



# Excel 2007

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Helen Dixon

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# Excel 2007

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THE **MANUAL**

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# Excel 2007

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THE **MANUAL**

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Helen Dixon

Apress®

## **Excel 2007: Beyond the Manual**

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*In memory of my father, Brian McGarry*



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# About the Author



**HELEN DIXON** has been working as an IT trainer for almost ten years, specializing in Microsoft Excel. She currently works for Queen's University in Belfast, training staff and students in IT and providing a consultancy service for staff. Her qualifications include a Bachelor's (with Honors) in Business Studies and a Master's in Computing and Information Systems and various IT qualifications, including MOS Excel 2002 Expert and ECDL

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**JUDITH M. MYERSON** is a systems architect and engineer. Her areas of interest include middleware technologies, enterprise-wide systems, database technologies, application development, web development, web services, object-oriented engineering, software engineering, network management, servers, security management, information assurance, standards, RFID technologies, and project management. Judith holds a Master of Science degree in engineering, as well as several certificates, and is a member of the IEEE organization. She has reviewed/edited a number of Apress books, including *Hardening Linux*, *Creating Client Extranets with SharePoint 2003*, and *Microsoft SharePoint: Building Office 2003 Solutions*.



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# Introduction



**T**he latest version of Microsoft Office brings with it some of the most notable enhancements to this popular suite of applications in years. *Excel 2007: Beyond the Manual* will help you to quickly adjust to the reconstructed interface of Microsoft Excel, directing you to the features that you have become accustomed to in previous versions of the software, as well as introducing you to more advanced components that you may not have tried yet and the new tools available with this release. Advanced techniques like consolidation, what-if analysis, PivotTable and PivotChart reports, and data validation are concisely described in straightforward steps, allowing you to quickly become confident with some of Excel's most powerful tools. The book also includes information on working with external data connections and a chapter on SharePoint and Excel Services to reflect the growing need for organizations to distribute information or provide access to spreadsheet models while maintaining control. Throughout the book I have included screenshots and examples to illustrate these features in operation along with timesaving shortcuts and tips to help you to increase your efficiency at producing professional-looking spreadsheets.

## Who This Book Is For

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This book is aimed at spreadsheet users who already have some familiarity with previous versions of Microsoft Excel and who want an overview of the modifications and new features being introduced with Microsoft Office 2007. The book is also intended to be a practical guide to anyone wishing to update their Excel skills and progress to the more advanced features of this essential spreadsheet application.

## How This Book Is Structured

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*Excel 2007: Beyond the Manual* can be used as a roadmap to becoming a power user in Excel or as handy reference to be called upon when required. Here is an outline of each chapter:

- Chapter 1, “What’s New in Excel 2007?”: The opening chapter of the book provides you with an overview of the modifications and enhancements you can expect to find in the latest version of Excel. The most notable difference when upgrading to Excel 2007 is the revamped interface, and this chapter will help to ease your transition from the traditional menus and toolbars to the new Ribbon. Advice is provided on how to work your way around the enlarged grid and where to find the tools and commands that you have become accustomed to in previous versions.
- Chapter 2, “Customizing Excel”: You can save yourself a lot of time by customizing features of Excel to match any personal preferences or requirements. In this chapter, you will learn how to customize the Quick Access toolbar and Status bar and store custom views. Useful techniques like freezing and splitting panes and organizing multiple windows are also covered.
- Chapter 3, “Excel Essentials”: This chapter covers some of the basic yet fundamental features of Excel that every user should be aware of. Data entry techniques like AutoFill and Custom Lists are covered here, along with the different ways you can paste data. You will also have an opportunity to become familiar with the new Name Manager for working with defined names. Finally, techniques for working with multiple worksheets are discussed, including how to enter and format data simultaneously on different worksheets.
- Chapter 4, “Styles and Formatting”: This chapter looks at the different ways you can format the data on a worksheet, starting with the new document themes and cell and table styles. The formatting of numerical data is equally important, and the chapter includes comprehensive instructions on how to use the built-in number formats and create your own custom formats. You will also learn about the advances made to conditional formatting with the introduction of the new color scales, data bars, and icon sets.
- Chapter 5, “Sorting and Filtering”: The increased functionality of the sort and filter features is discussed in this chapter. You will learn how to sort and filter by cell color or icon and discover how much easier it is to sort and filter by multiple items. The new easy-to-use date, text, and number filters are introduced, and for those who prefer something more complex, advanced filtering is also included.
- Chapter 6, “Analyzing Data Using Subtotals, Consolidations, and Tables”: There are various tools in Excel that can help you organize, structure, and summarize your data. This chapter covers the ways you can group and outline data and insert subtotals. It also explains how you can summarize data across different worksheets by consolidating by position, category, or formula. The section on tables will bring you up to speed with the advances made to the feature previously known as Excel Lists, allowing you to effectively work with data in tabular form.
- Chapter 7, “Creating PivotTables and PivotCharts”: As the title suggests, this chapter discusses how you can summarize and analyze data using a PivotTable or PivotChart report. Excel 2007 has made these versatile tools much more user-friendly, so if you haven’t tried them before, now’s your chance.

- Chapter 8, “Editing PivotTables and PivotCharts”: Following on from Chapter 7, this chapter will show you how to manipulate PivotTables and PivotCharts to summarize your data exactly how you want it. Topics covered include sorting and filtering data in PivotTables and PivotCharts, changing field settings, creating calculated fields and calculated items, and using PivotTable options.
- Chapter 9, “What-If Analysis”: Excel has a number of tools that can be used to answer what-if questions, including data tables, scenarios, Goal Seek, and Solver. This chapter shows you how you can make use of these tools to help you explore possible outcomes and make informed decisions.
- Chapter 10, “Formulas and Functions”: This chapter outlines the fundamentals of constructing formulas in Excel 2007, including the new Formula AutoComplete feature. It also examines some of the more commonly used functions in Excel and includes examples of financial, text, statistical, math and trigonometry, lookup and reference, and database functions.
- Chapter 11, “Charts”: Excel’s ability to graphically represent data using a gamut of chart types is a key feature of the application. This chapter takes you through the different stages of producing a chart, from choosing the appropriate type to editing and formatting the chart and adding analysis features.
- Chapter 12, “Adding Graphics to a Worksheet”: Microsoft Office 2007 introduces a new family of graphics for producing diagrams and lists known as SmartArt. Its use within Excel, along with the familiar graphics like AutoShapes, clip art, and WordArt, are the topic of this chapter.
- Chapter 13, “Preventing and Correcting Errors”: This chapter looks at how you can use data validation to prevent errors by controlling what can be entered in a cell. It also discusses the different types of errors that can occur in formulas and how you can use formula auditing to check and correct formulas.
- Chapter 14, “Protection and Security”: The different ways that you can protect worksheets and workbooks are discussed in this chapter. Adding digital signatures and changing security settings in the new Trust Center are also covered here.
- Chapter 15, “Getting Data from External Sources”: Excel data can come from various sources, including Microsoft Access, text files, or web pages. This chapter examines how you can import data from other sources and manage external data connections, allowing you access to data that is always up-to-date.
- Chapter 16, “Sharing, Reviewing and Distributing Data”: As workbooks are often the work of more than one user, this chapter examines how you can share a workbook, add comments for other users, and track the changes that have been made. It will also look at how you can prepare a document for printing or for distribution to others.
- Chapter 17, “SharePoint and Excel Services”: No book on Excel 2007 would be complete without mentioning Excel Services, the new technology that enables the distribution of workbooks via a browser using Microsoft Office SharePoint Server 2007. The final chapter provides you with an introduction to Excel Services and explores how it can be used to facilitate managed, secure access to organizational data.

