

Microsoft Excel Reference Card

Basic tasks in Excel 2010

What is Excel?

Excel is a spreadsheet program in the Microsoft Office system. You can use Excel to create and format workbooks (a collection of spreadsheets) in order to analyze data and make more informed business decisions. Specifically, you can use Excel to track data, build models for analyzing data, write formulas to perform calculations on that data, pivot the data in numerous ways, and present data in a variety of professional looking charts.

Common scenarios for using Excel include:

- **Accounting** You can use the powerful calculation features of Excel in many financial accounting statements—for example, a cash flow statement, income statement, or profit and loss statement.
- **Budgeting** Whether your needs are personal or business related, you can create any type of budget in Excel—for example, a marketing budget plan, an event budget, or a retirement budget.
- **Billing and sales** Excel is also useful for managing billing and sales data, and you can easily create the forms that you need—for example, sales invoices, packing slips, or purchase orders.
- **Reporting** You can create various types of reports in Excel that reflect your data analysis or summarize your data—for example, reports that measure project performance, show variance between projected and actual results, or reports that you can use to forecast data.
- **Planning** Excel is a great tool for creating professional plans or useful planners—for example, a weekly class plan, a marketing research plan, a year-end tax plan, or planners that help you organize weekly meals, parties, or vacations.
- **Tracking** You can use Excel to keep track of data in a time sheet or list—for example, a time sheet for tracking work, or an inventory list that keeps track of equipment.
- **Using calendars** Because of its grid-like workspace, Excel lends itself well to creating any type of calendar—for example, an academic calendar to keep track of activities during the school year, or a fiscal year calendar to track business events and milestones.

Find and apply a template

Excel 2010 allows you to apply built-in templates, to apply your own custom templates, and to search from a variety of templates on Office.com. Office.com provides a wide selection of popular Excel templates, including [budgets](#).

To find a template in Excel 2010, do the following:

1. On the **File** tab, click **New**.
2. Under **Available Templates**, do one of the following:
 - To reuse a template that you've recently used, click **Recent Templates**, click the template that you want, and then click **Create**.
 - To use your own template that you already have installed, click **My Templates**, select the template that you want, and then click **OK**.
 - To find a template on Office.com, under **Office.com Templates**, click a template category, select the template that you want, and then click **Download** to download the template from Office.com to your computer.

NOTE You can also search for templates on Office.com from within Excel. In the **Search Office.com for templates** box, type one or more search terms, and then click the arrow button to search.

For more information about how to find and apply templates, see [Create a new workbook](#).

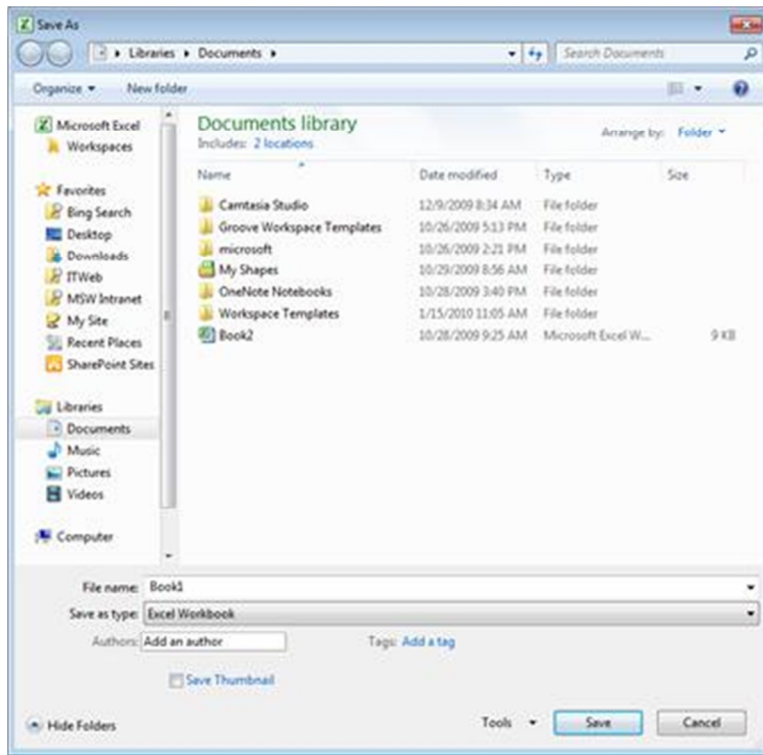
Create a new workbook

1. Click the **File** tab and then click **New**.
2. Under **Available Templates**, click **Blank Workbook**.
3. Click **Create**.

For more information about how to create a workbook, see [Create a new workbook](#).

Save a workbook

1. Click the **File** tab.
2. Click **Save As**.
3. In the **Save As** dialog box, in the **Save as type** list, select **Excel Workbook**
4. In the **File name** box, enter a name for your workbook.



5. Click **Save** to finish.

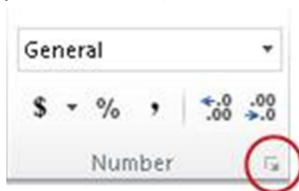
Enter data in a worksheet

1. Click the cell where you want to enter data.
2. Type the data in the cell.
3. Press enter or tab to move to the next cell.

For more information about how to enter data, see [Enter data in a worksheet](#).

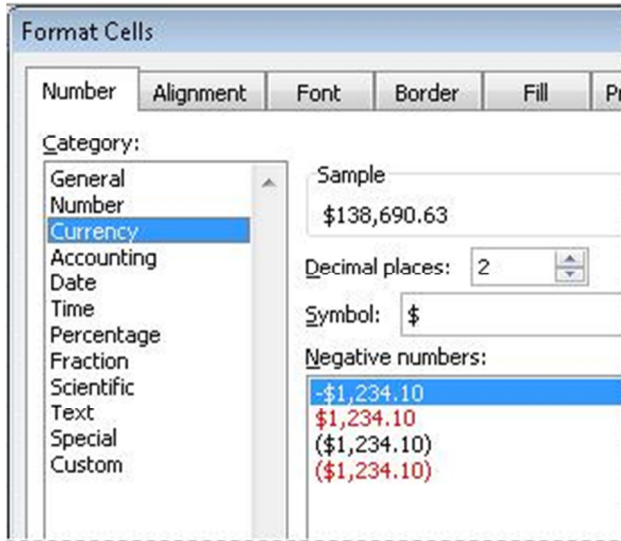
Format numbers

1. Select the cells that you want to format.
2. On the **Home** tab, in the **Number** group, click the **Dialog Box Launcher** next to **Number** (or just press CTRL+1).



3. In the **Category** list, click the format that you want to use, and then adjust settings, if necessary. For example, if you're using the Currency format, you can select a different currency symbol,

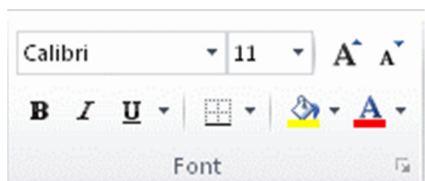
show more or fewer decimal places, or change the way negative numbers are displayed.



For more information about how to format numbers and available number formats, see [Format numbers in a worksheet](#) or [Available number formats](#).

Apply cell borders

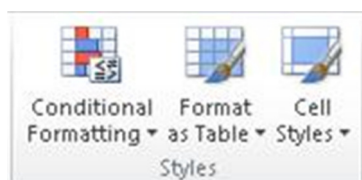
1. Select the cell or range of cells that you want to add a border to.
2. On the Home tab, in the Font group, click the arrow next to Borders, and then click the border style that you want.



For more information about how to apply formatting to a worksheet, see [Format a worksheet](#).

Create an Excel table


1. On a worksheet, select the range of cells that you want to include in the table. The cells can be empty or can contain data.
2. On the **Home** tab, in the **Styles** group, click **Format as Table**, and then click the table style that you want.



3. If the selected range contains data that you want to display as table headers, select the **My table has headers** check box in the **Format as Table** dialog box.

For more information about how to create a table, see [Create an Excel table](#).

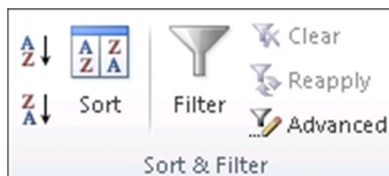
Apply cell shading


1. Select the cell or range of cells that you want to apply cell shading to.
2. On the **Home** tab, in the **Font** group, click the arrow next to **Fill Color** , and then under **Theme Colors** or **Standard Colors**, click the color that you want.

For more information about how to apply formatting to a worksheet, see [Format a worksheet](#).

Filter your data

1. Select the data that you want to filter.
2. On the **Data** tab, in the **Sort & Filter** group, click **Filter**.




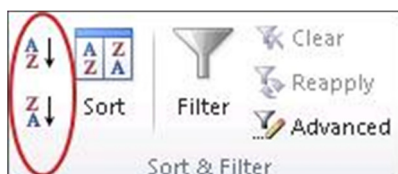
3. Click the arrow  in the column header to display a list in which you can make filter choices.
4. To select by values, in the list, clear the **(Select All)** check box. This removes the check marks from all the check boxes. Then, select only the values you want to see, and click **OK** to see the results.


For more information about how to filter data, see [Filter data by using an AutoFilter](#).

Sort your data

To quickly sort your data, do the following:

1. Select a range of data, such as A1:L5 (multiple rows and columns) or C1:C80 (a single column). The range can include titles that you created to identify columns or rows.
2. Select a single cell in the column on which you want to sort.
3. Click  to perform an ascending sort (A to Z or smallest number to largest).



- Click  to perform a descending sort (Z to A or largest number to smallest).

To sort by specific criteria, do the following:

- Select a single cell anywhere in the range that you want to sort.
- On the **Data** tab, in the **Sort & Filter** group, click **Sort**.



The **Sort** dialog box appears.

- In the **Sort by** list, select the first column on which you want to sort.
- In the **Sort On** list, select either **Values**, **Cell Color**, **Font Color**, or **Cell Icon**.
- In the **Order** list, select the order that you want to apply to the sort operation — alphabetically or numerically ascending or descending (that is, A to Z or Z to A for text or lower to higher or higher to lower for numbers).

For more information about how to sort data, see [Sort data by using an AutoFilter](#).

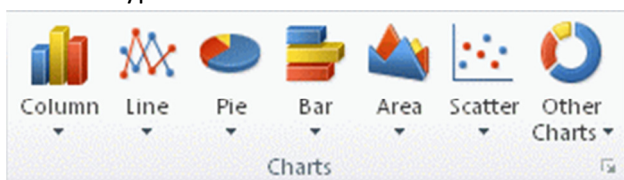
Create a formula

- In a cell, type an equal sign (=) to start the formula.
- Type a combination of numbers and operators; for example, **3+7**.
- Use the mouse to select other cells (inserting an operator between them). For example, select B1 and then type a plus sign (+), select C1 and type +, and then select D1.
- Press ENTER when you finish typing to complete the formula.

For more information about how to create a formula, see [Create a formula](#).

Chart your data

- Select the data that you want to chart.
- On the **Insert** tab, in the **Charts** group, click the chart type that you want to use, and then click a chart subtype.



3. Use the **Chart Tools** to add chart elements such as titles and data labels, and to change the design, layout, or format of your chart.



For more information about how to create a chart, see [Chart your data](#).

Print a worksheet

1. Click the worksheet or select the worksheets that you want to preview.
2. Click **File** and then click **Print**.

Keyboard shortcut You can also press CTRL+P.

Note The preview window will display in black and white, regardless of whether your worksheet(s) includes color, unless you are configured to print on a color printer.

3. To preview the next and previous pages, at the bottom of the Print Preview window, click **Next Page** and **Previous Page**.
4. To set the printing options, do the following:
 - To change the printer, click the drop-down box under **Printer**, and select the printer that you want.
 - To make page setup changes, including changing page orientation, paper size, and page margins, select the options that you want under **Settings**.
 - To scale the entire worksheet to fit on a single printed page, under **Settings**, click the option that you want in the scale options drop-down box.
5. To print the workbook, do one of the following:
 - To print a portion of a worksheet, click the worksheet, and then select the range of data that you want to print.
 - To print the entire worksheet, click the worksheet to activate it.
6. Click **Print**.

For more information about how to print, see [Print a worksheet](#).

Activate and use an add-in

1. Click the **File** tab.
2. Click **Options**, and then click the **Add-Ins** category.
3. Near the bottom of the **Excel Options** dialog box, make sure that **Excel Add-ins** is selected in the **Manage** box, and then click **Go**.
4. In the **Add-Ins** dialog box, select the check boxes the add-ins that you want to use, and then click **OK**.
5. If Excel displays a message that states it can't run this add-in and prompts you to install it, click **Yes** to install the add-ins.

For more information about how to use add-ins, see [Quick start: Activate and use an add-in](#).

CREATE A NEW SPREADSHEET

1. On the ribbon, click the **File** tab.
2. On the left side of the window, click **New**.
3. Click **Create**.

SAVE A SPREADSHEET

1. On the ribbon, click the **File** tab.
2. On the left side of the window, click **Save** or **Save as**.
3. If necessary, in **Folders**, select a folder to save the file in.
4. In the **File name** box, type a name for the spreadsheet.
5. Click **Save**.

PREPARE TO PRINT

1. On the ribbon, click the **File**.
2. On the left side of the window, click **Print**.
3. On the right side of the window, you'll see Print Preview view, which shows what your spreadsheet will look like when you print it.
4. Select any of the options you want under **Settings**.
5. Under **Settings**, click **Page Setup** to select, for example, whether to print gridlines.
6. If necessary, under **Printer**, select your printer.

7. Then click **Print** at the top of the window.

Tip You can also select print options on the **Page Layout** tab on the ribbon.

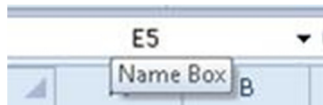
SPREADSHEETS AND CELL ADDRESSES

Spreadsheets are made up of columns, rows, and cells. Columns have alphabetical headings, starting with A, B, C, and so on. After the 26 letters of the alphabet, Excel starts the column headings with AA through AZ, and then starts again with AAA through ZZZ and so on. Excel has 16,384 columns altogether.

Rows have numerical headings, starting with 1, 2, 3, and so on.

A cell is where one column and one row meet, and a cell is where you type. When you click in a cell, it becomes the active cell, with a black border around the cell. Anything you type will go into the active cell.

Use the **Name Box** on the ribbon to see the address of the cell you are typing in.



When you look in the **Name Box**, if you see, for example, E5, it means the cursor is in column E, row 5. Cell addresses not only tell you where something is in a spreadsheet but also are used in Excel formulas.

To use the **Name Box** to go to another cell, type the cell address in the **Name Box**, and then press ENTER. To return to the beginning of the sheet, type **A1** in the **Name Box**, and then press ENTER again.

NAVIGATE IN A SPREADSHEET

- Click in any cell to move the cursor to that cell.
- Press ENTER to move down a cell.
- Press the TAB key to move to the right one cell.
- Use the UP, DOWN, LEFT, and RIGHT ARROW keys on your keyboard to move the cursor in different directions.



Tips

- To learn more about navigating in a spreadsheet, under **See Also** at the top of the Quick Reference Card, see “The best keyboard shortcuts for moving in a workbook.”
- To start a new line of text at a specific point in a cell, double-click the cell, click the location where you want to break the line in the cell, and then press ALT+ENTER..

ENTER DATA

To enter dates:

- Use a slash (/) or a minus sign (-) to separate the parts of a date. For example, 7/15/2010 or 15-July-2010. To enter today's date, press CTRL+; (semicolon).

To enter a time:

- Type a space after the time, and then an "a" or a "p." For example, 9:00 p. Otherwise, Excel enters the time as AM. To enter the current time, press CTRL+SHIFT+; (semicolon).

To enter fractions:

- Leave a space between the whole number and the fraction. For example, 1 1/8.
- To enter a fraction only, enter a zero first. For example, 0 1/4.

DATA-ENTRY TIMESAVERS

AutoComplete If the first few characters you type in a cell match an entry you've already made, Excel will fill in the remaining characters for you. Just press ENTER or TAB to accept the entry.

AutoFill Type an entry in a cell, such as the day of the week or a month of the year. Move the cursor to the lower-right corner of the cell until the cursor changes to a black plus sign. Click and drag the fill handle (the black plus sign) to fill in the rest of the series. You can drag either down a column, or across a row. Release the mouse button when you are done.

To fill in a series of numbers, you need to make more than one entry. For example, to fill in the series 2, 4, 6, 8, and so on, type **2** in a cell, and then press ENTER or the TAB key. Type **4** in an adjoining cell, and then press ENTER or the TAB key. Click and drag, following the steps above to complete the series.

EDIT DATA

Do any of the following:

- Double-click the cell that contains the data you want to edit, OR
- Click the cell that contains the data you want to edit, and then click in the **Formula Bar** to make changes.
- To delete characters, press BACKSPACE, or select the characters to highlight them, and then press DELETE.
- To insert characters, click in the cell where you need to type, and then type the new characters.
- To overwrite characters, select them, and then type the new characters.
- To enter changes, press ENTER or the TAB key after you make your changes.

WRAP TEXT IN A CELL



- On the **Home** tab, in the **Alignment** group, click **Wrap Text**  .

DO MATH IN EXCEL

To do math in Excel, you create formulas, which always start with an equal (=) sign.

- To add, type **=89+23**
- To subtract, type **=89-23**
- To multiply, type **=89*23**
- To divide, type **=89/23**

Use AutoSum to let Excel do the math for you:

1. Place the cursor directly under numbers in a column, or directly to the right of a row of numbers.
2. On the **Home** tab, in the **Editing** group:
 - To add, click the **AutoSum** button  .
 - To do other kinds of math, click the arrow on the **AutoSum** button  , and then click **Average**, **Count Numbers**, **Max**, or **Min**.
3. To complete the formula, in the spreadsheet, press ENTER or the TAB key.

INSERT OR DELETE COLUMNS AND ROWS

To insert:


- A column, click a cell immediately to the right of where you want to insert a new column, or
- A row, click a cell immediately below where you want to insert a new row, and then:
- On the **Home** tab, in the **Cells** group, click the arrow under **Insert** and click either:
 - **Insert Sheet Columns**, or
 - **Insert Sheet Rows**.

To delete:

- A column or a row, place your cursor in the column or row you want to delete, and then:
- On the **Home** tab, in the **Cells** group, click the arrow under **Delete** and click either:

- **Delete Sheet Columns**, or
- **Delete Sheet Rows**.

INSERT OR DELETE SPREADSHEETS

- To insert a spreadsheet, at the bottom of the spreadsheet, click the last sheet tab on the right. Then click the **Insert Worksheet** button .
- To delete a spreadsheet, click the sheet tab you want to delete. Then right-click and select **Delete**.

RENAME A SPREADSHEET TAB

- Click the spreadsheet sheet tab you want to rename, and then right-click the tab. Click **Rename**. The sheet name is highlighted on the tab. Type over the existing text, and then press ENTER.

FREEZE PANES

You can keep column titles and row headings in sight as you scroll down or across a spreadsheet. Note that you can use only one type of freeze at a time.

- On the **View** tab, in the **Window** group, click the arrow under **Freeze Panes**. To freeze:
 - The top row only, click **Freeze Top Row**.
 - The left column only, click **Freeze First Column**.
 - Both the top row and the left column, place the cursor in the cell immediately to the right of the first column and immediately under the first row. For example, you might click in cell B2. Then click **Freeze Panes**.
- To unfreeze panes, in the **Window** group, click the arrow under **Freeze Panes**, and then click **Unfreeze Panes**.