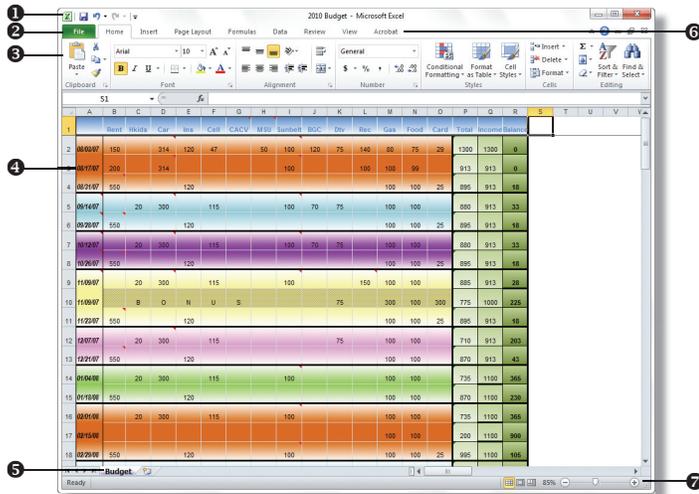# Getting Started

The Excel Window

❶ **Quick Access Toolbar** – contains shortcuts for the most commonly used tools.

❷ **Backstage View** – contains tools to work with workbook files and manage Excel settings.

❸ **Ribbon** – contains groups of tools for use with Excel 2010.

❹ **Worksheet Area** – displays the current worksheet.

❺ **Sheet Tabs** – displays tabs for the sheets in the current workbook.

❻ **Tab Bar** – contains tabs that display tools and commands in the ribbon.

❼ **Status Bar** – contains worksheet information and shortcuts.

NEW! Customizing the Ribbon
1. Click on the **File** tab.
2. Select **Options** in the left pane.
3. Select **Customize Ribbon**.
4. Click the arrow on the **Customize the Ribbon** box and select the tab group you want to customize from the resulting menu.
5. Do any of the following:
   • *To hide or display a tab,* check or clear the box next to the group name in the box on the right.
   • *To rename a tab or group,* select the current name and click the **Rename** button. Enter a new name in the **Display name** box and click the **OK** button.
   • *To rearrange tabs and groups,* select the tab or group name and click the **Move Up** ▲ or **Move Down** ▼ button.
6. Click the **OK** button when you are finished.

NEW! Using the Backstage View
The Backstage view replaces and expands on the File menu in Excel 2003 and the Microsoft Office button in Excel 2007. The Backstage view allows you to quickly manage Word settings, such as Permissions, Sharing, Versions, Properties, and Options. It also allows you to save a file, open a file, or print the current file. To access the Backstage view, click on the **File** tab on the **Tab Bar**. Make selections in the **Left pane**. Click on a tab (including the **File** tab) to exit the Backstage view.

Creating a New Blank Workbook
1. Click on the **File** tab.
2. Select **New** in the left pane.
3. Select the **Blank workbook** template in the **Available Templates** pane.
4. Click the **Create** button.

Creating a Workbook from a Template
1. Click on the **File** tab.
2. Select **New** in the left pane.
3. Do one of the following:
   • *To use a recently used template,* select **Recent templates**.
   • *To use a sample template, select* **Sample templates**.
   • *To use a template that you have created,* select **My templates**.
4. Select the template you want to use.
5. Click the **Create** button.

*Note: Click the **Home** button to return to the **Available Templates** pane.*

Creating a Workbook Based on an Office.com Template
1. Click on the **File** tab.
2. Select **New** in the left pane.
3. Select a template category in the **Office.com Templates** section.
4. Select the template you want to use.
5. Click the **Download** button.

Opening a Workbook
1. Click on the **File** tab.
2. Select **Open** in the left pane.
3. Locate and select the file you want to open.
4. Click the **Open** button.

Opening a Recent Workbook
1. Click on the **File** tab.
2. Select **Recent** in the left pane.
3. Do one of the following:
   • *To open a recent document,* select the document in the **Recent Workbooks** pane.
   • *To open a recent folder,* select the folder in the **Recent Places** pane. Select the file you want to open and click the **Open** button.

Saving a Workbook
1. Click on the **File** tab.
2. Do one of the following:
   • *To save the document as an Excel 2007 or Excel 2010 file (.xlsx),* select **Save** from the left pane.
   • *To save the document as another file format,* select **Save As** in the left pane. Click the arrow on the **Save as type** box and select a format from the resulting menu.
3. Select the location where you want to save the workbook.
4. Enter a file name in the **File name** box.
5. Click the **Save** button.

*Note: To quickly save after the initial save, click the **Save** 💾 button on the **Quick Access** toolbar or press **Ctrl + S**.*

Page Layout

Selecting the Paper Size
1. Click on the **Page Layout** tab.
2. Click the **Size** button in the **Page Setup** group.
3. Do one of the following:
   - *To select a standard paper size,* select a paper size from the resulting menu.
   - *To specify a custom paper size,* select **More Paper Sizes** from the resulting menu. Enter values in the **Width** and **Height** boxes and click the **OK** button.

Changing the Page Orientation
1. Click on the **Page Layout** tab.
2. Click the **Orientation** button in the **Page Setup** group.
3. Select **Portrait** or **Landscape** from the resulting menu.

Setting Page Margins
1. Click on the **Page Layout** tab.
2. Click the **Margins** button in the **Page Setup** group.
3. Select a margin type from the resulting menu.
*Note: To set custom margin values, click the **Margins** button and select **Custom Margins** from the resulting menu. In the **Margins** section, enter values and click the **OK** button.*

Worksheets

Inserting a Worksheet
- *To insert a new worksheet at the end of existing worksheets,* click the **Insert Worksheet** button on the right side of the row of worksheet tabs.
- *To insert a new worksheet before an existing worksheet,* select the worksheet and click on the **Home** tab. Click the arrow on the **Insert Cells** button in the **Cells** group and select **Insert Sheet** from the resulting menu.
- *To insert a new worksheet based on a template,* right-click a worksheet tab and select **Insert** from the shortcut menu. Select the template you want to use and click the **OK** button.

Renaming a Worksheet
1. Right-click the tab for the worksheet you want to rename.
2. Select **Rename** from the shortcut menu.
3. Enter a name for the worksheet and press the **Enter** key.
Note: You can also double-click the worksheet tab and enter a name.

Moving or Copying a Worksheet
1. Right-click the tab for the worksheet you want to move or copy.
2. Select **Move or Copy** from the shortcut menu.
3. *Optional:* To move or copy the sheet to another workbook, click the arrow on the **To book** box and select a workbook from the resulting menu.
4. Select the worksheet you want to move or copy the selected worksheet in front of.
5. Do one of the following:
   - *To copy the selected worksheet,* check the **Create a copy** box.
   - *To move the selected worksheet,* clear the **Create a copy** box.
6. Click the **OK** button.
*Note: To quickly move a worksheet, click and drag the tab to a new location along the row of sheet tabs. To quickly copy a worksheet, hold the **Ctrl** key and click and drag the tab to a new location along the row of sheet tabs.*

Deleting a Worksheet
1. Select the worksheet you want to delete.
2. Click on the **Home** tab.
3. Click the arrow on the **Delete** button in the **Cells** group.
4. Select **Delete Sheet** from the resulting menu. *(If the worksheet contains data, click the **Delete** button to confirm deletion.)*
*Note: To quickly delete a worksheet, right-click the worksheet tab and select **Delete** from the shortcut menu.*

Color Coding a Worksheet Tab
1. Select the worksheet.
2. Click on the **Home** tab.
3. Click the **Format** button in the **Cells** group.
4. Select **Tab Color** and select a color from the resulting color palette.

Rows & Columns

Selecting Rows or Columns
- *To select an entire row or column,* click the row heading `1` or column heading `A`.
- *To select a range of rows or columns,* click and drag the mouse pointer over the row or column headings.
- *To select nonadjacent rows or columns,* hold the **Ctrl** key and click on each row or column heading.

Inserting a Row or Column
1. Select the row heading below or the column heading to the right of where you want to insert the row or column. *(To insert multiple rows or columns, select the same number of columns or rows that you want to insert.)*
2. Click on the **Home** tab.
3. Click the arrow on the **Insert Cells** button in the **Cells** group.
4. Select **Insert Sheet Rows** or **Insert Sheet Columns** from the resulting menu.
*Note: To delete a row or column, select the row or column and click on the **Home** tab. Click the arrow on the **Delete Cells** button in the **Cells** group and select **Delete Sheet Rows** or **Delete Sheet Columns** from the resulting menu.*

Adjusting Row Height or Column Width
1. Select the row or column you want to adjust. *(To adjust multiple rows or columns, select the rows or columns.)*
2. Click on the **Home** tab and do any of the following:
   - *To adjust height or width with the mouse,* place the mouse pointer over the boundary line of the row or column heading until it turns into a double-sided arrow. Click and drag the boundary to adjust the row or column.
   - *To adjust the height or width to fit cell data,* click the **Format** button in the **Cells** group and select **AutoFit Row Height** or **AutoFit Column Width** from the resulting menu.
   - *To set a precise width or height,* click the **Format** button in the **Cells** group and select **Row Height** or **Column Width** from the resulting menu. Enter a value in the **Row height** or **Column width** box and click the **OK** button.
   - *To change the default column width for a worksheet,* click on the sheet tab for the worksheet. Click the **Format** button in the **Cells** group and select **Default Width** from the resulting menu. Enter a value in the **Standard column width** box and click the **OK** button.

Cells

Selecting Cells
- *To select a single cell,* click on the cell.
- *To select a range of cells,* click on the first cell in the range, hold the **Shift** key, and click on the last cell in the range, or click and drag the mouse pointer over the range of cells.
- *To select multiple nonadjacent cells,* hold the **Ctrl** key and click on each cell you want to select.
- *To select all the cells in a worksheet,* click the **Select All** button in the upper-left corner of the worksheet.

Inserting Cells
1. Select the cell or range of cells where you want to insert the new blank cells.
2. Click on the **Home** tab.
3. Click the arrow on the **Insert Cells** button in the **Cells** group.
4. Select **Insert Cells** from the resulting menu.
5. Select how you want to shift the cells and click the **OK** button.
*Note: To delete selected cells, click the arrow on the **Delete Cells** button in the **Cells** group and select **Delete Cells** from the resulting menu. Select how you want to shift the cells and click the **OK** button.*

Formatting Cells
1. Select the cells you want to change the formatting for.
2. Click on the **Home** tab.
3. Click the **Format** button in the **Cells** group.
4. Select **Format Cells** from the resulting menu.
5. Make formatting selections in the **Format Cells** dialog box.
6. Click the **OK** button when you are finished.
*Note: To quickly format selected cells, click the buttons in the **Font**, **Alignment**, **Number**, and **Styles** groups on the **Home** tab.*

Working with Cell Borders
1. Select the cells you want to apply borders to.
2. Click on the **Home** tab.
3. Click the arrow on the **Borders** button in the **Font** group.
4. Do one of the following:
   - *To apply a preset format,* select a border from the resulting menu.
   - *To select borders and apply formatting,* select **More Borders** from the resulting menu. Select a line style and color. Click the buttons in the **Border** section to select the borders you want to apply. Click the **OK** button when you are finished.
*Note: To remove borders from selected cells, click the arrow on the **Borders** button in the **Font** group and select **No Border** from the resulting menu.*

Merging Cells
Merge cells to spread the contents of one cell over several cells.
1. Copy the data into the upper-left cell of the range.
2. Select the cells you want to merge.
3. Click on the **Home** tab.
4. Click the arrow on the **Merge & Center** button in the **Alignment** group and do one of the following:
   - *To merge the cells and center the text,* select **Merge & Center** from the resulting menu.
   - *To merge without centering,* select **Merge Across** or **Merge Cells** from the resulting menu.
*Note: To split merged cells, select the cells, click the arrow on the **Merge & Center** button, and select **Unmerge Cells** from the resulting menu.*

Data

Entering Data
- *To enter data in a cell,* click the cell, enter data in the cell and press the **Tab** or **Enter** key to move to the next cell.
- *To insert a line break in a cell,* press **Alt + Enter**.
- *To enter the same data into several cells at once,* select the cells, enter the data into one of the selected cells, and press **Ctrl + Enter**.
- *To enter the current date,* press **Ctrl + ;**.
- *To enter the current time,* press **Ctrl + Shift + ;**.

Using AutoFill
The AutoFill feature will automatically fill in a series of numbers, dates, or other sequential items.
1. Select the first cell in the range you want to fill.
2. Enter the starting value.
3. Enter a value in the next cell to establish a pattern.
4. Select the cell or cells that contain the starting values.
5. Drag the fill handle over the range you want to fill. *(To fill in increasing order, drag down or to the right. To fill in decreasing order, drag up or to the left.)*
*Note: To fill the selected cell with the contents of an adjacent cell, click on the **Home** tab. Click the **Fill** button in the **Editing** group and select **Down**, **Right**, **Up**, or **Left** from the resulting menu.*

Clearing Cell Format or Contents
1. Select the cells you want to clear of formatting or contents.
2. Click on the **Home** tab.
3. Click the **Clear** button in the **Editing** group.
4. Select one of the following from the resulting menu:
   - *To clear everything in the cells,* select **Clear All**.
   - *To clear the formatting of the cell,* select **Clear Formats**.
   - *To clear the contents of the cell,* select **Clear Contents**.
   - *To clear comment attached to the cell,* select **Clear Comments**.
   - *To clear hyperlinks in the cell,* select **Clear Hyperlinks**.

Cutting, Copying, and Pasting Data
1. Select the data you want to cut or copy.
2. Click on the **Home** tab and do one of the following:
   - *To cut the text,* click the **Cut** button in the **Clipboard** group or press **Ctrl + X**.
   - *To copy the text,* click the **Copy** button in the **Clipboard** group or press **Ctrl + C**.
3. Click where you want to paste the selection.
4. Click the top section of the **Paste** button in the **Clipboard** group or press **Ctrl + V**.
5. *Optional:* Click the **Paste Options** smart tag button that appears and select a paste option from the resulting menu.

Previewing Data Before Pasting (NEW!)
Excel 2010 allows you to preview copied data to view the formatting before you paste it in.
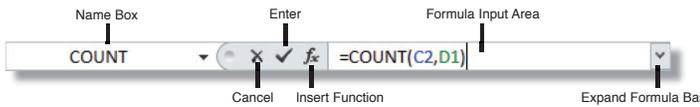1. Copy the data you want to paste into the document.
2. Select the cell you want to copy the data into.
3. Click on the **Home** tab.
4. Click the bottom section of the **Paste** button in the **Clipboard** group.
5. Rest your mouse pointer on the buttons to preview the data before you paste it.
6. Click a button to paste the text.

Formulas
Using the Formula Bar

Name Box   Enter   Formula Input Area

COUNT   ✕ ✓ fx   =COUNT(C2,D1)

Cancel   Insert Function   Expand Formula Bar

Creating a Formula
1. Select the cell that will contain the formula.
2. Enter an equal sign (=) in the **Formula Input Area**.
3. Enter the formula in the **Formula Input Area** using the following guidelines:
   • The four main types of operators are Add (+), Subtract (-), Multiply (*), and Divide (/).
   • Reference cells by their cell number (i.e. A1, B8).
   • Constants can also be used in formulas (i.e. 3, 8.5, 16).
   • Enter parentheses around calculations that are to be performed first.
4. *Optional:* To expand the Formula Bar, click the **Expand Formula Bar** button.
5. Click the **Enter** ✓ button or press the **Enter** key when you are finished.

Note: Excel displays error messages when there is an error in the formula, such as #VALUE! error that is displayed when the wrong type of argument or operand is used.

Inserting a Function
1. Select the cell that will contain the formula.
2. Click the **Insert Function** fx button on the **Formula Bar**. *(You can also click on the Formulas tab and click the Insert Function button in the Function Library group.)*
3. Do one of the following:
   • *To search for a function,* enter a description of the function in the **Search for a function** box and click the **Go** button.
   • *To select a category,* click the arrow on the **Or select a category** box and select a category from the resulting menu.
4. Select the function you want to use and click the **OK** button.
5. Enter the arguments for the function in the **Function Arguments** dialog box. *(Arguments are the values that a function uses to perform a calculation or operation.)*
6. *Optional:* To select a cell or range of cells as an argument, click the **Collapse Dialog** button, select the cells on the worksheet, and press the **Expand Dialog** button to return to the dialog box.
7. Click the **OK** button when you are finished.

Using the Function Library
To display the **Function Library** group, click on the **Formulas** tab. Click the buttons in the **Function Library** group and select functions from the resulting menus.

Understanding Cell References
• A **reference** identifies a cell or range of cells on a worksheet and tells the formula where to look for data.
• A **relative cell reference** is relative to the position of the formula. If the position of the cell that contains the formula changes, the reference is changed.
• An **absolute cell reference** always refers to a specific location, regardless of where the formula is located. To indicate an absolute reference, place a dollar sign ($) before the letter and number of the cell reference, such as B2.

Using the Sum Button
1. Click a cell below the column or to the right of the row of numbers you want to evaluate.
2. Click on the **Home** tab.
3. Click the arrow on the **Sum** Σ button in the **Editing** group.
4. Select a function from the resulting menu.
5. Do one of the following:
   • *To use the highlighted cells,* press the **Enter** key.
   • *To change the highlighted cells,* select other cells and press the **Enter** key.

Sparklines (NEW!)
Sparklines are tiny charts in a cell that allow you to show trends in a small amount of space.

Creating a Sparkline
1. Select an empty cell to insert the sparkline.
2. Click on the **Insert** tab.
3. Click the **Line** button, **Column** button, or **Win/Loss** button in the **Sparklines** group.
4. Enter or select the range of cells that contains the data you want to display in the sparkline in the **Data Range** box.
5. Click the **OK** button.
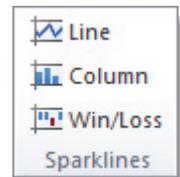
Adding Data Markers to a Line Sparkline
1. Select the cell that contains the sparkline you want to add data markers to.
2. Click on the **Design** tab.
3. Do any of the following in the **Show** group:
   • *To show the highest or lowest values,* check the **High Point** or **Low Point** box.
   • *To show the first or last values,* check the **First Point** or **Last Point** box.
   • *To show negative values,* check the **Negative Points** box.
   • *To show all values,* check the **Markers** box.

Formatting a Sparkline
1. Select the cell that contains the sparkline you want to format.
2. Click on the **Design** tab.
3. Do any of the following in the **Style** group:
   • *To change the style of the sparkline,* select a style in the **Style** box.
   • *To change the color of the sparkline,* click the **Sparkline Color** button and select a color from the resulting color palette.
   • *To change the color of the markers,* click the **Marker Color** button, select a marker type, and select a color from the resulting color palette.

Illustrations

Inserting an Illustration
1. Click in the workbook where you want to place the illustration.
2. Click on the **Insert** tab.
3. In the **Illustrations** group, do one of the following:
   - *To insert a picture from a file,* click the **Picture** button. Locate and select the graphic file you want to insert and click the **Insert** button.
   - *To insert a clip art graphic,* click the **Clip Art** button. Enter a keyword for the clip art you want insert in the **Search for** box in the **Clip Art** task pane. Click the **Go** button. Click once on the graphic you want to insert in the results pane.
   - *To insert a shape,* click the **Shapes** button and select a shape from the resulting menu. Click and drag in the message text box to create the shape.
   - *To insert a SmartArt graphic,* click the **SmartArt** button. Select a category in the left pane and select the SmartArt graphic you want to insert. Click the **OK** button.
4. *Optional:* Make selections on the **Format** tab that appears to format the illustration.
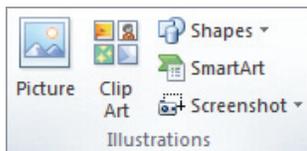
Inserting a Screen Shot
Excel now provides tools for taking screen shots (or pictures of the screen) and inserting them in your workbooks. You can take a screen shot of any window that is not minimized. If you want to insert a portion of a window, minimize all windows except the Excel window that you are working in and the window you want to use to take the screenshot.
1. Click the document where you want to add the screenshot.
2. Click on the **Insert** tab.
3. Click the **Screenshot** button in the **Illustrations** group and do one of the following:
   - *To insert a screen that you have open on your computer,* select the screen in the **Available Windows** section.
   - *To create your own screenshot,* select **Screen Clipping** from the resulting menu. Click and drag the area you want to insert in the document.
4. *Optional:* Make selections on the **Format** tab that appears to format the screen shot.

Views

Changing the Workbook View
1. Click on the **View** tab.
2. In the **Workbook Views** group, do one of the following:
   - *To view the workbook in Normal view,* click the **Normal View** button. *(Normal is the default view.)*
   - *To view the workbook as it will look when it is printed,* click the **Page Layout View** button.
   - *To view and adjust page breaks,* click the **Page Break Preview** button. *(Click the Normal View button to return to the default view.)*
   - *To view the workbook in full screen view,* click the **Toggle Full Screen View** button. *(Press the Esc key to return to the default view.)*
3. *Optional:* To open a new window with the current view, click the **New Window** button in the **Window** group.
Note: To quickly change the workbook view, click the Normal, Page Layout, or Page Break Preview button on the Status bar.

Viewing Multiple Workbooks
1. Open the workbooks you want to view.
2. Click on the **View** tab.
3. Click the **Arrange All** button in the **Window** group.
4. Make a selection in the Arrange section.
5. Click the **OK** button.

Splitting Panes
Split panes to view two parts of a worksheet at once.
1. Click on the **View** tab.
2. Click the **Split** button in the **Window** group.
3. Click and drag the split bars into the positions you want.
4. To remove the split, click the **Split** button in the **Window** group.
Note: You can also click and drag the Horizontal Split or Vertical Split boxes in the upper and lower right corners of the worksheet area.

Freezing a Row or Column
You can "freeze" horizontal or vertical panes to keep row and column labels or other data visible as you scroll through the worksheet.
1. Click on the **View** tab.
2. Do one of the following:
   - *To freeze rows,* select the row below where you want the split to appear.
   - *To freeze columns,* select the column to the right of where you want the split to appear.
   - *To freeze both rows and columns,* select the cell below and to the right of where you want the split to appear.
3. Click the **Freeze Panes** button in the **Window** group.
4. Select **Freeze Panes** from the resulting menu.
5. To unfreeze, click the **Freeze Panes** button in the **Window** group and select **Unfreeze Panes** from the resulting menu.
Note: To freeze the top row or the first column, click the Freeze Panes button in the Window group and select Freeze Top Row or Freeze First Column from the resulting menu.

Output

Previewing and Printing a Workbook
1. Click on the **File** tab.
2. Select **Print** in the left pane. *(The Print Preview is automatically displayed in the right pane).*
3. Select print options in the middle pane.
4. *Optional:* For additional print options, click the **Page Setup** shortcut. Make selections and click the **OK** button.
5. Click the **Print** button to print the document.
Note: You can also press Ctrl + P.
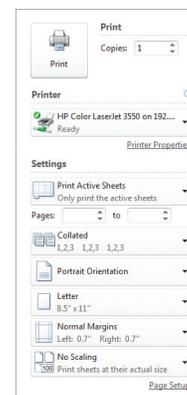
E-mailing a Workbook as an Attachment
1. Click on the **File** tab.
2. Select **Save & Send** in the left pane.
3. Click the **Send as Attachment** button.
4. Enter recipient information in the **To** box.
5. *Optional:* Enter additional information.
6. Click the **Send** button.
Note: You can also send a PDF or XPS copy of the workbook as an attachment or a link to the workbook in an e-mail.

Home Tab Shortcuts

Clipboard Group

Paste	....	**Ctrl + V**
Cut	....	**Ctrl + X**
Copy	....	**Ctrl + C**
Format Painter	....	**Ctrl + Shift + C**

Font Group

Font	....	**Ctrl + Shift + F**
Font Size	....	**Ctrl + Shift + P**
Grow Font	....	**Ctrl + Shift + .**
Shrink Font	....	**Ctrl + Shift + ,**
Bold	....	**Ctrl + B**
Italic	....	**Ctrl + I**
Underline	....	**Ctrl + U**
Bottom Border	....	*none*
Text Highlight Color	....	*none*
Font Color	....	*none*

Alignment Group

Top Align	....	*none*
Middle Align	....	*none*
Bottom Align	....	*none*
Orientation	....	*none*
Align Text Left	....	**Ctrl + L**
Center	....	**Ctrl + E**
Align Text Right	....	**Ctrl + R**
Decrease Indent	....	*none*
Increase Indent	....	*none*
Wrap Text	....	*none*
Merge & Center	....	*none*

Number Group

Number Format	.....	*none*
Accounting Number Format	......	*none*
Percent Style	....	**Ctrl + Shift + %**
Comma Style	....	*none*
Increase Decimal	....	*none*
Decrease Decimal	....	*none*

Styles Group

Conditional Formatting	....	*none*
Format as Table	....	*none*
Cell Styles	....	*none*

Cells Group

Insert Cells	....	*none*
Delete Cells	....	*none*
Format	....	*none*

Editing Group

Sum	....	**Alt + =**
Fill	....	*none*
Clear	....	*none*
Sort & Filter	....	*none*
Find & Select	....	*none*

Other Shortcuts

Quick Access Toolbar

Save	....	**Ctrl + S**
Undo	....	**Ctrl + Z**
Redo	....	**Ctrl + Y**

Getting Help

Using Excel Help

1. Click the **Microsoft Excel Help** button on the **Tab Bar** or press **F1**.
2. Do one of the following:
   - *To browse Excel Help,* select a topic heading in the **Browse Excel 2010 support** section.
   - *To browse the Help Table of Contents,* click the **Show Table of Contents** button on the **Standard** toolbar. Click a book icon to open a topic and view its subtopics.
3. Click once on a topic to view **Help** information.

*Note: Click the **Home** button on the **Standard** toolbar to return to the **Home** page. Click the **Back** and **Forward** buttons to navigate through Excel Help.*

Printing a Help Topic

1. Display the Help topic you want to print.
2. Click the **Print** button on the **Standard** toolbar.
3. Select print options.
4. Click the **Print** button to print the topic.

Searching for a Help Topic

1. Click the **Microsoft Excel Help** button on the **Tab Bar** or press **F1**.
2. Click the arrow on **Search** button and select where you want to search from the resulting menu.
3. Do one of the following:
   - *To search for a new Help topic,* enter what you want to search for in the **Type words to search for** box and click the **Search** button.
   - *To search for a recently used search topic,* click the arrow on the **Type words to search for box** and select a topic from the resulting menu.
4. Click once on a topic to view **Help** information.

Accessing Help in the Backstage View (NEW!)

Click on the **File** tab and select **Help** in the left pane. You can access Excel Help, Microsoft Office Online, or contact Microsoft Support.