

Contents

Introduction	xxxix
Part I: Getting Started with Excel	1
Chapter 1: Introducing Excel	3
Understanding What Excel Is Used For.....	3
Understanding Workbooks and Worksheets.....	4
Moving around a Worksheet	4
Navigating with your keyboard	7
Navigating with your mouse	8
Using the Ribbon.....	9
Ribbon tabs	9
Contextual tabs.....	11
Types of commands on the Ribbon	12
Accessing the Ribbon by using your keyboard.....	12
Using Shortcut Menus	15
Customizing Your Quick Access Toolbar.....	16
Working with Dialog Boxes.....	18
Navigating dialog boxes	18
Using tabbed dialog boxes.....	19
Using Task Panes	20
Creating Your First Excel Workbook.....	20
Getting started on your worksheet	20
Filling in the month names	21
Entering the sales data	22
Formatting the numbers.....	23
Making your worksheet look a bit fancier.....	23
Summing the values.....	24
Creating a chart	25
Printing your worksheet.....	25
Saving your workbook	26
Chapter 2: Entering and Editing Worksheet Data	27
Exploring Data Types.....	27
Numeric values	27
Text entries	28

Formulas	29
Error values	29
Entering Text and Values into Your Worksheets.....	30
Entering numbers.....	30
Entering text.....	30
Using Enter mode.....	31
Entering Dates and Times into Your Worksheets.....	31
Entering date values.....	31
Entering time values.....	32
Modifying Cell Contents.....	32
Deleting the contents of a cell.....	32
Replacing the contents of a cell.....	33
Editing the contents of a cell.....	33
Learning some handy data-entry techniques	35
Automatically moving the selection after entering data	35
Selecting a range of input cells before entering data.....	36
Using Ctrl+Enter to place information into multiple cells simultaneously....	36
Changing modes	36
Entering decimal points automatically	36
Using AutoFill to enter a series of values.....	37
Using AutoComplete to automate data entry.....	37
Forcing text to appear on a new line within a cell	38
Using AutoCorrect for shorthand data entry.....	39
Entering numbers with fractions.....	40
Using a form for data entry.....	40
Entering the current date or time into a cell.....	41
Applying Number Formatting	42
Using automatic number formatting.....	43
Formatting numbers by using the Ribbon	43
Using shortcut keys to format numbers.....	43
Formatting numbers by using the Format Cells dialog box	45
Adding your own custom number formats	47
Using Excel on a Tablet.....	47
Exploring Excel's tablet interface.....	48
Entering formulas on a tablet	49
Introducing the Draw Ribbon.....	49
Chapter 3: Performing Basic Worksheet Operations	53
Learning the Fundamentals of Excel Worksheets	53
Working with Excel windows.....	53
Moving and resizing windows	54
Switching among windows	55
Closing windows	55
Activating a worksheet	56
Adding a new worksheet to your workbook	56

Deleting a worksheet you no longer need.....	57
Changing the name of a worksheet.....	57
Changing a sheet tab color	58
Rearranging your worksheets.....	58
Hiding and unhiding a worksheet	60
Controlling the Worksheet View	60
Zooming in or out for a better view.....	60
Viewing a worksheet in multiple windows	61
Comparing sheets side by side.....	62
Splitting the worksheet window into panes	63
Keeping the titles in view by freezing panes.....	63
Monitoring cells with a Watch Window.....	65
Working with Rows and Columns	66
Selecting rows and columns.....	66
Inserting rows and columns.....	66
Deleting rows and columns.....	68
Changing column widths and row heights	68
Changing column widths	69
Changing row heights.....	69
Hiding rows and columns	70
Chapter 4: Working with Excel Ranges and Tables	73
Understanding Cells and Ranges	73
Selecting ranges.....	74
Selecting complete rows and columns	75
Selecting noncontiguous ranges	75
Selecting multi-sheet ranges.....	76
Selecting special types of cells.....	79
Selecting cells by searching	81
Copying or Moving Ranges	83
Copying by using Ribbon commands	84
Copying by using shortcut menu commands	85
Copying by using shortcut keys.....	85
Copying or moving by using drag-and-drop	87
Copying to adjacent cells.....	88
Copying a range to other sheets	89
Using the Office Clipboard to paste.....	89
Pasting in special ways	91
Using the Paste Special dialog box	92
Performing mathematical operations without formulas.....	94
Skipping blanks when pasting.....	94
Transposing a range	94
Using Names to Work with Ranges	95
Creating range names in your workbooks	96
Using the Name box.....	96

Using the New Name dialog box.....	96
Using the Create Names from Selection dialog box	97
Managing names	99
Adding Comments to Cells.....	100
Showing comments.....	101
Replying to comments	102
Editing comments and replies	102
Deleting comments and replies	103
Resolving comment threads.....	103
Adding Notes to Cells	104
Showing notes	105
Formatting notes	106
Editing notes.....	108
Deleting notes	108
Working with Tables.....	108
Understanding a table's structure	108
The header row.....	109
The data body	109
The total row	109
The resizing handle.....	110
Creating a table	110
Adding data to a table	111
Sorting and filtering table data.....	111
Sorting a table	112
Filtering a table.....	114
Filtering a table with slicers.....	116
Changing the table's appearance	117
Chapter 5: Formatting Worksheets.	121
Getting to Know the Formatting Tools	121
Using the formatting tools on the Home tab.....	122
Using the Mini toolbar.....	123
Using the Format Cells dialog box.....	124
Formatting Your Worksheet.....	124
Using fonts to format your worksheet.....	124
Changing text alignment.....	127
Choosing horizontal alignment options	127
Choosing vertical alignment options	129
Wrapping or shrinking text to fit the cell	129
Merging worksheet cells to create additional text space.....	129
Displaying text at an angle.....	131
Using colors and shading.....	131
Adding borders and lines.....	132
Using Conditional Formatting.....	135

Specifying conditional formatting	135
Using graphical conditional formats	135
Using data bars	135
Using color scales	137
Using icon sets	138
Creating formula-based rules	139
Understanding relative and absolute references	141
Conditional formatting formula examples	142
Identifying weekend days	142
Highlighting a row based on a value	142
Displaying alternate-row shading	143
Creating checkerboard shading	144
Shading groups of rows	144
Working with conditional formats	144
Managing rules	145
Copying cells that contain conditional formatting	145
Deleting conditional formatting	146
Locating cells that contain conditional formatting	146
Using Named Styles for Easier Formatting	146
Applying styles	147
Modifying an existing style	147
Creating new styles	149
Merging styles from other workbooks	150
Controlling styles with templates	150
Understanding Document Themes	150
Applying a theme	152
Customizing a theme	153
Chapter 6: Understanding Excel Files and Templates	157
Creating a New Workbook	157
Opening an Existing Workbook	158
Filtering filenames	160
Choosing your file display preferences	161
Saving a Workbook	161
Using AutoRecover	163
Recovering versions of the current workbook	164
Recovering unsaved work	164
Configuring AutoRecover	165
Password-Protecting a Workbook	165
Organizing Your Files	166
Other Workbook Info Options	166
Protect Workbook options	166
Check for Issues options	167
Version History	167

Manage Workbook options.....	167
Browser View options.....	168
Compatibility Mode section	168
Closing Workbooks	168
Safeguarding Your Work	168
Working with Templates	169
Exploring Excel templates	169
Viewing templates	169
Creating a workbook from a template.....	170
Modifying a template	172
Using default templates	172
Using the workbook template to change workbook defaults.....	173
Creating a worksheet template	174
Editing your template	174
Resetting the default workbook.....	174
Using custom workbook templates	174
Creating custom templates.....	174
Saving your custom templates.....	175
Using custom templates	176
Chapter 7: Printing Your Work	177
Doing Basic Printing	177
Changing Your Page View	179
Normal view	179
Page Layout view	180
Page Break Preview.....	181
Adjusting Common Page Setup Settings.....	183
Choosing your printer	184
Specifying what you want to print	184
Changing page orientation	185
Specifying paper size.....	185
Printing multiple copies of a report	186
Adjusting the page margins	186
Understanding page breaks.....	187
Inserting a page break.....	187
Removing manual page breaks.....	188
Printing row and column titles	188
Scaling printed output.....	189
Printing cell gridlines	189
Printing row and column headers	190
Using a background image.....	190
Adding a Header or a Footer to Your Reports	192
Selecting a predefined header or footer.....	192
Understanding header and footer element codes	192
Exploring other header and footer options	194

Exploring Other Print-Related Topics	194
Copying Page Setup settings across sheets	195
Preventing certain cells from being printed	195
Preventing objects from being printed	196
Creating custom views of your worksheet	197
Creating PDF files	198
Chapter 8: Customizing the Excel User Interface	199
Customizing the Quick Access Toolbar	199
About the Quick Access Toolbar	200
Adding new commands to the Quick Access Toolbar	201
Other Quick Access Toolbar actions	203
Customizing the Ribbon	204
Why you may want to customize the Ribbon	205
What can be customized	205
How to customize the Ribbon	205
Creating a new tab	206
Creating a new group	206
Adding commands to a new group	207
Resetting the Ribbon	208
Part II: Working with Formulas and Functions	209
Chapter 9: Introducing Formulas and Functions	211
Understanding Formula Basics	211
Using operators in formulas	213
Understanding operator precedence in formulas	214
Using functions in your formulas	216
Examples of formulas that use functions	216
Function arguments	217
More about functions	218
Entering Formulas into Your Worksheets	218
Entering formulas by pointing	220
Pasting range names into formulas	220
Inserting functions into formulas	221
Function entry tips	223
Editing Formulas	224
Using Cell References in Formulas	225
Using relative, absolute, and mixed references	225
Changing the types of your references	227
Referencing cells outside the worksheet	228
Referencing cells in other worksheets	228
Referencing cells in other workbooks	228
Introducing Formula Variables	229

Understanding the LET function.....	230
Formula variables in action.....	231
Using Formulas in Tables.....	232
Summarizing data in a table.....	232
Using formulas within a table.....	234
Referencing data in a table.....	235
Correcting Common Formula Errors.....	237
Handling circular references.....	238
Specifying when formulas are calculated.....	238
Using Advanced Naming Techniques.....	239
Using names for constants.....	240
Using names for formulas.....	240
Using range intersections.....	241
Applying names to existing references.....	243
Working with Formulas.....	244
Not hard-coding values.....	244
Using the Formula bar as a calculator.....	244
Making an exact copy of a formula.....	244
Converting formulas to values.....	245
Chapter 10: Understanding and Using Array Formulas	247
Understanding Legacy Array Formulas.....	248
Example of a legacy array formula.....	248
Editing legacy array formulas.....	249
Introducing Dynamic Arrays.....	250
Understanding spill ranges.....	252
Referencing spill ranges.....	254
Exploring Dynamic Array Functions.....	255
The SORT function.....	256
The SORTBY function.....	257
The UNIQUE function.....	258
The RANDARRAY function.....	259
The SEQUENCE function.....	260
The FILTER function.....	262
Using multiple conditions with the FILTER function.....	263
Filtering records that contain a search term.....	264
The XLOOKUP function.....	265
XLOOKUP with wildcards.....	268
Chapter 11: Using Formulas for Common Mathematical Operations	271
Calculating Percentages.....	271
Calculating percent of goal.....	271
Calculating percent variance.....	272
Calculating percent variance with negative values.....	273
Calculating a percent distribution.....	274

Calculating a running total.....	275
Applying a percent increase or decrease to values	276
Dealing with divide-by-zero errors.....	277
Rounding Numbers.....	278
Rounding numbers using formulas.....	279
Rounding to the nearest penny.....	279
Rounding to significant digits.....	280
Counting Values in a Range.....	282
Using Excel's Conversion Functions	283
Chapter 12: Using Formulas to Manipulate Text	285
Working with Text	285
Using Text Functions.....	286
Joining text strings.....	286
Setting text to sentence case.....	288
Removing spaces from a text string	289
Extracting parts of a text string.....	290
Finding a particular character in a text string.....	291
Finding the second instance of a character.....	292
Substituting text strings.....	293
Counting specific characters in a cell.....	294
Adding a line break within a formula.....	295
Cleaning strange characters from text fields	296
Padding numbers with zeros	297
Formatting the numbers in a text string	297
Using the DOLLAR function	299
Chapter 13: Using Formulas with Dates and Times.	301
Understanding How Excel Handles Dates and Times.....	301
Understanding date serial numbers.....	301
Entering dates	302
Understanding time serial numbers	303
Entering times	304
Formatting dates and times.....	305
Problems with dates	306
Excel's leap year bug	306
Pre-1900 dates	306
Inconsistent date entries.....	307
Using Excel's Date and Time Functions	307
Getting the current date and time.....	308
Calculating age	308
Calculating the number of days between two dates	309
Calculating the number of workdays between two dates.....	310
Using NETWORKDAYS.INTL	310

Generating a list of business days excluding holidays	311
Extracting parts of a date.....	313
Calculating number of years and months between dates.....	314
Converting dates to Julian date formats.....	315
Calculating the percent of year completed and remaining	316
Returning the last date of a given month.....	317
Using the EOMONTH function	318
Calculating the calendar quarter for a date.....	318
Calculating the fiscal quarter for a date	319
Returning a fiscal month from a date	320
Calculating the date of the Nth weekday of the month	321
Calculating the date of the last weekday of the month	322
Extracting parts of a time.....	323
Calculating elapsed time	324
Rounding time values	325
Converting decimal hours, minutes, or seconds to a time	326
Adding hours, minutes, or seconds to a time	326
Chapter 14: Using Formulas for Conditional Analysis	329
Understanding Conditional Analysis.....	329
Checking if a simple condition is met	329
Checking for multiple conditions.....	330
Validating conditional data	331
Looking up values	332
Checking if Condition1 AND Condition2 are met.....	333
Referring to logical conditions in cells	334
Checking if Condition1 OR Condition2 are met.....	335
Performing Conditional Calculations.....	336
Summing all values that meet a certain condition.....	336
Summing greater than zero.....	338
Summing all values that meet two or more conditions.....	339
Summing if values fall between a given date range	340
Using SUMIFS.....	341
Getting a count of values that meet a certain condition	341
Getting a count of values that meet two or more conditions.....	342
Finding nonstandard characters.....	343
Getting the average of all numbers that meet a certain condition	344
Getting the average of all numbers that meet two or more conditions	344
Chapter 15: Using Formulas for Matching and Lookups	347
Introducing Lookup Formulas.....	347
Leveraging Excel's Lookup Functions.....	348
Looking up an exact value based on a left lookup column.....	348
Looking up an exact value based on any lookup column	351
Looking up values horizontally	352

Hiding errors returned by lookup functions	353
Finding the closest match from a list of banded values	354
Finding the closest match with the INDEX and MATCH functions	356
Looking up values from multiple tables.....	357
Looking up a value based on a two-way matrix.....	359
Using default values for match.....	360
Finding a value based on multiple criteria.....	361
Returning text with SUMPRODUCT	362
Finding the last value in a column	362
Finding the last number using LOOKUP	363
Chapter 16: Using Formulas with Tables and Conditional Formatting	365
Highlighting Cells That Meet Certain Criteria.....	365
Highlighting cells based on the value of another cell	367
Highlighting Values That Exist in List1 but Not List2	369
Highlighting Values That Exist in List1 and List2.....	371
Highlighting Based on Dates	372
Highlighting days between two dates	374
Highlighting dates based on a due date	376
Chapter 17: Making Your Formulas Error-Free	379
Finding and Correcting Formula Errors.....	379
Mismatched parentheses	380
Cells are filled with hash marks	381
Blank cells are not blank	381
Extra space characters	382
Formulas returning an error.....	382
#DIV/0! errors.....	383
#N/A errors.....	383
#NAME? errors.....	384
#NULL! errors.....	384
#NUM! errors.....	384
#REF! errors	385
#SPILL! errors	385
#VALUE! errors	386
Operator precedence problems	386
Formulas are not calculated.....	387
Problems with decimal precision	387
“Phantom link” errors.....	388
Using Excel Auditing Tools.....	388
Identifying cells of a particular type.....	388
Viewing formulas	389
Tracing cell relationships	389
Identifying precedents	390
Identifying dependents	390

Tracing error values.....	391
Fixing circular reference errors	391
Using the background error-checking feature	391
Using Formula Evaluator	392
Searching and Replacing.....	393
Searching for information	393
Replacing information	394
Searching for formatting	395
Spell-checking your worksheets	396
Using AutoCorrect.....	396

Part III: Creating Charts and Other Visualizations **399**

Chapter 18: Getting Started with Excel Charts	401
What Is a Chart?.....	401
How Excel handles charts.....	402
Embedded charts.....	403
Chart sheets	404
Parts of a chart	405
Chart limitations.....	408
Basic Steps for Creating a Chart.....	408
Creating the chart.....	408
Switching the row and column orientation.....	410
Changing the chart type	410
Applying a chart layout.....	412
Applying a chart style	413
Adding and deleting chart elements	413
Formatting chart elements	413
Modifying and Customizing Charts	414
Moving and resizing a chart.....	414
Converting an embedded chart to a chart sheet	415
Copying a chart	416
Deleting a chart	416
Adding chart elements.....	416
Moving and deleting chart elements	416
Formatting chart elements	416
Copying a chart's formatting.....	417
Renaming a chart.....	418
Printing charts.....	418
Understanding Chart Types	419
Choosing a chart type.....	419
Column charts	421
Bar charts	423
Line charts.....	424

Pie charts.....	426
XY (scatter) charts	427
Area charts.....	428
Radar charts	429
Surface charts.....	430
Bubble charts	430
Stock charts	431
Newer Chart Types for Excel	431
Histogram charts.....	431
Pareto charts	433
Waterfall charts	434
Box & whisker charts.....	434
Sunburst charts	436
Treemap charts	437
Funnel charts	437
Map charts	438
Chapter 19: Using Advanced Charting Techniques	441
Selecting Chart Elements	441
Selecting with the mouse	442
Selecting with the keyboard	443
Selecting with the Chart Elements control.....	443
Exploring the User Interface Choices for Modifying Chart Elements	444
Using the Format task pane.....	444
Using the chart customization buttons	445
Using the Ribbon	446
Using the Mini toolbar	446
Modifying the Chart Area.....	447
Modifying the Plot Area.....	448
Working with Titles in a Chart.....	449
Working with a Legend.....	450
Working with Gridlines.....	452
Modifying the Axes	452
Modifying the value axis.....	452
Modifying the category axis	456
Working with Data Series.....	460
Deleting or hiding a data series	461
Adding a new data series to a chart.....	462
Changing data used by a series	462
Changing the data range by dragging the range outline.....	463
Using the Edit Series dialog box	463
Editing the Series formula	464
Displaying data labels in a chart	465
Handling missing data	467

Adding error bars	468
Adding a trendline	468
Creating combination charts	470
Displaying a data table	472
Creating Chart Templates	473
Chapter 20: Creating Sparkline Graphics	475
Sparkline Types	475
Creating Sparklines	477
Customizing Sparklines.....	480
Sizing Sparkline cells.....	480
Handling hidden or missing data.....	480
Changing the Sparkline type	481
Changing Sparkline colors and line width.....	481
Highlighting certain data points	481
Adjusting Sparkline axis scaling.....	482
Faking a reference line.....	483
Specifying a Date Axis.....	484
Auto-Updating Sparklines.....	486
Displaying a Sparkline for a Dynamic Range.....	486
Chapter 21: Visualizing with Custom Number Formats and Shapes	489
Visualizing with Number Formatting	489
Doing basic number formatting.....	489
Using shortcut keys to format numbers	490
Using the Format Cells dialog box to format numbers	491
Getting fancy with custom number formatting.....	492
Formatting numbers in thousands and millions	494
Hiding and suppressing zeros	495
Applying custom format colors	496
Formatting dates and times	497
Using symbols to enhance reporting	498
Using Shapes and Icons as Visual Elements	502
Inserting a shape	502
Inserting SVG icon graphics.....	504
Inserting 3D models	504
Formatting shapes and icons	506
Enhancing Excel reports with shapes	507
Creating visually appealing containers with shapes.....	507
Layering shapes to save space	509
Constructing your own infographic widgets with shapes.....	509
Creating dynamic labels	510
Creating linked pictures	510

Using SmartArt and WordArt	513
SmartArt basics.....	513
WordArt basics.....	514
Working with Other Graphics Types.....	515
About graphics files	515
Inserting screenshots.....	516
Displaying a worksheet background image.....	516
Using the Equation Editor.....	516

Part IV: Managing and Analyzing Data 519

Chapter 22: Importing and Cleaning Data 521

Importing Data.....	521
Importing from a file	522
Spreadsheet file formats	522
Database file formats	522
Text file formats	523
HTML files	523
XML files	524
Importing vs. opening	524
Importing a text file.....	525
Copying and pasting data.....	528
Cleaning Up Data.....	529
Removing duplicate rows.....	529
Identifying duplicate rows.....	530
Splitting text.....	531
Using Text to Columns.....	532
Using Flash Fill.....	533
Changing the case of text	536
Removing extra spaces.....	537
Removing strange characters	538
Converting values	538
Classifying values.....	538
Joining columns	540
Rearranging columns	541
Randomizing the rows	541
Extracting a filename from a URL.....	541
Matching text in a list	542
Changing vertical data to horizontal data	543
Filling gaps in an imported report.....	545
Checking spelling.....	547
Replacing or removing text in cells.....	547
Adding text to cells.....	548

Fixing trailing minus signs	549
Following a data cleaning checklist	549
Exporting Data	550
Exporting to a text file	550
CSV files	550
TXT files	550
PRN files.....	551
Exporting to other file formats	551
Chapter 23: Using Data Validation.	553
About Data Validation	553
Specifying Validation Criteria	554
Types of Validation Criteria You Can Apply.....	555
Creating a Drop-Down List	557
Using Formulas for Data Validation Rules.....	558
Understanding Cell References.....	559
Data Validation Formula Examples	560
Accepting text only.....	561
Accepting a larger value than the previous cell.....	561
Accepting nonduplicate entries only	561
Accepting text that begins with a specific character.....	561
Accepting dates by the day of the week.....	562
Accepting only values that don't exceed a total.....	563
Creating a dependent list	563
Using Data Validation without Restricting Entry.....	564
Showing an input message	564
Making suggested entries.....	564
Chapter 24: Creating and Using Worksheet Outlines	567
Introducing Worksheet Outlines.....	567
Creating an Outline.....	570
Preparing the data	571
Creating an outline automatically	572
Creating an outline manually.....	572
Working with Outlines.....	574
Displaying levels	574
Adding data to an outline	575
Removing an outline	575
Adjusting the outline symbols	575
Hiding the outline symbols	575
Chapter 25: Linking and Consolidating Worksheets	577
Linking Workbooks	577
Creating External Reference Formulas.....	578

Understanding link formula syntax.....	578
Creating a link formula by pointing.....	579
Pasting links.....	580
Working with External Reference Formulas	580
Creating links to unsaved workbooks.....	580
Opening a workbook with external reference formulas.....	581
Changing the startup prompt.....	582
Updating links.....	582
Changing the link source	583
Severing links.....	583
Avoiding Potential Problems with External Reference Formulas.....	583
Renaming or moving a source workbook	584
Using the Save As command	584
Modifying a source workbook	584
Using Intermediary links.....	585
Consolidating Worksheets	585
Consolidating worksheets by using formulas.....	587
Consolidating worksheets by using Paste Special.....	587
Consolidating worksheets by using the Consolidate dialog box.....	588
Viewing a workbook consolidation example.....	590
Refreshing a consolidation	592
Learning more about consolidation	593
Chapter 26: Introducing PivotTables	595
About PivotTables.....	595
A PivotTable example.....	596
Data appropriate for a PivotTable	598
Creating a PivotTable Automatically.....	600
Creating a PivotTable Manually.....	602
Specifying the data	602
Specifying the location for the PivotTable	603
Laying out the PivotTable	603
Formatting the PivotTable	607
Modifying the PivotTable.....	609
Seeing More PivotTable Examples.....	611
What is the daily total new deposit amount for each branch?	611
Which day of the week accounts for the most deposits?.....	611
How many accounts were opened at each branch, broken down by account type?	613
How much money was used to open the accounts?	613
What types of accounts do tellers open most often?	614
In which branch do tellers open the most checking accounts for new customers?	615
Learning More	616

Chapter 27: Analyzing Data with PivotTables	617
Working with Non-Numeric Data	617
Grouping PivotTable Items	619
Grouping items manually	619
Grouping items automatically	621
Grouping by date	621
Grouping by time	625
Using a PivotTable to Create a Frequency Distribution	626
Creating a Calculated Field or Calculated Item	628
Creating a calculated field	630
Inserting a calculated item	632
Filtering PivotTables with Slicers	635
Filtering PivotTables with a Timeline	637
Referencing Cells within a PivotTable	638
Creating PivotCharts	640
A PivotChart example	640
More about PivotCharts	643
Using the Data Model	644
Chapter 28: Performing Spreadsheet What-If Analysis	651
Looking at a What-If Example	651
Exploring Types of What-If Analyses	653
Performing manual what-if analysis	653
Creating data tables	653
Creating a one-input data table	654
Creating a two-input data table	657
Using Scenario Manager	661
Defining scenarios	662
Displaying scenarios	664
Modifying scenarios	666
Merging scenarios	666
Generating a scenario report	666
Analyzing Data with Artificial Intelligence	668
Using Excel's suggestions	668
Querying analyzed data	671
Chapter 29: Analyzing Data Using Goal Seeking and Solver	675
Exploring What-If Analysis, in Reverse	675
Using Single-Cell Goal Seeking	675
Looking at a goal-seeking example	676
Learning more about goal seeking	678
Introducing Solver	678
Looking at appropriate problems for Solver	679
Seeing a simple Solver example	679
Exploring Solver options	685

Seeing Some Solver Examples	686
Solving simultaneous linear equations	686
Minimizing shipping costs	688
Allocating resources	691
Optimizing an investment portfolio	693
Chapter 30: Analyzing Data with the Analysis ToolPak	697
The Analysis ToolPak: An Overview	697
Installing the Analysis ToolPak Add-In	698
Using the Analysis Tools	698
Introducing the Analysis ToolPak Tools	699
Analysis of variance	699
Correlation	700
Covariance	701
Descriptive statistics	701
Exponential smoothing	701
F-Test (two-sample test for variance)	701
Fourier analysis	702
Histogram	703
Moving average	704
Random number generation	705
Rank and percentile	706
Regression	706
Sampling	707
t-Test	707
z-Test (two-sample test for means)	708
Chapter 31: Protecting Your Work	709
Types of Protection	709
Protecting a Worksheet	710
Unlocking cells	710
Sheet protection options	712
Assigning user permissions	713
Protecting a Workbook	714
Requiring a password to open a workbook	714
Protecting a workbook's structure	715
Protecting a VBA Project	716
Related Topics	717
Saving a worksheet as a PDF file	717
Marking a workbook as final	717
Inspecting a workbook	718
Using a digital signature	719
Getting a digital ID	719
Signing a workbook	719

Part V: Understanding Power Pivot and Power Query	721
Chapter 32: Introducing Power Pivot	723
Understanding the Power Pivot Internal Data Model	723
The Power Pivot Ribbon	724
Linking Excel tables to Power Pivot	725
Preparing your Excel tables	726
Adding your Excel tables to the data model	727
Creating relationships between your PowerPivot tables	728
Managing existing relationships	730
Using Power Pivot data in reporting	732
Loading Data from Other Data Sources	733
Loading data from relational databases	733
Loading data from SQL Server	733
Loading data from other relational database systems	738
Loading data from flat files	738
Loading data from external Excel files	739
Loading data from text files	741
Loading data from the Clipboard	742
Refreshing and managing external data connections	742
Manually refreshing your Power Pivot data	743
Setting up automatic refreshing	743
Editing your data connection	745
Chapter 33: Working Directly with the Internal Data Model	747
Directly Feeding the Internal Data Model	747
Managing Relationships in the Internal Data Model	754
Managing Queries & Connections	755
Chapter 34: Adding Formulas to Power Pivot	757
Enhancing Power Pivot Data with Calculated Columns	757
Creating your first calculated column	758
Formatting your calculated columns	759
Referencing calculated columns in other calculations	760
Hiding calculated columns from end users	760
Utilizing DAX to Create Calculated Columns	762
Identifying DAX functions safe for calculated columns	762
Building DAX-driven calculated columns	764
Month sorting in Power Pivot–driven PivotTables	765
Referencing fields from other tables	768
Nesting functions	770
Understanding Calculated Measures	770
Editing and deleting calculated measures	773
Using Cube Functions to Free Your Data	773

Chapter 35: Introducing Power Query	777
Understanding Power Query Basics	777
Understanding query steps	784
Viewing the Advanced Query Editor	785
Refreshing Power Query data	786
Managing existing queries	787
Understanding column-level actions	788
Understanding table actions	790
Getting Data from External Sources	792
Importing data from files	793
Getting data from Excel workbooks	794
Getting data from CSV and text files	795
Getting data from PDF files	795
Importing data from database systems	796
Importing data from relational and OLAP databases	796
Importing data from Azure databases	797
Importing data using ODBC connections to nonstandard databases	797
Getting Data from Other Data Systems	797
Managing Data Source Settings	798
Editing data source settings	798
Data Profiling with Power Query	800
Data profiling options	800
Data profiling quick actions	801
Chapter 36: Transforming Data with Power Query	805
Performing Common Transformation Tasks	805
Removing duplicate records	805
Filling in blank fields	808
Filling in empty strings	808
Concatenating columns	809
Changing case	811
Finding and replacing specific text	811
Trimming and cleaning text	812
Extracting the left, right, and middle values	814
Extracting first and last characters	815
Extracting middle characters	816
Splitting columns using character markers	816
Unpivoting columns	819
Unpivoting other columns	820
Pivoting columns	821
Creating Custom Columns	823
Concatenating with a custom column	824
Understanding data type conversions	826
Spicing up custom columns with functions	826
Adding conditional logic to custom columns	829

Grouping and Aggregating Data	830
Working with Custom Data Types	832
Chapter 37: Making Queries Work Together	837
Reusing Query Steps	837
Understanding the Append Feature	841
Creating the needed base queries	841
Appending the data	842
Understanding the Merge Feature	845
Understanding Power Query joins	845
Merging queries	846
Understanding fuzzy matching	851
Chapter 38: Enhancing Power Query Productivity	855
Implementing Some Power Query Productivity Tips	855
Getting quick information about your queries	855
Organizing queries in groups	856
Selecting columns in your queries faster	857
Renaming query steps	857
Quickly creating reference tables	859
Copying queries to save time	859
Viewing query dependencies	860
Setting a default load behavior	860
Preventing automatic data type changes	861
Avoiding Power Query Performance Issues	862
Using views instead of tables	862
Letting your back-end database servers do some crunching	863
Upgrading to 64-bit Excel	863
Disabling privacy settings to improve performance	864
Disabling relationship detection	864
 Part VI: Automating Excel	 867
Chapter 39: Introducing Visual Basic for Applications	869
Introducing VBA Macros	869
Displaying the Developer Tab	870
Learning about Macro Security	871
Saving Workbooks That Contain Macros	872
Looking at Two Types of VBA Macros	873
VBA Sub procedures	873
VBA functions	874
Creating VBA Macros	876
Recording VBA macros	876
Recording your actions to create VBA code: the basics	876
Recording a macro: a simple example	877
Examining the macro	878

Testing the macro	879
Editing the macro	879
Relative versus absolute recording	880
Another example	881
Running the macro	881
Examining the macro	882
Rerecording the macro	883
Testing the macro	883
More about recording VBA macros	884
Storing macros in your Personal Macro Workbook	884
Assigning a macro to a shortcut key	885
Assigning a macro to a button.....	885
Adding a macro to your Quick Access Toolbar.....	886
Writing VBA code	887
The basics: entering and editing code	887
The Excel object model.....	888
Objects and collections.....	889
Properties.....	889
Methods	891
The Range object.....	892
Variables.....	892
Controlling execution.....	893
A macro that can't be recorded.....	895
Learning More	896
Chapter 40: Creating Custom Worksheet Functions	899
Introducing VBA Functions	899
Seeing a Simple Example	900
Creating a custom function	900
Using the function in a worksheet	901
Analyzing the custom function.....	901
Learning about Function Procedures	902
Executing Function Procedures.....	904
Calling custom functions from a procedure.....	904
Using custom functions in a worksheet formula	904
Using Function Procedure Arguments	905
Creating a function with no arguments	905
Creating a function with one argument.....	906
Creating another function with one argument	906
Creating a function with two arguments	907
Creating a function with a range argument	908
Creating a simple but useful function	909
Debugging Custom Functions	910
Inserting Custom Functions.....	910
Learning More	912

Chapter 41: Creating UserForms	913
Understanding Why to Create UserForms.....	913
Exploring UserForm Alternatives.....	914
Using the InputBox function	914
Using the MsgBox function.....	915
Creating UserForms: An Overview.....	918
Working with UserForms	919
Adding controls	919
Changing the properties of a control	920
Handling events.....	921
Displaying a UserForm	922
Looking at a UserForm Example.....	923
Creating the UserForm	923
Testing the UserForm.....	924
Creating an event handler procedure	925
Looking at Another UserForm Example	926
Creating the UserForm	926
Creating event handler procedures	928
Showing the UserForm	930
Testing the UserForm.....	931
Making the macro available from a worksheet button	931
Making the macro available on your Quick Access Toolbar	932
Enhancing UserForms	932
Adding accelerator keys	932
Controlling tab order	933
Learning More	933
Chapter 42: Using UserForm Controls in a Worksheet.	935
Understanding Why to Use Controls on a Worksheet.....	935
Using Controls.....	938
Adding a control	938
Learning about Design mode	938
Adjusting properties.....	938
Using common properties.....	939
Linking controls to cells.....	940
Creating macros for controls	941
Reviewing the Available ActiveX Controls.....	942
CheckBox	942
ComboBox	942
CommandButton	943
Image	944
Label	944
ListBox	944
OptionButton	945

ScrollBar	945
SpinButton.....	946
TextBox	946
ToggleButton.....	947
Chapter 43: Working with Excel Events.	949
Understanding Events.....	949
Entering Event-Handler VBA Code.....	950
Using Workbook-Level Events.....	951
Using the Open event	952
Using the SheetActivate event	953
Using the NewSheet event.....	954
Using the BeforeSave event	954
Using the BeforeClose event	954
Working with Worksheet Events.....	955
Using the Change event	956
Monitoring a specific range for changes	956
Using the SelectionChange event	958
Using the BeforeRightClick event	959
Using Special Application Events	959
Using the OnTime event	960
Using the OnKey event.....	961
Chapter 44: Seeing Some VBA Examples.	963
Working with Ranges	963
Copying a range	964
Copying a variable-size range.....	965
Selecting to the end of a row or column.....	966
Selecting a row or column.....	966
Moving a range	967
Looping through a range efficiently	967
Prompting for a cell value	968
Determining the type of selection	970
Identifying a multiple selection	970
Counting selected cells	971
Working with Workbooks	972
Saving all workbooks.....	972
Saving and closing all workbooks	972
Creating a workbook.....	972
Working with Charts	973
Modifying the chart type	973
Modifying chart properties	974
Applying chart formatting	974
VBA Speed Tips	975
Turning off screen updating	975

- Preventing alert messages 975
- Simplifying object references..... 976
- Declaring variable types..... 976
- Chapter 45: Creating Custom Excel Add-Ins. 979**
 - Understanding Add-Ins..... 979
 - Working with Add-Ins 980
 - Understanding When to Create Add-Ins 982
 - Creating Add-Ins..... 982
 - Looking at an Add-In Example 983
 - Learning about Module1 984
 - Learning about the UserForm..... 984
 - Testing the workbook 985
 - Adding descriptive information..... 985
 - Creating the user interface for your add-in macro..... 986
 - Protecting the project..... 986
 - Creating the add-in 987
 - Installing the add-in 987
- Index 989**