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Basic tasks in Excel 2010



Here are some basic tasks that you can do in Microsoft Excel 2010.

In this article

- [↓ What is Excel?](#)
- [↓ Find and apply a template](#)
- [↓ Create a new workbook](#)
- [↓ Save a workbook](#)
- [↓ Enter data in a worksheet](#)
- [↓ Format numbers](#)
- [↓ Apply cell borders](#)
- [↓ Create an Excel table](#)
- [↓ Apply cell shading](#)
- [↓ Filter your data](#)
- [↓ Sort your data](#)
- [↓ Create a formula](#)
- [↓ Chart your data](#)
- [↓ Print a worksheet](#)
- [↓ Activate and use an add-in](#)

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](#).

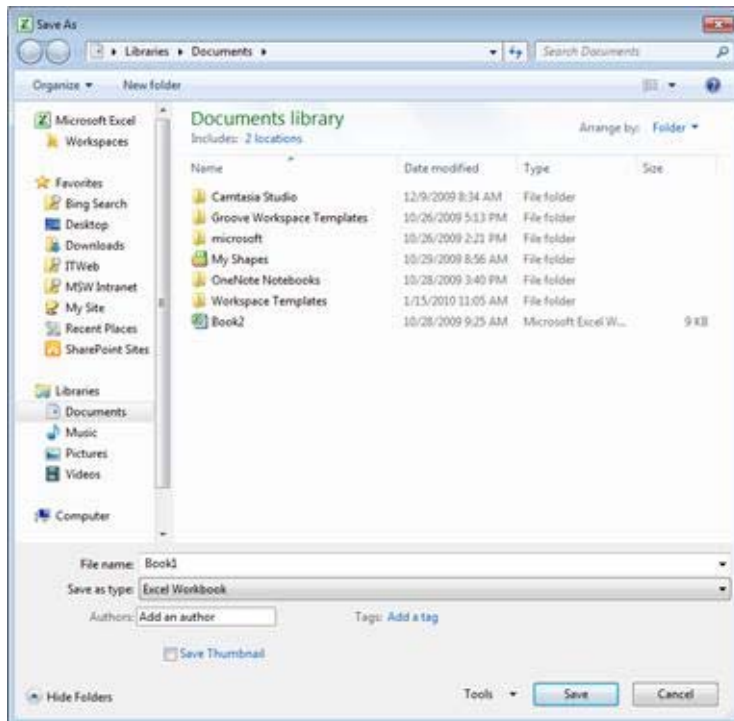
Create a new workbook

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

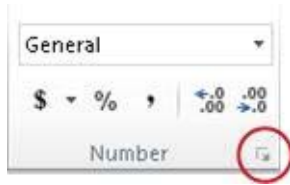
1. Click the cell where you want to enter data.
2. Type the data in the cell.
3. Press enter or tab to move to the next cell.

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

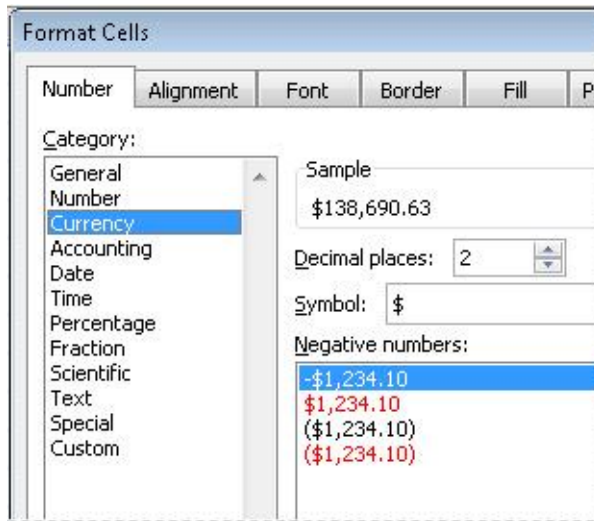
Format numbers

1. Select the cells that you want to format.

- On the **Home** tab, in the **Number** group, click the **Dialog Box Launcher** next to **Number** (or just press CTRL+1).



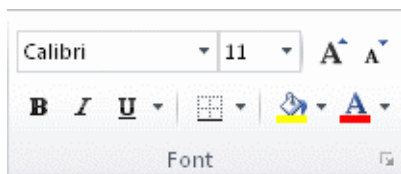
- In the **Category** list, click the format that you want to use, and then adjust settings, if necessary. For example, if you're using the Currency format, you can select a different currency symbol, show more or fewer decimal places, or change the way negative numbers are displayed.



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

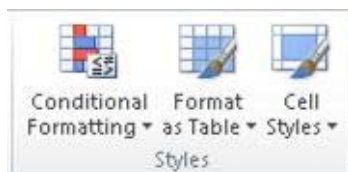
- Select the cell or range of cells that you want to add a border to.
- On the **Home** tab, in the Font group, click the arrow next to Borders, and then click the border style that you want.



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

Create an Excel table


- 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.
- 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](#).

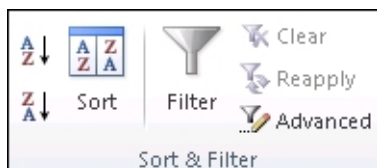
Apply cell shading


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**.




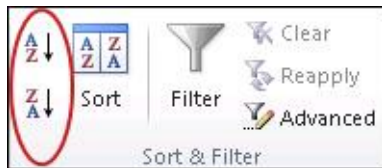
3. Click the arrow  in the column header to display a list in which you can make filter choices.
4. To select by values, in the list, clear the **(Select All)** check box. This removes the check marks from all the check boxes. Then, select only the values you want to see, and click **OK** to see the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



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

To sort by specific criteria, do the following:

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



The **Sort** dialog box appears.

3. In the **Sort by** list, select the first column on which you want to sort.
4. In the **Sort On** list, select either **Values**, **Cell Color**, **Font Color**, or **Cell Icon**.
5. 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](#).

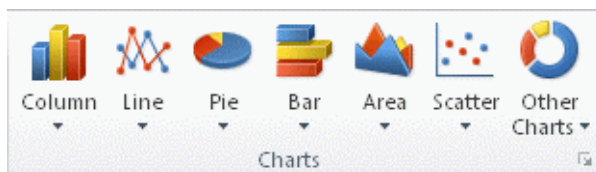
Create a formula

1. In a cell, type an equal sign (=) to start the formula.
2. Type a combination of numbers and operators; for example, **3+7**.
3. 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.
4. 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

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



- 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

- Click the worksheet or select the worksheets that you want to preview.
- 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.

- To preview the next and previous pages, at the bottom of the Print Preview window, click **Next Page** and **Previous Page**.
- 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.
- 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.

- Click **Print**.

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

Activate and use an add-in

- Click the **File** tab.
- Click **Options**, and then click the **Add-Ins** category.
- 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**.
- 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](#).