

Excel 2010

Office Button



The File Button located in the upper left corner of the window contains the Save, Save As, Open, Close, Info, Recent, New, Print, Share and Help commands.

Excel Options Menu

The Excel Options window allows the user to set preferences for view, edit, and display settings.

General –

- Show Minitoolbar on selection
- Enable Live Preview
- Color Scheme
- ScreenTip Style
- Default font and size
- Number of worksheets

Formulas –

- Calculation Options
- Autocomplete formulas
- Error checking rules

Proofing –

- AutoCorrect Options
- Spelling and Grammar Options

Advanced –

- Editing Options
- Display

Quick Access Toolbar



Allows single click access to popular commands such as Save and Undo. Located to the right of the File button, the toolbar can be moved and customized.

To customize the Quick Access Toolbar, click the drop arrow and select or remove commands.

Ribbon

The ribbon in Office 2010 replaces the menus and toolbars of previous Office Versions and is organized with similar commands grouped under tabs. Some tabs do not appear until required.

Double-clicking a tab minimizes the ribbon. The commands are still available when the ribbon is minimized.

Select All



Layout Views



Normal
Page Layout
Page Break Preview

Enter/Edit Data

Data Types

Autofill



Clear Data



To select the entire worksheet, click the Select All button located in the upper left corner of the spreadsheet.

Your spreadsheet can be viewed in 3 different ways.

*Normal – Default layout for working in a spreadsheet

*Page Layout – Useful before printing to see how the spreadsheet will print
Can add header and footer.

*Page Break Preview – Useful for adjusting the page breaks in a spreadsheet

Numbers, text, dates, formulas, and functions are the data types that can be entered into a spreadsheet.

Pressing the [ENTER] key moves the cursor down; pressing [TAB] moves the cursor to the right.

To repeat data entered in a cell in subsequent cells:

1. Click the cell with the data
2. Place the mouse on the bottom right of the cell.
3. When the mouse changes to a plus sign, drag down or across

To autofill a series of data:

1. Click the cell with the data
2. Place the mouse on the bottom right of the cell
3. When the mouse changes to a plus sign, drag down or across
4. After releasing the mouse, select **Fill Series** from the **AutoFill Options** box

Another way to fill a series:

1. Highlight the beginning cell and cells to fill
2. **Home>Editing>Fill>Series**
3. Specify the type, unit, and step value

To clear data from cells:

1. Highlight the cells to clear
2. **Home>Editing>Clear**
You can select Clear All, Clear Formats, Clear Contents, Clear Comments

Move Cell Data

Copy/Paste Cell Data

Move data from one cell to another:

1. Select the cells to move
2. Place the mouse over the border of the highlighted cells until the mouse is a cross with 4 arrows
3. Click and drag the cells to a new location

Create a Simple Formula

Copy the contents from one cell to another:

1. Select the cells to copy
2. Right-click on the cells and select **Copy**
3. Click the cell to receive the data
4. Right-click and select **Paste**

Formulas perform calculations on values in the worksheet. All formulas begin with an equal sign (=).

To create a formula to add the values of 3 cells:

1. Click in the cell that will hold the formula and display the sum
2. Enter =
3. Click the first cell to add to the equation
4. Enter +
5. Click the second cell to add to the equation
6. Enter +
7. Click the third cell to add to the equation
8. Press **[ENTER]**

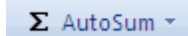
The spreadsheet cell will display the result of the formula but the formula bar above the column headings will display the formula.

Create a Formula Using a Function

Excel contains many ready to use functions that perform calculations without typing a long formula.

Functions may be found under the Formulas tab.

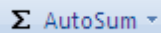
Sum Function



To sum a range of numbers:

1. Click the cell after the numbers
2. **Formulas>Function Library>AutoSum>Sum**
3. Press **[ENTER]**

Average Function



To average a range of numbers:

1. Click the cell after the numbers
2. **Formulas>Function Library>AutoSum>Average**
3. Press **[ENTER]**

Format Data

Selecting Cells

- * Select a row by clicking the row heading.
- * Select a column by clicking the column heading.
- * Select a range of cells by:
 1. Clicking the first cell
 2. Locate the bottom right cell
 3. Hold **[SHIFT]** and click
- * Select to last cell with data
 1. Click the first cell with data
 2. Press **[CTRL] [SHIFT] [END]**

Format Dates, Numbers, Text

To format text (font, size, bold, italics, underline, shading, text color)

Home>Font

To change the alignment of data (left, center, right, top, middle, bottom, orientation, wrap, and indentation)

Home>Alignment

To format numbers (commas, percents, fractions, decimal, date, time)

Home>Numbers>Number Format drop menu

Change height/width

To change the height of a row or the width of a column:

1. Place the mouse on the line between the rows (columns) until the mouse appears as plus with 2 arrows
2. Click and drag to adjust the height (width)

Autofit: To automatically adjust the width of a column to accommodate the longest item, double-click the right edge of the column.

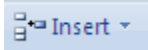
Merge Cells



To merge 2 or more cells:

1. Click and drag to select the cells
2. **Home>Alignment>Merge & Center**
3. Select either Merge & Center, Merge Across, Merge Cells, or Unmerge Cells

Insert Column/Row



To insert a column:

1. Click in the column to be pushed to the right of the new column
2. **Home>Cells>Insert>Insert sheet column**

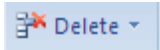
To insert a row:

1. Click in the row to be pushed down by the new row
2. **Home>Cells>Insert>Insert sheet row**

To insert a cell:

1. Click in the cell to be moved
2. **Home>Cells>Insert>Insert cell**
3. Select which direction to move the cell
4. Click **OK**

Delete Column/Row



To delete a column:

1. Click in the column to be deleted
2. **Home>Cells>Delete>Delete sheet column**

To delete a row:

1. Click in the row to be deleted
2. **Home>Cells>Delete>Delete sheet row**

To delete a cell:

1. Click in the cell to be deleted
2. **Home>Cells>Delete>Delete cell**
3. Select which direction to move the remaining cells
4. Click **OK**


Shading (Fill Color)



To add shading to a cell:

1. Highlight the cell
2. **Home>Font>Fill Color drop arrow**
3. Select a color

To add a pattern to a cell:

1. Highlight the cell
2. **Home>Font**
3. Click the Dialog Box Launcher 
4. Click the **Fill** tab
5. Select a pattern color and style
6. Click **OK**

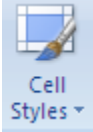
Borders



To add borders to a group of cells:

1. Highlight the cells
2. **Home>Font**
3. Click the **Borders** drop arrow
4. Select the border to apply or click More Borders to create a custom border

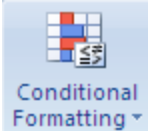
Cell Styles



Cell styles are preset colors, font, size, and formatting to help format your spreadsheet.

1. Highlight the cells to change
2. **Home>Styles>Cell Styles**
3. Select one of the preset styles

Conditional Formatting



Conditional formatting uses rules to determine how to shade a cell. For example if you wanted to highlight the member renewal month of February in a member database:

1. Highlight the cells containing the renewal month
2. **Home>Styles>Conditional Formatting drop arrow**
3. Select **Highlight Cell Rules>Text That Contains**
4. Enter February and select a color
5. Click **OK**

Find/Replace



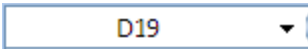
To locate data in a spreadsheet, use the Find command:

1. **Home>Edit>Find & Select>Find**
2. Enter the data to find
3. Click **Find Next**
4. Continue to click Find to locate other occurrences of the data

To replace data in a spreadsheet, use the Replace command:

1. **Home>Edit>Find & Select>Replace**
2. Enter the text to be replaced
3. Enter the new text
4. Click **Find Next**
5. Click **Replace**
Replace All will automatically replace all occurrences of the data.

Go To

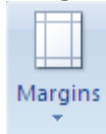


To jump to any cell in the worksheet:

1. Double-click the **Name Box**
2. Type the address of the cell
3. Press **[ENTER]**

Prepare to Print

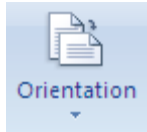
Margins



To set the document margins:

1. **Page Layout>Page Setup>Margins**
2. Select one of the preset margins or choose Customize

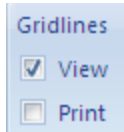
Orientation



To change the page orientation:

1. **Page Layout>Page Setup>Orientation**
2. Select either Landscape or Portrait

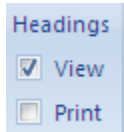
Print Gridlines



If borders have not been set but you want the gridlines to print:

1. **Page Layout>Sheet Options>Gridlines**
2. Click **Print checkbox**

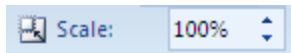
Print Headings



To print the column and row headings:

1. **Page Layout>Sheet Options>Headings**
2. Click **Print checkbox**

Scale to Fit



To reduce the size of the printed spreadsheet:

1. **Page Layout>Scale to Fit**
2. Reduce the scale of the spreadsheet by entering a number less than 100%

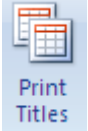
Set Print Area



To print only part of a spreadsheet:

1. Highlight the area to print
2. **Page Layout>Page Setup>Print Area**
3. Select **Set Print Area**

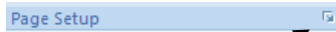
Print Titles



The Print Titles feature allows designated column and rows to print on each page. To set print titles:

1. **Page Layout>Page Setup>Print Titles**
2. To repeat a row on every page, enter the row number in the Row to Repeat at Top box in this format - 1:1 (repeat row 1)
3. To repeat a column on every page, enter the column letter in the Columns to Repeat at Left in this format – a:a (repeat column a)
4. Click **OK**

Headers/Footers



Document
Launcher

To create a header/footer:

1. **Page Layout>Page Setup>Document Launcher**
2. Click **Header/Footer tab**
3. Click Custom Header or Custom Footer
4. Enter the text or click to add page numbers, date, etc.
5. Click **OK** twice

Print Preview

To preview the spreadsheet before printing:

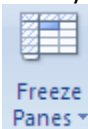
1. **Office Button>Print>Print Preview**
2. Within Print Preview you can scroll to another page, zoom in to see the information, look at the margins, access page setup, and print
3. Click **Close Preview**

Printing

To print a spreadsheet:

1. **Office Button>Print>Print**
2. Within the print window, you can select the number of copies to print, print selected pages, print selection, or ignore print areas
3. Click **OK** to print

Freeze (Lock) Rows/Columns



Freezing rows or columns will allow the rows or columns to remain on the screen even when you scroll to another page. This does not affect printing the spreadsheet; just viewing.

To freeze a row:

1. Click a cell below the row to freeze
2. **View>Window>Freeze Panes**
3. Select **Freeze Panes**

To unfreeze:
View>Window>Freeze Panes
Select Unfreeze Panes

To freeze a column:

1. Click a cell to the right of the column to freeze
2. **View>Window>Freeze Panes**
3. Select **Freeze Panes**

Split Panes



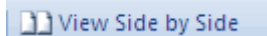
Splitting the pane creates 2 work areas from the same spreadsheet that allows you to scroll independently within each pane.

To split the pane:

1. Move the mouse over the split box at the top of the vertical scroll bar or the far right of the horizontal scroll bar
2. Click and drag to create the panes

To remove the split, double-click on the split bar that displays in the spreadsheet.

View Side by Side



To view 2 worksheets at the same time:

1. Open both worksheets
2. **View>Window>View Side by Side**

To return to viewing only 1 spreadsheet:

View>Window>View Side by Side (acts as a toggle)


WordArt, Clipart, SmartArt, Freeform Shapes

Each of these features operate the same in Excel as in Word except the objects sit on top of the cells in a spreadsheet. All of the objects are accessed from the Insert tab.

Multiple Worksheets

Excel begins each new spreadsheet with 3 worksheets. You will see the worksheets listed at the bottom of the window names Sheet1, Sheet2, and Sheet3.

You can add additional worksheets if needed. To add a worksheet after the last worksheet:

Click **the Insert Worksheet** tab  to the right of the last worksheet

To add a worksheet before a worksheet:

1. Click the existing worksheet's name
2. **Home>Cells>Insert>Insert Sheet**

Right-click a worksheet name to:

Delete
Rename
Change tab color
Move

Filter Data



In a spreadsheet that contains a listing, filtering will only display the rows that match the criteria you create.

1. Select the range of cells to filter
2. **Home>Editing>Sort & Filter>Filter**
3. Click the arrow beside the column to filter
4. Click the value(s) to filter
5. Click **OK**

To remove the filter, Home>Editing>Sort & Filter> Filter (toggle)

Sort Data



To quickly sort a list of information:

1. Click a cell in the column to use as the sort
2. **Home>Editing>Sort & Filter**
3. Click either **Sort A to Z** or **Sort Z to A**

To create a custom sort:

1. **Home>Editing>Sort & Filter>Custom Sort**
2. Select the column for the primary sort and the order
3. Click **Add Level**
4. Select the column for the secondary sort and the order
5. Continue to add sort levels as needed
6. Click **OK**

Mailmerge List in Excel with Word Letter

To merge an Excel spreadsheet list with a Word letter

Open Word –

1. Open the letter
2. **Mailings>Start Mail Merge>Start Mail Merge>Step by Step Mail Merge Wizard**
3. Select **Letters**
4. Click **Next: Starting Document**
5. Select **Use the Current Document**
6. Click **Next: Select Recipients**
7. Select **Use an Existing List**
8. Click **Browse**
9. Locate the Excel spreadsheet containing the list of names
10. Each person in the list with a check will have a label printed
11. Click **OK**
12. Click **Next: Write Your Letters**
13. Place cursor where first field will be inserted
14. Click **More Items** to select fields to include in Letter
15. Highlight field to insert
16. Click **Insert**; click **Close**
17. Place cursor in position for next field
18. Repeat steps 14-16 until required fields are inserted into letter
19. Click **Preview Your Letters**
20. Click **Next: Complete the Merge**

Mailmerge List in Excel with Word Letter (cont.)

Mailmerge Excel and Word to Create Mailing Labels

21. Click Print to send the letters to the printer or Edit Individual Letters to merge the letters into a document

To create mailing labels from an Excel spreadsheet:
Open Word –

1. **Mailings>Start Mail Merge>Start Mail Merge>Step by Step Mail Merge Wizard**
The Mail Merge Wizard task pane opens to the right
2. Click **Labels**
3. Click **Next: Starting Document**
4. Click **Label Options**
5. Select the label maker and product number
6. Click **OK**
7. Click **Next: Select Recipients**
8. Click **Use an Existing List**
9. Browse and open the Excel spreadsheet of names
10. Each person in the list with a check will have a label printed
11. Click **OK**
12. Click **Next: Arrange Your Labels**
13. Place cursor where first field will be inserted
14. Click **More Items** to select fields to include in Letter
15. Highlight field to insert
16. Click **Insert; Close**
17. Place cursor in position for next field
18. Repeat steps 11-13 until required fields are inserted onto label
19. Click **Update All Labels**
20. Click **Next: Preview Your Labels**
21. Click **Complete the Merge**
22. Click Print to send the labels to the printer or Edit Individual Labels to merge the labels into a document

Charts

Excel can take data you enter in the spreadsheet and create a graphical representation of the data in a chart/graph. The chart types available include: bar, column, pie, line, area, surface, radar, XY (scatter), bubble, and stock.

The type of chart you need determines how the data should be entered in the spreadsheet.

Create a Chart

To create a chart:

1. Enter the data in the spreadsheet
2. Select the data including the data labels
3. **Insert>Charts>Column**
4. Select a style

The chart is embedded into the worksheet

Three new tabs appear in the ribbon:

Chart Design, Layout, Format

Chart Design

1. **Chart Design>Chart Layouts**
2. Select a layout (title, legend, etc)
3. **Chart Design>Chart styles**
4. Select a chart style

Chart Layout

The **Current Selection** group allows you to select which element of the chart to format.

1. **Chart Layout>Current Selection**
2. From the drop menu select an element of the chart.
3. Click **Format Selection**
4. Set the Fill, Border, Border Style, Shadow or 3D Format

Labels Group

To set a chart title:

1. **Chart Layout>Labels**
2. Click **Chart Title**
3. Select either Centered Overlay Title or Above Chart
4. Enter the text for the chart title
5. Click **Chart Title>More Title Options** to set the Fill, Border Color, Border Style, and Shadow effects

To set axis titles:

1. **Chart Layout>Labels**
2. Click **Axis Titles**
3. Select Primary Horizontal Axis Title>select location of title
4. Enter the text for the title
5. Select **Primary Vertical Axis Title>select location of title**
6. Enter the text for the title

To create a legend:

1. **Chart Layout>Labels**
2. Click **Legend**
3. Select a location for the legend
4. Click **Legend>More Legend Options**
5. Set the Fill, Border Color, Border Style, and Shadow effects

Chart Layout (cont.)

Axes

Data Labels:

1. **Chart Layout>Labels**
2. Click **Data Labels**
3. Select a location for the labels
4. Click **Data Labels>More Data Label Options**
5. Set the label options, number, fill, border color, border styles, shadow, 3D format, or alignment

Data Table:

To display the data table below the chart:

Chart Layout>Labels>Data Table

Background

Format the axes by: **Chart Layout>Labels**

- **Axes>Primary Horizontal Axis>select display option**
- **Axes>Primary Vertical Axis>select display option**
- **Axes>Gridlines>Primary Horizontal Axis>select gridlines option**
- **Axes>Gridlines>Primary Vertical Axis>select gridlines option**

Analysis

Alter the plot area by choosing

Chart Layout>Background>Plot Area> More Plot Area Options

Set the fill, border color, border style, shadow, and 3D format

If the chart is a 3D chart then Chart Wall, Chart Rotation, and 3D Rotation are available.

Chart Format

If the chart type is a line chart then the Analysis group is available for formatting the chart.

Allows you to format elements of a chart. Formatting options include border type, color, style, WordArt style and size of the chart

*All graphics were captured from the screen of Microsoft Excel 2007