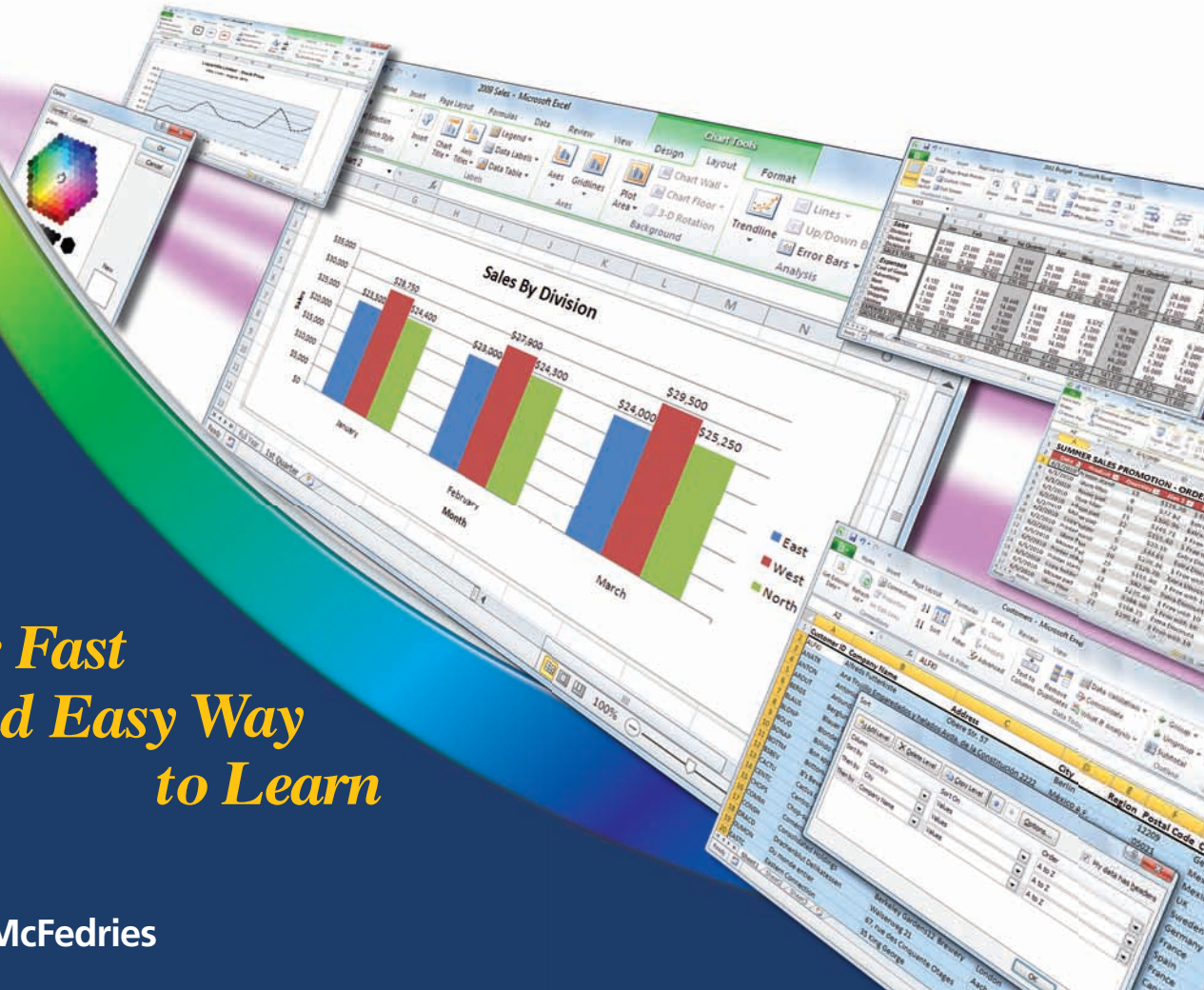


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VISUALLY™

Microsoft® Excel® 2010



*The Fast
and Easy Way
to Learn*

Paul McFedries

Teach Yourself

VISUALLY[™]

Excel® 2010



by Paul McFedries



Wiley Publishing, Inc.

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In order to get this information to you in a timely manner, this book was based on a pre-release version of Microsoft Office 2010. There may be some minor changes between the screenshots in this book and what you see on your desktop. As always, Microsoft has the final word on how programs look and function; if you have any questions or see any discrepancies, consult the online help for further information about the software.

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Author's Acknowledgments

The book you hold in your hands is not only an excellent learning tool, but it is truly beautiful, as well. I am happy to have supplied the text that you will read, but the gorgeous images come from Wiley's crack team of artists and illustrators. The layout of the tasks, the accuracy of the spelling and grammar, and the veracity of the information are all the result of hard work performed by project editor Lynn Northrup and technical editor Namir Shamma. Thanks to both of you for your excellent work. My thanks, as well, to executive editor Jody Lefevre for asking me to write this book.

How to Use This Book

Who This Book Is For

This book is for the reader who has never used this particular technology or software application. It is also for readers who want to expand their knowledge.

The Conventions in This Book

1 Steps

This book uses a step-by-step format to guide you easily through each task. Numbered steps are actions you must do; bulleted steps clarify a point, step, or optional feature; and indented steps give you the result.

2 Notes

Notes give additional information — special conditions that may occur during an operation, a situation that you want to avoid, or a cross reference to a related area of the book.

3 Icons and Buttons

Icons and buttons show you exactly what you need to click to perform a step.

4 Tips

Tips offer additional information, including warnings and shortcuts.

5 Bold

Bold type shows command names, options, and text or numbers you must type.

6 Italics

Italic type introduces and defines a new term.

Draw a Shape

6 Excel's Shapes gallery comes with more than 150 predefined objects called *shapes* (or sometimes *AutoShapes*) that enable you to quickly and easily draw anything from simple geometric figures such as lines, rectangles, and ovals, to more elaborate items such as starbursts, flowchart symbols, and callout boxes.

Draw a Shape

1 Display the worksheet on which you want to draw the shape.
2 Click the **Insert** tab.
5 Click **Shapes**.

3 Click the shape you want to draw. \rightarrow changes to \rightarrow .

Adding and Editing Worksheet Graphics **chapter 14**

3 Click and drag the mouse \rightarrow to draw the shape.
4 When the shape is the size you want, release the mouse button.

The program draws the shape and adds edit handles around the shape's edges.

Notes: If you need to move or size the shape, see "Move or Resize a Graphic" later in this chapter.

TIPS
Is there an easy way to draw a perfect circle or square?
Yes, Excel offers an easy technique for drawing circles and squares. Hold down the **SHIFT** key as you click and drag the shape to constrain the shape into a perfect circle or square. When you finish drawing the shape, release **SHIFT**.

Can I add text to a shape?
Yes, you can add text to the interior of any 2-D shape (that is, any shape that is not a line). After you draw the shape, right-click the shape, click **Edit Text**, and then type your text inside the shape. You can use the Home tab's Font controls to format the text. When you finish, click outside of the shape.

2

4

Table of Contents

chapter 1

Working with Excel

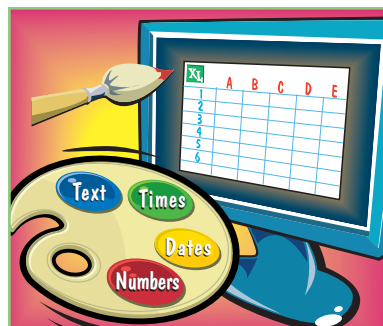
Getting to Know Excel	4
Start Excel	6
Tour the Excel Window	8
Work with Excel's Ribbon	9
Work with Excel's Galleries	10
Customize the Quick Access Toolbar	12
Customize the Ribbon	14
Work with Smart Tags	16
Change the View	18
Configure Excel Options	20
Add Excel to the Windows 7 Taskbar	22
Quit Excel	23



chapter 2

Entering and Editing Excel Data

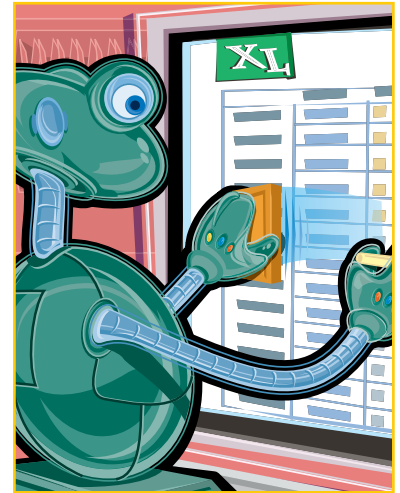
Learning the Layout of a Worksheet	26
Understanding the Types of Data You Can Use	27
Enter Text into a Cell	28
Enter a Number into a Cell	30
Enter a Date or Time into a Cell	32
Insert a Symbol	34
Edit Cell Data	36
Delete Data from a Cell	38



chapter 3

Working with Excel Ranges

- Select a Range 42
- Fill a Range with the Same Data 44
- Fill a Range with a Series of Values 46
- Move or Copy a Range 48
- Insert a Row or Column 50
- Insert a Cell or Range 52
- Delete Data from a Range 54
- Delete a Range 56
- Hide a Row or Column 58
- Freeze Rows or Columns 60
- Merge Two or More Cells 62
- Transpose Rows and Columns 64



chapter 4

Working with Range Names

- Understanding the Benefits of Using Range Names 68
- Define a Range Name 70
- Use Worksheet Text to Define a Range Name 72
- Navigate a Workbook Using Range Names 74
- Change a Range Name 76
- Delete a Range Name 78
- Paste a List of Range Names 80

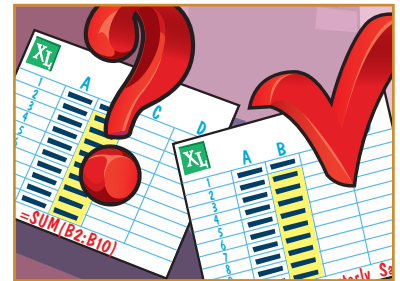
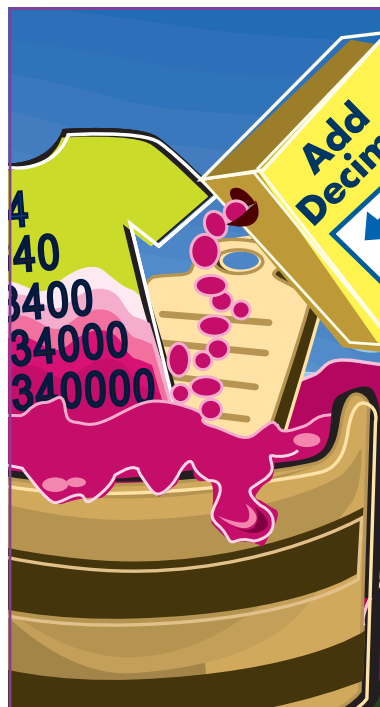


Table of Contents

chapter 5

Formatting Excel Ranges

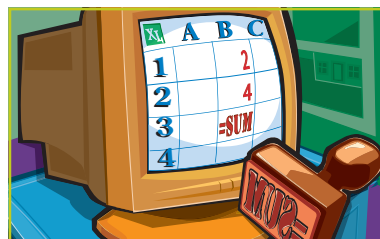
Change the Font and Font Size	84
Apply Font Effects.	86
Change the Font Color.	88
Align Text Within a Cell	90
Center Text Across Multiple Columns.	92
Rotate Text Within a Cell	94
Add a Background Color to a Range.	96
Apply a Number Format	98
Change the Number of Decimal Places Displayed	100
Apply an AutoFormat to a Range	102
Apply a Conditional Format to a Range	104
Apply a Style to a Range	106
Change the Column Width	108
Change the Row Height.	110
Wrap Text Within a Cell	112
Add Borders to a Range.	114
Copy Formatting from One Cell to Another	116



chapter 6

Building Formulas and Functions

Understanding Excel Formulas	120
Build a Formula	122
Understanding Excel Functions.	124
Add a Function to a Formula.	126
Add a Row or Column of Numbers	128
Build an AutoSum Formula	130



Add a Range Name to a Formula	132
Reference Another Worksheet Range in a Formula	134
Move or Copy a Formula.....	136
Switch to Absolute Cell References.....	138
Toggle the Formula Bar On and Off	140
Troubleshoot Formula Errors	142



chapter 7

Manipulating Excel Worksheets

Navigate a Worksheet	146
Rename a Worksheet.....	147
Create a New Worksheet.....	148
Move a Worksheet.....	150
Copy a Worksheet	152
Delete a Worksheet	154
Change the Gridline Color.....	156
Toggle Worksheet Gridlines On and Off.....	158
Toggle Worksheet Headings On and Off	159
Set the Worksheet Tab Color.....	160
Set the Worksheet Background.....	162
Zoom In On or Out of a Worksheet	164
Split a Worksheet into Two Panes.....	166
Hide and Unhide a Worksheet	168

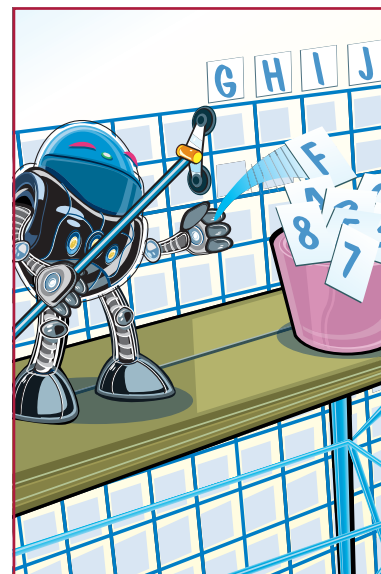


Table of Contents

chapter 8

Dealing with Excel Workbooks

Create a New Blank Workbook	172
Create a New Workbook from a Template	174
Save a Workbook	176
Open a Workbook	177
Arrange Workbook Windows	178
Find Text in a Workbook	180
Replace Text in a Workbook	182
Check Spelling and Grammar	184
Close a Workbook	186



chapter 9

Formatting Excel Workbooks

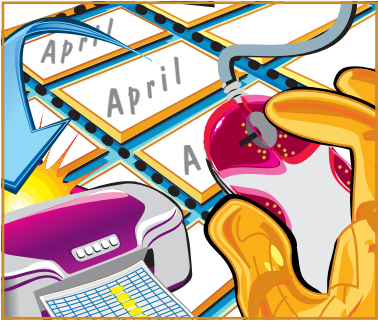
Modify the Workbook Colors	190
Set the Workbook Fonts	192
Choose Workbook Effects	194
Apply a Workbook Theme	196
Add a Workbook Header	198
Add a Workbook Footer	200



chapter 10

Printing Excel Workbooks

- Adjust the Workbook Margins 204
- Change the Page Orientation 206
- Insert a Page Break 207
- Choose a Paper Size 208
- Set the Print Area 210
- Configure Titles to Print on Each Page 212
- Preview the Printout 214
- Print a Workbook 216



chapter 11

Analyzing Excel Data

- Sort a Range 220
- Filter a Range 222
- Set Data Validation Rules 224
- Convert a Range to a Table 226
- Create a Data Table 228
- Summarize Data with Subtotals 230
- Group Related Data 232
- Analyze Data with Goal Seek 234
- Analyze Data with Scenarios 236
- Create a PivotTable 240
- Load Excel's Analysis ToolPak 242



Table of Contents

chapter 12

Visualizing Data with Excel Charts

Examining Chart Elements	246
Understanding Chart Types	247
Create a Chart	248
Add Chart Titles	250
Add Data Labels	251
Position the Chart Legend	252
Display Chart Gridlines	253
Display a Data Table	254
Change the Chart Layout and Style	255
Select a Different Chart Type	256
Change the Chart Source Data	258
Move or Resize a Chart	260
Add a Sparkline to a Cell	262



chapter 13

Formatting Excel Charts

Format Chart Elements	266
Customize a Chart Element Background	268
Set a Chart Element's Outline	270
Add Effects to a Chart Element	272
Apply a Style to a Chart Element	274
Apply a WordArt Style to Chart Text	276



chapter 14

Adding and Editing Worksheet Graphics

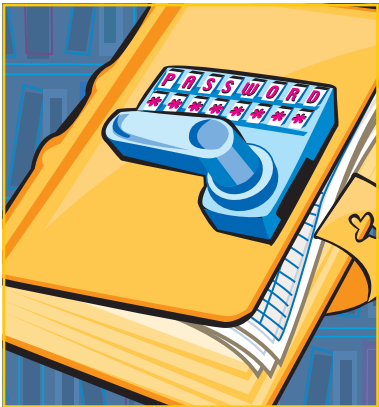
- Draw a Shape 280
- Insert a Clip Art Image 282
- Insert a Photo 284
- Insert a WordArt Image 286
- Insert a SmartArt Graphic 288
- Move or Resize a Graphic 290
- Crop a Picture 292
- Format a Picture 294
- Add a Shadow or Glow to a Picture 296
- Add a Reflection or 3-D Effect to a Picture 298
- Add an Artistic Effect to a Photo 300
- Recolor an Image 302



chapter 15

Collaborating with Other People

- Add a Comment to a Cell 306
- Protect a Worksheet's Data 308
- Protect a Workbook's Structure and Windows 310
- Share a Workbook with Other Users 312
- Track Workbook Changes 314
- Accept or Reject Workbook Changes 316
- Send a Workbook as an E-Mail Attachment 318
- Save Excel Data as a Web Page 320
- Make a Workbook Compatible with Earlier Versions of Excel 322
- Collaborate on a Workbook Online 324



CHAPTER

1

Working with Excel



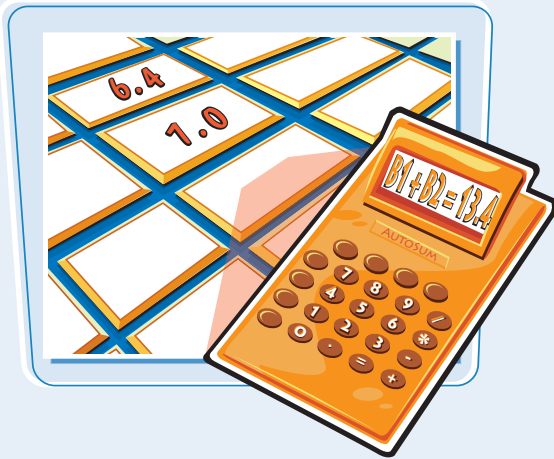
You use Microsoft Excel to create *spreadsheets*, which are documents that enable you to manipulate numbers and formulas to quickly create powerful mathematical, financial, and statistical models. In this chapter you learn about Excel, take a tour of the program's features, and learn how to customize some aspects of the program.

Getting to Know Excel	4
Start Excel	6
Tour the Excel Window	8
Work with Excel's Ribbon	9
Work with Excel's Galleries.....	10
Customize the Quick Access Toolbar.....	12
Customize the Ribbon	14
Work with Smart Tags	16
Change the View	18
Configure Excel Options.....	20
Add Excel to the Windows 7 Taskbar.....	22
Quit Excel.....	23

Manipulate Data

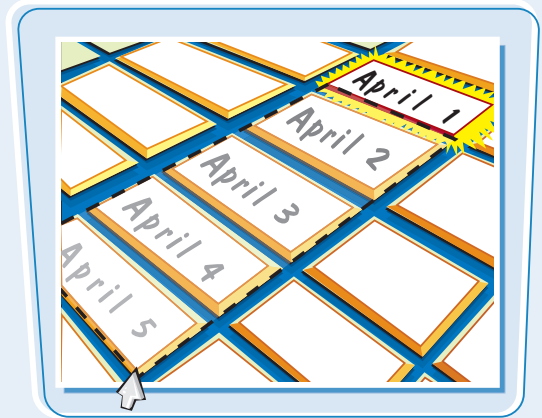
Calculate Totals Quickly

If you just need a quick sum of a list of numbers, click a cell below the numbers and then click the **Sum** button (Σ), which is available in the Home tab of Excel's Ribbon. In Excel, you can also select the cells that you want to sum, and their total appears in the status bar.



Fill a Series

Excel enables you to save time by completing a series of values automatically. For example, if you need to enter the numbers 1 to 100 in consecutive cells, you can enter just the first few numbers, select the cells, and then click and drag the lower right corner to fill in the rest of the numbers. Most programs also fill in dates, as well as the names for weekdays and months.



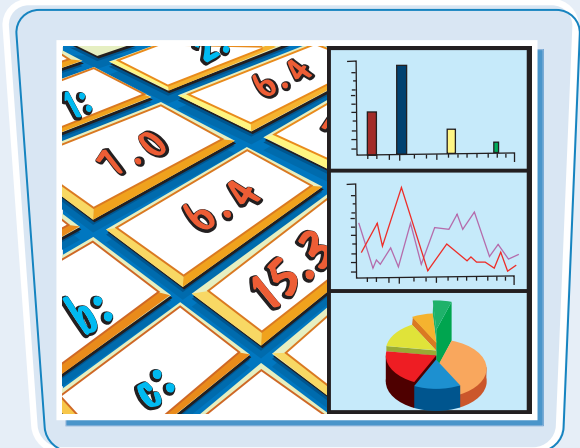
Manage Tables

The row-and-column format of a spreadsheet makes the program suitable for simple databases called *tables*. Each column becomes a field in the table, and each row is a record. You can sort the records, filter the records to show only certain values, and add subtotals.



Add a Chart

A *chart* is a graphic representation of spreadsheet data. As the data in the spreadsheet changes, the chart also changes to reflect the new numbers. Excel offers a wide variety of charts, including bar charts, line charts, and pie charts.



Start Excel

Before you can perform tasks such as adding data and building formulas, you must first start Excel. This brings the Excel window onto the Windows desktop, and you can then begin using the program.

This task and the rest of the book assume that you have already installed Excel 2010 on your computer.

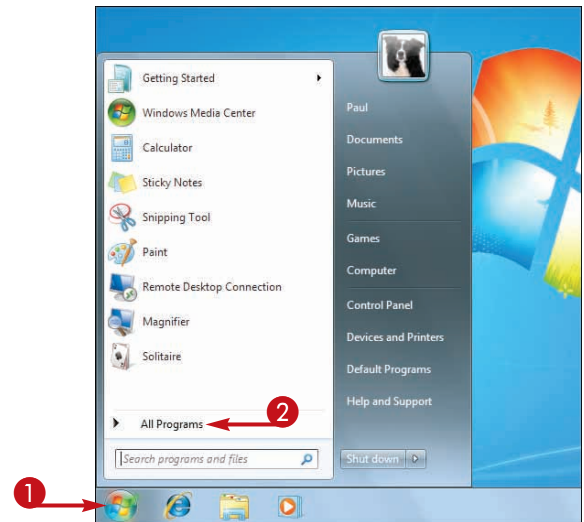


Start Excel

- 1 Click **Start**.

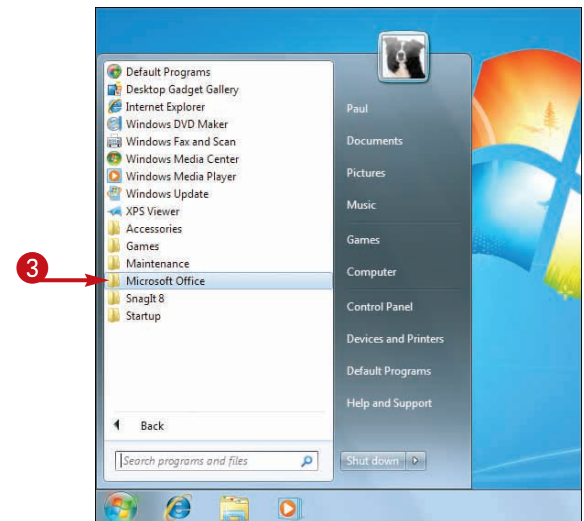
The Start menu appears.

- 2 Click **All Programs**.



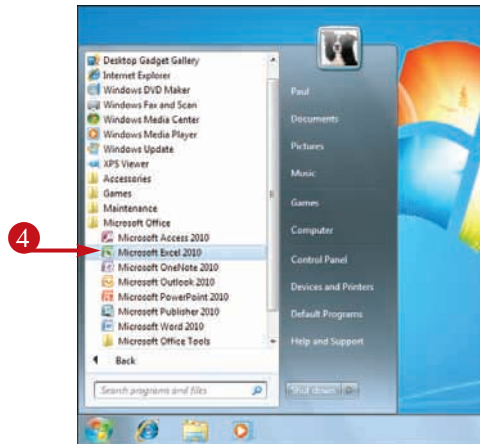
The App Programs menu appears.

- 3 Click **Microsoft Office**.

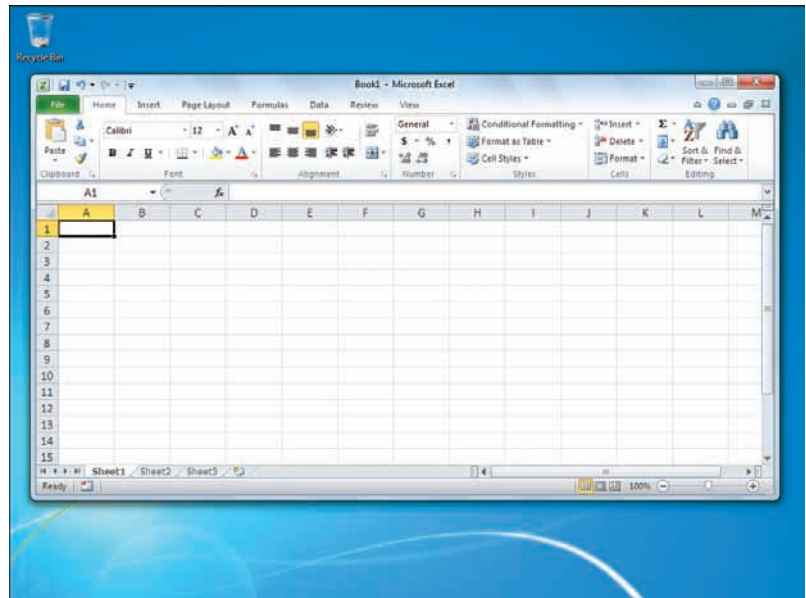


The Microsoft Office menu appears.

4 Click **Microsoft Excel 2010**.



The Microsoft Excel window appears on the desktop.



TIP

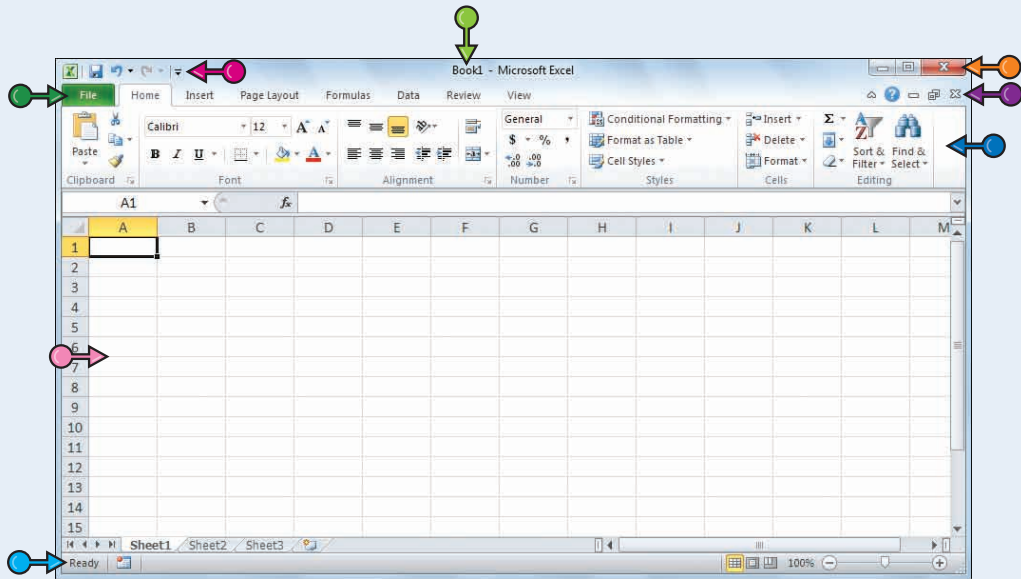
Are there faster methods I can use to start Excel?

Yes. After you have used Excel a few times, it should appear on the main Start menu in the list of your most-used programs. If so, you can click that icon to start the program. You can also force the Excel icon onto the Start menu by following Steps 1 to 3, right-clicking the **Microsoft Excel 2010** icon, and then clicking **Pin to Start Menu**. If you are using Windows 7, you can also click **Pin to Taskbar** to add the Excel icon to the taskbar.



Tour the Excel Window

To get up to speed quickly with Excel, it helps to understand the various elements of the Excel window. These include standard window elements such as the title bar and status bar, as well as Office-specific elements such as the Ribbon and the File tab.



Title Bar

The title bar displays the name of the current workbook.

Quick Access Toolbar

This area gives you one-click access to a few often-used features. To learn how to customize this toolbar, see "Customize the Quick Access Toolbar."

Ribbon

This area gives you access to all of Excel's commands, options, and features. To learn how to use this element, see "Work with Excel's Ribbon."

Excel Window Controls

You use these controls to minimize, maximize, restore, and close Excel's application window.

Workbook Window Controls

You use these controls to minimize, maximize, restore, and close the current workbook window.

File Tab

Click this tab to access file-related commands, such as Save and Open.

Worksheet

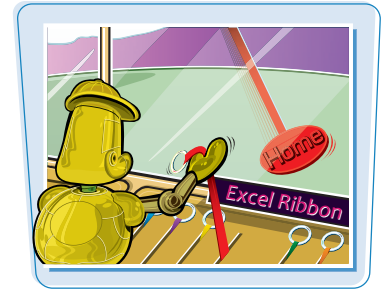
This area displays the current worksheet, and it is where you will do most of your Excel work.

Status Bar

This area displays the messages about Excel's current status, the results of certain operations, and other information.

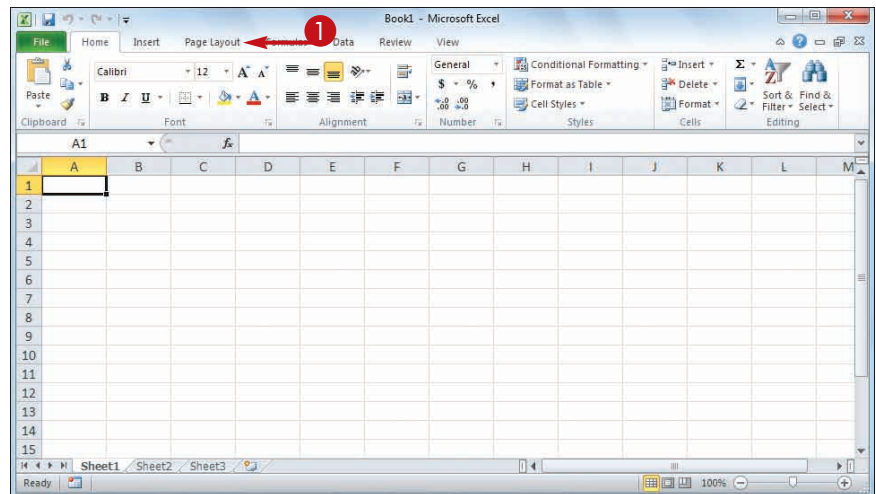
You use Excel's Ribbon element to access all of the program's features and commands. The *Ribbon* is the horizontal strip that runs across the top of the Excel window, just below the title bar. The Ribbon is organized into various tabs, such as File, Home and Insert, and each tab contains related controls, which usually include buttons, lists, and check boxes.

There is no menu bar in Excel, so you do not use pull-down menus to access commands.



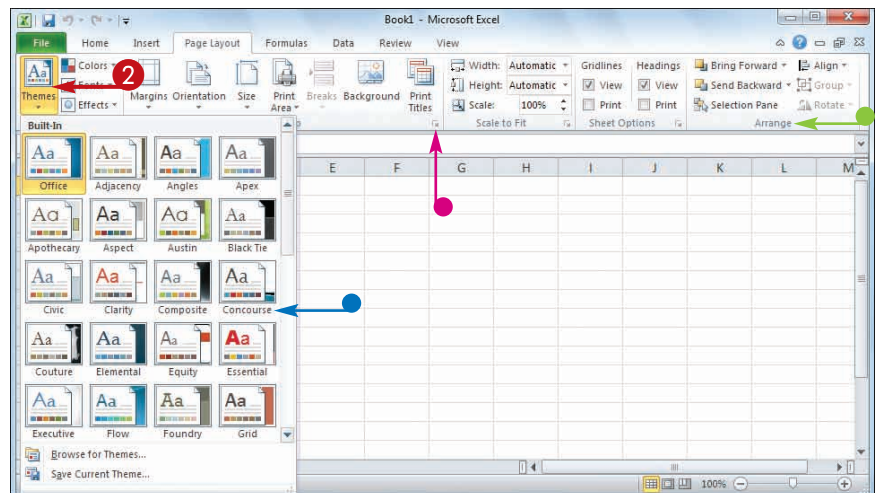
Work with Excel's Ribbon

- 1 Click the tab that contains the Excel feature you want to work with.



Excel displays the controls in the tab.

- Each tab is organized into groups of related controls, and the group names appear here.
 - In many groups you can click the dialog box launcher button (☰) to display a dialog box that contains group settings.
- 2 Click the control for the feature.
 - If the control displays a list of options, click the option you want.

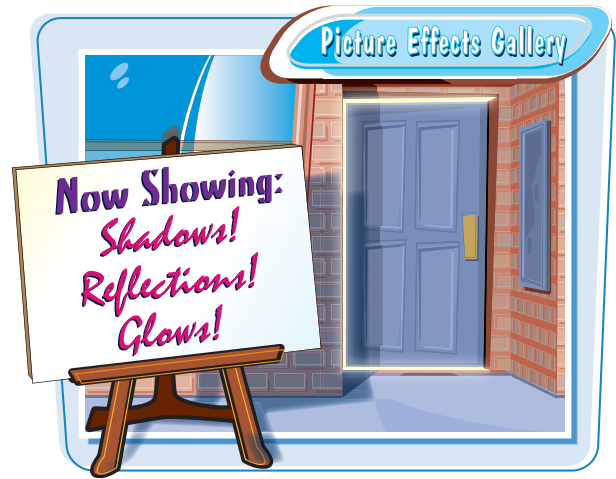


Excel runs the command or sets the option.

Work with Excel's Galleries

In Excel's Ribbon, a *gallery* is a collection of preset options that you can apply to the selected object in the worksheet. To get the most out of galleries, you need to know how they work.

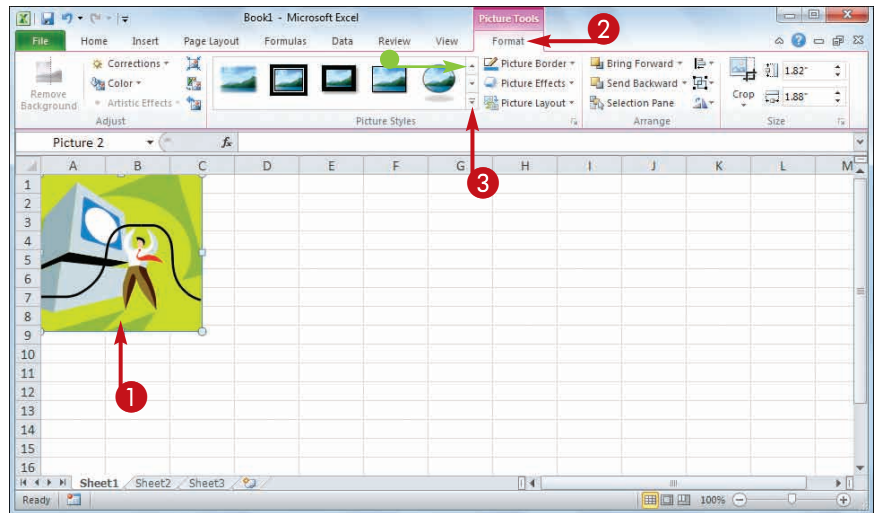
Although some galleries are available all the time, in most cases you must select an object – such as a range of cells or a clip art image – before you work with a gallery.



Work with Excel's Galleries

Work with a Gallery List

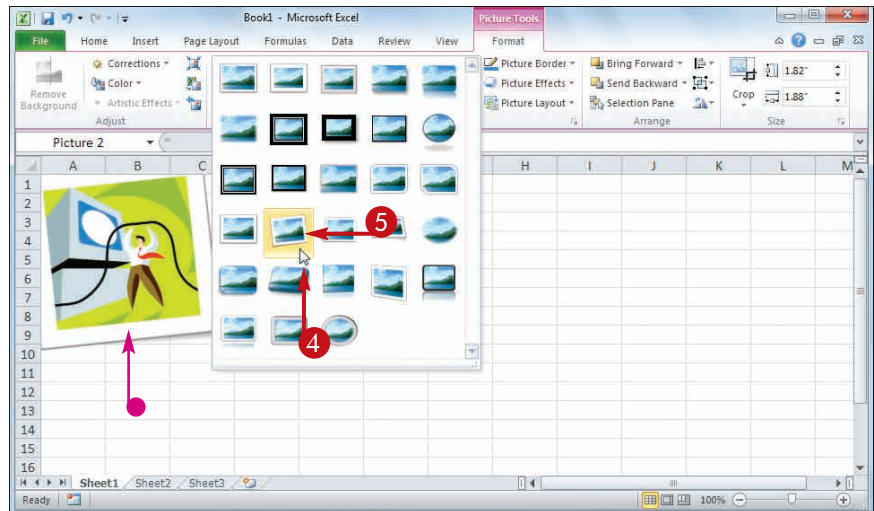
- 1 If necessary, click the object with which you want to apply an option from the gallery.
 - 2 Click the tab that contains the gallery you want to use.
 - 3 Click the gallery's **More** arrow (▾).
- You can also scroll through the gallery by clicking the **Down** (▾) and **Up** (▴) arrows.



Excel displays a list of the gallery's contents.

- 4 Move the mouse over a gallery option to see a preview of the effect.
- 5 Click the gallery option you want to use.

Excel applies the gallery options to the selected object.




Work with a Drop-Down Gallery

- 1 If necessary, click the object with which you want to apply an option from the gallery.
- 2 Click the tab that contains the gallery you want to use.
- 3 Click the gallery's drop-down arrow (▾).

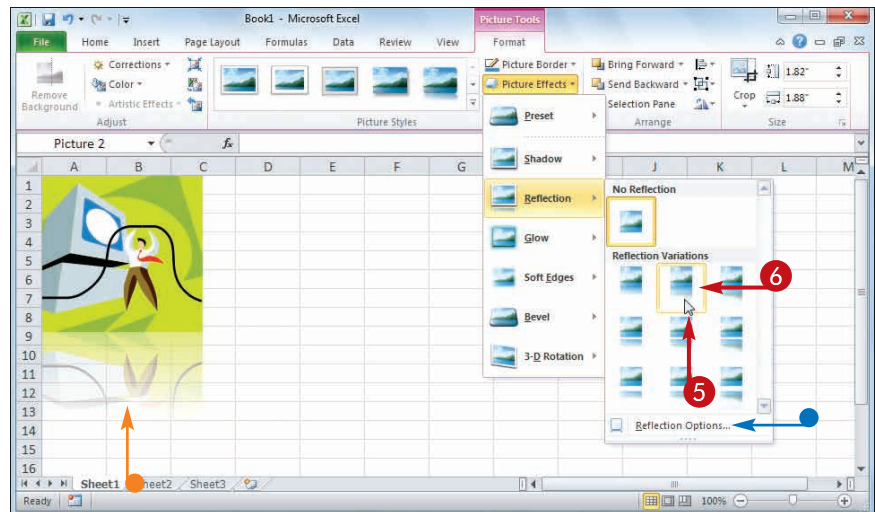
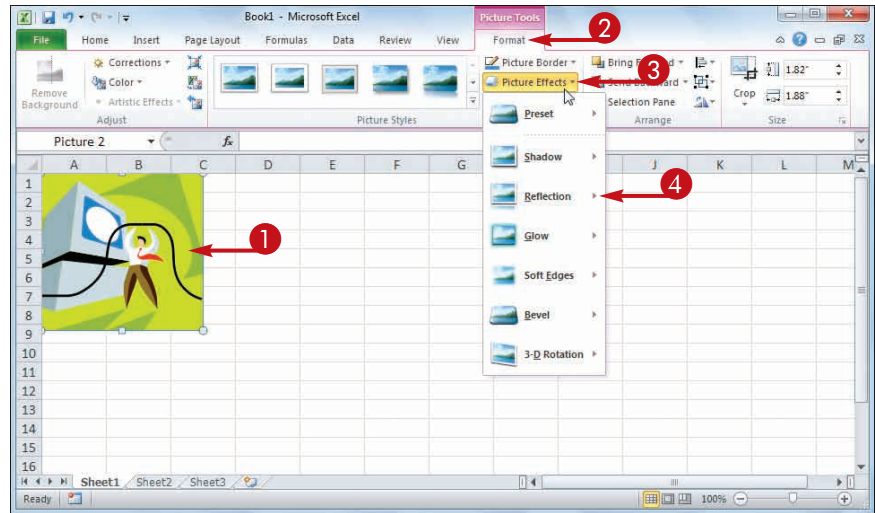
Excel displays a list of the gallery's contents.

- 4 If the gallery contains one or more subgalleries, click the subgallery you want to use.

Excel displays the subgallery's contents.


- If a gallery has commands that you can run, those commands appear at the bottom of the gallery menu.
- 5 Move the mouse  over a gallery option to see a preview of the effect.
 - 6 Click the gallery option you want to use.

Excel applies the gallery option to the selected object.



TIP

If I find the gallery preview feature distracting, can I turn it off?

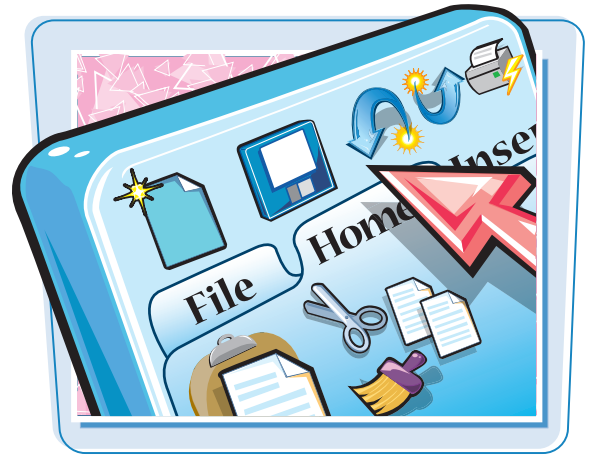
Yes. The Live Preview feature is often handy because it shows you exactly what will happen when you click a gallery option. However, as you move the mouse  through the gallery, the previews can be distracting. To turn off Live Preview, click the **File** tab, click **Options**, click the **General** tab, click **Enable Live Preview** (changes to), and then click **OK**.



Customize the Quick Access Toolbar

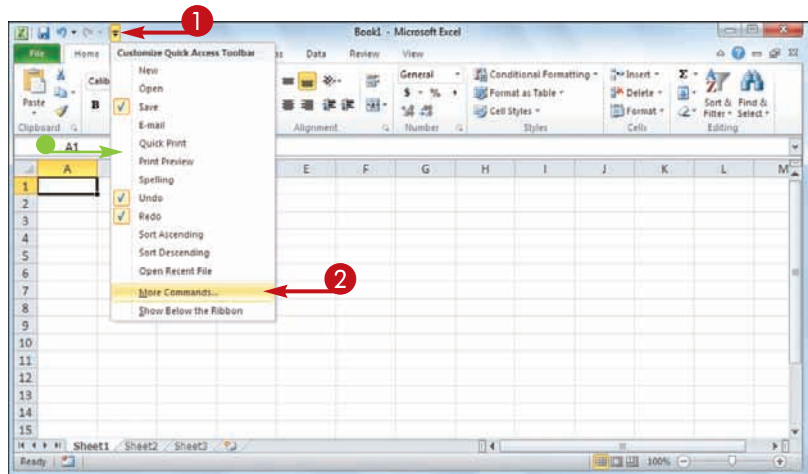
You can make Excel easier to use by customizing the Quick Access Toolbar to include the Excel commands you use most often. You run Quick Access Toolbar buttons with a single click, so adding your favorite commands saves time.

By default, the Quick Access Toolbar contains three buttons: Save, Undo, and Redo, but you can add any of Excel's hundreds of commands.



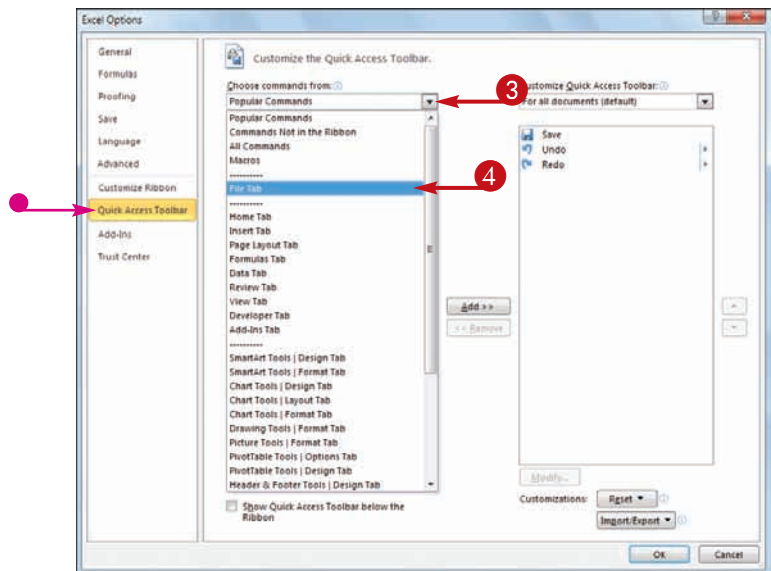
Customize the Quick Access Toolbar

- 1 Click the **Customize Quick Access Toolbar** button (☰).
- 2 Click **More Commands**.

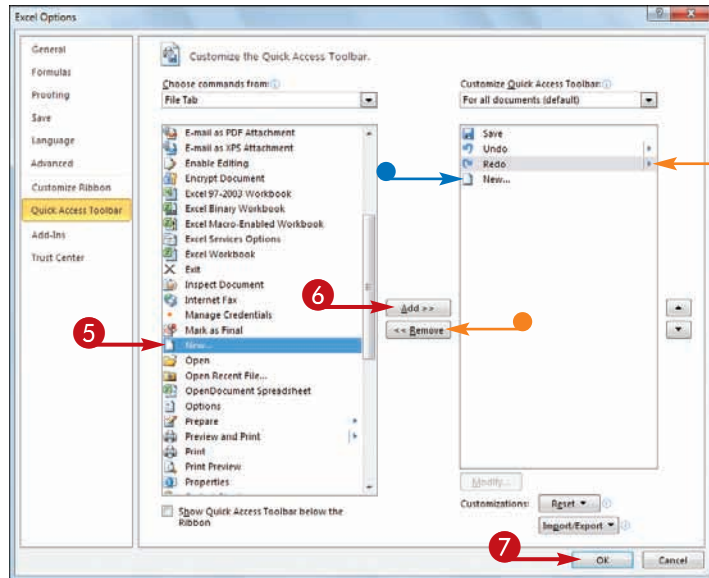


The Excel Options dialog box appears.

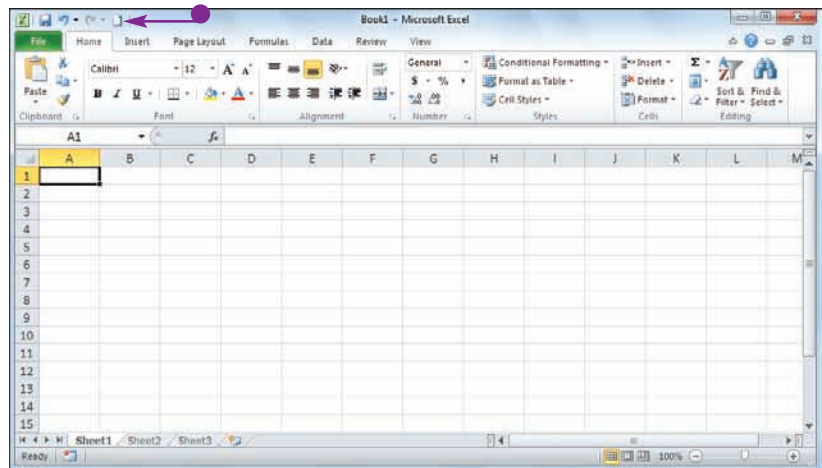
- 3 Click the **Choose commands from** dropdown.
- 4 Click the command category you want to use.



- 5 Click the command you want to add.
- 6 Click **Add**.
- Excel adds the command.
- To remove a command, click it and then click **Remove**.
- 7 Click **OK**.



- Excel adds a button for the command to the Quick Access Toolbar.



TIPS

Can I get more room on the Quick Access Toolbar to show more buttons?

Yes, you can increase the space available to the Quick Access Toolbar by moving it below the Ribbon. This gives the toolbar the full width of the Excel window, so you can add many more buttons. Click the **Customize Quick Access Toolbar** button (☰) and then click **Show Below the Ribbon**.



Is there a faster way to add buttons to the Quick Access Toolbar?

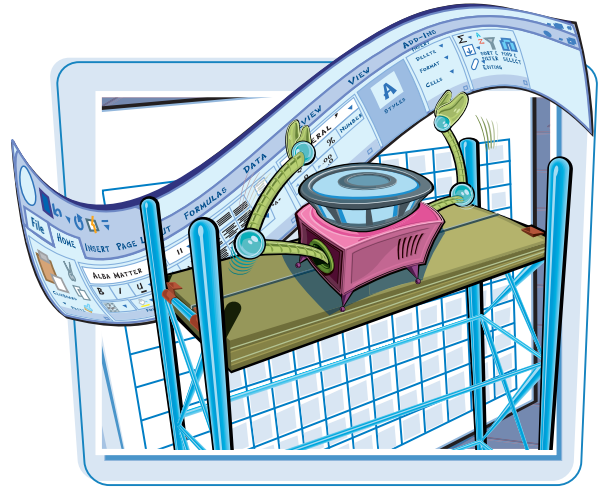
Yes. If the command you want to add appears on the Ribbon, you can add a button for the command directly from the Ribbon. Click the Ribbon tab that contains the command, right-click the command, and then click **Add to Quick Access Toolbar**. Excel inserts a button for the command on the Quick Access Toolbar.



Customize the Ribbon

You can improve your Excel productivity by customizing the Ribbon with extra commands that you use frequently.

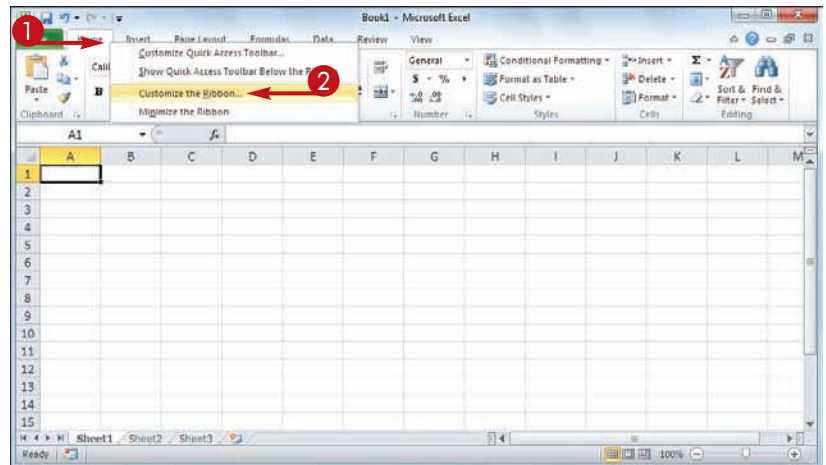
To add a new command to the Ribbon, you must first create a new tab or a new group within an existing tab, and then add the command to the new tab or group.



Customize the Ribbon

Display the Customize Ribbon Tab

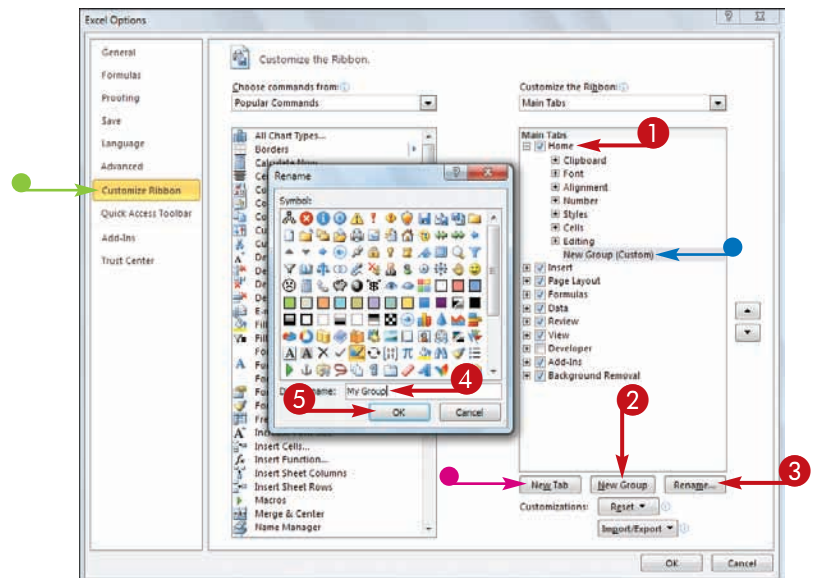
- 1 Right-click any part of the Ribbon.
- 2 Click **Customize the Ribbon**.




Add a New Tab or Group

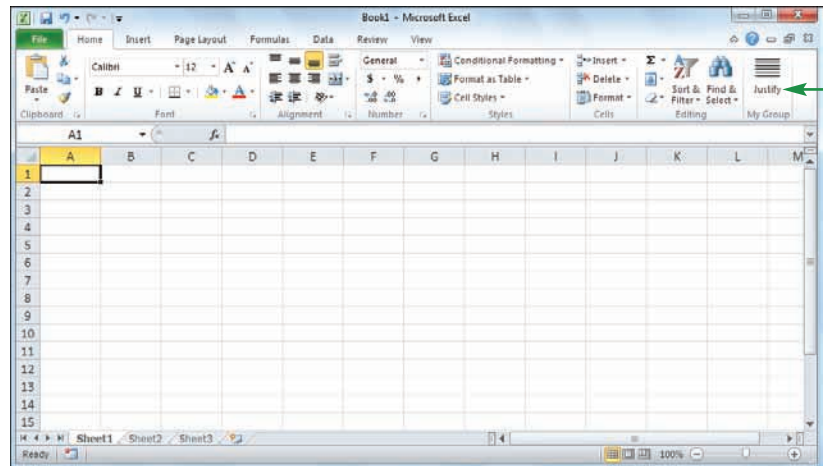
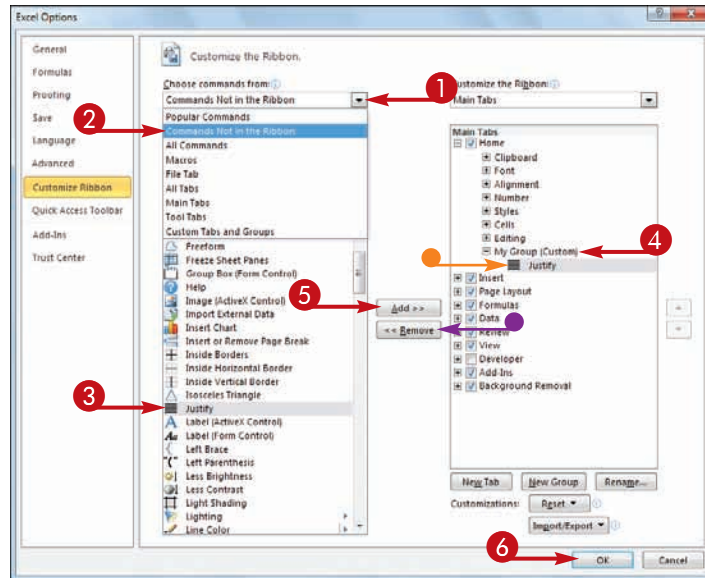
The Excel Options dialog box appears.

- Excel automatically displays the Customize Ribbon tab.
- 1 Click the tab you want to customize.
 - 2 Click **New Group**.
 - Excel adds the group.
 - 3 Click **Rename**.
 - 4 Type a name for the group.
 - 5 Click **OK**.




Add a Command

- 1 Click the **Choose commands from** .
- 2 Click the command category you want to use.
- 3 Click the command you want to add.
- 4 Click the custom group or tab you want to use.
- 5 Click **Add**.
 - Excel adds the command.
 - To remove a custom command, click it and then click **Remove**.
- 6 Click **OK**.
 - Excel adds the new group and command to the Ribbon.



TIPS

Can I customize the tabs that appear only when I select an Excel object?

Yes. Excel calls these *tool tabs*, and you can add custom groups and commands to any tool tab. Right-click any part of the Ribbon and then click **Customize the Ribbon** to display the Excel Options dialog box with the Customize Ribbon tab displayed. Click the **Customize the Ribbon**  and then click **Tool Tabs**. Click the tab you want and then follow the steps in this section to customize it.



How do I restore the Ribbon to its default configuration?

Right-click any part of the Ribbon and then click **Customize the Ribbon** to display the Excel Options dialog box with the Customize Ribbon tab displayed. To restore a tab, click the tab, click **Restore Defaults**, and then click **Restore only selected Ribbon tab**. To remove all customizations, click **Restore Defaults** and then click **Restore all Ribbon tabs and Quick Access Toolbar customizations**.



Work with Smart Tags

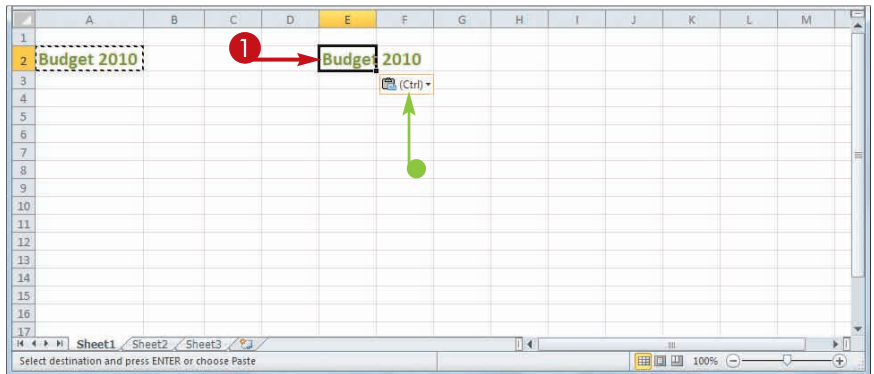
You can make your Excel work faster and easier by taking advantage of smart tags. A *smart tag* is a special icon that appears when you perform certain Excel tasks, such as pasting data and using the AutoFill feature. Clicking the smart tag displays a list of options that enable you to control or modify the task you just performed.

Some smart tags appear automatically in response to certain conditions. For example, if Excel detects an inconsistent formula, it displays a smart tag to let you know.



Work with Smart Tags

- 1 Perform an action that displays a smart tag, such as copying and pasting a cell as shown here.
- 2 The smart tag appears.



- 2 Click the smart tag.
- 3 The smart tag displays a list of its options.

