CHAPTER 1

Introducing Excel

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This chapter serves as an introductory overview of Excel 2010. If you're already familiar with a previous version of Excel, reading this chapter is still a good idea. You'll find that Excel 2010 is very similar to Excel 2007. However, both Excel 2007 and Excel 2010 are different from every previous version — *very* different.

IN THIS CHAPTER

- **Understanding what Excel is used for**
- **What's new for Excel 2010**
- **Learning the parts of Excel's window**
- **Introducing the Ribbon user interface, shortcut menus, and dialog boxes**
- **Navigating Excel worksheets**
- **Introducing Excel with a quick hands-on session**

What Is Excel Good For?

Excel, as you probably know, is the world's most widely used spreadsheet program, and is part of the Microsoft Office suite. Other spreadsheet programs are available, but Excel is by far the most popular and has become the world standard.

Much of the appeal of Excel is due to the fact that it's so versatile. Excel's *forte,* of course, is performing numerical calculations, but Excel is also very useful for non-numeric applications. Here are just a few of the uses for Excel:

- **Number crunching:** Create budgets, analyze survey results, and perform just about any type of financial analysis you can think of.
- **Creating charts:** Create a wide variety of highly customizable charts.
- **Organizing lists:** Use the row-and-column layout to store lists efficiently.
- **Accessing other data:** Import data from a wide variety of sources.
- **Creating graphical dashboards:** Summarize a large amount of business information in a concise format.

- **Creating graphics and diagrams:** Use Shapes and the new SmartArt to create professional-looking diagrams.
- **Automating complex tasks:** Perform a tedious task with a single mouse click with Excel's macro capabilities.

What's New in Excel 2010?

When a new version of Microsoft Office is released, sometimes Excel gets lots of new features. And sometimes it gets very few new features. In the case of Office 2010, Excel got very few new features. Here's a quick summary of what's new in Excel 2010, relative to Excel 2007:

- **64-bit version**: If your hardware (and Windows version) supports it, you can install the 64-bit version, which lets you create larger workbooks. Most people do not require the 64-bit version, and using it might cause some add-ins to not function.
- **Sparkline charts:** Create small in-cell charts to summarize a range of data graphically. See Chapter 21.
- **Slicers:** A new way to filter and display data in pivot tables, by clicking buttons. See Chapter 35.
- **New pivot table formatting options:** You have more control over the appearance of pivot table reports. See Chapter 35.
- **Office button changes:** The big round Office button in Excel 2007 has been replaced by a File button/tab, displayed to the left of the tabs. Clicking it displays a screen that lets you perform various operations on your workbook. This view essentially replaces the traditional File and Print menus — plus quite a bit more.
- **Conditional formatting enhancements:** Data bar conditional formatting can display in a solid color, and the bars provide a more accurate display. See Chapter 20.
- **Function enhancements:** Some Excel worksheet financial and statistical functions have been improved in terms of numerical accuracy.
- **Image editing enhancements:** You have much more control over graphic images inserted into a workbook, including the ability to remove nonessential parts from the background of an image.
- **Screen capture tool:** You can easily capture a window from a different program and then insert the image on a worksheet.
- **Paste preview:** When you copy a range, the Paste command displays various options with a live preview so you can see how the paste operation will look.

- **Ribbon customization:** You can customize the Ribbon by adding new tabs and groups.
- **Equation editor:** Create and display (noncalculating) mathematical equations and embed them on a worksheet. See Chapter 22.
- **Faster:** Microsoft made some improvements to the calculation engine, and files load a bit faster.
- **New security features:** Workbooks downloaded from the Internet or from e-mail attachments are opened in Protected View mode. Workbooks can be designated as "trusted," and don't need to reside in special trusted folders.
- **Solver:** Excel 2010 includes a new version of the Solver add-in, which is useful for solving some complex problems.
- **Enhancements to VBA:** Operations that used to require old XLM macros can now be performed directly using VBA macro commands. In addition, macro recording now works for operations such as chart shape formatting.

Understanding Workbooks and Worksheets

The work you do in Excel is performed in a workbook file, which appears in its own window. You can have as many workbooks open as you need. By default, Excel 2010 workbooks use an `.xlsx` file extension.

Each *workbook* comprises one or more worksheets, and each *worksheet* is made up of individual *cells.* Each cell contains a value, a formula, or text. A worksheet also has an invisible *draw layer,* which holds charts, images, and diagrams. Each worksheet in a workbook is accessible by clicking the *tab* at the bottom of the workbook window. In addition, workbooks can store chart sheets. A *chart sheet* displays a single chart and is also accessible by clicking a tab.

Newcomers to Excel are often intimidated by all the different elements that appear within Excel's window. After you become familiar with the various parts, it all starts to make sense.

Figure 1.1 shows you the more important bits and pieces of Excel. As you look at the figure, refer to Table 1.1 for a brief explanation of the items shown in the figure.

FIGURE 1.1

The Excel screen has many useful elements that you will use often.

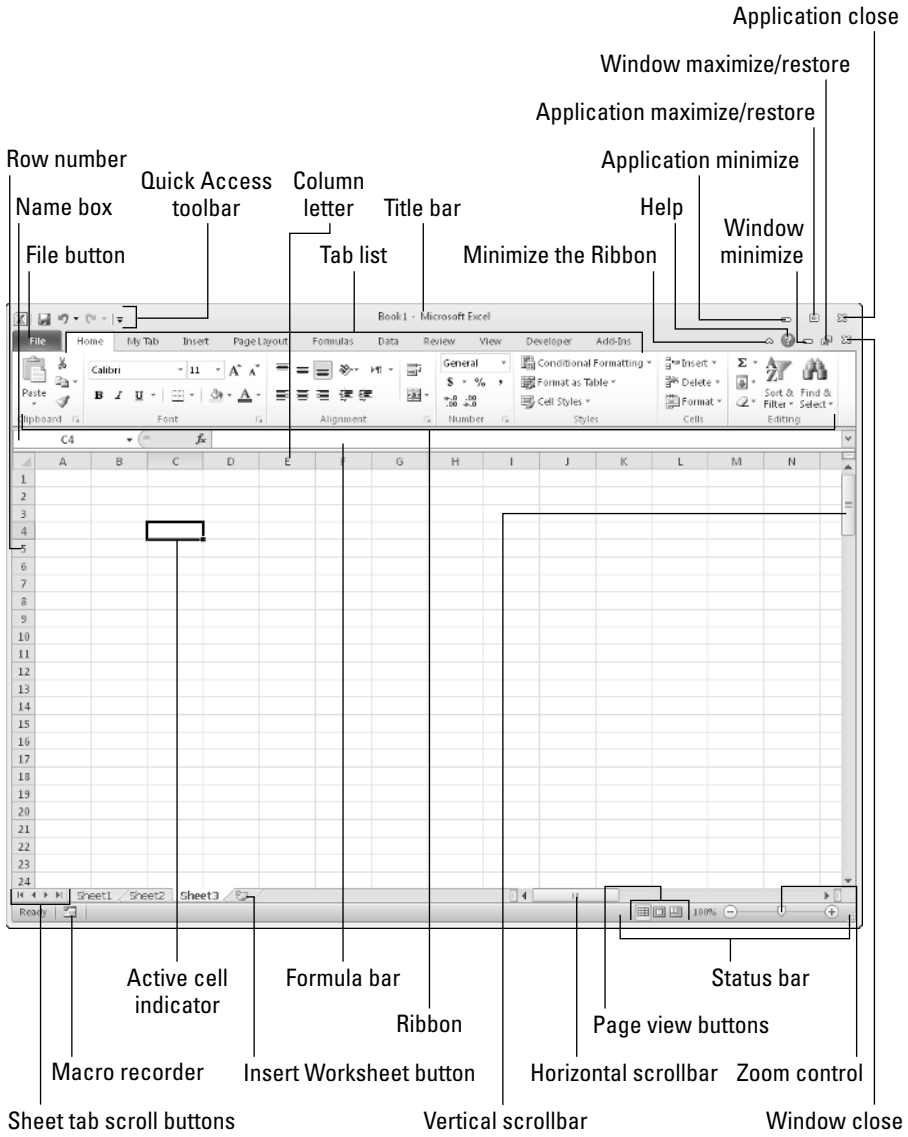


TABLE 1.1

Parts of the Excel Screen That You Need to Know

Name	Description
Active cell indicator	This dark outline indicates the currently active cell (one of the 17,179,869,184 cells on each worksheet).
Application Close button	Clicking this button closes Excel.
Application Minimize button	Clicking this button minimizes the Excel window.
Column letters	Letters range from A to XFD — one for each of the 16,384 columns in the worksheet. You can click a column heading to select an entire column of cells, or drag a column border to change its width.
File button	Click this button to open Back Stage view, which contains many options for working with your document (including printing), and setting Excel options.
Formula bar	When you enter information or formulas into a cell, it appears in this line.
Help button	Clicking this button displays the Excel Help system window.
Horizontal scrollbar	Use this tool to scroll the sheet horizontally.
Macro recorder indicator	Click to start recording a VBA macro. The icon changes while your actions are being recorded. Click again to stop recording.
Minimize Ribbon button	Clicking this button hides the Ribbon, giving you a bit more space onscreen. When you click a tab, the Ribbon reappears.
Name box	This field displays the active cell address or the name of the selected cell, range, or object.
Page View buttons	Change the way the worksheet is displayed by clicking one of these buttons.
Quick Access toolbar	This customizable toolbar holds commonly used commands. The Quick Access toolbar is always visible, regardless of which tab is selected.
Ribbon	This is the main location for Excel commands. Clicking an item in the tab list changes the Ribbon that displays.
Row numbers	Numbers range from 1 to 1,048,576 — one for each row in the worksheet. You can click a row number to select an entire row of cells.
Sheet tabs	Each of these notebook-like tabs represents a different sheet in the workbook. A workbook can have any number of sheets, and each sheet has its name displayed in a sheet tab.
Insert Sheet button	By default, each new workbook that you create contains three sheets. Add a new sheet by clicking the Insert Worksheet button (which is displayed after the last sheet tab).
Sheet tab scroll buttons	Use these buttons to scroll the sheet tabs to display tabs that aren't visible.

continued

TABLE 1.1 *(continued)*

Name	Description
Status bar	This bar displays various messages as well as the status of the Num Lock, Caps Lock, and Scroll Lock keys on your keyboard. It also shows summary information about the range of cells that is selected. Right-click the status bar to change the information that's displayed.
Tab list	Use these commands to display a different Ribbon, similar to a menu.
Title bar	This displays the name of the program and the name of the current workbook, and also holds some control buttons that you can use to modify the window.
Vertical scrollbar	Use this to scroll the sheet vertically.
Window Close button	Clicking this button closes the active workbook window.
Window Maximize/Restore button	Clicking this button increases the workbook window's size to fill Excel's complete workspace. If the window is already maximized, clicking this button "unmaximizes" Excel's window so that it no longer fills the entire screen.
Window Minimize button	Clicking this button minimizes the workbook window, and it displays as an icon.
Zoom control	Use this scroller to zoom your worksheet in and out.

Moving around a Worksheet

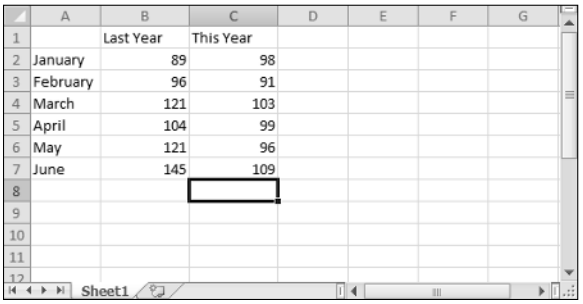
This section describes various ways to navigate through the cells in a worksheet. Every worksheet consists of rows (numbered 1 through 1,048,576) and columns (labeled A through XFD). After column Z comes column AA, which is followed by AB, AC, and so on. After column AZ comes BA, BB, and so on. After column ZZ is AAA, AAB, and so on.

The intersection of a row and a column is a single cell. At any given time, one cell is the *active cell.* You can identify the active cell by its darker border, as shown in Figure 1.2. Its *address* (its column letter and row number) appears in the Name box. Depending on the technique that you use to navigate through a workbook, you may or may not change the active cell when you navigate.

Notice that the row and column headings of the active cell appear in different colors to make it easier to identify the row and column of the active cell.

FIGURE 1.2

The active cell is the cell with the dark border — in this case, cell C8.



Navigating with your keyboard

Not surprisingly, you can use the standard navigational keys on your keyboard to move around a worksheet. These keys work just as you'd expect: The down arrow moves the active cell down one row, the right arrow moves it one column to the right, and so on. PgUp and PgDn move the active cell up or down one full window. (The actual number of rows moved depends on the number of rows displayed in the window.)

Tip

You can use the keyboard to scroll through the worksheet without changing the active cell by turning on Scroll Lock, which is useful if you need to view another area of your worksheet and then quickly return to your original location. Just press Scroll Lock and use the navigation keys to scroll through the worksheet. When you want to return to the original position (the active cell), press Ctrl+Backspace. Then, press Scroll Lock again to turn it off. When Scroll Lock is turned on, Excel displays `Scroll Lock` in the status bar at the bottom of the window. ■

The Num Lock key on your keyboard controls how the keys on the numeric keypad behave. When Num Lock is on, the keys on your numeric keypad generate numbers. Many keyboards have a separate set of navigation (arrow) keys located to the left of the numeric keypad. The state of the Num Lock key doesn't affect these keys.

Table 1.2 summarizes all the worksheet movement keys available in Excel.

TABLE 1.2

Excel Worksheet Movement Keys

Key	Action
Up arrow (↑)	Moves the active cell up one row.
Down arrow (↓)	Moves the active cell down one row.
Left arrow (←) or Shift+Tab	Moves the active cell one column to the left.
Right arrow (→) or Tab	Moves the active cell one column to the right.
PgUp	Moves the active cell up one screen.
PgDn	Moves the active cell down one screen.
Alt+PgDn	Moves the active cell right one screen.
Alt+PgUp	Moves the active cell left one screen.
Ctrl+Backspace	Scrolls the screen so that the active cell is visible.
↑*	Scrolls the screen up one row (active cell does not change).
↓*	Scrolls the screen down one row (active cell does not change).
←*	Scrolls the screen left one column (active cell does not change).
→*	Scrolls the screen right one column (active cell does not change).

* With Scroll Lock on

Navigating with your mouse

To change the active cell by using the mouse, click another cell; it becomes the active cell. If the cell that you want to activate isn't visible in the workbook window, you can use the scrollbars to scroll the window in any direction. To scroll one cell, click either of the arrows on the scrollbar. To scroll by a complete screen, click either side of the scrollbar's scroll box. You also can drag the scroll box for faster scrolling.

Tip

If your mouse has a wheel, you can use the mouse wheel to scroll vertically. Also, if you click the wheel and move the mouse in any direction, the worksheet scrolls automatically in that direction. The more you move the mouse, the faster the scrolling. ■

Press Ctrl while you use the mouse wheel to zoom the worksheet. If you prefer to use the mouse wheel to zoom the worksheet without pressing Ctrl, choose File ➪ Options and select the Advanced section. Place a check mark next to the Zoom on Roll with Intellimouse check box.

Using the scrollbars or scrolling with your mouse doesn't change the active cell. It simply scrolls the worksheet. To change the active cell, you must click a new cell after scrolling.

Introducing the Ribbon

The most dramatic change introduced in Office 2007 was the new user interface. In most Office 2007 applications, traditional menus and toolbars were replaced with the Ribbon. In Office 2010, all applications use the Ribbon interface. In addition, the Ribbon can be customized in Office 2010 (see Chapter 23).

Ribbon tabs

The commands available in the Ribbon vary, depending upon which tab is selected. The Ribbon is arranged into groups of related commands. Here's a quick overview of Excel's tabs.

- **Home:** You'll probably spend most of your time with the Home tab selected. This tab contains the basic Clipboard commands, formatting commands, style commands, commands to insert and delete rows or columns, plus an assortment of worksheet editing commands.
- **Insert:** Select this tab when you need to insert something in a worksheet — a table, a diagram, a chart, a symbol, and so on.
- **Page Layout:** This tab contains commands that affect the overall appearance of your worksheet, including some settings that deal with printing.
- **Formulas:** Use this tab to insert a formula, name a cell or a range, access the formula auditing tools, or control how Excel performs calculations.
- **Data:** Excel's data-related commands are on this tab.
- **Review:** This tab contains tools to check spelling, translate words, add comments, or protect sheets.
- **View:** The View tab contains commands that control various aspects of how a sheet is viewed. Some commands on this tab are also available in the status bar.
- **Developer:** This tab isn't visible by default. It contains commands that are useful for programmers. To display the Developer tab, choose File ➪ Options and then select Customize Ribbon. In the Customize the Ribbon section on the right, place a check mark next to Developer and then click OK.
- **Add-Ins:** This tab is visible only if you loaded an older workbook or add-in that customizes the menu or toolbars. Because menus and toolbars are no longer available in Excel 2010, these user interface customizations appear on the Add-Ins tab.

Note

Although the File button shares space with the tabs, it's not actually a tab. Clicking the File button displays the new Back Stage view, where you perform actions with your documents. ■

The appearance of the commands on the Ribbon varies, depending on the width of Excel window. When the window is too narrow to display everything, the commands adapt; some of them might seem to be missing, but the commands are still available. Figure 1.3 shows the Home tab of the Ribbon with all controls fully visible. Figure 1.4 shows the Ribbon when Excel's window is made more narrow. Notice that some of the descriptive text is gone, but the icons remain. Figure 1.5 shows the extreme case when the window is made very narrow. Some groups display a single icon. However, if you click the icon, all the group commands are available to you.

FIGURE 1.3

The Home tab of the Ribbon.

FIGURE 1.4

The Home tab when Excel's window is made narrower.

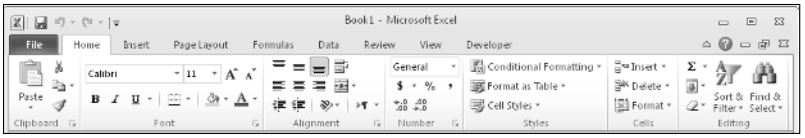
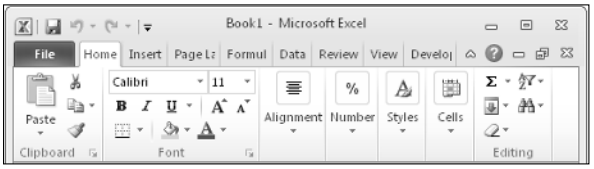


FIGURE 1.5

The Home tab when Excel's window is made very narrow.



Tip

If you would like to hide the Ribbon to increase your worksheet view, just double-click any tab. The Ribbon goes away, and you can see about five additional rows of your worksheet. When you need to use the Ribbon again, just click a tab, and it comes back temporarily. To keep the Ribbon turned on, double-click a tab. You can also press Ctrl+F1 to toggle the Ribbon display on and off. The Minimize the Ribbon button (to the left of the Help button) provides yet another way to toggle the Ribbon. ■

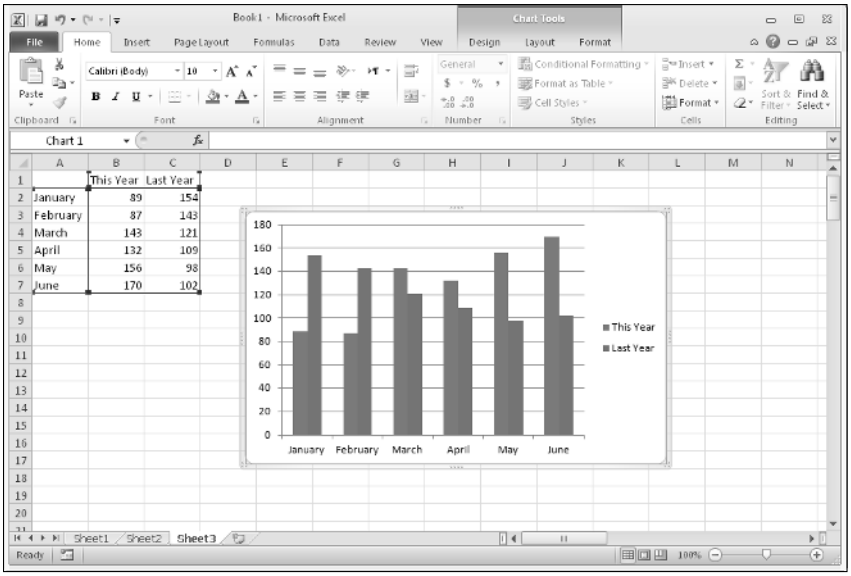
Contextual tabs

In addition to the standard tabs, Excel 2010 also includes *contextual tabs*. Whenever an object (such as a chart, a table, or a SmartArt diagram) is selected, specific tools for working with that object are made available in the Ribbon.

Figure 1.6 shows the contextual tab that appears when a chart is selected. In this case, it has three contextual tabs: Design, Layout, and Format. Notice that the contextual tabs contain a description (Chart Tools) in Excel's title bar. When contextual tabs appear, you can, of course, continue to use all the other tabs.

FIGURE 1.6

When you select an object, contextual tabs contain tools for working with that object.



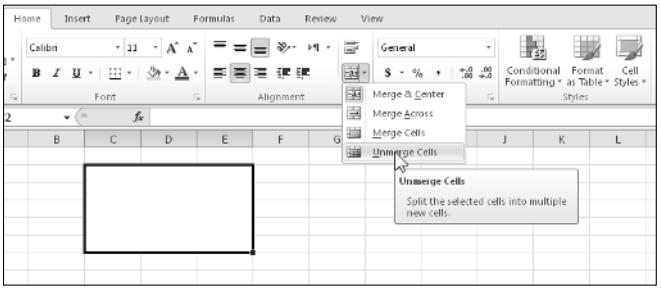
Types of commands on the Ribbon

When you hover your mouse pointer over a Ribbon command, you'll see a pop-up box that contains the command's name as well as a brief description. For the most part, the commands in the Ribbon work just as you would expect them to. You do encounter several different styles of commands on the Ribbon.

- **Simple buttons:** Click the button, and it does its thing. An example of a simple button is the Increase Font Size button in the Font group of the Home tab. Some buttons perform the action immediately; others display a dialog box so that you can enter additional information. Button controls may or may not be accompanied by a descriptive label.
- **Toggle buttons:** A toggle button is clickable and also conveys some type of information by displaying two different colors. An example is the Bold button in the Font group of the Home tab. If the active cell isn't bold, the Bold button displays in its normal color. If the active cell is already bold, though, the Bold button displays a different background color. If you click this button, it toggles the Bold attribute for the selection.
- **Simple drop-downs:** If the Ribbon command has a small down arrow, the command is a drop-down. Click it, and additional commands appear below it. An example of a simple drop-down is the Conditional Formatting command in the Styles group of the Home tab. When you click this control, you see several options related to conditional formatting.
- **Split buttons:** A *split button control* combines a one-click button with a drop-down. If you click the button part, the command is executed. If you click the drop-down part (a down arrow), you choose from a list of related commands. You can identify a split button command because it displays in two colors when you hover the mouse over it. An example of a split button is the Merge & Center command in the Alignment group of the Home tab (see Figure 1.7). Clicking the left part of this control merges and centers text in the selected cells. If you click the arrow part of the control (on the right), you get a list of commands related to merging cells.

FIGURE 1.7

The Merge & Center command is a split button control.

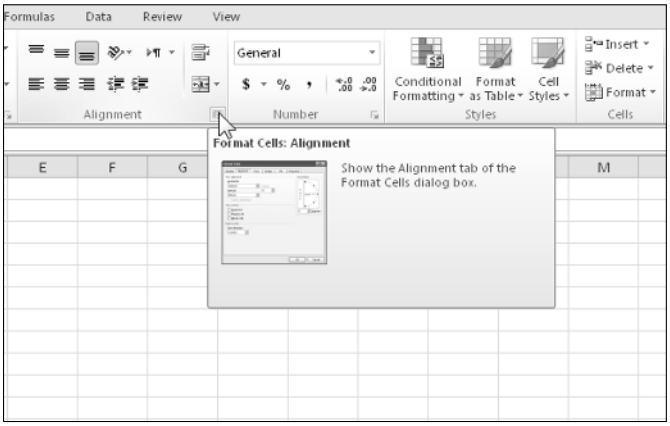


- **Check boxes:** A check box control turns something on or off. An example is the Gridlines control in the Show group of the View tab. When the Gridlines check box is checked, the sheet displays gridlines. When the control isn't checked, the sheet gridlines don't appear.
- **Spinners:** Excel's Ribbon has only one spinner control: the Scale To Fit group of the Page Layout tab. Click the top part of the spinner to increase the value; click the bottom part of the spinner to decrease the value.

Some of the Ribbon groups contain a small icon on the right side, known as a *dialog box launcher*. For example, if you examine the Home ➪ Alignment group, you see this icon (see Figure 1.8). Click it, and Excel displays the Format Cells dialog box, with the Alignment tab preselected. The dialog launchers generally provide options that aren't available in the Ribbon.

FIGURE 1.8

Some Ribbon groups contain a small icon on the right side, known as a dialog box launcher.



Accessing the Ribbon by using your keyboard

At first glance, you may think that the Ribbon is completely mouse-centric. After all, none of the commands have the traditional underline letter to indicate the Alt+keystrokes. But in fact, the Ribbon is *very* keyboard friendly. The trick is to press the Alt key to display the pop-up *keytips*. Each Ribbon control has a letter (or series of letters) that you type to issue the command.

Tip

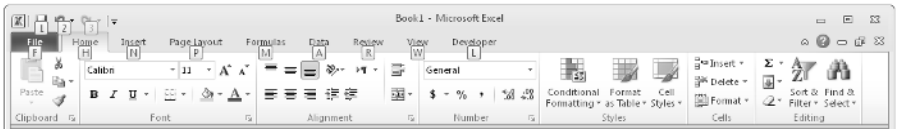
You don't need to hold down the Alt key while you type keytip letters. ■

Figure 1.9 shows how the Home tab looks after I press the Alt key to display the keytips. If you press one of the keytips, the screen then displays more keytips. For example, to use the keyboard to align the cell contents to the left, press Alt, followed by H (for Home) and then AL (for Align Left). Nobody will memorize *all* these keys, but if you're a keyboard fan (like me), it takes just a few times before you memorize the keystrokes required for commands that you use frequently.

After you press Alt, you can also use the left- and right-arrow keys to scroll through the tabs. When you reach the proper tab, press the down arrow to enter the Ribbon. Then use left and right arrow keys to scroll through the Ribbon commands. When you reach the command you need, press Enter to execute it. This method isn't as efficient as using the keytips, but it's a quick way to take a look at the commands available.

FIGURE 1.9

Pressing Alt displays the keytips.



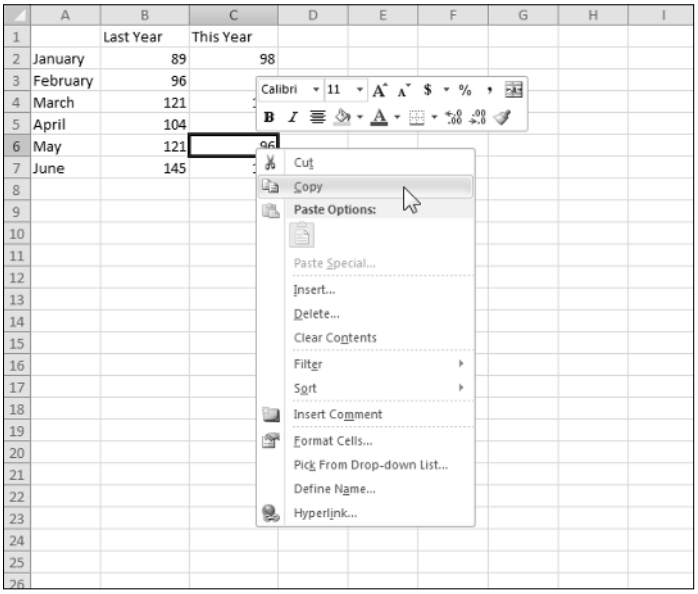
Using Shortcut Menus

In addition to the Ribbon, Excel features many shortcut menus, which you access by right-clicking just about anything within Excel. Shortcut menus don't contain every relevant command, just those that are most commonly used for whatever is selected.

As an example, Figure 1.10 shows the shortcut menu that appears when you right-click a cell. The shortcut menu appears at the mouse-pointer position, which makes selecting a command fast and efficient. The shortcut menu that appears depends on what you're doing at the time. For example, if you're working with a chart, the shortcut menu contains commands that are pertinent to the selected chart element.

FIGURE 1.10

Click the right mouse button to display a shortcut menu of commands you're most likely to use.



Mini Toolbar Be Gone

If you find the Mini toolbar annoying, you can search all day and not find an option to turn it off. The General tab of the Excel Options dialog box has an option labeled Show Mini Toolbar on Selection, but this option applies to selecting characters while editing a cell. The only way to turn off the Mini toolbar when you right-click is to execute a VBA macro:

```
Sub ZapMiniToolbar()
    Application.ShowMenuFloaties = True
End Sub
```

The statement might seem wrong, but it's actually correct. Setting that property to `True` turns off the Mini toolbar. It's a bug that appeared in Excel 2007 and was not fixed in Excel 2010 because correcting it would cause many macros to fail. (See Part VI for more information about VBA macros.)

The box above the shortcut menu — the Mini toolbar — contains commonly used tools from the Home tab. The Mini toolbar was designed to reduce the distance your mouse has to travel around the screen. Just right-click, and common formatting tools are within an inch from your mouse pointer. The Mini toolbar is particularly useful when a tab other than Home is displayed. If you use a tool on the Mini toolbar, the toolbar remains displayed in case you want to perform other formatting on the selection.

Customizing Your Quick Access Toolbar

The Ribbon is fairly efficient, but many users prefer to have some commands available at all times — without having to click a tab. The solution is to customize your Quick Access toolbar. Typically, the Quick Access toolbar appears on the left side of the title bar, above the Ribbon. Alternatively, you can display the Quick Access toolbar below the Ribbon; just right-click the Quick Access toolbar and choose Show Quick Access Toolbar below the Ribbon.

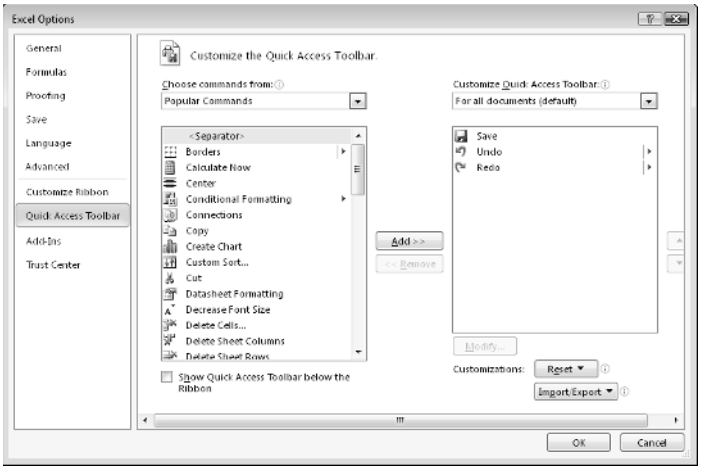
Displaying the Quick Access Toolbar below the Ribbon provides a bit more room for icons, but it also means that you see one less row of your worksheet.

By default, the Quick Access toolbar contains three tools: Save, Undo, and Repeat. You can customize the Quick Access toolbar by adding other commands that you use often. To add a command from the Ribbon to your Quick Access toolbar, right-click the command and choose Add to Quick Access Toolbar. If you click the down arrow to the right of the Quick Access toolbar, you see a drop-down menu with some additional commands that you might want to place in your Quick Access toolbar.

Excel has commands that aren't available on the Ribbon. In most cases, the only way to access these commands is to add them to your Quick Access toolbar. Right-click the Quick Access toolbar and choose Customize the Quick Access Toolbar. You see the dialog box shown in Figure 1.11. This section of the Excel Options dialog box is your one-stop shop for Quick Access toolbar customization.

FIGURE 1.11

Add new icons to your Quick Access toolbar by using the Quick Access Toolbar section of the Excel Options dialog box.



Cross-Reference

See Chapter 23 for more information about customizing your Quick Access toolbar. ■

Caution

You can't reverse every action, however. Generally, anything that you do using the File button can't be undone. For example, if you save a file and realize that you've overwritten a good copy with a bad one, Undo can't save the day. You're just out of luck. ■

The Repeat button, also on the Quick Access toolbar, performs the opposite of the Undo button: Repeat reissues commands that have been undone. If nothing has been undone, then you can use the Repeat button (or Ctrl+Y) to repeat the last command that you performed. For example, if you applied a particular style to a cell (by choosing Home ➪ Styles ➪ Cell Styles), you can activate another cell and press Ctrl+Y to repeat the command.

Changing Your Mind

You can reverse almost every action in Excel by using the Undo command, located on the Quick Access toolbar. Click Undo (or press Ctrl+Z) after issuing a command in error, and it's as if you never issued the command. You can reverse the effects of the past 100 actions that you performed by executing Undo more than once.

If you click the arrow on the right side of the Undo button, you see a list of the actions that you can reverse. Click an item in that list to undo that action and all the subsequent actions you performed.

Working with Dialog Boxes

Many Excel commands display a dialog box, which is simply a way of getting more information from you. For example, if you choose Review ➪ Changes ➪ Protect Sheet, Excel can't carry out the command until you tell it what parts of the sheet you want to protect. Therefore, it displays the Protect Sheet dialog box, shown in Figure 1.12.

FIGURE 1.12

Excel uses a dialog box to get additional information about a command.

Excel dialog boxes vary in how they work. You'll find two types of dialog boxes:

- **Typical dialog box:** A *modal* dialog box takes the focus away from the spreadsheet. When this type of dialog box is displayed, you can't do anything in the worksheet until you dismiss the dialog box. Clicking OK performs the specified actions, and clicking Cancel (or pressing Esc) closes the dialog box without taking any action. Most Excel dialog boxes are this type.

- **Stay-on-top dialog box:** A *modeless* dialog box works in a manner similar to a toolbar. When a modeless dialog box is displayed, you can continue working in Excel, and the dialog box remains open. Changes made in a modeless dialog box take effect immediately. For example, if you're applying formatting to a chart, changes you make in the Format dialog box appear in the chart as soon as you make them. A modeless dialog box has a Close button but no OK button.

Most people find working with dialog boxes to be quite straightforward and natural. If you've used other programs, you'll feel right at home. You can manipulate the controls either with your mouse or directly from the keyboard.

Navigating dialog boxes

Navigating dialog boxes is generally very easy — you simply click the control you want to activate.

Although dialog boxes were designed with mouse users in mind, you can also use the keyboard. Every dialog box control has text associated with it, and this text always has one underlined letter (a *hot key* or an *accelerator key*). You can access the control from the keyboard by pressing Alt and then the underlined letter. You also can press Tab to cycle through all the controls on a dialog box. Pressing Shift+Tab cycles through the controls in reverse order.

Tip

When a control is selected, it appears with a dotted outline. You can use the spacebar to activate a selected control. ■

Using tabbed dialog boxes

Many Excel dialog boxes are "tabbed" dialog boxes: That is, they include notebook-like tabs, each of which is associated with a different panel.

When you click a tab, the dialog box changes to display a new panel containing a new set of controls. The Format Cells dialog box, shown in Figure 1.13, is a good example. It has six tabs, which makes it functionally equivalent to six different dialog boxes.

Tabbed dialog boxes are quite convenient because you can make several changes in a single dialog box. After you make all your setting changes, click OK or press Enter.

Tip

To select a tab by using the keyboard, press Ctrl+PgUp or Ctrl+PgDn, or simply press the first letter of the tab that you want to activate. ■

Excel 2007 introduced a new style of modeless tabbed dialog box in which the tabs are on the left, rather than across the top. Excel 2010 also uses this style. Figure 1.14 shows the Format Shape

dialog box, which is modeless tabbed. To select a tab using the keyboard, press the up- or down-arrow key and then Tab to access the controls.

FIGURE 1.13

Use the dialog box tabs to select different functional areas in the dialog box.

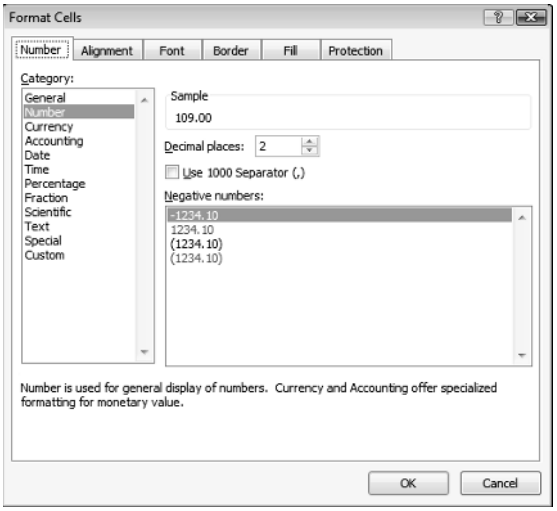
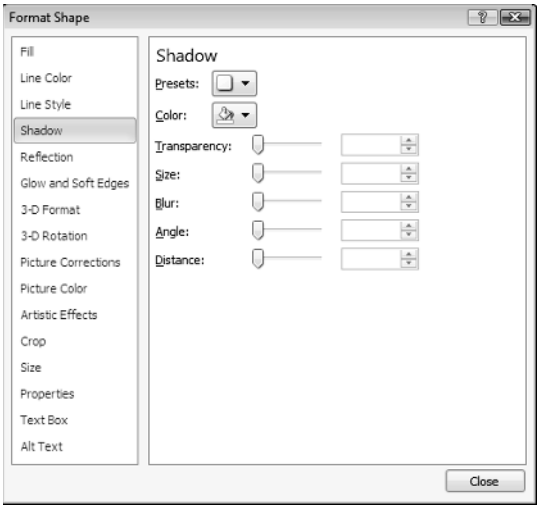


FIGURE 1.14

A tabbed dialog box with tabs on the left.



Using the Task Pane

The final user interface element that I discuss is the task pane. The task pane appears automatically in response to several commands. For example, to insert a clip art image, choose Insert ➪ Illustrations ➪ Clip Art. Excel responds by displaying the Clip Art task pane, shown in Figure 1.15. The task pane is similar to a dialog box except that you can keep it visible as long as you like. There's no OK button. When you're finished using a task pane, click the Close button in the upper-right corner.

By default, the task pane is docked on the right side of the Excel window, but you can move it anywhere you like by clicking its title bar and dragging. Excel remembers the last position, so the next time you use that task pane, it will be right where you left it.

FIGURE 1.15

The Clip Art task pane.

Creating Your First Excel Worksheet

This section presents an introductory hands-on session with Excel. If you haven't used Excel, you may want to follow along on your computer to get a feel for how this software works.

In this example, you create a simple monthly sales projection table along with a chart.

Getting started on your worksheet

Start Excel and make sure that you have an empty workbook displayed. To create a new, blank workbook, press Ctrl+N (the shortcut key for File ➪ New ➪ Blank Workbook ➪ Create).

The sales projection will consist of two columns of information. Column A will contain the month names, and column B will store the projected sales numbers. You start by entering some descriptive titles into the worksheet. Here's how to begin:

1. **Move the cell pointer to cell A1 (the upper-left cell in the worksheet) by using the navigation (arrow) keys.** The Name box displays the cell's address.
2. **Enter** Month **into cell A1 and press Enter.** Depending on your setup, Excel either moves the cell pointer to a different cell, or the pointer remains in cell A1.
3. **Move the cell pointer to B1, type** Projected Sales**, and press Enter.**

   The text extends beyond the cell width, but don't worry about that for now.

Filling in the month names

In this step, you enter the month names in column A.

1. **Move the cell pointer to A2 and type** Jan **(an abbreviation for January).** At this point, you can enter the other month name abbreviations manually, but you can let Excel do some of the work by taking advantage of the AutoFill feature.
2. **Make sure that cell A2 is selected.** Notice that the active cell is displayed with a heavy outline. At the bottom-right corner of the outline, you'll see a small square known as the *fill handle*. Move your mouse pointer over the fill handle, click, and drag down until you've highlighted from A2 down to A13.
3. **Release the mouse button, and Excel automatically fills in the month names.**

Your worksheet should resemble the one shown in Figure 1.16.

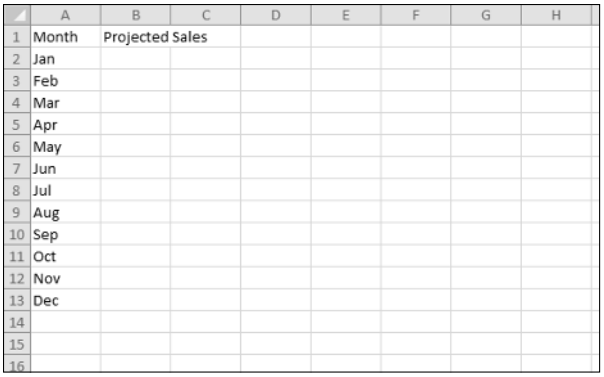
Entering the sales data

Next, you provide the sales projection numbers in column B. Assume that January's sales are projected to be $50,000, and that sales will increase by 3.5 percent in each subsequent month.

1. **Move the cell pointer to B2 and type** 50000**, the projected sales for January.** You could type a dollar sign and comma to make the number more legible, but you do the number formatting a bit later.
2. **To enter a formula to calculate the projected sales for February, move to cell B3 and enter the following:** =B2*103.5%**.** When you press Enter, the cell displays 51750. The formula returns the contents of cell B2, multiplied by 103.5%. In other words, February sales are projected to be 3.5% greater than January sales.
3. **The projected sales for subsequent months use a similar formula.** But rather than retype the formula for each cell in column B, once again take advantage of the AutoFill feature. Make sure that cell B3 is selected. Click the cell's fill handle, drag down to cell B13, and release the mouse button.

FIGURE 1.16

Your worksheet, after entering the column headings and month names.

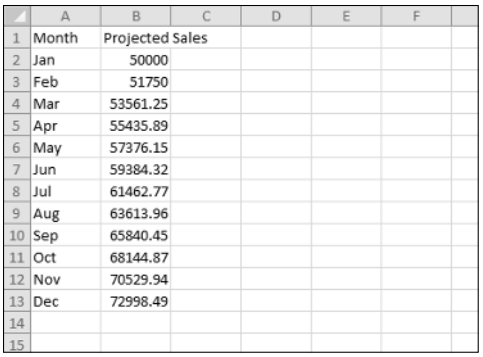


	A	B	C	D	E	F	G	H
1	Month	Projected Sales						
2	Jan							
3	Feb							
4	Mar							
5	Apr							
6	May							
7	Jun							
8	Jul							
9	Aug							
10	Sep							
11	Oct							
12	Nov							
13	Dec							
14								
15								
16								

At this point, your worksheet should resemble the one shown in Figure 1.17. Keep in mind that except for cell B2, the values in column B are calculated *with formulas*. To demonstrate, try changing the projected sales value for the initial month, January (in cell B2). You'll find that the formulas recalculate and return different values. These formulas all depend on the initial value in cell B2, though.

FIGURE 1.17

Your worksheet, after creating the formulas.



	A	B	C	D	E	F
1	Month	Projected Sales				
2	Jan	50000				
3	Feb	51750				
4	Mar	53561.25				
5	Apr	55435.89				
6	May	57376.15				
7	Jun	59384.32				
8	Jul	61462.77				
9	Aug	63613.96				
10	Sep	65840.45				
11	Oct	68144.87				
12	Nov	70529.94				
13	Dec	72998.49				
14						
15						

Formatting the numbers

The values in the worksheet are difficult to read because they aren't formatted. In this step, you apply a number format to make the numbers easier to read and more consistent in appearance:

1. **Select the numbers by clicking cell B2 and dragging down to cell B13.**

Tip

Don't drag the fill handle this time, though, because you're selecting cells, not filling a range. ■

2. **Choose Home ➪ Number, click the drop-down Number Format control (it initially displays General), and select Currency from the list.** The numbers now display with a currency symbol and two decimal places. Much better!

Making your worksheet look a bit fancier

At this point, you have a functional worksheet, but it could use some help in the appearance department. Converting this range to an "official" (and attractive) Excel table is a snap:

1. **Move to any cell within the range.**
2. **Choose Insert ➪ Tables ➪ Table.** Excel displays its Create Table dialog box to make sure that it guessed the range properly.
3. **Click OK to close the Create Table dialog box.** Excel applies its default table formatting and also displays its Table Tools ➪ Design contextual tab. Your worksheet should look like Figure 1.18.
4. **If you don't like the default table style, just select another one from the Table Tools ➪ Design ➪ Table Styles group.** Notice that you can get a preview of different table styles by moving your mouse over the Ribbon. When you find one you like, click it, and style will be applied to your table.

FIGURE 1.18

Your worksheet, after converting the range to a table.

	A	B	C	D	E	F
1	Month	Projected Sales				
2	Jan	$50,000.00				
3	Feb	$51,750.00				
4	Mar	$53,561.25				
5	Apr	$55,435.89				
6	May	$57,376.15				
7	Jun	$59,384.32				
8	Jul	$61,462.77				
9	Aug	$63,613.96				
10	Sep	$65,840.45				
11	Oct	$68,144.87				
12	Nov	$70,529.94				
13	Dec	$72,998.49				
14						
15						
16						

Summing the values

The worksheet displays the monthly projected sales, but what about the total projected sales for the year? Because this range is a table, it's simple.

1. **Activate any cell in the table**
2. **Choose Table Tools ➪ Design ➪ Table Style Options ➪ Total Row.** Excel automatically adds a new row to the bottom of your table, including a formula that calculated the total of the Projected Sales column.
3. **If you'd prefer to see a different summary formula (for example, average), click cell B14 and choose a different summary formula from the drop-down list.**

Creating a chart

How about a chart that shows the projected sales for each month?

1. **Activate any cell in the table.**
2. **Choose Insert ➪ Charts ➪ Column and then select one of the 2-D column chart types.** Excel inserts the chart in the center of your screen.

Tip

To move the chart to another location, click its border and drag it. To change the appearance and style of the chart, use the commands on the Chart Tools contextual tab. ■

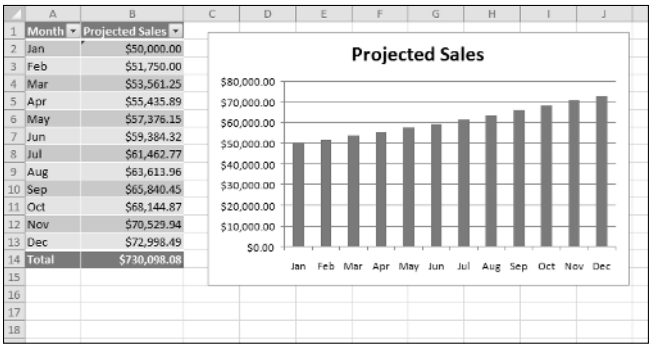
Figure 1.19 shows the worksheet with a column chart. Your chart may look different, depending on the chart layout or style you selected.

On the CD

This workbook is available on the companion CD-ROM. The filename is `table and chart.xlsx`.

FIGURE 1.19

The table and chart.



Month	Projected Sales
Jan	$50,000.00
Feb	$51,750.00
Mar	$53,561.25
Apr	$55,435.89
May	$57,376.15
Jun	$59,384.32
Jul	$61,462.77
Aug	$63,613.96
Sep	$65,840.45
Oct	$68,144.87
Nov	$70,529.94
Dec	$72,998.49
Total	$730,098.08

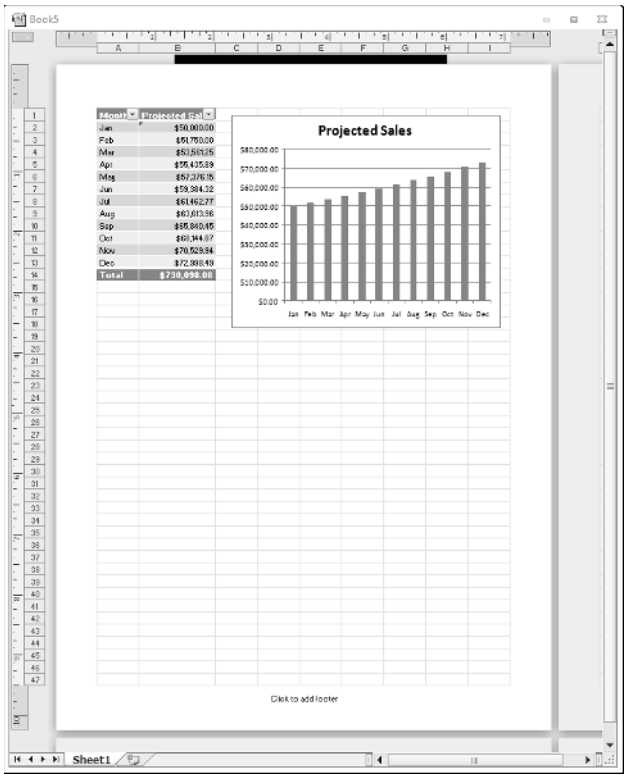
Printing your worksheet

Printing your worksheet is very easy (assuming that you have a printer attached and that it works properly).

1. **Make sure that the chart isn't selected.** If a chart is selected, it will print on a page by itself. To deselect the chart, just press Esc or click any cell.
2. **To make use of Excel's handy page layout view, click the Page Layout View button on the right side of the status bar.** Excel then displays the worksheet page by page so that you can easily see how your printed output will look. Figure 1.20 shows the worksheet zoomed out to show a complete page. In Page Layout view, you can tell immediately whether the chart is too wide to fit on one page. If the chart is too wide, click and drag a corner to resize it. Or, you can just move the chart below the table of numbers.

FIGURE 1.20

Viewing the worksheet in Page Layout mode.



3. **When you're ready to print, choose File ➪ Print.**

   At this point, you can change some print settings. For example, you can choose to print in landscape rather than portrait orientation. Make the change, and you see the result in the preview window. When you're satisfied, click the Print button in the upper-left corner. The page is printed, and you're returned to your workbook.

Saving your workbook

Until now, everything that you've done has occurred in your computer's memory. If the power should fail, all may be lost — unless Excel's AutoRecover feature happened to kick in. It's time to save your work to a file on your hard drive.

1. **Click the Save button on the Quick Access toolbar.** (This button looks like an old-fashioned floppy disk, popular in the previous century.) Because the workbook hasn't been saved yet and still has its default name, Excel responds with the Save As dialog box.
2. **In the box labeled File Name, enter a name (such as Monthly Sales Projection), and then click Save or press Enter.** Excel saves the workbook as a file. The workbook remains open so that you can work with it some more.

Note

By default, Excel saves a backup copy of your work automatically every ten minutes. To adjust the AutoRecover setting (or turn if off), choose File ➪ Options, and click the Save tab of the Excel Options dialog box. However, you should never rely on Excel's AutoRecover feature. Saving your work frequently is a good idea. ■

If you've followed along, you may have realized that creating this workbook was not at all difficult. But, of course, you've barely scratched the surface. The remainder of this book covers these tasks (and many, many more) in much greater detail.