



Make the switch to Excel 2010

Quick Reference Card

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USE BACKSTAGE VIEW

In Microsoft® Excel® 2010, the **File** tab and Backstage view replace and expand on the **File** menu from Excel 2003 and earlier versions. Backstage view is where you create new files, open your existing files, save and print your files, set options for Excel, and more.

1. To get started, click the **File** tab and then click **New**.
2. You can click **Blank Workbook** or, to use a template, click **Sample Templates**. You can choose one of these templates or search for a different one on Office.com.
3. For printing options, click the **Print** tab.
4. On the **Save & Send** tab are options for sending a file in e-mail, by fax, sending it to a Microsoft Office SharePoint® Server site, and more.
5. The **Save**, **Save As**, **Open**, and **Close** buttons are always displayed under the **File** tab.
6. Now click **Options** under the **File** tab. Here are the commands that used to be on **Options** under the **Tools** menu.

USE THE HOME TAB

On the **Home** tab, you'll find commands you use most often for common tasks. Commands are grouped together by the task or area they relate to, so you spend less time looking for commands.

- Copy and paste commands are in the **Clipboard** group.
- Commands for changing fonts are in the **Font** group.
- The **Alignment** group has commands to center text or align it on the right.

To change the appearance of data

- Select the data you want to change, and in the **Styles** group, click **Cell Styles**. Note that you can point to a style and see how it will look.
- Click a style.
- In the **Font** group, click the paint can icon to add a fill color.

To change column widths

1. Select all your data.
2. Click **Format** in the **Cells** group, and then select **AutoFit Column Width**.

To get rid of highlighting in cells

- Select the cells. In the **Editing** group, click **Clear**, and then select **Clear Formats**.
- In the **Editing** group, click **Clear**, and then select **Clear Formats**.

To add a column to a worksheet

1. In the **Cells** group, click **Insert**.
2. Select **Insert Sheet Columns**.

When you use the **Paste** command in the **Clipboard** group, you see a set of options that let you control how you paste the data. You can mouse over the buttons to see what each option does.

DO THE MATH

It doesn't matter which tab you're using in Excel 2010, you can still do math. To do basic math—to sum, average, and so on—use the **Sum** button on the **Home** tab.

When you need to find a function, use the **Formulas** tab. The function libraries are in the **Function Library** group. Click the arrow under each library to see a list of the functions it contains.

Note: Rest your mouse over a function to see a ScreenTip that tells you what it's for.

Also on the **Formulas** tab are the **Sum** commands and other tools for working with formulas, such as **Trace Precedents** and **Calculation Options**.

CREATE A COLUMN CHART

Note In Excel 2010, many commands are contextual, meaning they appear on the ribbon only when you need them. To experience this feature, follow these steps to create a column chart:

1. Place the insertion point in your chart data and click the **Insert** tab.
2. Click **Column**, and then select a chart type. Notice that as soon as your chart is inserted, more commands appear under **Chart Tools**. When you click outside the chart, the **Chart Tools** commands disappear.
3. Click inside the chart to get the **Chart Tools** commands back.

Examples of how to use the commands

1. To change the chart type, click the **Design** tab.
2. To quickly change the look and feel of the chart, click any of the options in the **Chart Layouts** gallery or the **Chart Styles** gallery.
3. On the **Layout** tab, you find commands for changing elements in the chart, such as titles. For example, click the **Axes** command, and then set the vertical axis to display dollar amounts in thousands.
4. You can click the **Data Labels** command and add specific dollar amounts to each bar in your chart.
5. Finally, the **Format** tab is where you can add fill colors or change line styles. For example, you can add a fill color.

Note The arrow in the lower-right corner of the group is a dialog box launcher. You see them on several of the ribbon tabs.

USE KEYBOARD SHORTCUTS

The familiar keyboard shortcuts that begin with CTRL are still there. In addition, there's a set of shortcuts called Key Tips that are part of the ribbon. Every command has a Key Tip.

To use Key Tips

- With your worksheet open, press ALT to display the Key Tips for all the tabs on the ribbon.
- To see the Key Tips for the commands on a tab, press the letter for that tab. For example, for the **Home** tab, press H.
- To access a command, press the letter or letters for that command. For example, to format cells, press **F+C**. To close that dialog box, press ESC.
- Now press ALT twice. The first press hides the Key Tips for the **Home** tab, and the second press displays the Key Tips for the entire ribbon. Press **F** to go to Backstage view. The Key Tips for the Backstage view tabs appear automatically when you navigate to Backstage view this way.

ADD YOUR FAVORITE BUTTONS TO THE QUICK ACCESS TOOLBAR AND THE RIBBON

When you first install Excel, the Quick Access toolbar provides the **Save**, **Undo**, and **Redo** commands. You can customize the toolbar with almost any of the other commands that Excel provides.

To customize the Quick Access Toolbar

1. Click the arrow to the right of the Quick Access Toolbar to see the **Customize Quick Access Toolbar** menu.
2. Click a command to add it to the toolbar. If you don't see a command that you want, open the list again and click **More Commands** to start the **Excel Options** dialog box. The window on the left shows you the available commands, and the window on the right shows you what's on the Quick Access Toolbar. The window on the left is filtered. If you want to see all the commands, select **All Commands** on the **Choose commands from** drop-down list.
3. Locate the command you want and either double-click it or click **Add**.
4. To change the order of the commands on the Quick Access Toolbar, use the arrows to move them up or down.
5. If you don't like your changes, click **Reset** and then click **Reset only Quick Access Toolbar**.

To save your customizations for others to import

1. In the **Excel Options** dialog box, click the arrow on the **Import/Export** button, and then click **Export All Customizations**.
2. In the **File Save** dialog box, click **Save** to save the file to your local computer.
3. To import a customization file, click the **Import/Export** arrow, click **Import customization file**, open the customization file, and confirm the operation.

4. To customize the ribbon, click the arrow to the right of the Quick Access Toolbar. On the **Customize Quick Access Toolbar** menu, click **More Commands**.
5. Click the **Customize Ribbon** tab on the left. The dialog box is similar to the one you used earlier to customize the Quick Access Toolbar. Use the **Choose commands from** list to select commands, groups, and tabs to add to the ribbon. Use the **Customize the ribbon** list on the right to add, remove, rename, and reorder tabs, groups, and commands the way you want.

WORK BETWEEN VERSIONS OF EXCEL

Excel 2010 opens older files in compatibility mode. That means Excel tracks anything you do in the new version that isn't available in the old version and alerts you about any differences when you save your changes. If you then open the file in a previous version, any features you added that are unique to 2010 won't work in the previous version.

Important You may lose data when you open the changed file in the earlier version of Excel. Pay attention to the messages that Compatibility Checker displays, and correct any issues as needed.

An option is to convert the file to the 2010 format. In Backstage view, click the **Info** tab and then click **Convert**. Click **Yes** to let Excel close and reopen the file.

You can also go to the **Save & Send** tab, click **Change File Type**, and click **Workbook**. That starts the **Save As** dialog box, and the format is selected for you.