

Contents at a Glance

Introduction	1	Part III: Handy Ways to Format and Present Worksheet Data	85
Part I: Making Excel Work Your Way	5	Technique 17: Instant Range Formatting	87
Technique 1: Customizing the Excel Screen Display	7	Technique 18: Style Formatting Magic	92
Technique 2: Customizing the Excel Menus and Toolbars	13	Technique 19: Controlling When Certain Formats Are Used	97
Technique 3: Perfecting Your Spreadsheet Workspace	19	Technique 20: Customizing Number Formats	102
Technique 4: Saving Your Worksheets So You Can Find Them	22	Technique 21: Dazzling Alignments for Data Entries	111
Technique 5: Tailoring Excel's Error Checking to Your Needs	27	Technique 22: Charting Data in a Snap	117
Technique 6: Utilizing Excel's Editing Settings	31	Technique 23: Chart Customization Tricks	123
Technique 7: Streamlining Excel Program Startup	36	Part IV: Worksheet Formula Timesavers	129
Technique 8: Saving Time with Excel Add-ins	40	Technique 24: Efficient Formula Copying	131
Part II: Quick Worksheet Creation Tricks	45	Technique 25: Speeding Up Table Creation with Array Formulas	137
Technique 9: Navigating the Worksheet in a Snap	47	Technique 26: Using Range Names	141
Technique 10: Making the Most Efficient Cell Selections	53	Technique 27: Smarter Formula Construction	148
Technique 11: Speeding Through Long Data Entries with AutoCorrect	58	Technique 28: Trapping Those Terrible Errors	154
Technique 12: Data Entry Tricks	62	Technique 29: Eliminating Errors with Error Tracing	158
Technique 13: Speeding Up Data Entry with AutoFill	67	Technique 30: Creating Efficient Date and Time Formulas	164
Technique 14: Ensuring Accurate Data Entries with Data Validation	72	Part V: Worksheet Editing Timesavers	169
Technique 15: All Aboard the Numerical Entry Express!	78	Technique 31: Quickly Finding the Workbook You Want to Edit	171
Technique 16: Verifying Entries with Text to Speech	82	Technique 32: Controlling the Worksheet Window Display	177
		Technique 33: Managing Worksheet Windows	182
		Technique 34: Quick and Easy Insertion and Deletion	187

Technique 35: Outline and Subtotal Magic	191
Technique 36: Consolidating Data from Different Worksheets	195
Technique 37: Editing with Search & Replace and Spell Check	199

Part VI: Tips for Printing, Sharing, and Reviewing Workbooks 205

Technique 38: Spreadsheet Security	207
Technique 39: Printing Tricks for Flawless Reports	219
Technique 40: Sharing Data with Other Office Programs	230
Technique 41: Sharing Workbooks on a Network	238
Technique 42: Sending Workbooks Out for Review	247

Part VII: Streamlining Data Listing and Data Analysis 253

Technique 43: Adding and Editing Data Lists with the Data Form	255
Technique 44: Sorting Worksheet Data	261
Technique 45: Quick and Easy Basic Data List Filtering	267
Technique 46: More Data List Filtering plus Statistical Analysis	272
Technique 47: Doing What-if Analysis in a Snap with Data Tables	280
Technique 48: Easy What-if Analysis through Scenarios and Goal Seeking	284
Technique 49: Summarizing Data with Pivot Tables and Pivot Charts	291

Part VIII: Internet-Related Timesavers 301

Technique 50: Saving Worksheets as Web Pages	303
Technique 51: Importing Web Data into the Worksheet	310
Technique 52: Using Hyperlinks to Make Jumps in Workbooks	317

Part IX: The Scary (Or Fun) Stuff 323

Technique 53: Instant Lists in Excel 2003	325
Technique 54: Sharing Excel Workbooks and Lists with a SharePoint Web Site	330
Technique 55: Entering Data and Issuing Commands by Voice	337
Technique 56: Sprucing Up Your Spreadsheets with Graphics	342
Technique 57: Doing Automated Table Lookups	349
Technique 58: Using Text Formulas for Fun and Profit	355
Technique 59: Creating Queries to Import Data from an External Database	358
Technique 60: Automating Repetitive Tasks with Macros	365
Technique 61: Creating Custom Functions to Use in Your Worksheets	374

Index 379

Table of Contents

Introduction	1	A Toolbar and Menu of Your Own	16
Saving Time with This Book	1	Adding Macros and Links to Toolbars and Menus	17
Foolish Assumptions	2	Technique 3: Perfecting Your Spreadsheet Workspace	19
What's In This Book	2	Saving Your Workspace	19
<i>Part I: Making Excel Work Your Way</i>	2	Opening a Workspace Whenever Excel Launches	20
<i>Part II: Quick Worksheet Creation Tricks</i>	2	Technique 4: Saving Your Worksheets So You Can Find Them	22
<i>Part III: Handy Ways to Format and Present Worksheet Data</i>	2	Modifying the Default File Location	23
<i>Part IV: Worksheet Formula Timesavers</i>	3	Saving New Files with Summary Information	24
<i>Part V: Worksheet Editing Timesavers</i>	3	Changing the AutoRecover Settings	25
<i>Part VI: Tips for Printing, Sharing, and Reviewing Workbooks</i>	3	Technique 5: Tailoring Excel's Error Checking to Your Needs	27
<i>Part VII: Streamlining Data Listing and Data Analysis</i>	3	Modifying the Error Checking Settings	28
<i>Part VIII: Internet-Related Timesavers</i>	3	Suppressing All Error Indicators	29
<i>Part IX: The Scary (Or Fun) Stuff</i>	3	Hiding Error Values On-Screen and in Print	29
Icons Used in This Book	4	Technique 6: Utilizing Excel's Editing Settings	31
Where to Go from Here	4	Putting the Cell Pointer in the Right Direction	32
Part 1: Making Excel Work Your Way	5	Completely Turned Off to AutoComplete	32
Technique 1: Customizing the Excel Screen Display	7	Doing the Drag-and-Drop Thing	33
Standard Display Settings	8	<i>Please make room for me</i>	33
Switching to Full Screen	8	<i>When drag-and-drop flops</i>	33
Customizing the Worksheet Display	9	Doing Direct Cell Editing	34
<i>Setting a new standard column width</i>	9	Technique 7: Streamlining Excel Program Startup	36
<i>Setting a new standard row height</i>	10	Excel Desktop Shortcut	36
<i>Modifying the number of sheets in a workbook</i>	10	Adding Excel to the Quick Launch Toolbar	37
<i>Customizing the worksheet gridlines</i>	11	Pinning Excel to the Start Menu	38
Saving Custom Display Settings	11	Launching Excel on Windows Startup	39
<i>Creating a template</i>	11	Technique 8: Saving Time with Excel Add-ins	40
<i>Using a template</i>	12	Installing Add-ins	40
Technique 2: Customizing the Excel Menus and Toolbars	13	Using the Built-in Add-ins	41
Showing the Toolbars and Menus in All Their Glory	13	Getting Online Add-ins	42
Toolbars and Menus Made to Order	14		

Part II: Quick Worksheet Creation Tricks

45

Technique 9: Navigating the Worksheet in a Snap

47

Saving the Cell Pointer's Position 47

Going Direct 48

Leaping through data ranges and hopping over blanks 48

Going right to the last cell in a sheet 49

Zippering through the sheets 50

A Little Go To Magic 51

Zooming Out to Get the Big Picture 52

Technique 10: Making the Most Efficient Cell Selections

53

AutoSelect at Your Service 54

Go To It and Select It 55

Going for the Big Selections 56

Technique 11: Speeding Through Long Data Entries with AutoCorrect

58

Setting the Correct AutoCorrect Settings 58

Losing the Links 59

Taming the Smart Tags 60

Technique 12: Data Entry Tricks

62

Making the Same Entry in Many Places 62

Putting the Wraps on the Data Entry 63

Let's Do It as a Group! 65

Technique 13: Speeding Up Data Entry with AutoFill

67

Getting Your Fill of AutoFill 67

Using AutoFill to generate a sequentially numbered series 69

Copying an entry instead of filling in a series 69

Incrementally Speaking 70

Fill Lists Made to Order 71

Technique 14: Ensuring Accurate Data Entries with Data Validation

72

Only the Valid Need Apply 72

Data entries from a list 73

Copying data validation settings 74

Finding cells using data validation 75

Information Please! 75

Warnings to Make Them Wary 76

Technique 15: All Aboard the Numerical Entry Express!

78

Taking Advantage of the Numeric Keypad 78

Putting the Decimal Places at Your Service 79

Number Please! 80

Technique 16: Verifying Entries with Text to Speech

82

"Can You Hear Me Now?" 82

Speak on Enter 83

Reading by columns and rows 83

Modifying the Text to Speech Settings 84

Part III: Handy Ways to Format and Present Worksheet Data

85

Technique 17: Instant Range Formatting

87

Head-to-Toe Table Formatting with AutoFormat 87

Getting Artistic with the Format Painter 89

Cutting and Pasting Formats Only 90

Technique 18: Style Formatting Magic

92

Styling 93

Applying predefined styles in a spreadsheet 93

Customizing predefined styles 94

Creating Styles of Your Own 94

Merging Styles from One Book into Another 95

Technique 19: Controlling When Certain Formats Are Used

97

Formats to Suit Every Condition 97

When two conditions are better than one 99

Finding cells with conditional formatting 100

Making Your Outstanding Errors Stand Out 100

Technique 20: Customizing Number Formats

102

Creating Custom Number Formats 102

Custom formats that conditionally format entries 105

Custom formats that hide certain entries 106

Assigning Custom Number Formats to Styles and Toolbars	107		
Applying Euro Currency Formats	109		
Technique 21: Dazzling Alignments for Data Entries	111		
Line Me Up	111		
<i>Indenting data entries</i>	112		
<i>Using nonstandard vertical alignment</i>	113		
<i>Rotating text entries</i>	113		
Getting Your Text under Control	114		
<i>Making text wrap within a cell</i>	114		
<i>Shrinking the text to fit within a cell</i>	115		
<i>Centering a heading across columns</i>	116		
Technique 22: Charting Data in a Snap	117		
Instant Charts	117		
Chart Wizard Magic	119		
Technique 23: Chart Customization Tricks	123		
Getting the Chart Titles and Headings in Balance	123		
Scaling and Formatting the Chart Axes	125		
Tricks for Making the Plotted Data Easier to Decipher	127		
Part IV: Worksheet Formula Timesavers	129		
Technique 24: Efficient Formula Copying	131		
Going from Relative to Absolute	131		
When It's Copy Time	133		
<i>Making one-dimensional copies down or across</i>	134		
<i>Making two-dimensional copies both down and across</i>	135		
Technique 25: Speeding Up Table Creation with Array Formulas	137		
A Quick Look at Array Ranges	137		
Hurray for Array Formulas!	138		
Editing Array Formulas	140		
Technique 26: Using Range Names	141		
Name That Range!	141		
<i>Creating names from row and column headings</i>	142		
<i>Assigning range names that span different sheets</i>	143		
Assigning Range Names to Constants	144		
Using Your Range Names in Formulas	144		
<i>Using range names in new formulas</i>	145		
<i>Assigning range names to existing formulas</i>	145		
Technique 27: Smarter Formula Construction	148		
Pointing Out Cell References in Formulas	148		
Putting the Insert Function Feature at Your Service	150		
Using Labels Instead of Cell References in Formulas	152		
Technique 28: Trapping Those Terrible Errors	154		
If I Were a Logical Function	154		
Trapping Division by Zero Errors	155		
Trapping All Types of Error Values	156		
Technique 29: Eliminating Errors with Error Tracing	158		
Formula Auditing 101	158		
Tracing Formula Precedents	160		
Tracing Formula Dependents	161		
Finding the Original Error and Fixing Its Formula	162		
Technique 30: Creating Efficient Date and Time Formulas	164		
The Deal with Dates and Times	164		
You Do the Date Math!	165		
When Your Time Is Up	166		

Part V: Worksheet Editing Timesavers 169**Technique 31: Quickly Finding the Workbook You Want to Edit 171**

Opening Recently Used Files	171
Making the Most of the File Search Task Pane	172
<i>Doing a basic file search</i>	172
<i>Conducting the file search and using the results</i>	173
<i>Doing an advanced file search</i>	174
Searching for Files in the Open Dialog Box	175

Technique 32: Controlling the Worksheet Window Display 177

Zooming In for the Edits	177
Frozen Panes in My Windows	179
A Worksheet with a Custom View	180

Technique 33: Managing Worksheet Windows 182

Opening Panes in the Worksheet Window	182
Comparing Sheets in the Same Workbook	184
Comparing Sheets in Separate Workbooks	185

Technique 34: Quick and Easy Insertion and Deletion 187

Inserting and Deleting Cells in an Existing Range	187
Inserting and Deleting Rows and Columns	188
Inserting and Deleting Worksheets	190

Technique 35: Outline and Subtotal Magic 191

Adding Outline Levels to a Table or List	191
Subtotaling a Table or List	193

Technique 36: Consolidating Data from Different Worksheets 195

Consolidating Data by Position	195
Consolidating Data by Category	197
Linking Consolidated Data	197

Technique 37: Editing with Search & Replace and Spell Check 199

Using Find and Replace	199
Eliminating Typing Errors with Spell Check	201
<i>Customizing the Spell Check settings</i>	202
<i>Adding words to a custom dictionary</i>	203

Part VI: Tips for Printing, Sharing, and Reviewing Workbooks 205**Technique 38: Spreadsheet Security 207**

Assigning a Password for Opening a Workbook	207
<i>Opening a password-protected workbook</i>	209
<i>Changing or deleting passwords</i>	210
Protecting the Worksheet Against Unwanted Changes	211
<i>Unlocking cells for data entry</i>	211
<i>Turning on worksheet protection</i>	212
<i>Removing protection from a worksheet</i>	213
<i>Enabling cell range editing by certain users</i>	214
<i>Protecting the structure of the workbook file</i>	216
Hiding Sensitive Worksheet Data	217

Technique 39: Printing Tricks for Flawless Reports 219

Making Last-Minute Adjustments with Print Preview	219
<i>Manipulating the margins and column widths</i>	221
<i>Manipulating the page settings</i>	221
Controlling Bad Page Breaks	222
<i>Using the Page Break Preview feature</i>	223
<i>Changing the scale of the printing</i>	224
Adding Headings to Your Report	225
<i>Headers and footers made to order</i>	225
<i>Print titles on every page</i>	226
Printing the Formulas in the Report	227
Printing the Charts in the Report	228

Technique 40: Sharing Data with Other Office Programs 230

Swapping Data via the Clipboard	230
Importing Text Files into Excel	232
Embedding Excel Data in Other Office Documents	235
<i>Embedded worksheet data</i>	235
<i>Linking worksheet data</i>	237

Technique 41: Sharing Workbooks on a Network 238

Let's All Learn to Share	238
<i>Editing changes not available to a shared workbook</i>	239
<i>Sharing a workbook</i>	239

<i>Setting your sharing options</i>	240	Technique 46: More Data List Filtering plus Statistical Analysis	272
<i>Turning on change tracking</i>	241	Putting the Advanced Filter in Service	272
Merging Changes from Different Users	243	<i>Specifying filtering criteria</i>	274
<i>Conflict resolution worksheet style</i>	243	<i>Setting up AND and OR filtering criteria</i>	274
<i>Accepting or rejecting highlighted changes</i>	244	<i>Setting up calculated filtering criteria</i>	276
<i>Turning off file sharing</i>	245	Getting Data List Statistics	277
Merging Different Copies of a Shared Workbook	245	Technique 47: Doing What-if Analysis in a Snap with Data Tables	280
<i>Distributing the copies</i>	245	Creating a One-Variable Data Table	280
<i>Merging the changes</i>	246	Creating a Two-Variable Data Table	282
Technique 42: Sending Workbooks Out for Review	247	Technique 48: Easy What-if Analysis through Scenarios and Goal Seeking	284
Getting a Workbook Ready for Review	247	Exploring Different Scenarios	284
<i>Getting your two cents in</i>	248	Reaching a Target with Goal Seeking	288
<i>Comments: Now you see them, now you don't</i>	248	<i>Performing goal seeking</i>	288
<i>Editing and formatting comments</i>	248	<i>Goal seeking graph style</i>	289
<i>Deleting comments in a worksheet</i>	249	Technique 49: Summarizing Data with Pivot Tables and Pivot Charts	291
Sending Out a Workbook for Review	250	Creating Pivot Tables	291
<i>Replying with changes</i>	250	<i>Pivoting the fields in the table</i>	294
<i>Merging changes into the original workbook</i>	250	<i>Formatting the values in the pivot table</i>	295
Part VII: Streamlining Data Listing and Data Analysis	253	<i>Selecting new summary functions</i>	296
Technique 43: Adding and Editing Data Lists with the Data Form	255	<i>Creating a calculated field for the pivot table</i>	297
Creating a New Data List and Data Form	255	Creating a Pivot Chart	298
<i>Adding new records with the data form</i>	257	Part VIII: Internet-Related Timesavers	301
<i>Finding records with the data form</i>	258	Technique 50: Saving Worksheets as Web Pages	303
<i>Editing records in the data form</i>	259	Saving Worksheets as Web Pages	303
<i>Removing records from the data list with the data form</i>	260	<i>Opening your new Web page at the time you save it</i>	305
Technique 44: Sorting Worksheet Data	261	<i>Saving all the worksheets in a workbook</i>	305
Don't Be Out of Sorts	261	<i>Saving just part of a worksheet</i>	306
<i>Sorting records in a data list</i>	262	<i>Adding data to an existing Web page</i>	306
<i>Sorting on a record number field to restore a list to its original order</i>	264	Creating Interactive Web Pages	307
<i>Sorting a list on more than three key fields</i>	264		
Sorting the Field Names in a Data List	265		
Technique 45: Quick and Easy Basic Data List Filtering	267		
AutoFilter Basics	267		
<i>Making it into the top-ten list</i>	268		
<i>Saving subsets of a data list as custom views</i>	269		
Customizing the AutoFilter Settings	270		

Technique 51: Importing Web Data into the Worksheet	310	Technique 56: Sprucing Up Your Spreadsheets with Graphics	342
Capturing Information for the Spreadsheet with Web Queries	310	Jazz It Up with Clip Art	342
Importing XML Data into a Worksheet	313	Adding Images from Graphics Files	343
Technique 52: Using Hyperlinks to Make Jumps in Workbooks	317	Drawing Objects for the Spreadsheet	344
Adding Hyperlinks to a Worksheet	317	<i>Drawing various shapes</i>	345
Following Links in a Worksheet	320	<i>Using text boxes as callouts</i>	346
Editing Links in a Worksheet	321	<i>Making a statement with WordArt</i>	346
Creating Hyperlinks for Custom Menus and Toolbars	321	<i>Drawing diagrams and organization charts</i>	347
Part IX: The Scary (Or Fun) Stuff	323	Technique 57: Doing Automated Table Lookups	349
Technique 53: Instant Lists in Excel 2003	325	Looking Up a Single Table Value	349
Creating an Excel 2003 List	325	<i>Performing a vertical table lookup</i>	350
<i>Converting an existing list into an Excel list</i>	326	<i>Performing a horizontal lookup</i>	351
<i>Creating an Excel list from scratch</i>	327	Doing a Two-Way Lookup in a Data Table	352
Sorting and Filtering the List	327	Technique 58: Using Text Formulas for Fun and Profit	355
Toggling the List's Total Row On and Off	328	Getting Right on the Case	355
Easy List Editing	328	Joining Separate Text Entries Together	356
<i>Inserting or deleting rows and columns</i>	329	Replacing Text Formulas with Their Results	357
<i>Converting a list back into a regular cell range</i>	329	Technique 59: Creating Queries to Import Data from an External Database	358
<i>Deleting a list</i>	329	Setting Up the Data Source Definition	358
Technique 54: Sharing Excel Workbooks and Lists with a SharePoint Web Site	330	Creating the Database Query	360
Adding Excel Spreadsheets to the SharePoint Site	330	Technique 60: Automating Repetitive Tasks with Macros	365
<i>Opening the spreadsheets on the SharePoint site</i>	332	Recording and Playing Back Macros	365
<i>Adding a list of your spreadsheets to SharePoint site home page</i>	333	<i>Recording the macro</i>	366
Publishing Lists to the SharePoint Site	334	<i>Playing back the macro</i>	368
<i>Publishing an Excel list on a SharePoint site</i>	334	Editing Macros in the Visual Basic Editor	369
<i>Synchronizing list data</i>	336	<i>Modifying the settings for VBA properties</i>	370
Technique 55: Entering Data and Issuing Commands by Voice	337	<i>Getting user input by adding a custom dialog box</i>	371
Hands-Free Data Entry	337	Technique 61: Creating Custom Functions to Use in Your Worksheets	374
Just Tell Me What to Do	339	Creating Custom Functions	374
<i>Choosing menu items, dialog box options, and toolbar buttons</i>	340	Saving Custom Functions in an Excel Add-in	376
<i>Telling the cell pointer "where to go"</i>	340	Index	379