

Getting Started

Excel 2010

Microsoft[®] Excel[®] 2010 delivers rich, new and enhanced data analysis and visualization tools. Whether you're analyzing statistical data or keeping track of your personal or business expenses, with Excel 2010 you can analyze, manage, and share information in more ways than ever before. Excel 2010 can help you keep better track of your information and make better decisions. Easily publish your Excel workbooks to the Web and extend the ways you can share and work together with friends and colleagues. Your work is never farther away than your closest Web browser or smartphone work when and where you want.1

Backstage View:

Prep your work for prime time

Information about Fourth_Coffee_Sales_Report

Save

Save As

C Open i Close

Recent

New

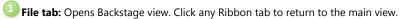
Print

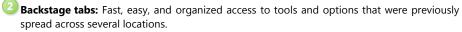
Help

Save & Send

Options Exit

Get centralized access to prepare your workbooks such as save, share, print, and publish or customize your Excel experience in Microsoft Office Backstage™ view.





- Info: Obtain information about your workbook, such as file properties, and get a single access point to new and improved file management tools, including the ability to recover unsaved versions of your workbooks.
- **Recent**: Displays a list of recent saved workbooks and file locations. Click the pushpin icon next to a workbook to 'pin' it to the list and move it to the top so it's readily available.
- New: Quick access to your templates and a rich set of built-in templates for starting new workbooks. Also find online and community-submitted templates.
- **Print**: Print options and Print Preview are now combined in one effortless view.
- Save & Send: Easily save your files in other formats, such as PDF or XPS. Or share your workbooks via e-mail, save to Microsoft SharePoint® Server, Microsoft SharePoint Online2 or your Windows Live™ SkyDrive™.
- Help: Get application help and links to other online self-help resources, such as training tutorials. Also find information about the version you are running, activation, and licensing
- Options: Offers extensive options for setting your preferences, including the ability to customize the Ribbon and Quick Access Toolbar.



Tip: Get help for using the Ribbon, including how to customize the Ribbon in Excel 2010, in the Office 2010 Getting Started Guide

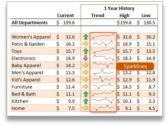
Make your work stand out

Turn complexity into clarity: New visualization and analysis tools help you analyze your information more effectively and create compelling visualizations.

Create powerful data insights and visuals

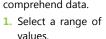
The Sparklines feature in Excel 2010 enables you to present a clear and compact visual of your data in small charts within a worksheet cell.

- 1. Select the cells in which you would like to place Sparklines.
- 2. On the Insert tab, in the Sparklines group, click Line, Column, or Win/Loss.
- 3. In the Create Sparklines dialog box, select the associated values from which to create Sparklines. (Do not include data labels when selecting associated values.)
- To customize your Sparklines: Select cells containing Sparklines. On the Sparkline Tools Design tab, which displays automatically, find options to change the Sparkline type, style, and more. Use the **Clear** options to remove Sparklines.



Illustrate important trends and highlight data exceptions

New styles, icons, and data bar options quickly help you visualize and comprehend data.





- 2. On the Home tab, in the Styles group, click Conditional Formatting.
- 3. Select a conditional format from an available gallery.

Tip: Use the More Rules option at the bottom of a gallery to further customize your conditional formatting.

¹ Web and smartphone access require an appropriate device and some functionality requires an Internet connection. Web functionality uses Office Web Apps, which require a supported Internet Explorer®, Firefox, or Safari browser and either SharePoint Foundation 2010, SharePoint Online (Office 365) or a Windows Live ID. Some mobile functionality requires Office Mobile which is not included in Office 2010 applications, suites, or Office Web Apps. There are some differences between the features of the Office Web Apps, Office Mobile and the Office 2010 applications.

² Available in Microsoft Office 365 service plans. Visit <u>www.office365.com</u> for more information.

Find your answers faster: Harness the power of filtering

Analyze your information with fewer clicks than before and spend less time sifting through large data sets.

Dynamically filter your PivotChart views

Excel 2010 takes the popular PivotChart, used for visual analysis and reporting,



one step further. You can now filter directly on your PivotChart using new interactive buttons.

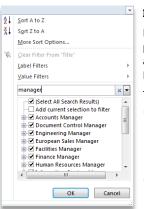
On a PivotChart, click the interactive buttons to access filtering options.

To show or hide interactive buttons on a PivotChart:

On the PivotChart Tools Analyze tab, in the Show/Hide group, click the top half of Field Buttons to show or hide all buttons on your PivotChart.

To show or hide individual buttons on a PivotChart:

On the PivotChart Tools Analyze tab, in the Show/Hide group, click the bottom half of Field Buttons to access additional options.



Instant Search for your filters

Easily find relevant items among potentially thousands or millions of tables, available choices in PivotTable or PivotChart views.

To access the Search Filter:

- In any active table or PivotTable, click the arrow • appears on row or column headings.
- In a PivotChart, click an interactive button to access the Search Filter.

Note: Use the Add current selection to filter option on subsequent searches to add additional filter items and maintain your previously filtered list.

Drill down to the right details

Enhanced PivotTable and PivotChart filtering lets you intuitively filter large amounts of data in fewer steps than before so you can quickly find just the relevant information you need.



To insert a Slicer:

- 1. Place your cell pointer in a PivotTable. The **PivotTable Tools** automatically display.
- 2. On the Options tab, in the Sort & Filter group, click Insert Slicer.
- 3. Select your desired filter field, or select multiple fields to insert more than one Slicer, and click OK. For PivotChart views:
- Select a PivotChart. Find Insert Slicer on the PivotChart Tools Analyze tab, in the Data group.

Note: To select fields in a Slicer, drag through adjacent fields. For nonadjacent fields, hold the Ctrl key and click each field you wish to filter.

Streamline your tasks: Get things done faster

Accomplish your work more seamlessly and in fewer clicks than before through Paste with Live Preview.



Preview before you paste

Save time when reusing content across applications using Paste with Live Preview. Determine how your pasted content will look prior to actually pasting and get it right the first time.

- 1. On the Home tab, in the Clipboard group, click the arrow beneath the Paste button or right-click at the insertion point to view available Paste Options.
- 2. Hover your mouse pointer on individual Paste Options to preview results and click your preferred option to paste. As you point to options, a ScreenTip appears with the name of that option.

Note: Available Paste Options change contextually to best fit the content you are reusing.

malicious files

Better protect yourself from Office 2010 introduces Protected View to help you make more informed decisions before exposing your computer to possible vulnerabilities.

Files received in e-mail, or originate from an Internet source, are automatically opened in a Protected View

Protected View

so you can view the content before you choose whether to enable the file for editing.

- 1. Opening in Protected View is automatic. A message bar appears below the Ribbon to indicate that your file has been opened in Protected View.
- 2. If you trust the contents and choose to proceed with editing, click **Enable Editing** on the message bar to close Protected View.

To manage Protected View settings:

- 1. Click the **File** tab to open Backstage view.
- 2. Click **Options**, then in the Options dialog box, click **Trust Center**.
- 3. On the right, click the Trust Center Settings button.

This file originated as an e-mail attachment and might be unsafe. Click for more details.

4. In the Trust Center dialog box, click the Protected View tab to display options for enabling Protected View.



Enable Editing

Don't do the same work twice

You can now recover unsaved versions of your Excel 2010 workbooks—even if your file was never previously saved.

Work on that workbook for a while and then accidentally close without saving? No problem. Excel 2010 lets you recover unsaved workbooks as easily as opening any file. And, for previously saved files, you can view up to five autosave versions of your files as you work, right from Backstage view.

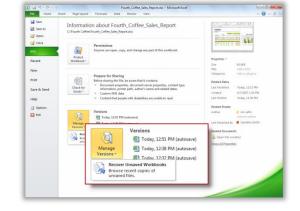
To recover autosave versions (created while working on previously saved files):

- 1. Click the File tab to open Backstage view.
- 2. On the **Info** tab, under the **Versions** heading, view available autosave versions.
- 3. Click an available autosave version to open the file.

To recover unsaved workbooks (workbooks that were never previously saved):

- 1. Click the **File** tab to open Backstage view.
- 2. On the Info tab, click Manage Versions to access Recover Unsaved Workbooks.

Note: If you are working on a file that has never been previously saved, when you click **Manage Versions** you'll also see an option for **Delete All Unsaved Workbooks**.



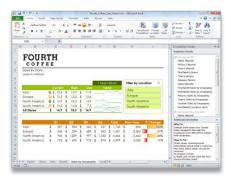
Note: Recovering available unsaved workbooks and autosave versions requires you elect to save AutoRecover information. To keep an autosave version until your next editing session you must also elect to keep the last autosaved version when you close without saving. To access these options, in Backstage view click Options and then click Save.



Tip: Also recover or manage your unsaved workbooks from the Recent tab in Backstage view. Click Recover Unsaved Workbooks at the bottom of the Recent Places list to open your UnsavedFiles folder.

Can your workbook be read by those with disabilities?

Use the Accessibility Checker and inspect your workbook for content that may be difficult for those with disabilities to read.



The new Accessibility Checker inspects your workbook for inaccessible content. When issues are found, the tool provides an explanation of the issue along with step-by-step help for correcting it.

To display the Accessibility Checker and correct accessibility issues:

- 1. Click the File tab to open Backstage view.
- 2. On the Info tab, click Check for Issues.
- Click Check Accessibility to return to your workbook and view the Accessibility Checker task pane.
- 4. In the Accessibility Checker task pane, click a specific error or warning.
- 5. Read the Why Fix section to better understand the inspection results.
- 6. Follow the steps in the **How to Fix** section near the bottom to correct the issue.

Analyze enormous quantities of data

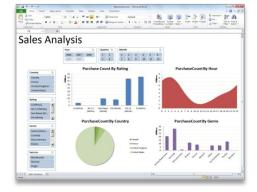
PowerPivot for Excel 2010, a free add-in, is a data analysis tool that delivers unmatched computational power directly within Excel.

PowerPivot enables you to empower your insight and decision-making, to share and collaborate with confidence, and to help improve IT efficiency.

- Excel-based in-memory analysis. Overcome existing limitations of large data analysis on the desktop with efficient compression algorithms to load even the biggest data sets into memory.
- Data Analysis Expressions (DAX). Places powerful relational capabilities into the hands of power users who want to create advanced analytics applications such as SamePeriodLastYear(), ClosingBalances(), Previous Day(), and more.
- Hit the ground running. Leverage new Excel features such as Slicers and those you already know, including the Ribbon, PivotTable, and PivotChart views.

To obtain the free PowerPivot for Excel 2010 add-in:

Visit: <u>www.powerpivot.com</u>.





Communicate more, cobble less

Easily initiate an instant conversation with another author without leaving Excel 2010 through Microsoft Lync 2010 right from Backstage view.

The power of presence

Wherever you see presence information , you can point to the person's name and display their contact card which provides a variety of communication options, such as instant messaging and voice calls

- 1. Open a workbook and click the File tab to open Backstage view.
- 2. On the **Info** tab, in the Properties pane, hover your mouse over a document property with a person's name, such as Author or Last Modified By, to display the new contact card. Expand the contact card for even more details.

Note: Instant messaging and presence information requires one of the following: Microsoft Lync Server 2010 or Lync Online (Office 365) with Microsoft Lync 2010, Microsoft Office Communications Server 2007 R2 with Microsoft Office Communicator 2007 R2, Windows Live Messenger, or another instant messaging application that supports IMessenger. Voice calls require either Lync Server 2010 or Lync Online (Office 365 includes PC-to-PC audio/video only) with Lync 2010, Office Communications Server 2007 R2 with Office Communicator 2007 R2 or an instant messaging application that supports IMessengerAdvanced.



Tip: Click the push pin near the top of the contact card to keep it visible and readily available.

Break down barriers:Work together in new ways

Excel Web App offers easy ways to bring people together to increase work quality and work simultaneously on workbooks.



Stop waiting your turn and coauthor instead

You no longer have to worry about someone locking you out of a workbook while they edit it. Microsoft Excel Web App lets you work in unison and see changes from others appear in near real-time. Save your Excel workbooks online and co-author with ease.

To co-author a workbook:

 Co-authoring is automatically enabled when multiple authors open the same file from a SharePoint Server 2010 or SharePoint Online site.

To view current authors

The total number of authors editing the workbook appears in the status bar.
Click the author count to view author names.

For more on using Excel Web App, see the Office Web Apps Getting Started Guide.

Note: Co-authoring requires SharePoint Foundation 2010 or SharePoint Online (Office 365) for business use or a free Windows Live ID for personal use.

Publish and share through Excel Services

SharePoint Excel Services lets you share your easy-to-read workbooks in a Web browser with your team while maintaining a single version of the workbook.



In a meeting with Dev, will check e-mail after 10:30

In a meeting - Busy. Free at 10:30 AM

F -

BUSINESS MANAGER

To publish to Excel Services:

- 1. Click the **File** tab to open Backstage view.
- 2. On the Save & Send tab, click Save to SharePoint.
- 3. Click Publish Options.
- In the Publish Options dialog box, on the **Show** tab, select specific sheets or items in the workbook you wish to publish.
- On the Parameters tab, specify cells that should be editable in the browser.

Note: Editable cells must be named ranges consisting of a single cell and contain a value.

Note: Microsoft Office Professional Plus 2010, Microsoft Office Professional Academic 2010, or Microsoft Excel 2010 when purchased as an individual application is required for publishing to Excel Services from Excel 2010.

Keyboard shortcut tips

 Press the Alt key to view KeyTips. KeyTips appear on the Ribbon with letter or number combinations you press sequentially on the keyboard to execute commands. Press a KeyTip to activate a Ribbon tab and then press the KeyTip for your desired command.

Note: KeyTips are also available for the Quick Access Toolbar and Backstage view.

- Hover your mouse pointer on Ribbon commands and find keyboard shortcuts in the ScreenTips. (Note not all commands have shortcuts.)
- Many common commands use Ctrl + the first letter of the command. Here are a few examples:

New: Ctrl + N • Open: Ctrl + O • Save: Ctrl + S • Print: Ctrl + P

Miscellaneous keyboard shortcuts

Below is a sampling of the many keyboard shortcuts Excel has to offer. To find additional keyboard shortcuts: Press F1 to open Help and then search for Keyboard Shortcuts.

- To insert the AutoSum function: Press Alt + =
- To start a new line in the same cell: Press Alt + Enter
- To select the current region: Press Ctrl + Shift + Spacebar
- To toggle the size of the Excel formula bar: Press Ctrl + Shift + U
- New shortcuts for working with shapes:

Resize: Shift + arrow keys • **Rotate**: Alt + right or left arrow keys **Tip**: To resize or rotate in smaller increments, add Ctrl to these key combinations.