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by Greg Harvey, PhD



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Microsoft® Office Excel® 2007 For Dummies®

Published by
Wiley Publishing, Inc.
111 River Street
Hoboken, NJ 07030-5774
www.wiley.com

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Published by Wiley Publishing, Inc., Indianapolis, Indiana

Published simultaneously in Canada

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Library of Congress Control Number: 2006934835

ISBN-13: 978-0-470-03737-9

ISBN-10: 0-470-03737-7

1B/QV/RS/QW/IN

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2



About the Author

Greg Harvey has authored tons of computer books, the most recent being *Excel Workbook For Dummies* and *Roxio Easy Media Creator 8 For Dummies*, and the most popular being *Excel 2003 For Dummies* and *Excel 2003 All-In-One Desk Reference For Dummies*. He started out training business users on how to use IBM personal computers and their attendant computer software in the rough and tumble days of DOS, WordStar, and Lotus 1-2-3 in the mid-80s of the last century. After working for a number of independent training firms, Greg went on to teach semester-long courses in spreadsheet and database management software at Golden Gate University in San Francisco.

His love of teaching has translated into an equal love of writing. *For Dummies* books are, of course, his all-time favorites to write because they enable him to write to his favorite audience: the beginner. They also enable him to use humor (a key element to success in the training room) and, most delightful of all, to express an opinion or two about the subject matter at hand.

Greg received his doctorate degree in Humanities in Philosophy and Religion with a concentration in Asian Studies and Comparative Religion last May. Everyone is glad that Greg was finally able to get out of school before he retired.

Dedication

An Erucolindo melindonya

Author's Acknowledgments

Let me take this opportunity to thank all the people, both at Wiley Publishing, Inc., and at Mind over Media, Inc., whose dedication and talent combined to get this book out and into your hands in such great shape.

At Wiley Publishing, Inc., I want to thank Andy Cummings and Katie Feltman for their encouragement and help in getting this project underway and their ongoing support every step of the way, and project editor Christine Berman. These people made sure that the project stayed on course and made it into production so that all the talented folks on the production team could create this great final product.

At Mind over Media, I want to thank Christopher Aiken for his review of the updated manuscript and invaluable input and suggestions on how best to restructure the book to accommodate all the new features and, most importantly, present the new user interface.

Publisher's Acknowledgments

We're proud of this book; please send us your comments through our online registration form located at www.dummies.com/register/.

Some of the people who helped bring this book to market include the following:

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Introduction

I'm very proud to present you with the completely revamped and almost totally brand new *Excel 2007 For Dummies*, the latest version of everybody's favorite book on Microsoft Office Excel for readers with no intention whatsoever of becoming spreadsheet gurus. The dramatic changes evident in this version of the book reflect the striking, dare I say, revolutionary changes that Microsoft has brought to its ever-popular spreadsheet program. One look at the new Ribbon command structure and all those rich style galleries in Excel 2007 and you know you're not in Kansas anymore 'cause this is *definitely* not your mother's Excel!

In keeping with Excel's more graphical and colorful look and feel, *Excel 2007 For Dummies* has taken on some color of its own (just take a gander at those color plates in the mid-section of the book) and now starts off with a definitive introduction to the new user Ribbon interface. This chapter is written both for those of you for whom Excel is a completely new experience and those of you who have had some experience with the old pull-down menu and multi-toolbar Excel interface who are now faced with the seemingly daunting task of getting comfortable with a whole new user experience.

Excel 2007 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 make no 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 on, 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 like a reference in which you start out by looking up the topic you need information about (in either the table of contents or the index), and then you 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). These sections are often 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 going to make only one assumption about you (let's see how close I get): You have access to a PC (at least some of the time) that is running either Windows Vista or Windows XP and on which Microsoft Office Excel 2007 is installed. However, having said that, I make no assumption that you've ever launched Excel 2007, let alone done anything with it.



This book is intended **ONLY** for users of Microsoft Office Excel 2007! If you're using any previous version of Excel for Windows (from Excel 97 through 2003), the information in this book will only confuse and confound you as your version of Excel works nothing like the 2007 version this book describes.

If you are working on an earlier version of Excel, please put this book down slowly and instead pick up a copy of *Excel 2003 For Dummies*, published by Wiley Publishing.

How This Book Is Organized

This book is organized in six parts (which gives you a chance to see at least six of those great Rich Tennant cartoons!). Each part contains two or more chapters (to keep the editors happy) that more or less go together (to keep you happy). Each chapter is further divided into loosely related sections that cover the basics of the topic at hand. You should not, however, get too hung up on following along with the structure of the book; ultimately, it doesn't matter at all if you find out how to edit the worksheet before you learn how to format it, or if 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 I: Getting In on the Ground Floor

As the name implies, in this part I cover 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 new Ribbon interface before you move on to how to create new worksheets in Chapter 2.

Part II: Editing Without Tears

In this part, I show how to edit spreadsheets to make them look good, as well as how to make major editing changes to them 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. And read Chapter 5 for the skinny on printing out your finished product.

Part III: 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 IV: Digging Data Analysis

This part consists of two chapters. Chapter 8 gives you an introduction to 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 you to Excel's vastly improved 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 V: Life Beyond the Spreadsheet

In Part V, 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 basic 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 VI: The Part of Tens

As is the tradition in *For Dummies* books, the last part contains lists of the top ten most useful and useless facts, tips, and suggestions. In this part, you find three chapters. Chapter 13 provides my top ten list of the best new features in Excel 2007 (and boy was it hard keeping it down to just ten). Chapter 14 gives you the top ten beginner basics you need to know as you start using this program. And Chapter 15 gives you the King James Version of the Ten Commandments of Excel 2007. With this chapter under your belt, how canst thou goest astray?

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).

Keyboard and mouse

Excel 2007 is a sophisticated program with a whole new and wonderful user interface, dubbed the Ribbon. In Chapter 1, I explain all about this new Ribbon interface and how to get comfortable with its new command structure. Throughout the book, you'll find Ribbon command sequences using the shorthand developed by Microsoft whereby the name on the tab on the Ribbon and the command button you select are separated by vertical bars as in:

Home | Copy

This is shorthand for 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's not already displayed) 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 vertical bars, as in:

Formulas | Calculation Options | Manual

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

Although you use the mouse and keyboard shortcut keys to move your way in, out, and around the Excel worksheet, you do have to take some time to enter the data so that you can eventually mouse around with it. Therefore, this book occasionally encourages you to type something specific into a specific cell in the worksheet. Of course, you can always choose not to follow the instructions. 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.

When Excel isn't talking to you by popping up message boxes, it displays highly informative messages in the status bar at the bottom of the screen. This book renders messages that you see on-screen like this:

Calculate

This is the message that tells you that Excel is in manual recalculation mode (after using the earlier Ribbon command sequence) and that one or more of the formulas in your worksheet are not up-to-date and are in sore need of recalculation.

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, 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. You have to hold down the Ctrl key as you type the hot letter (though again, type only lowercase letters unless you see the Shift key in the sequence, as in Ctrl+Shift+C).

Excel 2007 uses only one pull-down menu (the File pull-down menu) and one toolbar (the Quick Access toolbar). You open the File pull-down menu by clicking the Office Button (the four-color round button in the upper-left corner of Excel program window) or pressing Alt+F. The Quick Access toolbar with its four buttons appears to the immediate right of the Office Button.

All earlier versions of this book use *command arrows* to lead you from the initial pull-down menu, to the submenu, and so on, to the command you ultimately want. For example, if you need to open the File pull-down menu to get to the Open command, that instruction would look like this: Choose File⇨Open. This is the equivalent of Office Button | Open and Alt+FO. Commands using the older command arrow notation rather than the vertical bar notation occur only in the tables in Chapter 1 for people upgrading to Excel 2007 from older versions of Excel.

Finally, if you're really observant, you may notice a discrepancy between the capitalization of the names of dialog box options (such as headings, option buttons, and check boxes) as they appear in 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.

Special icons

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



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



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



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



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

Where to Go from Here

If you've never worked with a computer spreadsheet, I suggest that, right after getting your chuckles with the cartoons, you first go to Chapter 1 and find out what you're dealing with. And, if you're someone with some experience with earlier versions of Excel, I want you to head directly to the section, "Migrating to Excel 2007 from Earlier Versions" in Chapter 1, where you find out how to stay calm as you become familiar and, yes, comfortable with the new Ribbon user interface.

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.

Part I

Getting In on the Ground Floor

The 5th Wave

By Rich Tennant



"I've used several spreadsheet programs, but this is the best one for designing quilt patterns."

In this part . . .

One look at the Excel 2007 screen with its new Microsoft Office Button, Quick Access toolbar, and Ribbon, and you realize how much stuff is going on here. Well, not to worry: In Chapter 1, I break down the parts of the Excel 2007 Ribbon user interface and make some sense out of the rash of tabs and command buttons that you're going to be facing day after day after day.

Of course, it's not enough to just sit back and have someone like me explain what's what on the screen. To get any good out of Excel, you've got to start learning how to use all these bells and whistles (or buttons and boxes, in this case). That's where Chapter 2 comes in, giving you the lowdown on how to use some of the screen's more prominent buttons and boxes to get your spreadsheet data entered. From this humble beginning, it's a quick trip to total screen mastery.