Introduction

The most widely used spreadsheet application in the world, Excel is a key part of the Microsoft Office suite of applications. You can use Excel for anything from a small spreadsheet of household finances to monster databases of all your company's products, customers, and sales. You can use Excel either on its own or together with the other Office applications.

Excel 2003 builds on the many previous versions of Excel to deliver powerful functionality and many new features along with a slick and easy-to-use interface. If you're new to Excel, you've got a large amount to learn. If you're coming to Excel 2003 as an experienced user of earlier versions, you've still got plenty to learn. But either way, this book will get you up to speed quickly.

Who Is This Book For?

This book is designed to help beginning and intermediate users get the most out of Excel 2003 in the shortest possible time. If you fall into either of those categories, you'll benefit from this book's comprehensive coverage, focused approach, and helpful advice. If you're an Excel expert seeking super-advanced coverage, look elsewhere.

What Does This Book Cover?

Here's what this book covers:

- Chapter 1, "Get Started with Excel," shows you how to launch Excel in the many ways that Windows provides and how to navigate the main components of the Excel screen. You'll also learn what workbooks and worksheets are, how to select objects, and how to get help on using Excel.
- Chapter 2, "Configure Excel to Suit Your Working Needs," discusses how to improve your view of worksheets by splitting the view, displaying extra windows, hiding and redisplaying windows, zooming the view, and freezing particular rows and columns so they never move while everything else scrolls. You'll learn how to set the most important of Excel's many options to customize its behavior, how to load add-ins when you need the extra functionality they provide, and how to configure AutoCorrect to save you time and effort.

- Chapter 3, "Create Spreadsheets and Enter Data," starts by explaining how to create a new workbook in any of several convenient ways and how to save it, and then shows you how to create your own templates to use as the basis for future worksheets. You'll also find out how to enter data in your worksheets manually and by using Excel's AutoFill feature, how to use Excel's Find and Replace features, and how to recover your work if Excel crashes.
- Chapter 4, "Format Worksheets for Best Effect," discusses how to manipulate the worksheets in a workbook, and then moves on to cover formatting cells and ranges using the many types of formatting that Excel supports.
- Chapter 5, "Add Graphics and Drawings to Worksheets," shows you how to add visual impact to your worksheets by including pictures, shapes, diagrams, and other graphical objects. This chapter also explains how Excel's drawing layer handles graphical objects and how you can position, resize, and format objects.
- Chapter 6, "Check, Lay Out, and Print Worksheets," explains how to get your worksheets into shape for printing and how to print them. Topics covered include checking spelling, setting the print area, specifying the paper size and orientation, creating headers and footers, and using Print Preview to avoid wasting paper. You'll also learn to set and adjust page breaks and specify which extra items to include in the printout.
- Chapter 7, "Perform Calculations with Functions," covers what functions are and how you enter them in your worksheets. You'll also learn about the nine categories of functions that Excel provides, with examples of some of the most useful functions in each category.
- Chapter 8, "Create Formulas to Perform Custom Calculations," starts by teaching you the basics of formulas in Excel and the components from which formulas are constructed. After that, you'll learn how Excel handles numbers, and how to create both regular formulas and array formulas. The end of the chapter shows you how to troubleshoot formulas when they don't work correctly.
- Chapter 9, "Organize Data with Excel Databases," shows you how to create Excel databases, enter data, and sort and filter the data to find the information you need. This chapter also covers how to link an Excel worksheet to an external database (for example, an Access database) so that you can extract data to an Excel worksheet and manipulate it there, and how to perform web queries to bring web data into worksheets.
- Chapter 10, "Outline and Consolidate Worksheets," discusses how to outline a worksheet so that you can collapse it to show only the parts you need and how to consolidate multiple worksheets into a single worksheet. Both outlining and consolidation can save you welcome amounts of time.
- Chapter 11, "Analyze Data Using PivotTables and PivotCharts," explains how to use Excel's powerful PivotTables and dynamic PivotCharts to manipulate your data so that you can draw conclusions from it. You'll also learn how to create a conventional (static) chart from PivotTable data.
- Chapter 12, "Solve Problems by Performing What-If Analysis," discusses how to create data tables that enable you to assess what impact one or two variables have on a calculation.

This chapter then describes how to use Excel's scenarios to explore the effects of alternative data sets within the same worksheet, how to solve one-variable problems using Goal Seek, and how to use the Solver to solve multi-variable problems.

- Chapter 13, "Create Effective Charts to Present Data Visually," covers how to use Excel's chart features to create compelling charts. You'll learn how to create charts by using the Chart Wizard, how to choose the right type of chart for your data, and how to edit and format charts to give them the effect you need. You'll also learn how to copy formatting you've applied to one chart to another chart, how to unlink a chart from its data source, how to print your charts, and how to add custom chart types to Excel's existing types.
- Chapter 14, "Share Workbooks and Collaborate with Colleagues," explains the range of features that Excel provides for sharing workbooks, protecting them from types of changes you don't want others to make, and collecting and reviewing input from your colleagues to produce a final version of a workbook. Among other things, you'll learn how to work with comments, how to send workbooks via e-mail, how to track changes to a workbook, and how to merge multiple workbooks into a single workbook.
- Chapter 15, "Using Excel's Web Capabilities," describes Excel's key features for creating and working with Web data. You'll learn when to save files directly to intranet sites and Internet servers, how to save a worksheet or workbook as a web page, how to configure Excel's web options, and how to work in an interactive web workbook. If your company uses XML for data exchange, you can also learn how to use Excel's powerful XML capabilities, including external schemas.
- Chapter 16, "Use Excel with the Other Office Applications," discusses how to transfer data smoothly and easily among Excel and the other Office applications (such as Word and PowerPoint). This chapter starts by discussing data transfer via the Clipboard, then covers embedding and linking, two different technologies for including a part of one document in another document. The end of the chapter explains how to insert Excel objects in Word documents and PowerPoint presentations, and how to insert Word objects and PowerPoint objects in worksheets.
- Chapter 17, "Customize Excel's Interface," describes how to customize Excel's toolbars and menus to put the commands you need at your fingertips while maximizing the amount of space available onscreen. This chapter is short, but it can save you considerable time and effort, so it's worth a visit.
- Chapter 18, "Use Macros to Automate Tasks," explains how to use Office's built-in Macro Recorder feature to record macros (sequences of commands) so you can perform them automatically later. To use macros, you must configure Excel's macro virus–protection mechanism, so you'll learn about that in this chapter as well.
- The Appendix lists the keyboard shortcuts you can use to make Excel do your bidding without touching the mouse.

NOTE

Excel 2003 runs on Windows XP and Windows 2000 (not on Windows Me, Windows 9x, or Windows NT). The illustrations in this book show how Excel looks with Windows XP's default interface, which is somewhat different than Windows 2000's interface. Looks aside, Excel's functionality is the same on both Windows XP and Windows 2000. However, you sometimes need to use different commands when working in Windows itself. For example, Windows XP's default Start menu is laid out differently than Windows 2000's Start menu, so where in Windows XP you launch Excel by choosing Start | All Programs | Microsoft Office | Microsoft Office Excel 2003, in Windows 2000 you choose Start | Programs | Microsoft Office | Microsoft Office Excel 2003.

Conventions Used in This Book

To make its meaning clear without using far more words than necessary, this book uses a number of conventions, three of which are worth mentioning here:

- Note, Tip, and Caution paragraphs highlight information you should pay extra attention to.
- The pipe character or vertical bar denotes choosing an item from a menu. For example, "choose File | Open" means that you should pull down the File menu and select the Open item. Use the keyboard, mouse, or a combination of the two as you wish.
- Most check boxes have two states: *selected* (with a check mark in them) and *cleared* (without a check mark in them). This book tells you to *select* a check box or *clear* a check box rather than "click to place a check mark in the box" or "click to remove the check mark from the box." (Often, you'll be verifying the state of the check box, so it may already have the required setting—in which case, you don't need to click at all.) Some check boxes have a third state as well, in which they're selected but dimmed and unavailable. This state is usually used for options that apply to only part of the current situation.

NOTE

This book assumes you're using Internet Explorer rather than another browser. Given that Internet Explorer currently enjoys a market share of more than 95 percent at this writing (according to OneState.com, a web analytics firm), that's probably a reasonable assumption. But if you're using another browser, you'll see different behavior when you take an action that causes Excel to access your default browser.