



Detailed Guide to Office 2010 - Excel

Microsoft Excel offers an array of functions to all users. While it is an excellent source for storing relatively small amounts of data (as compared to our mainframe systems), most find it to be much more. It is a superb tool for doing data analysis and sharing the results, either in number or graphically.

The distinct purpose of this document is to provide you with greater detail related to Excel 2010 than can be obtained by completing a walkthrough of the Windows 7 and Microsoft Office 2010 Quick Start Guide. By design, this guide can be used as a **replacement** for the Quick Start guide section for ***“Microsoft Excel 2010”*** and the Excel-related pieces of ***“Microsoft Office 2010 – Common Features”***. Most of the Quick Start guide text is duplicated in this document, but it does expand upon the discussion of the new and enhanced functionality, as well as providing tips to make the overall conversion experience more satisfying.

This document can also serve the dual purpose of acting as a FAQ resource. The Table of Contents has been set up primarily as a “How To”. It is our hope that you will find this document to be a beneficial learning tool and Help guide, in addition to a useful trouble shooting guide.

Finally, you can delve further into the many applications of Excel through the use of the embedded links to Microsoft training or quick reference guides. These links provide you with more in-depth knowledge of the Microsoft Excel 2010 product than the casual user generally wants to know.

We hope you find this guide to be useful as you dig deeper into the functionality of Excel 2010.

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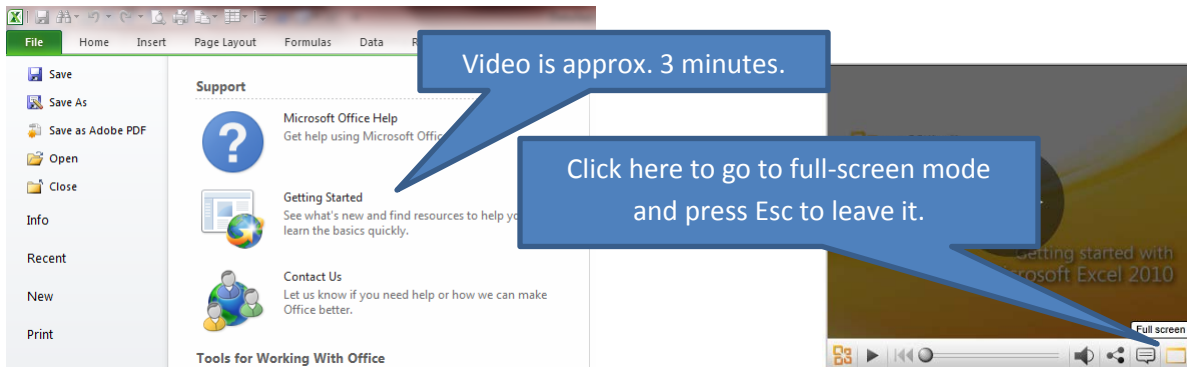
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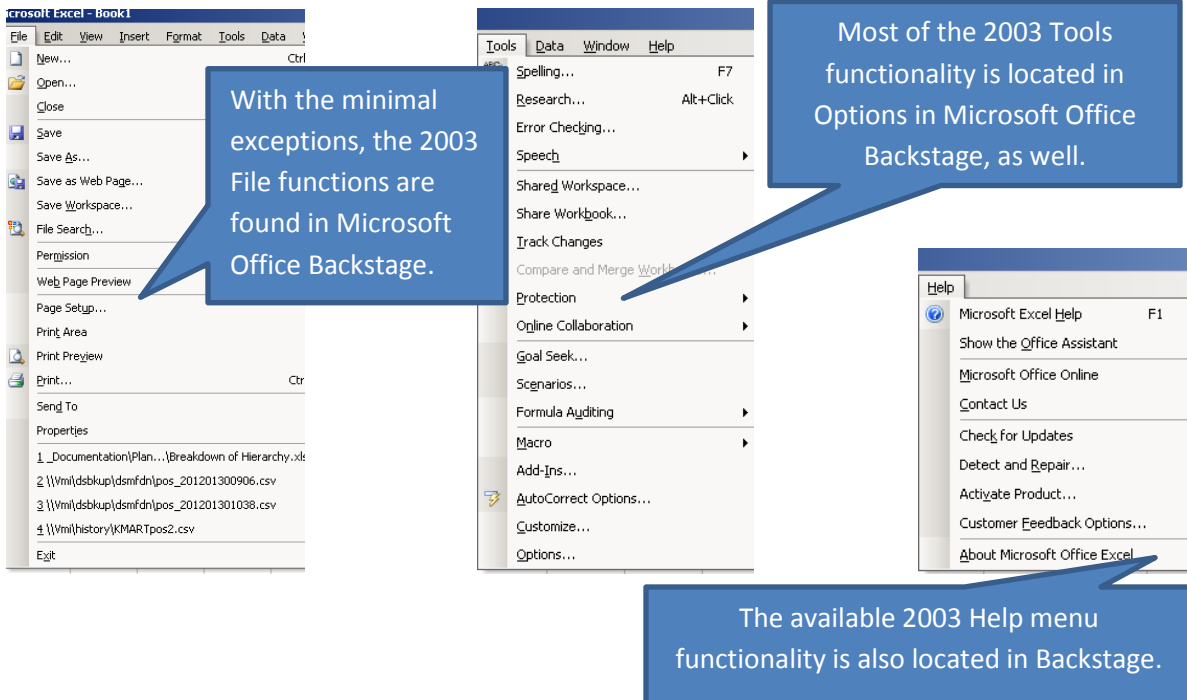
Microsoft Excel 2010 – General Information

1. Your best first step is to look at the **Getting Started** video, accessed via the File / Help.



2. **Microsoft Office Backstage (Excel)** – This refers to the tab labeled **File** on each of your Microsoft Office products and is basically where you will manage your files, as it primarily contains most components from the Office 2003 File and Tools menu options. It would be **to your advantage** to take a few minutes to become familiar with this screen.

Microsoft Excel 2003:



Microsoft Excel 2010:

Excel Backstage

Save & Send: Double click on "Send Using E-mail" and it automatically opens a new E-mail with the workbook attached.

Options: Set parameters for your interface, formulas, and auto-save. Customize your Ribbons and your Quick Access Toolbar.

Info: Includes Permissions (protecting your workbook) and Prepare for Sharing.

Recent: View most recently opened workbooks (**Default:** Up to 25).

Print: Print Preview in Backstage (see below) as well as other Print functions.

Print / Print Preview: Now it is all on one page in the Backstage.

Click here to print.

Number of Copies

Printer selection

Print Range, Worksheet/Workbook, Print Selection, etc.

Paper orientation for current file

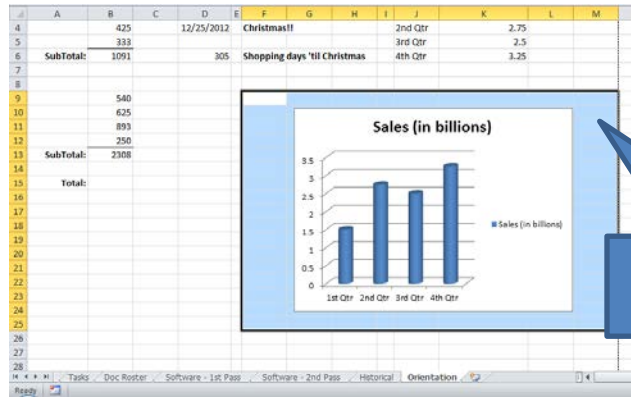
Print Preview

Page # being viewed in preview

Quarter	Sales (in billions)
1st Qtr	1.5
2nd Qtr	2.75
3rd Qtr	2.5
4th Qtr	3.25

Print Range: There are two options in Excel for printing only a portion of a worksheet.

For a **one-time selection only** that will not save the range when you leave the document:



Print Selection
Only print the current selection

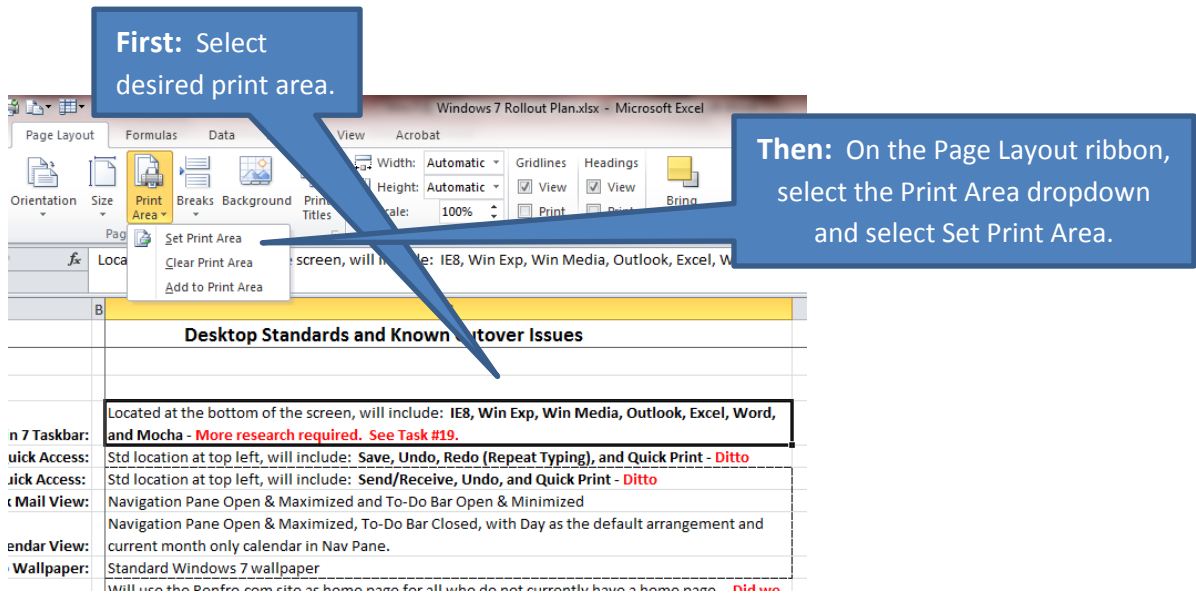
OR

Print Active Sheets
Only print the active sheets

Pages: 1 to 1

To set and keep for the next time you open the file:

First: Select desired print area.



Then: On the Page Layout ribbon, select the Print Area dropdown and select Set Print Area.

Windows 7 Rollout Plan.xlsx - Microsoft Excel

Page Layout Formulas Data View Acrobat

Orientation Size **Print Area** Breaks Background Print Titles

Set Print Area
Clear Print Area
Add to Print Area

Width: Automatic Gridlines View View
Height: Automatic
Scale: 100% Print Print

Desktop Standards and Known Over Issues

Located at the bottom of the screen, will include: IE8, Win Exp, Win Media, Outlook, Excel, Word, and Mocha - More research required. See Task #19.

Quick Access: Std location at top left, will include: Save, Undo, Redo (Repeat Typing), and Quick Print - Ditto

Quick Access: Std location at top left, will include: Send/Receive, Undo, and Quick Print - Ditto

Mail View: Navigation Pane Open & Maximized and To-Do Bar Open & Minimized

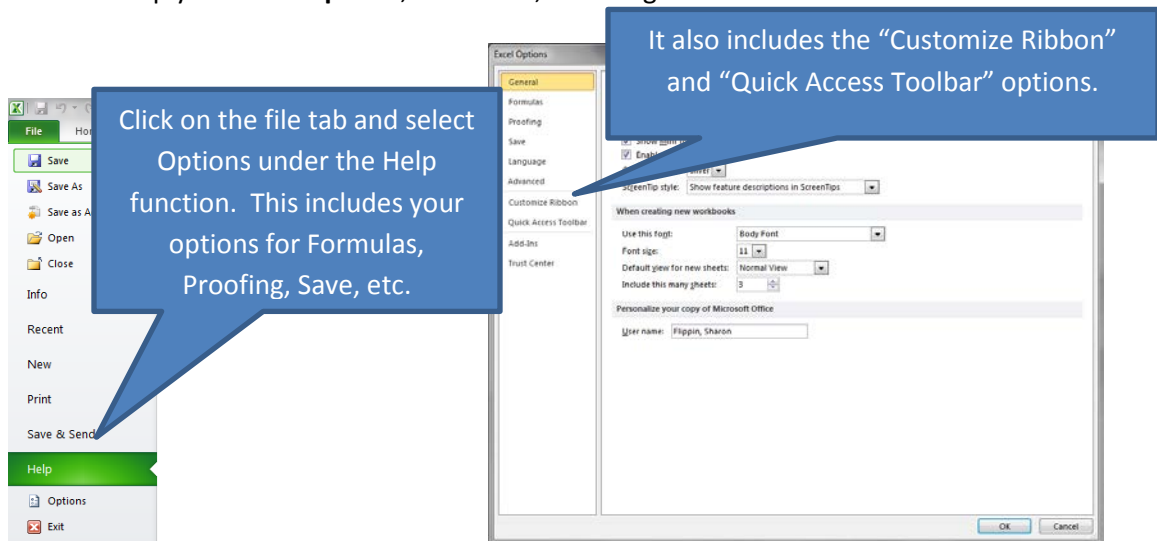
Mail View: Navigation Pane Open & Maximized, To-Do Bar Closed, with Day as the default arrangement and current month only calendar in Nav Pane.

Standard View: Standard Windows 7 wallpaper

Wallpaper: Standard Windows 7 wallpaper

3. **Options** – Set up your **Excel Options**, as desired, including AutoRecover under Save.

Click on the file tab and select Options under the Help function. This includes your options for Formulas, Proofing, Save, etc.



It also includes the "Customize Ribbon" and "Quick Access Toolbar" options.

Excel Options

General Formulas Proofing Save Language Advanced Customize Ribbon Quick Access Toolbar Trust Center

When creating new workbooks

Use this font: Body Font
Font size: 11
Default view for new sheets: Normal View
Include this many sheets: 3

Personalize your copy of Microsoft Office

User name: Flippin, Sharon

OK Cancel

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4. **Ribbons** – Ribbons and Backstage replace the functionality of your Excel 2003 Toolbar selections, including Menu Bar.

Excel 2003:

Comparing 2003 menu selections to the 2010 ribbon selections, you see some duplication in names, such as Data, View, and Insert.

Many of the frequently used functions found in Insert, Format, and Edit will now be found on the Home ribbon.

The View ribbon includes much of the old View menu, but also contains functions from Window.

Excel 2010:

File (Backstage) & Home Tabs

New to 2010: Formula ribbon to enhance your ability to find the formula you need.

Ribbon tabs, based on functionality

Quick Access Toolbar: Just as you had your favorite icons on your 2003 toolbar, they can be added to your Quick Access Toolbar.

Logical grouping name

As noted above, the File (Backstage) option contains what you need to manage your Excel files.

Formula Ribbon: The new formula ribbon gives you everything you need at one place to easily make full use of Excel functionality.

The screenshot shows the Excel Formula ribbon with various function categories like Date & Time, Lookup & Reference, Math, and More Functions. A callout points to the Function Library, stating: "You can select functions from any of the Function Library options." Another callout points to the 'Date & Time' category, stating: "When you hover over a function, tool tips will provide you with a description of the function...". A third callout points to the 'TODAY' function, stating: "...as well as the formula." A fourth callout points to the 'Function Arguments' dialog box, stating: "A single left-click on the function results in this response." The dialog box shows the description for the TODAY function: "Returns the current date formatted as a date. This function takes no arguments. Formula result = Volatile." It also includes a "Help on this function" link and "OK" and "Cancel" buttons.

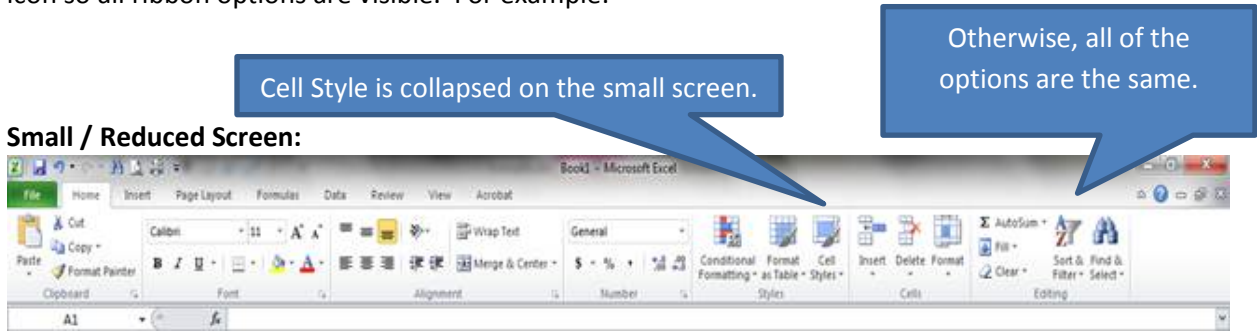
Or you can start typing a function name, from any ribbon:

The screenshot shows the formula bar with the text "=SU" entered. A dropdown list of functions is displayed, including SUBSTITUTE, SUBTOTAL, SUM, SUMIF, SUMIFS, SUMPRODUCT, SUMSQ, SUMX2MY2, SUMX2PY2, and SUMXMY2. A callout points to the list, stating: "You will get a list of possible responses." Another callout points to the 'SUM' function, stating: "Double-click on the desired function...". A third callout points to the formula bar, stating: "...and the required formula format is displayed." The formula bar shows the formula "=SUM(D1:G1)" and the cell address "D1:G1".

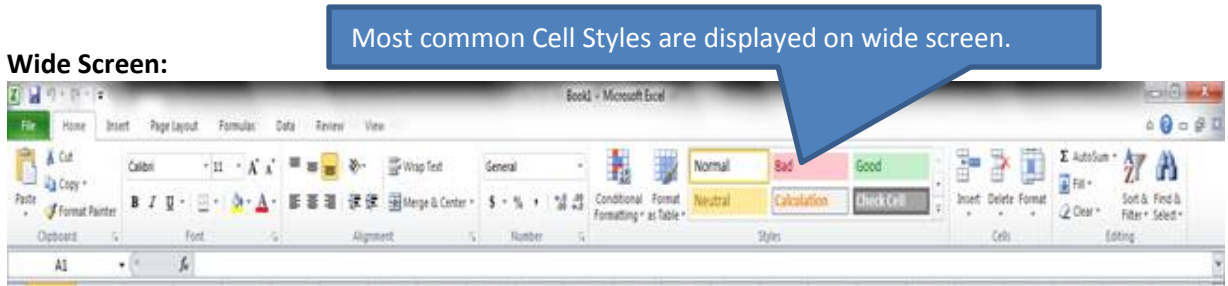
Ribbon Tip: The Excel 2003 View menu contained a selection called "Toolbars". You will not find a similar selection in 2010, since toolbars have been replaced. However, you do still have the same functional options available to you. They are located in one of three places:

- Standard Excel Ribbons:** For example, there was a Protection toolbar that could be activated in Excel 2003. The same functions are now located in the Review ribbon as part of the Changes grouping.
- Contextual Ribbons:** These ribbons become instantly available, on demand. For example, if you click on a chart within a spreadsheet, you will see the Chart Tools tab appear for your selection.
- Customize the Ribbon:** There are some tools that are so infrequently used by the general user group that they are either not on a ribbon or the ribbon has been de-selected. For example, the Developer ribbon has been de-selected. If you activate it, you will see that it contains the Visual Basic toolbar functions, in addition to the XML and Macro functionality.

Finally, the appearance of your ribbon option icons may vary slightly from one monitor to another, based on screen size, or even on the same monitor if you do not have the file maximized. For smaller screens, or reduced screen size, Office 2010 will automatically reduce the size of the option icon so all ribbon options are visible. For example:

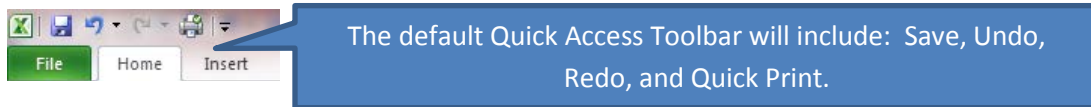


Small / Reduced Screen:



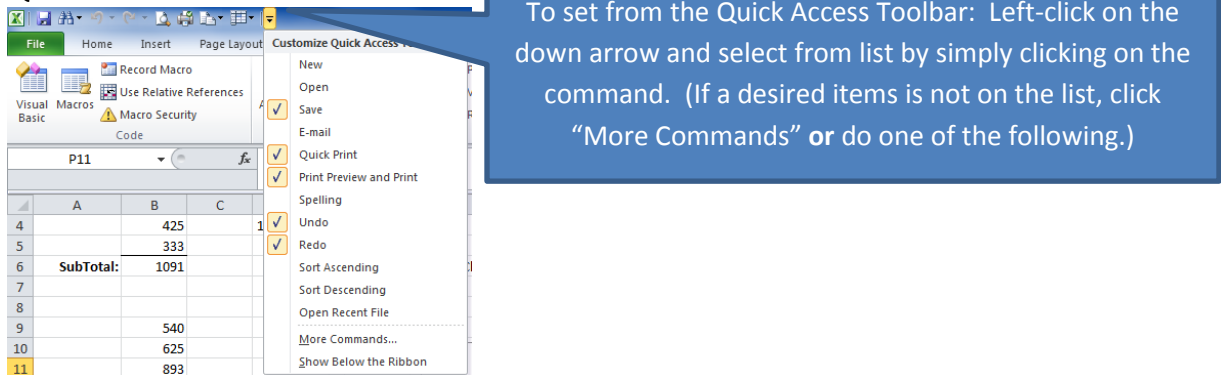
Wide Screen:

- Quick Access Toolbar** – As you review Excel’s many ribbons, you may find frequently used functions located on a ribbon other than Home. If it is truly frequently used, you may want to consider adding it to the Quick Access Toolbar. Your starting point Quick Access Toolbar for Excel is as follows:

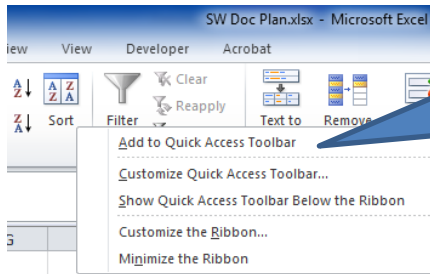


To add functions to your Quick Access, use one of the following steps.

Quick Access – Easiest:

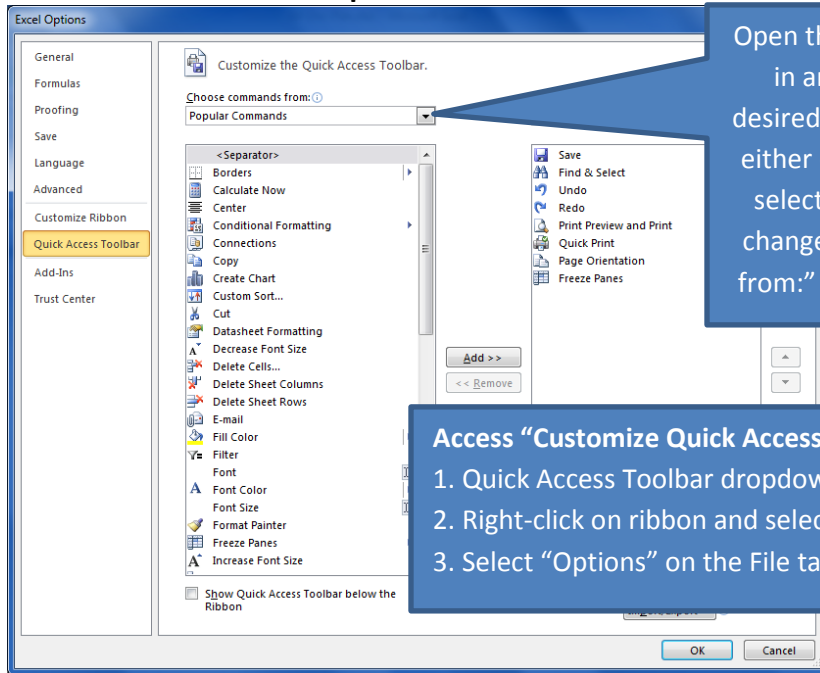


Quick Access – Next Easiest:



If the command is not in the drop down box above, but you know where it is located on the ribbon, simply right-click on the item on the ribbon and select "Add to Quick Access Toolbar".

Quick Access – Detailed Option:

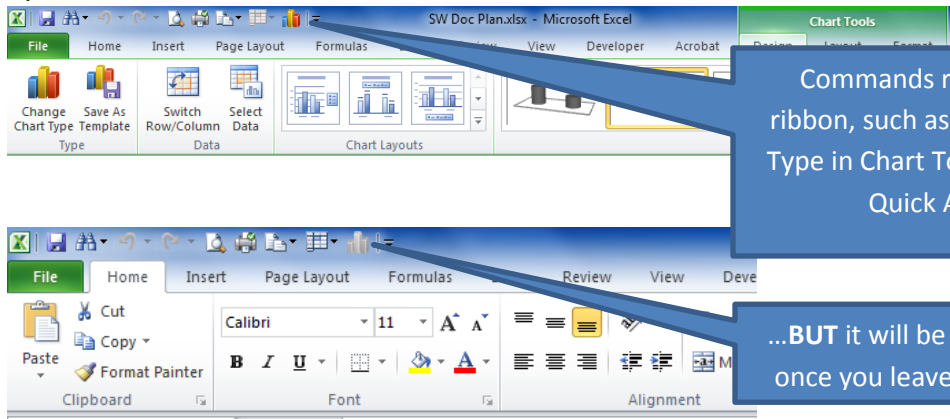


Open the "Customize Quick Access Toolbar" in any number of ways and select the desired command from the list to the left by either double-click or by highlighting it and selecting "Add". **Note:** May need to change selection under "Chose commands from:" as it defaults to Popular Commands.

Access "Customize Quick Access Toolbar" by:

1. Quick Access Toolbar dropdown, select "More Commands"
2. Right-click on ribbon and select "Customize Quick Access Toolbar"
3. Select "Options" on the File tab; Go to Quick Access Toolbar

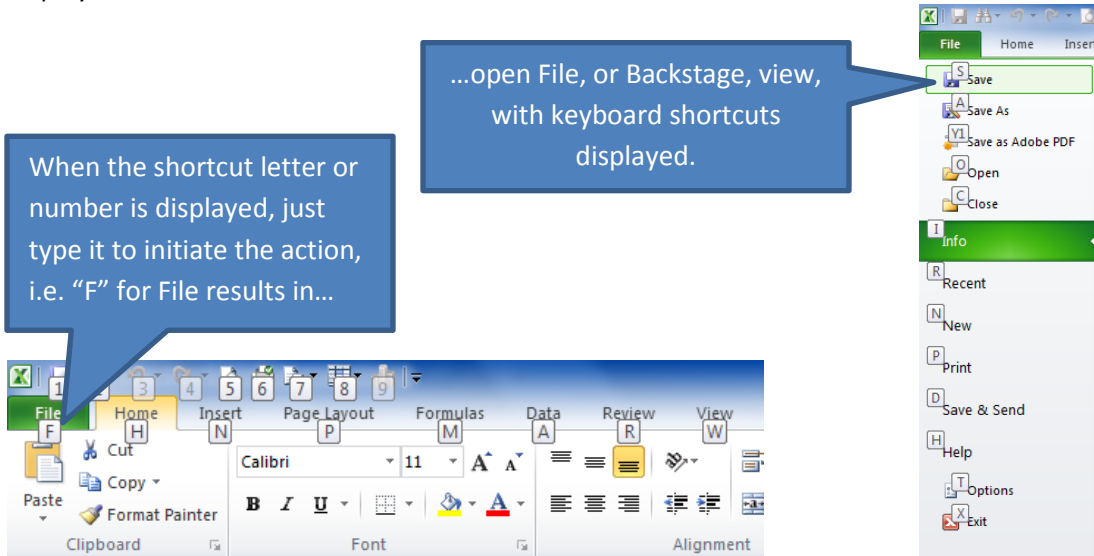
Quick Access – Final Notes:



Commands related to a Contextual ribbon, such as Change Chart Type from Type in Chart Tools may be added to the Quick Access Toolbar ...

...BUT it will be "grayed out" or disabled, once you leave the associated function.

6. **Key Tips** – All you need to remember is to press the **ALT** key and the keyboard shortcuts will be displayed.



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Key Considerations with Excel Workbook (*.xlsx)

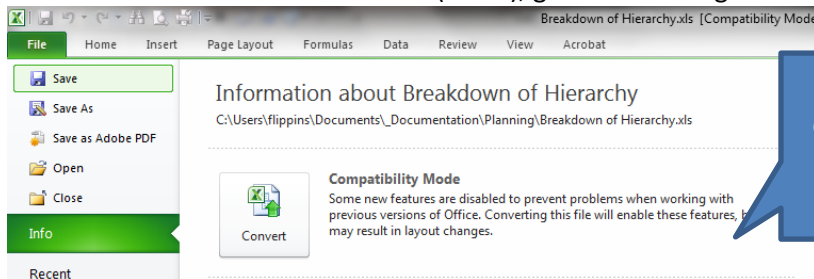
1. **Compatibility** – Because of compatibility issues between Excel 2003 and Excel 2010, there are a few things you should consider as you use your new product.
 - a. When you open one of your existing Excel workbook, it will be opened in **Compatibility Mode** since it was last saved as file type Excel 97-2003 Workbook (*.xls). Unless you change the file type, it will be continue to be saved as file type (*.xls). This basically means you will not be taking full advantage of any enhanced functionality in Excel 2010.

Compatibility Mode



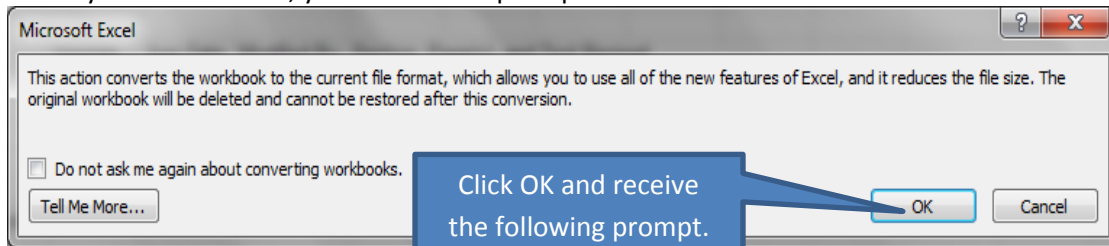
- b. Things to consider **before** you convert:
 - i. Is your workbook shared with others? If so, do they have Excel 2010? If not, be aware that if you convert the workbook, they will only be able to view it in Compatibility Mode, so may not see exactly the same thing that you see. (As a worst case scenario, they may even lose data.)
 - ii. Once you convert, your old 2003 version will disappear. If it is a complex workbook, you may want to save a copy of it elsewhere before doing the conversion process. **Important:** If you do this, be sure to remove the old version, once you have verified the new version. Otherwise, you could end up updating the wrong version at a future date.

2. **Conversion** – To convert to Excel 2010 (*.xlsx), go into Backstage and do the following.

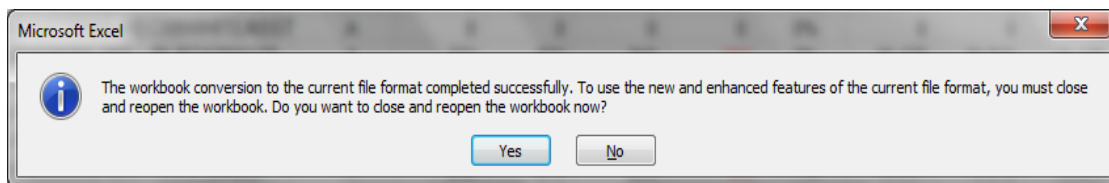


Read this disclaimer, determine if you need to save a backup for comparison, and only then select Convert.

When you click Convert, you receive this prompt:



Click OK and receive the following prompt.



Note: You will only see the Convert option when viewing a worksheet saved in Compatibility Mode.

3. **Snap Functionality in Excel 2010** – Because Excel is not a true SDI (Single Document Interface) application; it will not work unless you open two instances of Excel. Basically, this means that you have to follow a **workaround** process to view two Excel spreadsheets side by side, using the Snap functionality.
 - a. Open your first Excel workbook in your normal manner.
 - b. Go to your Start menu and open Excel from there. (You may want to consider pinning Excel to your Start menu, if you have not done so.)
 - c. Open the second Excel workbook from within this new instance of Excel by selecting File and clicking on the second workbook with Recent or by using Open to go into Windows Explorer.
 - d. Then follow the normal process to “Snap” the files into place.

Note: You can still use the “View Side by Side” functionality located on the View ribbon, without this workaround. The difference in this and Snap functionality is that the two workbooks are independent of each other in Snap. In “View Side by Side”, you will see that when you scroll in one workbook, the other workbook scrolls, too.

Additional Resources

1. The [Excel Quick Reference Card](#) provides you with further details on Excel 2010.
2. For a more in-depth online training session, go to [Excel 2010 Training](#). (30-45 minute session)

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