Paul McFedries

SIMPLY EXCEL 2010

- ☑ Step-by-step introduction to Excel 2010
- ☑ Concise, jargon-free instructions
- ☑ Packed with screenshots in full-colour

Make It Simple For Yourself

SIMPLY EXCEL® 2010

by Paul McFedries

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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 layout comes from Wiley's crack team of designers and screen artists. 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 Shammas. Thanks to both of you for your excellent work. My thanks, as well, to executive editor Jody Lefevere for asking me to write this book.

How to Use This Book

Who Needs This Book

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

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.

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.

Icons and Buttons

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

Tip and Warning Icons

Tips offer additional information, including tips, hints, and tricks. You can use the tip information to go beyond what you have learned in the steps. Warnings tell you about solutions to common problems and general pitfalls to avoid.

Bold

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

Italics

Italic type introduces and defines a new term.

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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 and you find out the kinds of tasks you can perform with Excel. You also learn how to start the program and you take a tour of the program's major features. This chapter also shows you how to work with the Excel Ribbon, how to customise the Ribbon and the Quick Access Toolbar, how to work with smart tags, and how to customise the view and other aspects of the program.

GETTING TO KNOW EXCEL

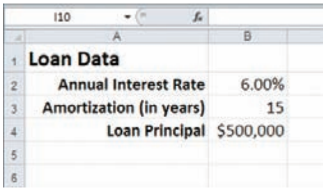
Working with Excel involves two basic tasks: building a spreadsheet and then manipulating the data on the spreadsheet. Building a spreadsheet involves adding data, formulas, and functions. Manipulating data involves calculating totals, working with series, creating tables for your data, and visualising data in charts.

This section gives you an overview of these tasks. You learn about each task in greater detail as you work through the book.

Build a Spreadsheet

Add Data

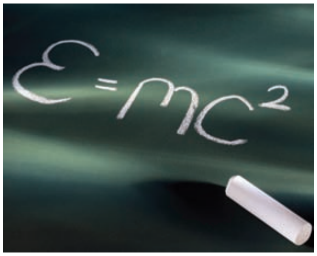
You can insert text, numbers, and other characters into any cell in the spreadsheet. Click the cell that you want to work with and then type your data in the Formula bar. This is the large text box above the column letters. Your typing appears in the cell that you selected. When you are done, press Enter. To edit existing cell data, click the cell and then edit the text in the Formula bar.



	A	B
1	**Loan Data**	
2	**Annual Interest Rate**	6.00%
3	**Amortization (in years)**	15
4	**Loan Principal**	$500,000
5		
6		

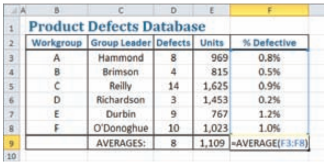
Add a Formula

A *formula* is a collection of numbers, cell addresses, and mathematical operators that performs a calculation. In Excel, you enter a formula in a cell by typing an equals sign (**=**) and then the formula text. For example, the formula **=B1-B2** subtracts the value in cell B2 from the value in cell B1.



Add a Function

A *function* is a predefined formula that performs a specific task. For example, the AVERAGE function calculates the average of a list of numbers and the PMT function calculates a loan or mortgage payment. You can use functions on their own, preceded by **=**, or as part of a larger formula. Click **Insert Function** (*fx*) to see a list of the available functions.



	A	B	C	D	E	F
1		**Product Defects Database**				
2		**Workgroup**	**Group Leader**	**Defects**	**Units**	**% Defective**
3		A	Hammond	8	969	0.8%
4		B	Brimson	4	815	0.5%
5		C	Reilly	14	1,625	0.9%
6		D	Richardson	3	1,453	0.2%
7		E	Durbin	9	767	1.2%
8		F	O'Donoghue	10	1,023	1.0%
9			AVERAGES:	8	1,109	=AVERAGE(F3:F8)
10						

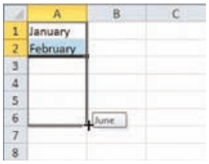
Manipulate Data

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. 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 and the names of week days and months.



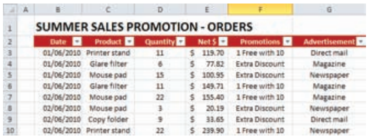
January

February

June

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.

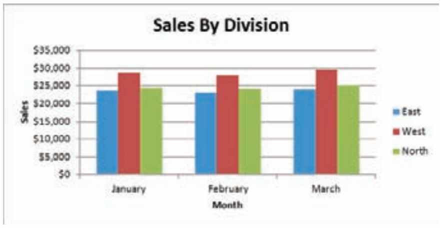


SUMMER SALES PROMOTION - ORDERS

Date	Product	Quantity	Net $	Promotions	Advertisement
01/06/2010	Printer stand	11	$ 119.70	1 Free with 10	Direct mail
01/06/2010	Glare filter	6	$ 77.82	Extra Discount	Magazine
01/06/2010	Mouse pad	15	$ 100.95	Extra Discount	Newspaper
01/06/2010	Glare filter	11	$ 149.71	1 Free with 10	Magazine
02/06/2010	Mouse pad	22	$ 155.40	1 Free with 10	Magazine
02/06/2010	Mouse pad	3	$ 20.19	Extra Discount	Newspaper
02/06/2010	Copy folder	9	$ 33.65	Extra Discount	Direct mail
02/06/2010	Printer stand	22	$ 239.90	1 Free with 10	Newspaper

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.

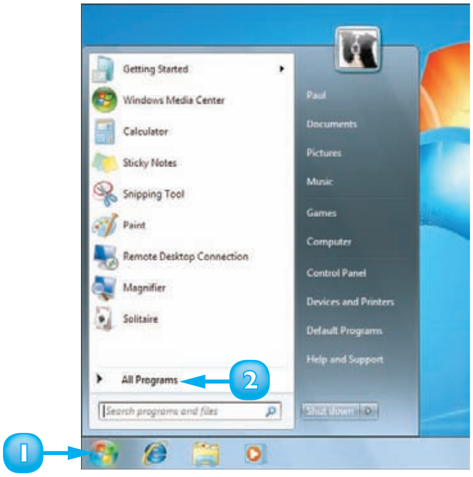
When you have finished your work with Excel, you should shut down the program. This reduces clutter on the desktop and in the taskbar, and it also conserves memory and other system resources.

1. Click **Start**.

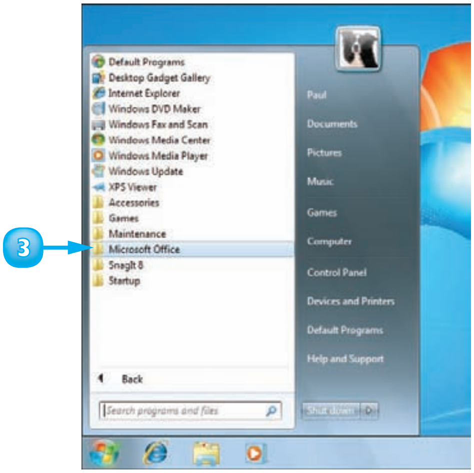
   The Start menu appears.

2. Click **All Programs**.

   The App Programs menu appears.

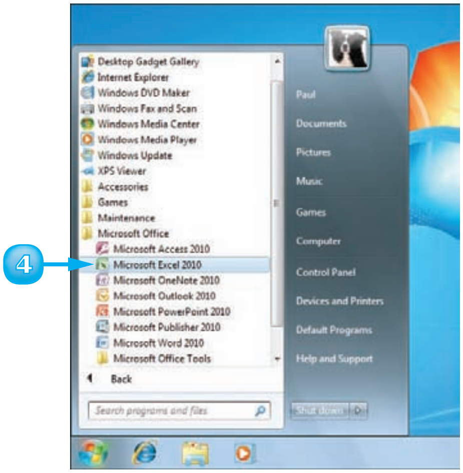

Getting Started
Windows Media Center
Calculator
Sticky Notes
Snipping Tool
Paint
Remote Desktop Connection
Magnifier
Solitaire
All Programs
2
Search programs and files
Paul
Documents
Pictures
Music
Games
Computer
Control Panel
Devices and Printers
Default Programs
Help and Support
Shut down
1

3. Click **Microsoft Office**.


Default Programs
Desktop Gadget Gallery
Internet Explorer
Windows DVD Maker
Windows Fax and Scan
Windows Media Center
Windows Media Player
Windows Update
XPS Viewer
Accessories
Games
Maintenance
Microsoft Office
SnagIt 8
Startup
Back
Search programs and files
3
Paul
Documents
Pictures
Music
Games
Computer
Control Panel
Devices and Printers
Default Programs
Help and Support
Shut down

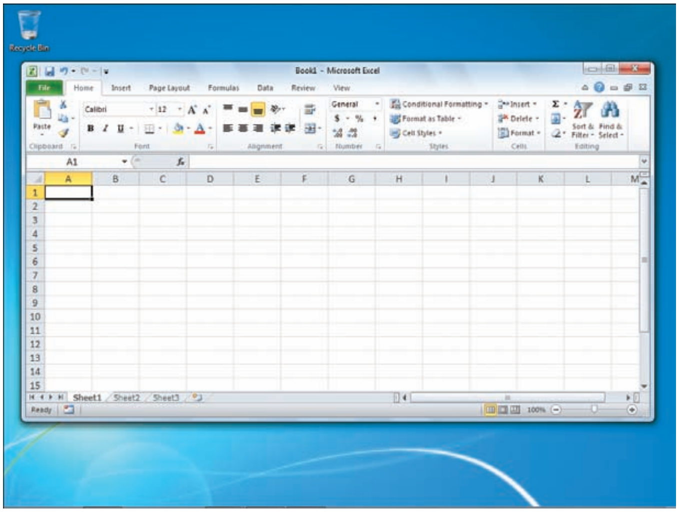
The Microsoft Office menu appears.

4 Click **Microsoft Excel 2010**.


Desktop Gadget Gallery
Internet Explorer
Windows DVD Maker
Windows Fax and Scan
Windows Media Center
Windows Media Player
Windows Update
XPS Viewer
Accessories
Games
Maintenance
Microsoft Office
Microsoft Access 2010
4
Microsoft Excel 2010
Microsoft OneNote 2010
Microsoft Outlook 2010
Microsoft PowerPoint 2010
Microsoft Publisher 2010
Microsoft Word 2010
Microsoft Office Tools
Back
Search programs and files
Paul
Documents
Pictures
Music
Games
Computer
Control Panel
Devices and Printers
Default Programs
Help and Support
Shut down

The Microsoft Excel window appears on the desktop.

Note: *When you are finished with Excel, close the program by clicking the* **File** *tab and then clicking* **Exit***.*


Recycle Bin
Book1 - Microsoft Excel
File
Home
Insert
Page Layout
Formulas
Data
Review
View
Paste
Clipboard
Calibri
12
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%

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

A Title Bar

The title bar displays the name of the current workbook.

B Quick Access Toolbar

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

C Excel Window Controls

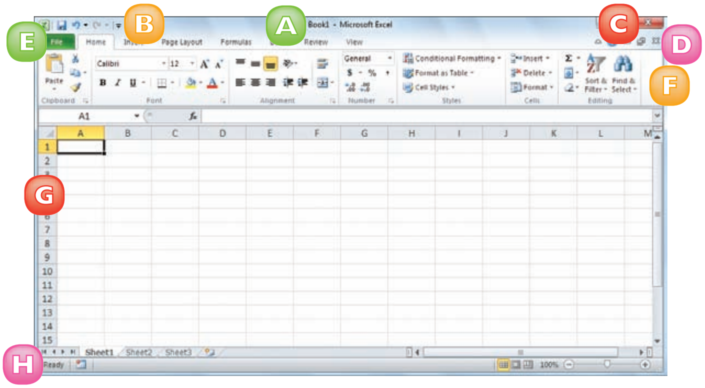
You use these controls to minimise, maximise, restore and close Excel's application window.

D Workbook Window Controls

You use these controls to minimise, maximise, restore, and close the current workbook window.

E File Tab

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


A
B
C
D
E
F
G
H
Book1 - Microsoft Excel
File
Home
Insert
Page Layout
Formulas
Data
Review
View
Clipboard
Font
Alignment
Number
Styles
Cells
Editing
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
Sort & Filter
Find & Select
A1
Sheet1
Sheet2
Sheet3
Ready
100%

F 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."

G Worksheet

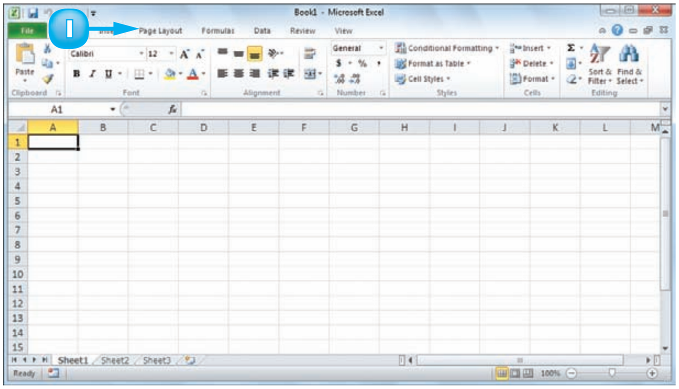
This area displays the current worksheet and it is where you will do most of your Excel work.

H Status Bar

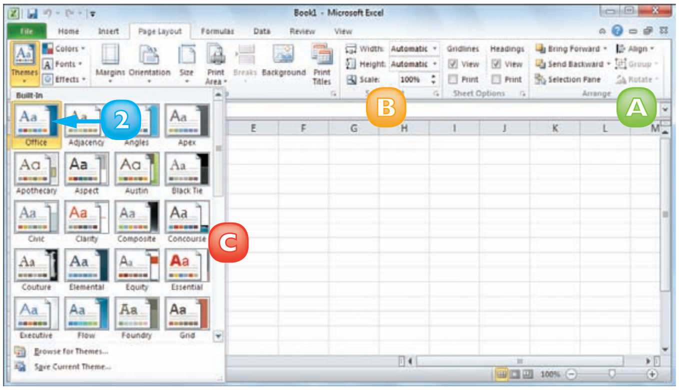
This area displays messages about Excel's current status, the results of certain operations and other information.

WORK WITH EXCEL'S RIBBON

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 organised 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.


1
Book1 - Microsoft Excel
File
Page Layout
Formulas
Data
Review
View

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


2
A
B
C
Book1 - Microsoft Excel
Themes
Built-In
Office

Excel displays the controls in the tab.

A *Each tab is organised into groups of related controls, and the group names appear here.*

B *In many groups you can click the dialog box launcher button (⧉) to see group settings.*

2 Click the control for the feature.

C *If the control displays a list of options, click the option you want.*

Excel runs the command or sets the option.

CUSTOMISE THE QUICK ACCESS TOOLBAR

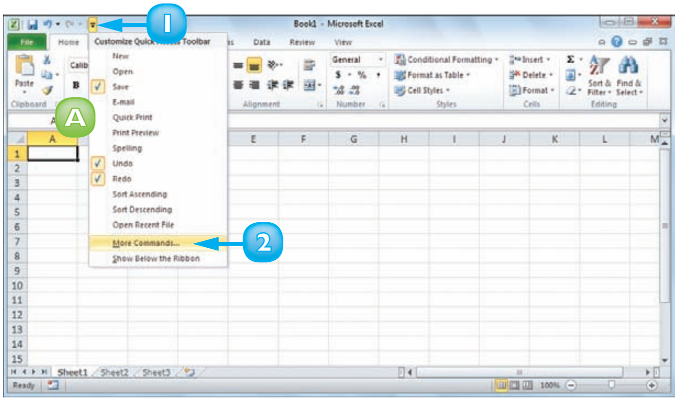
You can make Excel easier to use by customising the Quick Access Toolbar to include the Excel commands you use most often. You run Quick Access Toolbar buttons with a single click, so adding your favourite commands saves time. By default, the Quick Access Toolbar contains three buttons, Save, Undo and Redo, but you can add any of Excel's hundreds of commands.

Since there is only so much room for the Quick Access Toolbar in Excel's menu bar, consider moving the Quick Access Toolbar below the Ribbon to gain more space for your custom commands.

1 Click the **Customize Quick Access Toolbar** button (▾).

A *If you see the command you want, click it and skip the rest of the steps in this section.*

2 Click **More Commands**.

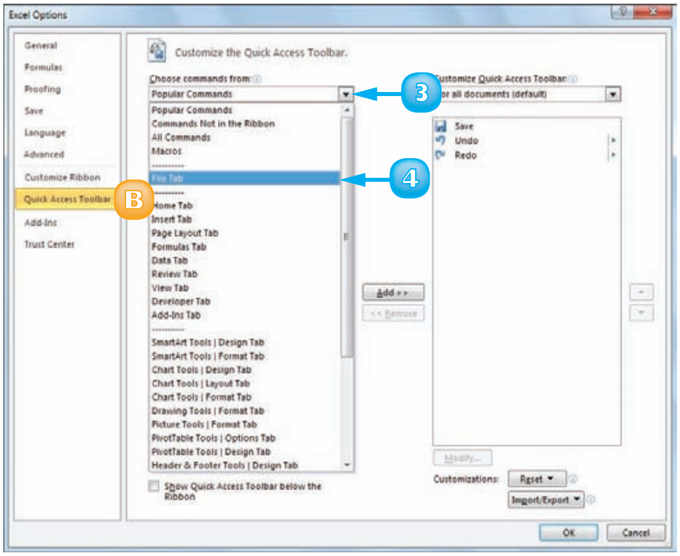

1
Book1 - Microsoft Excel
File
Home
Customize Quick Access Toolbar
Data
Review
View
New
Open
☑ Save
E-mail
Quick Print
Print Preview
Spelling
☑ Undo
☑ Redo
Sort Ascending
Sort Descending
Open Recent File
More Commands...
Show Below the Ribbon
2
A
Paste
Clipboard
General
Conditional Formatting
Format as Table
Cell Styles
Styles
Insert
Delete
Format
Cells
Sort & Filter
Find & Select
Editing
Alignment
Number
Sheet1
Sheet2
Sheet3
Ready
100%

The Excel Options dialog box appears.

B *Excel automatically displays the Quick Access Toolbar tab.*

3 Click the **Choose commands from** ▾.

4 Click the command category you want to use.


Excel Options
General
Formulas
Proofing
Save
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
B
Customize the Quick Access Toolbar.
Choose commands from:
Popular Commands
3
Popular Commands
Commands Not in the Ribbon
All Commands
Macros
File Tab
4
Home Tab
Insert Tab
Page Layout Tab
Formulas Tab
Data Tab
Review Tab
View Tab
Developer Tab
Add-Ins Tab
SmartArt Tools | Design Tab
SmartArt Tools | Format Tab
Chart Tools | Design Tab
Chart Tools | Layout Tab
Chart Tools | Format Tab
Drawing Tools | Format Tab
Picture Tools | Format Tab
PivotTable Tools | Options Tab
PivotTable Tools | Design Tab
Header & Footer Tools | Design Tab
Customize Quick Access Toolbar:
For all documents (default)
Save
Undo
Redo
Add >>
<< Remove
Modify...
Customizations:
Reset ▾
Import/Export ▾
☐ Show Quick Access Toolbar below the Ribbon
OK
Cancel

5 Click the command you want to add.

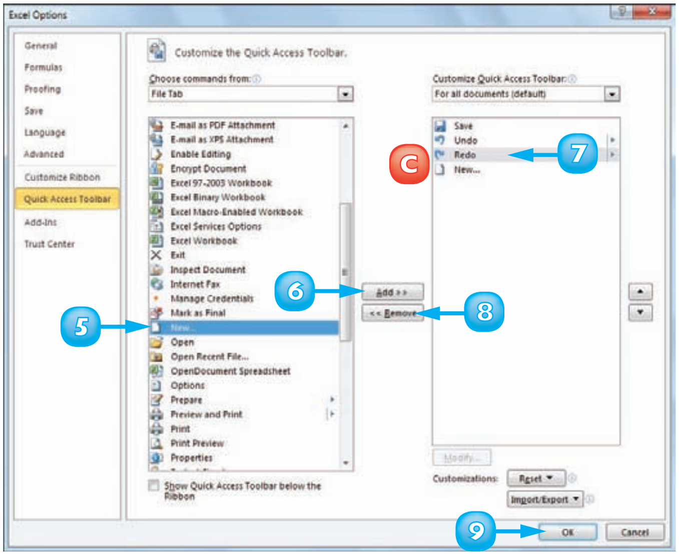
6 Click **Add**.

C *Excel adds the command.*

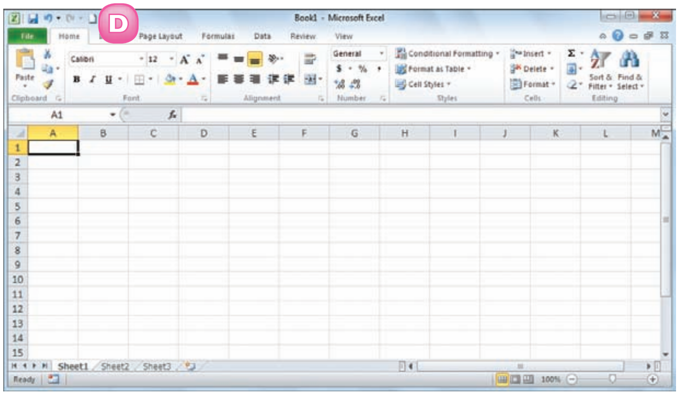
7 To remove a command, click it.

8 Click **Remove**.

9 Click **OK**.


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:
File Tab
E-mail as PDF Attachment
E-mail as XPS Attachment
Enable Editing
Encrypt Document
Excel 97-2003 Workbook
Excel Binary Workbook
Excel Macro-Enabled Workbook
Excel Services Options
Excel Workbook
Exit
Inspect Document
Internet Fax
Manage Credentials
Mark as Final
New...
Open
Open Recent File...
OpenDocument Spreadsheet
Options
Prepare
Preview and Print
Print
Print Preview
Properties
Show Quick Access Toolbar below the Ribbon
Customize Quick Access Toolbar:
For all documents (default)
Save
Undo
Redo
New...
Add >>
<< Remove
Modify...
Customizations:
Reset
Import/Export
OK
Cancel
5
6
7
8
9
C

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


Book1 - Microsoft Excel
D
File
Home
Page Layout
Formulas
Data
Review
View
Paste
Calibri
12
General
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
Sort & Filter
Find & Select
Clipboard
Font
Alignment
Number
Styles
Cells
Editing
A1
Sheet1
Sheet2
Sheet3
Ready
100%

***You can move the Quick Access Toolbar below the Ribbon to give it 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.**

You can add a button 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.