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Use Excel on
any device

Show off your data using all
the new features of Excel

Stay on top of data and track
and organize information

Greg Harvey, PhD

Bestselling author of all editions of
Excel All-in-One For Dummies



Excel[®] 2019

by Greg Harvey, PhD

for
dummies[®]
A Wiley Brand

Excel® 2019 For Dummies®

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Introduction

I'm very proud to present you with *Excel 2019 For Dummies*, the latest version of everybody's favorite book on Microsoft Office Excel for readers with no intention whatsoever of becoming spreadsheet gurus.

Excel 2019 For Dummies covers all the fundamental techniques you need to know in order to create, edit, format, and print your own worksheets. In addition to showing you around the worksheet, this book also exposes you to the basics of charting, creating data lists, and performing data analysis. Keep in mind, though, that this book just touches on the easiest ways to get a few things done with these features — I don't attempt to cover charting, data lists, or data analysis in the same definitive way as spreadsheets: This book concentrates on spreadsheets because spreadsheets are what most regular folks create with Excel.

About This Book

This book isn't meant to be read cover to cover. Although its chapters are loosely organized in a logical order (progressing as you might when studying Excel in a classroom situation), each topic covered in a chapter is really meant to stand on its own.

Each discussion of a topic briefly addresses the question of what a particular feature is good for before launching into how to use it. In Excel, as with most other sophisticated programs, you usually have more than one way to do a task. For the sake of your sanity, I have purposely limited the choices by usually giving you only the most efficient ways to do a particular task. Later, if you're so tempted, you can experiment with alternative ways of doing a task. For now, just concentrate on performing the task as I describe.

As much as possible, I've tried to make it unnecessary for you to remember anything covered in another section of the book. From time to time, however, you will come across a cross-reference to another section or chapter in the book. For the most part, such cross-references are meant to help you get more complete information on a subject, should you have the time and interest. If you have neither, no problem. Just ignore the cross-references as if they never existed.

How to Use This Book

This book is similar to a reference book. You can start by looking up the topic you need information about (in either the Table of Contents or the index) and then refer directly to the section of interest. I explain most topics conversationally (as though you were sitting in the back of a classroom where you can safely nap). Sometimes, however, my regiment-commander mentality takes over, and I list the steps you need to take to accomplish a particular task in a particular section.

What You Can Safely Ignore

When you come across a section that contains the steps you take to get something done, you can safely ignore all text accompanying the steps (the text that isn't in bold) if you have neither the time nor the inclination to wade through more material.

Whenever possible, I have also tried to separate background or footnote-type information from the essential facts by exiling this kind of junk to a sidebar (look for blocks of text on a gray background). Often, these sections are flagged with icons that let you know what type of information you will encounter there. You can easily disregard text marked this way. (I'll scoop you on the icons I use in this book a little later.)

Foolish Assumptions

I'm only going to make one foolish assumption about you, and that is that you have some need to use Microsoft Excel 2019 in your work or studies. If pushed, I further guess that you aren't particularly interested in knowing Excel at an expert level but are terribly motivated to find out how to do the stuff you need to get done. If that's the case, this is definitely the book for you. Fortunately, even if you happen to be one of those newcomers who's highly motivated to become the company's resident spreadsheet guru, you've still come to the right place.

As far as your hardware and software goes, I'm assuming that you already have Excel 2019 (usually as part of Microsoft Office 2019) installed on your computing device, using a standard home or business installation running under Windows 10 (this is the first version of Excel that is not supported by earlier versions of Windows, such as the infamous Window 8 or the ever-popular Windows 7). I'm not assuming, however, that when you're using Excel 2019, you are sitting in front of

a large screen monitor and making cell entries and command selections with a physical keyboard or connected mouse. With the introduction of Microsoft's Surface 4 tablets and the support for a whole slew of different Windows tablets, you may well be entering data and selecting commands with your finger or stylus using the Windows Touch keyboard.



TIP

To deal with the differences between using Excel 2019 on a standard desktop or laptop computer with access only to a physical keyboard and mouse and a touch-screen tablet or smartphone environment with access only to the virtual Touch keyboard, I've outlined the touchscreen equivalents to common commands you find throughout the text such as "click," "double-click," "drag," and so forth in Chapter 1.



WARNING

This book is intended *only* for users of Microsoft Office Excel 2019! Because of the diversity of the devices that Excel 2019 runs on and the places where its files can be saved and used, if you're using Excel 2007 or Excel 2010 for Windows, much of the file-related information in this book may only confuse and confound you. If you're still using a version prior to Excel 2007, which introduced the Ribbon interface, this edition will be of no use to you as your version of the program works nothing like the 2019 version this book describes.

How This Book Is Organized

This book is organized in six parts with each part containing two or more chapters (to keep the editors happy) that more or less go together (to keep you happy). Each chapter is divided further into loosely related sections that cover the basics of the topic at hand. However, don't get hung up on following the structure of the book; ultimately, it doesn't matter whether you find out how to edit the worksheet before you learn how to format it, or whether you figure out printing before you learn editing. The important thing is that you find the information — and understand it when you find it — when you need to perform a particular task.

In case you're interested, a synopsis of what you find in each part follows.

Part 1: Getting Started with Excel 2019

As the name implies, this part covers such fundamentals as how to start the program, identify the parts of the screen, enter information in the worksheet, save a document, and so on. If you're starting with absolutely no background in using spreadsheets, you definitely want to glance at the information in Chapter 1 to

discover the secrets of the Ribbon interface before you move on to how to create new worksheets in Chapter 2.

Part 2: Editing Without Tears

In this part, I show you how to edit spreadsheets to make them look good, including how to make major editing changes without courting disaster. Peruse Chapter 3 when you need information on formatting the data to improve the way it appears in the worksheet. See Chapter 4 for rearranging, deleting, or inserting new information in the worksheet. Read Chapter 5 for the skinny on printing your finished product.

Part 3: Getting Organized and Staying That Way

Here I give you all kinds of information on how to stay on top of the data that you've entered into your spreadsheets. Chapter 6 is full of good ideas on how to keep track of and organize the data in a single worksheet. Chapter 7 gives you the ins and outs of working with data in different worksheets in the same workbook and gives you information on transferring data between the sheets of different workbooks.

Part 4: Digging Data Analysis

This part consists of two chapters. Chapter 8 introduces performing various types of what-if analysis in Excel, including setting up data tables with one and two inputs, performing goal seeking, and creating different cases with Scenario Manager. Chapter 9 introduces Excel's powerful pivot table and pivot chart capabilities that enable you to summarize and filter vast amounts of data in a worksheet table or data list in a compact tabular or chart format.

Part 5: Life Beyond the Spreadsheet

In Part 5, I explore some of the other aspects of Excel besides the spreadsheet. In Chapter 10, you find out just how ridiculously easy it is to create a chart using the data in a worksheet. In Chapter 11, you discover just how useful Excel's data list capabilities can be when you have to track and organize a large amount of information. In Chapter 12, you find out about using add-in programs to enhance Excel's built-in features, adding hyperlinks to jump to new places in a worksheet, to new documents, and even to web pages, as well as how to record macros to automate your work.

Part 6: The Part of Tens

As is the tradition in *For Dummies* books, the last part contains lists of the top ten most useful facts, tips, and suggestions. In this part, you find four chapters. Chapter 13 provides you with the top ten beginner basics you need to know as you start using this program. Chapter 14 gives you the King James Version of the Ten Commandments of Excel 2019. With this chapter under your belt, how canst thou goest astray? Chapter 15 talks about the top ten features for managing and maintaining loads of data in Excel 2019, while Chapter 16 examines the top ten features for identifying trends and vital indicators in your Excel data.

Conventions Used in This Book

The following information gives you the lowdown on how things look in this book. Publishers call these items the book's *conventions* (no campaigning, flag-waving, name-calling, or finger-pointing is involved, however).

Selecting Ribbon commands

Throughout the book, you'll find Ribbon command sequences (the name on the tab on the Ribbon and the command button you select) separated by a command arrow, as in

HOME ⇨ Copy

This shorthand is the Ribbon command that copies whatever cells or graphics are currently selected to the Windows Clipboard. It means that you click the Home tab on the Ribbon (if it isn't displayed already) and then click the Copy button (that sports the traditional side-by-side page icon).

Some of the Ribbon command sequences involve not only selecting a command button on a tab but then also selecting an item on a drop-down menu. In this case, the drop-down menu command follows the name of the tab and command button, all separated by command arrows, as in

Formulas ⇨ Calculation Options ⇨ Manual

This shorthand is the Ribbon command sequence that turns on manual recalculation in Excel. It says that you click the Formulas tab (if it isn't displayed already) and then click the Calculation Options button followed by the Manual drop-down menu option.

The book occasionally encourages you to type something specific into a specific cell in the worksheet. When I tell you to enter a specific function, the part you should type generally appears in **bold** type. For example, `=SUM(A2:B2)` means that you should type exactly what you see: an equal sign, the word **SUM**, a left parenthesis, the text **A2:B2** (complete with a colon between the letter-number combos), and a right parenthesis. You then, of course, have to press Enter to make the entry stick.

Occasionally, I give you a *hot key combination* that you can press in order to choose a command from the keyboard rather than clicking buttons on the Ribbon with the mouse. Hot key combinations are written like this: Alt+FS or Ctrl+S (both of these hot key combos save workbook changes).

With the Alt key combos on a physical keyboard, you press the Alt key until the hot key letters appear in little squares all along the Ribbon. At that point, you can release the Alt key and start typing the hot key letters (by the way, you type all lowercase hot key letters — I only put them in caps to make them stand out in the text).

Hot key combos that use the Ctrl key are of an older vintage and work a little bit differently. On physical keyboards you have to hold down the Ctrl key while you type the hot key letter (though again, type only lowercase letters unless you see the Shift key in the sequence, as in Ctrl+Shift+C).

Excel 2019 uses only one pull-down menu (File) and one toolbar (the Quick Access toolbar). You open the File pull-down menu by clicking the File tab or pressing Alt+F to access the Excel Backstage. The Quick Access toolbar with its four buttons appears to the immediate right of the File tab.

Finally, if you're really observant, you may notice a discrepancy in how the names of dialog box options (such as headings, option buttons, and check boxes) appear in the text and how they actually appear in Excel on your computer screen. I intentionally use the convention of capitalizing the initial letters of all the main words of a dialog box option to help you differentiate the name of the option from the rest of the text describing its use.

Icons Used in This Book

The following icons are placed in the margins to point out stuff you may or may not want to read.



TECHNICAL
STUFF

This icon alerts you to nerdy discussions that you may well want to skip (or read when no one else is around).



TIP

This icon alerts you to shortcuts or other valuable hints related to the topic at hand.



REMEMBER

This icon alerts you to information to keep in mind if you want to meet with a modicum of success.



WARNING

This icon alerts you to information to keep in mind if you want to avert complete disaster.

Beyond the Book

In addition to what you're reading right now, this product also comes with a free access-anywhere Cheat Sheet that's full of pointers on how to make your way through Excel's command menus and immediately start using its features to create great-looking spreadsheets and charts. To get this Cheat Sheet, simply go to www.dummies.com and search for "Excel 2019 For Dummies Cheat Sheet" in the Search box.

Where to Go from Here

If you've never worked with a computer spreadsheet, I suggest that you first go to Chapter 1 and find out what you're dealing with. Then, as specific needs arise (such as, "How do I copy a formula?" or "How do I print just a particular section of my worksheet?"), you can go to the Table of Contents or the index to find the appropriate section and go right to that section for answers.

1

Getting Started with Excel 2019

IN THIS PART . . .

Explore the Excel user interface and the Ribbon.

Make sense of the most commonly used tabs and command buttons.

Customize the Quick Access toolbar.

Start (and stop) Excel 2019.

Get online help with the Help tab and with the Tell Me feature in Excel 2019.

Become familiar with the prominent buttons and boxes for entering spreadsheet data.

Save your work and recover a lost workbook if disaster strikes.

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IN THIS CHAPTER

- » Getting familiar with the Excel 2019 program window and Backstage view
- » Selecting commands from the Ribbon
- » Customizing the Quick Access toolbar
- » Starting Excel 2019
- » Surfing an Excel 2019 worksheet and workbook
- » Getting things done with the Tell Me feature

Chapter 1

The Excel 2019 User Experience

Excel 2019, like Excel 2016, 2013, 2010, and 2007 before it, relies upon a single strip at the top of the worksheet called the Ribbon that puts the bulk of the Excel commands you use at your fingertips at all times.

Add to the Ribbon a File tab and a Quick Access toolbar — along with a few remaining task panes (Help, Clipboard, Clip Art, and Research, to name a few) — and you end up with the handiest way to crunch your numbers, produce and print polished financial reports, as well as organize and chart your data. In other words, to do all the wonderful things for which you rely on Excel.

Best of all, the Excel 2019 user interface includes all sorts of graphical elements that make working on spreadsheets a lot faster and a great deal easier. Foremost is Live Preview, which shows you how your actual worksheet data would appear in a particular font, table formatting, and so on before you actually select it. This Live Preview extends to the new Quick Analysis and Recommended PivotTables and Recommended Charts commands to enable you to preview your data in various formats before you apply them.

Additionally, Excel 2019 supports a Page Layout View that displays rulers and margins along with headers and footers for every worksheet with a Zoom slider at the bottom of the screen that enables you to zoom in and out on the spreadsheet data instantly. Finally, Excel 2019 is full of pop-up galleries that make spreadsheet formatting and charting a real breeze, especially in tandem with Live Preview.

Excel's Ribbon User Interface

When you launch Excel 2019, the Start screen similar to the one shown in Figure 1-1 opens. Here you can start a new blank workbook by clicking the Blank workbook template, or you can select any of the other templates shown as the basis for your new spreadsheet. If none of the templates shown in the Start screen suits your needs, you can search for templates online. After you've worked with Excel for some time, the Start screen also displays a list of recently opened workbooks that you can reopen for further editing or printing.

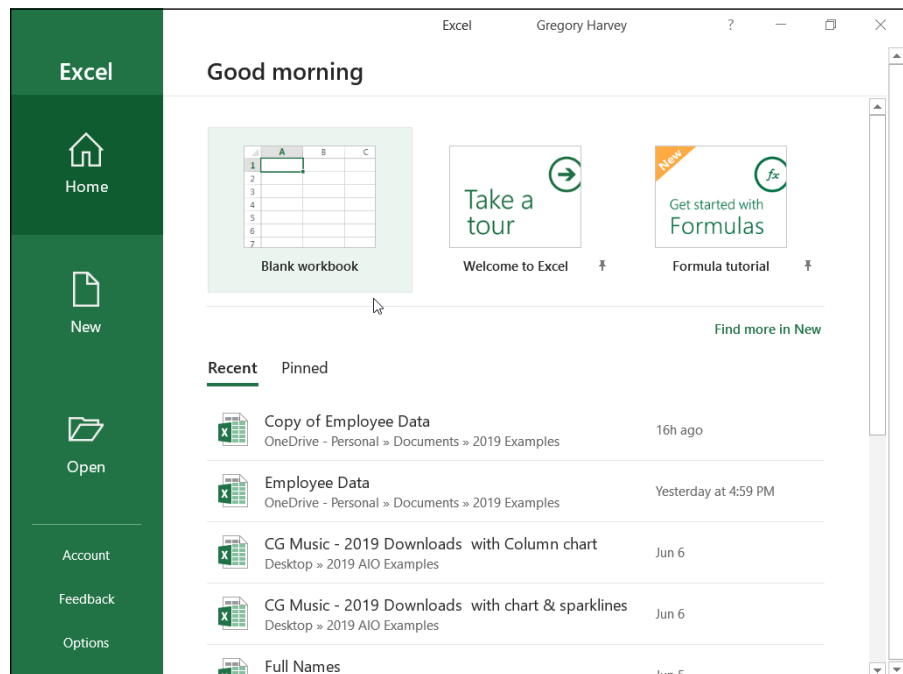


FIGURE 1-1: The Excel 2019 Start screen enables you to open a new blank workbook or a recently opened workbook, or find a template to use as the basis for a new workbook.

When you select the Blank workbook template from the Excel 2019 Start screen, the program opens an initial worksheet (named Sheet1) in a new workbook file (named Book1) inside a program window like the one shown in Figure 1-2.

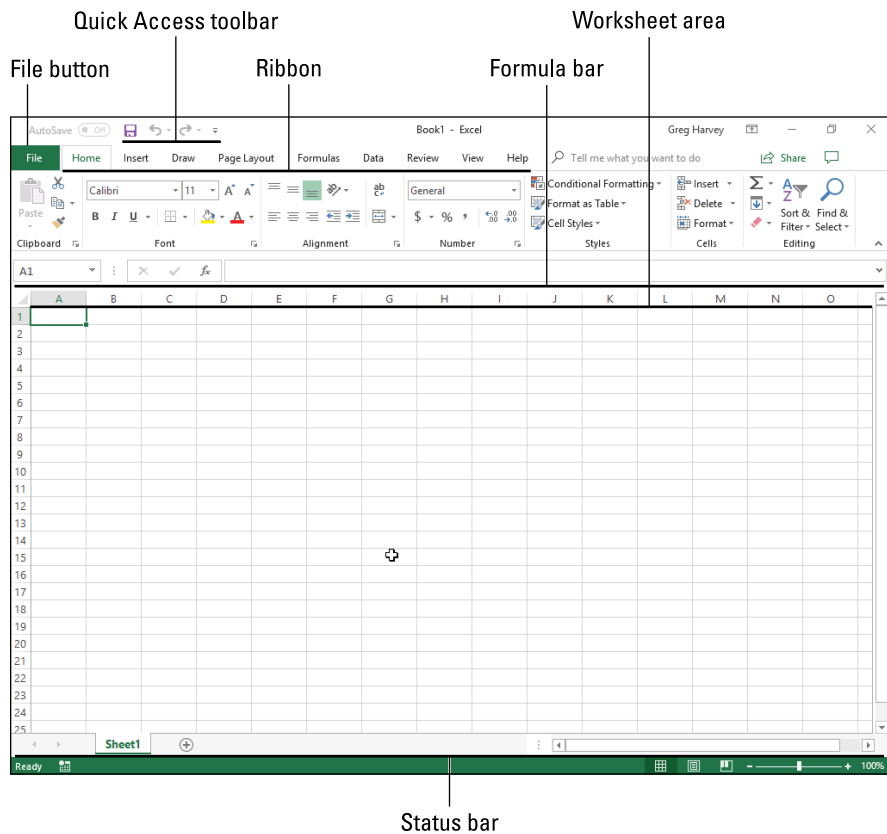


FIGURE 1-2:
The Excel 2019 program window that appears immediately after selecting the Blank Workbook template in the opening screen.

The Excel program window containing this worksheet of the workbook contains the following components:

- » **File** button that when clicked opens the Backstage view — a menu on the left that contains all the document- and file-related commands, including Info, New, Open (selected by default when you first launch Excel), Save, Save As, Print, Share, Export, Publish, and Close. Additionally, at the bottom, there's an Account option with User and Product information and an Options item that enables you to change many of Excel's default settings. Note that you can press Esc to exit the Backstage view and return to the normal worksheet view.
- » Customizable **Quick Access toolbar** that contains buttons you can click to perform common tasks, such as manually saving your work and undoing and redoing edits. This toolbar is on the left side and begins with the Save button in a new worksheet. The deactivated AutoSave button to its immediate left is automatically turned on after you manually save a workbook file in the cloud on OneDrive or a SharePoint website.
- » **Ribbon** that consists of a series of tabs, ranging from Home through Help. The tabs on the Ribbon contains the bulk of the Excel.

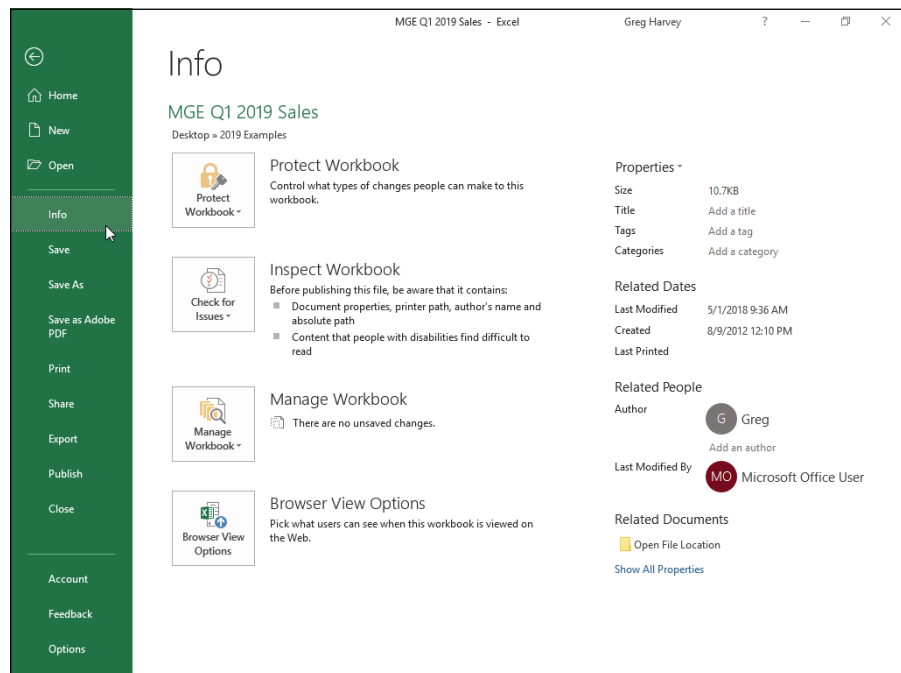
- » **Formula bar** that displays the address of the current cell along with the contents of that cell.
- » **Worksheet area** that contains the cells of the worksheet identified by column headings using letters along the top and row headings using numbers along the left edge; tabs for switching to a new worksheet; a horizontal scroll bar to move left and right through the sheet; and a vertical scroll bar to move up and down through the sheet.
- » **Status bar** that keeps you informed of the program's current mode and any special keys you engage and enables you to select a new worksheet view and to zoom in and out on the worksheet.

Going Backstage

To the immediate left of the Home tab on the Ribbon right below the AutoSave button and Quick Access toolbar, you find the File button.

When you select File, the Backstage view opens. This view contains a menu similar to the one shown in Figure 1-3. When you open the Backstage view with the Info option selected (Alt+F1), Excel displays at-a-glance stats about the workbook file you have open and active in the program.

FIGURE 1-3: Open Backstage view to get at-a-glance information about the current file, access all file-related commands, and modify the program options.



This information panel is divided into two panes. The pane on the left contains large buttons that enable you to modify the workbook's protection status, check the document before publishing, manage its versions, and determine which worksheets in the file are shown when the Excel workbook file is viewed in a web browser. The pane on the right contains a list of fields detailing the workbook's various document Properties, some of which you can change (such as Title, Tags, Categories, Author, and Last Modified By), and many of which you can't (such as Size, Last Modified, Created, and so forth).

Below the Info option, you find the commands (New, Open, Save, Save As, Save as Adobe PDF, Print, Share, Export, Publish, and Close) that you commonly need for working with Excel workbook files. Near the bottom, the File tab contains an Account option that, when selected, displays an Account panel in the Backstage view. This panel displays user, connection, and Microsoft Office account information. Below the Account menu item, you find options to give Microsoft feedback about Excel 2019 as well as options that you can select to change the program's many default settings.



TIP

Select the Open option to open an Excel workbook you've previously worked on for more editing. When you select Open, Excel displays a panel with a list of all the workbook files recently opened in the program. To re-open a particular file for editing, all you do is click its filename in this list.



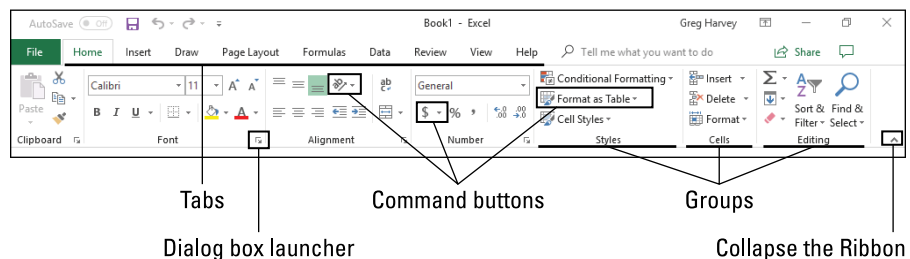
REMEMBER

To close the Backstage view and return to the normal worksheet view, you select the Back button at the very top of the menu or simply press Esc on your keyboard.

Using the Excel Ribbon

The Ribbon (shown in Figure 1-4) groups the most commonly used options needed to perform particular types of Excel tasks.

FIGURE 1-4: Excel's Ribbon consists of a series of tabs containing command buttons arranged into different groups.



To do this, the Ribbon uses the following components:

- » **Tabs** for each of Excel's main tasks that bring together and display all the commands commonly needed to perform that core task.
- » **Groups** that organize related command buttons into subtasks normally performed as part of the tab's larger core task.
- » **Command buttons** within each group that you select to perform a particular action or to open a gallery from which you can click a particular thumbnail.
Note: Many command buttons on certain tabs of the Ribbon are organized into mini-toolbars with related settings.
- » **Dialog Box launcher** in the lower-right corner of certain groups that opens a dialog box containing a bunch of additional options you can select. (Note that you can mouse over this button to display a preview of the dialog box.)



TIP

To display more of the Worksheet area in the program window, collapse the Ribbon so that only the names of its tabs are displayed by simply clicking the Collapse the Ribbon button on the right side above the vertical scroll bar. You can also double-click (or double-tap on a touchscreen) any one of the Ribbon's tabs, or press Ctrl+F1 on your keyboard. To once again pin the Ribbon in place so that all the command buttons on each of its tabs are always displayed in the program window, double-click (or double-tap) any one of the tabs, or press Ctrl+F1 a second time. You can also do this by selecting the Pin the Ribbon button (whose icon looks just like a pin) that replaces the Unpin the Ribbon button and appears whenever you temporarily activate a tab to use its command buttons.



REMEMBER

When you work in Excel with the Ribbon collapsed, the Ribbon expands each time you activate one of its tabs to show its command buttons, but that tab stays open only until you select one of the command buttons or select an element in the worksheet. The moment you select a command button, Excel immediately minimizes the Ribbon again and just displays its tabs. Note that you can also use the Show Tabs and Show Tabs and Commands options on the Ribbon Display Options button's drop-down menu to switch between collapsing the Ribbon to its tabs and restoring its commands again.



TIP

If you really want to maximize the Worksheet area in Excel 2019, you can use its Auto-Hide Ribbon command to remove the display of the Quick Access toolbar plus the names of the Ribbon's tabs and commands. To do this, click or tap the Ribbon Display Options button (to the immediate left of the Minimize button in the upper-right corner of the screen) and select Auto-Hide Ribbon command at the top of the drop-down menu. With this mode turned on, you simply need to click or tap anywhere in the blank area of the screen above the Formula bar to display the tab names and their commands.