1

The Four-One-One of Excel

To Do List

Figure out where Excel came from (yawn!)

Beautify the data

Share the work of art

Satisfy yourself with a Soy Chai Latte

I f you looked up "Excel" on Wikipedia, you'd find a blurb about a spreadsheet program called "Multiplan," released in 1982. Excel has come a long way since then, thanks in part to competition from Lotus 1-2-3.

By 1988 Excel started to outsell Lotus 1-2-3, and since then Microsoft has regularly released updates. Soon, Microsoft became the leader in personal computer software development.

You, too, can become the Excel Diva with a bit of practice and consistent application. I won't lie to you, and I will not add yet another 10-minute routine you have to do every day to enhance your Excel skills. (I think the 10-minute routines are best kept for personal primping.) I will, however, say that no matter what you want in life, you still have to put some time in. You're a busy IT Girl and will put the time in when it is necessary for you to do so at work or otherwise, and I will be here to guide you when you need it. I hope this chapter (and this book) builds the Excel Diva-like intuition in you, so you can think it, and it will happen.

Excel 2007: The Louis Vuitton of Spreadsheets

So are you ready to look at Excel 2007 with new eyes? You should look at Excel the same way you look at the shoe department in Nordstrom's or the feeling you got when you went to a candy store as a kid. There is no other way. The enhancements in this version are so COOL you can't help but be excited about it and share with your friends. (At least, if you're an IT Girl you can't!) The gist of it is that you can do more with less time. If done right, Excel 2007 will give you some of your much-needed time back.

Do you remember when you purchased your first name-brand handbag? The feel of it, how it smelled, and how you knew it would be perfect with every shoe in your closet and it would go with the dresses you had not yet bought, because in its entirety that handbag is perfect? Well, in the software world, there really is no Louis Vuitton spreadsheet program, but Microsoft's Excel 2007 comes pretty darn close. Sometimes new versions of software just don't seem complete enough to worry about. When you walk into a department store, you're usually not looking for a purse because you want something, anything new; you want a specific function. You walk into your favorite department store and you will see a lot of handbags that are all new. You don't buy just any new handbag, you find just the right one, built in a way that makes sense: the zippers work well, the pockets were made with your needs in mind, and it comes with an extra bag to protect it when you don't use it and a lock or some other feature for the cutesy look. Well that's a top-shelf company: they keep everything in mind and put your needs first. Maybe you're not a Louis Vuitton kind of girl with a fancy purse; you're more of an Eddie Bauer backpacker—it matters not. The point is still the same: you're looking for improved functionality, and Excel 2007 has it.

Who knew?

Out in the courtyard of Building 17 on Microsoft's campus there are tiles in the ground with all the product names and dates they were released.

For those of you who have used Excel in the past I would say that Excel 2007 is truly close to the "Extreme Makeover" or the "Swan." There was great substance there before but it really wasn't apparent until an extreme makeover enabled us to have access to more of the functions with less effort and time to find it. After all, I promised we would be spending more time utilizing the functions and keeping the 10-minute routines for your abdominal workouts and your skin care, to give us time back to do the important things, like take care of our family and friends, and shop for fancy handbags. The best part about the whole thing is, despite the "Extreme Makeover," Excel 2007 still feels and works like a spreadsheet should. So for those of you who have been using Excel for a while now, it will take some time to get used to the new layout, but after the initial bumps you will be up and running in no time making your spreadsheet beautiful and effective.

What Excel Can Do for You

With all the changes in Excel 2007 it's important to bond. It's important to spend time with Excel 2007 and learn a few key terms. Let's begin with the "Office Pearl." It's not just another pearl to add to your necklace, it's the Office logo on the top-left corner of the Microsoft Excel 2007 screen (Figure 1-1).

Figure 1-1

When you hover over it, you can learn more about what it does. It is where you will find the most common items such as printing, saving, and others. We will get into that more later. The next big item is the Microsoft Office Ribbon. Microsoft has spent a lot of time learning from

Did you know?

The most commonly used function in all of Microsoft Office is the Paste function, followed by Cut, Copy, and Format Painter. These common functions have been put on the first tab on the farthest left corner where you are easily able to use them.
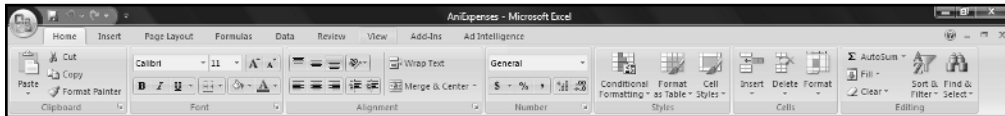
users how and which features they use most when using Office. From this they have organized the Microsoft Office Ribbon, which is what sits on top of Excel 2007. The Microsoft Office Ribbon is shown in Figure 1-2, where you can see several tabs organized from left to right with several of the most commonly used buttons on each tab.

Figure 1-2

The tabs are also organized per utilization order. If you notice, Paste is the first item on the left corner; that is because Microsoft has found that Paste is used most commonly across all the users they studied. You'll notice this spreadsheet application was designed with you in mind. It has what you need, where you need it, and you can hover on any of the items on the Ribbon and a pop-up window will explain what each logo does as well as where to get help (Figure 1-2).

Excel Can Beautify Your Data

We all like to spend more time with things that are beautiful or pleasing to the eye. We ladies already know this. So Excel 2007 has just the thing. New key features, such as Format as Table located on the Styles section of the Home tab (Figure 1-3), allow you to make your work look beautiful and helpful, impressing your boss and your coworkers while making complex information easier to understand. Managing printed headers and footers is very easy with the use of Page Layout view. I love the new Themes feature, which lets me have access to colors, fonts, and even make my data look flashy and sharp. I use this feature throughout Office 2007 and my manager always wonders how much time I spent on that thing. But to tell the truth in most cases I spend 1–2 minutes more, which buys me 5 minutes of kudos, and no rework needs to be done so I always get a great deal of my time back, making it a great investment.

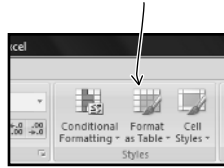*New feature styles cells into a table.*

Figure 1-3

For those of you who want to understand the data you are looking at right away, there is *Conditional Formatting,* located on the Styles section of the Home tab (Figure 1-4). This is a new feature added to Excel 2007, and the enhancement makes it much easier to find and use. Conditional formatting helps you see what your data is telling you right away. Rather than having to graph the block of data to see where the highest or lowest numbers are, this little function tells you that in real time. You can add graph bars to the numbers in each cell to better understand the trends of your data. You know that cool feature on the Home Depot site that allows you to pick the color of paint and it shows you what a room with that color of paint and the certain color of backsplash you picked looks like? Well this is very much the same thing, but instead it shows you information about the data you're trying to digest. Once you select the Data Bars option from the Conditional Formatting button in Figure 1-4, you can easily see the highest and lowest values, as shown in Figure 1-5.
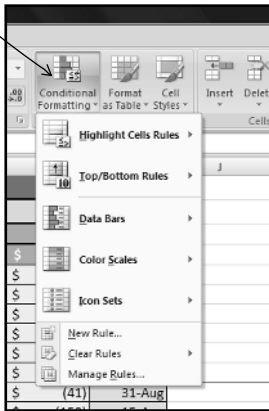
Select Data Bars or other formats here.
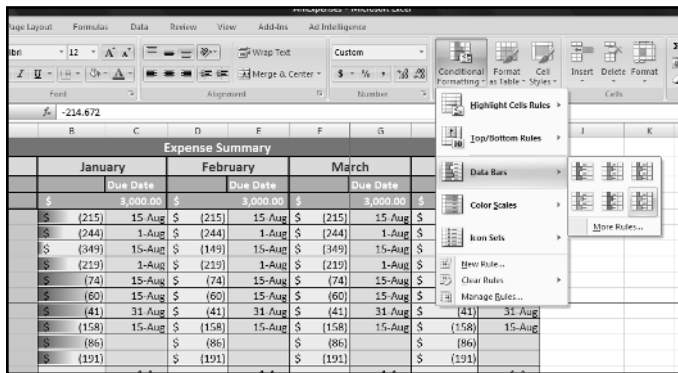
Figure 1-4

Figure 1-5

There are so many new things, and old things that are now done better, that it is hard to pick and choose. By far my favorite, and probably the most important in terms of improving the look of your data, is the robust *SmartArt* feature (Figure 1-6). All the guys in the office always wonder how I make my presentations look so good. All the well-known diagrams are there, but now they have a more sophisticated and chic look. Divas, if you want to learn more about SmartArt, also read through Chapter 9.
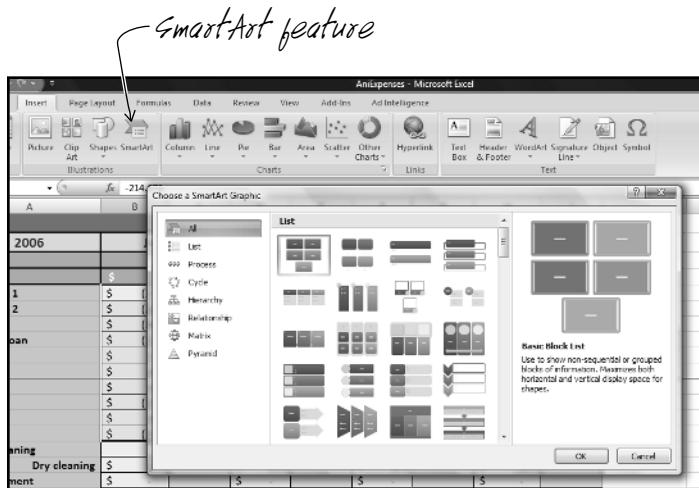
SmartArt feature

Figure 1-6

The presentation piece of Excel has always been a bit hard and frankly most of the tools were not really there, or if they were they were hard to find. In Excel 2003, you could have a maximum of 56 different colors in your workbook (see the Geek Facts 1.1 sidebar). Also, there was just no easy way to make sure the colors looked good together, unless you spent countless time and had your graphic artist friends help you. Well, Excel 2007 includes a great number of improvements and new formatting options. You can have as many different colors as you'd like. Also, the cool part for those of us who are not color coordinated but want to be, is that we can assign a theme to the workbook (mine are always magically pink if I spend time to change it). The nice part about assigning a theme is that you get the complementary colors to assign inside your workbook. But if you want to make sure certain data points still show up clearly and you don't really care about color coordination, you can of course do that as well. Just be mindful that you might be questioned by the fashion police. And for those color Divas out there you can create your own themes. Really, a theme is a group of colors you choose; this way the reader of your data knows all your expenses will be a certain color, and your total income a certain color—you can also think of it as formatting. This is something you can define for yourself or use pre-created common themes (Figure 1-7). To learn more about themes, take a look at Chapter 7.

Excel 2007 also gives you time back by including a lot of new chart types, cool graphics, and new Chart Tools that make looking at data very easy. You now have more graphic ability and can apply shadows, bevels, and most anything else you can do with other types of graphic elements. We can now all become our own Excel Divas. What's amazing about this is that Microsoft Word 2007 and Microsoft

PowerPoint 2007 now use the Microsoft Excel 2007 charting engine, making creating charts much easier and more powerful within those applications too. So you can take the charts you create in Excel 2007 into PowerPoint 2007 and Word 2007 for great presentations and reports. You heard it here first!
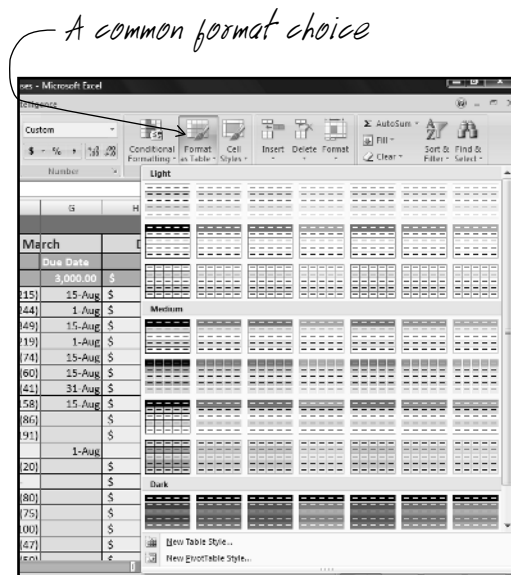

Figure 1-7

Geek Facts 1.1

How about the geeky cool things? Now you can show off your geek-skills: Excel 2007 can hold more than 1 million rows of data. Want more?

- Total number of columns in Excel 2007 is now 16,384; it was 256.
- Total number of rows is now 1,048,576; it was 65,536.
- The number of unique colors allowed in a single workbook is now 4.3 billion; it was 56. But please follow your good sense and use color coordination.
- The number of levels of sorting you can perform on a range of tables is now 64; it was 3.
- The number of items allowed in the Filter drop-down is now 10,000; it was 1,000.
- The maximum number of characters allowed in formulas is 8,000; it was 1,000.
- The maximum number of arguments allowed to a function is now 255; it was 30.

Excel Formulas: It All Adds Up!

Ever remember getting frustrated trying to type Excel functions? If you are new you probably don't even know where to begin. Well, never fear! You get a new AutoComplete feature in all the equations you will use, and now you have it in Excel 2007. When you type an equal sign followed by any letter you get a drop-down list of functions that start with that letter, and as you type more letters the list narrows down to finally what you need.

A few items AutoComplete offers are:

Excel 2007 functions: As you can see in Figure 1-8, when you type the "=s" you can see a lot of equations from "SUM" (which is the total) to "SQRT" (which is Square Root) and more.

User-defined functions: These are the special functions that you (yes, you will create some of these later on), or someone else has created in your workbook or macro code.

Defined names: These are user-defined (defined by you) nicknames for specific cell ranges (so if you had cells A1 to A30 on your monthly bill worksheet you could call them February Bills).

Notice these windows pop up as you begin typing in the cell.

Helpful hints conveniently pop up.
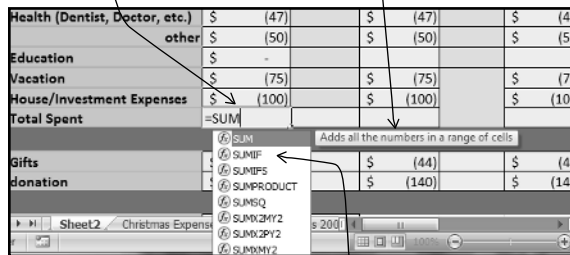
AutoComplete shows many different equations from SUM.

Figure 1-8

One of the most common requests from corporations that have utilized Excel was to find the average value of cells where the cell met a certain criteria. So for those of you looking at your monthly budget and you want to find out where you spend more than $500 every month (probably at the Louis Vuitton store!), this is a great place to start. After you enter all your expenses you can use the cool new formulas the Excel 2007 team has created to summarize your data given a certain condition. In the following list you can find a couple of the new added functions with Excel 2007 that enable you to get the most out of your data. If you want to find out more about functions, please read Chapter 6.

> **AVERAGEIF:** Helps you to find the average value of cells in a range for cells that meet a single criterion. So in this case if you want to find out where you spend more than $500 in monthly expenses, this function is how you would do it. You would start by typing "**=AVERAGEIF("** (including the quotes, of course) into a cell and continue by selecting the cells you are looking at.

> **AVERAGEIFS:** Helps you find the average value of cells in a range of cells that meet multiple criteria. So if you wanted to find out in which month you spent $500 on your shopping bill that would be two criteria: shopping and $500 minimum. So you would select the shopping column and then the cell for each month where you spent your shopping money.

File Formats and How to Share with Your Friends

With the new Microsoft Open Office file format XLSX (.xlsx) you can integrate better with other programs such as Open Office or other types of comparable office products. You can also integrate better with other types of data, such as if you want to copy pictures or your Christmas wish list to a blog, Amazon.com, eBay, or other places. As you grow your Excel 2007 skills and want to connect to data sources such as Access, SQL database, or others, it is easier than ever with Excel 2007. You can even begin by clicking on the Data tab of the Office 2007 Ribbon. So what this means, ladies, is more room for pictures of all the wish list items you have and room for music and video lists. So the next time you make a wish list on Overstock.com, you can put that list on your desktop and save it for later use. But this also means that if you want your friends and coworkers (who may not have been as lucky as you to have gotten a copy of Excel 2007) to be able to read the spreadsheets you create, you will have to save in the 97-2003 format. Some things might change (such as shading or font styles that were unavailable in older versions of Excel) but most of what you see, they will see.

In order to save properly, click on the Office Pearl from Figure 1-1 and choose the Save As option (Figure 1-9) from the drop-down menu. Once you click on the Save As option, you will see a window like the one in Figure 1-10 come up. This window is where you can make sure you are saving to the right location, with the right name, and to the right format (pay close attention here or your friends can't see it!), as shown by the bottom arrow of Figure 1-10.
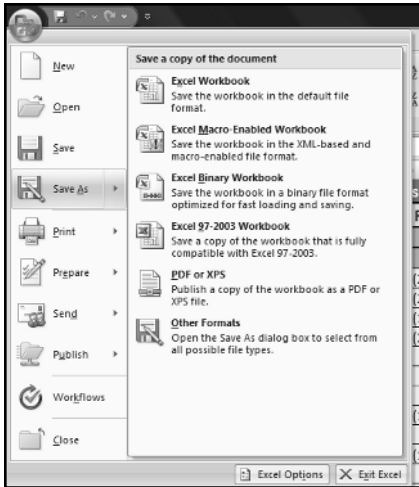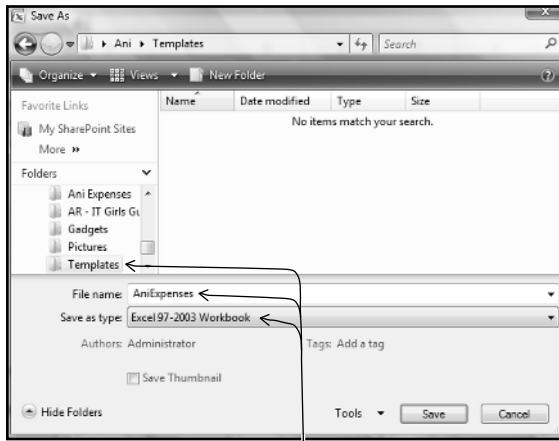
Figure 1-9

Save options

Figure 1-10

Review Before You Print

Now you know the value that has been added into Excel 2007, but how about print-ing? After all your effort you'd like to share your work with your colleagues and man-ager. With Excel 97 there was something called Page Break Preview view, which helped you see (in a small font, which you couldn't really read) what your work would look like. Well, when you take a look at your workbook with Page Layout view you see exactly what your work will look like. The cool thing with Page Layout view (Figure 1-11) now is that you can change your workbook's margins, so they fit better

on a printed page; and add and edit headers and footers, so you can put the confidential lines, page numbers, and dates in that you forgot. And most importantly, edit your data.
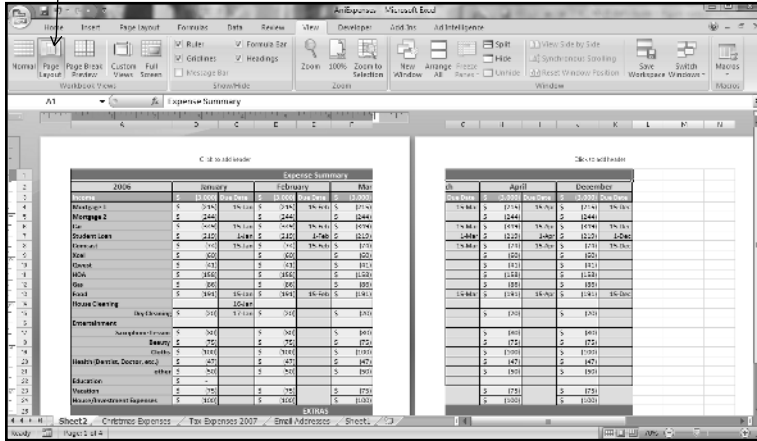
Click here to see the Page Layout view.

Figure 1-11

Online Help

There is ample help inside Excel 2007, but if you need more for the project you are doing, there is also ample help online. You can click on the question mark on the top-right side of the screen (Figure 1-12).
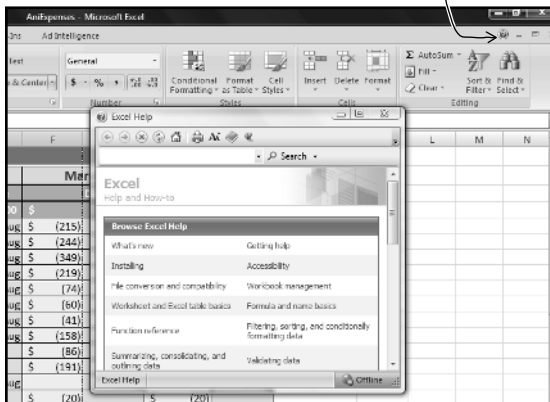
Find help here.

Figure 1-12

Figure 1-12 shows a great place to find help about anything you are trying to do. You can also visit http://Office.Microsoft.com, where you will find the same Ribbon feel and be able to navigate to get the updates and help you need. For updates you can click on the Office Pearl and go down to the Excel options. When you click on Excel 2007 Options, the Excel Options window appears (Figure 1-13). From this window you can select Resources from the left side and check for updates online. In most cases you will be automatically notified that updates are available from Microsoft for your product. What you can expect from these updates are mainly bug fixes, so when you find something and let Microsoft know, the Excel team captures the most important ones based on number of occurrences and amount of impact, and fixes them and sends out updates.
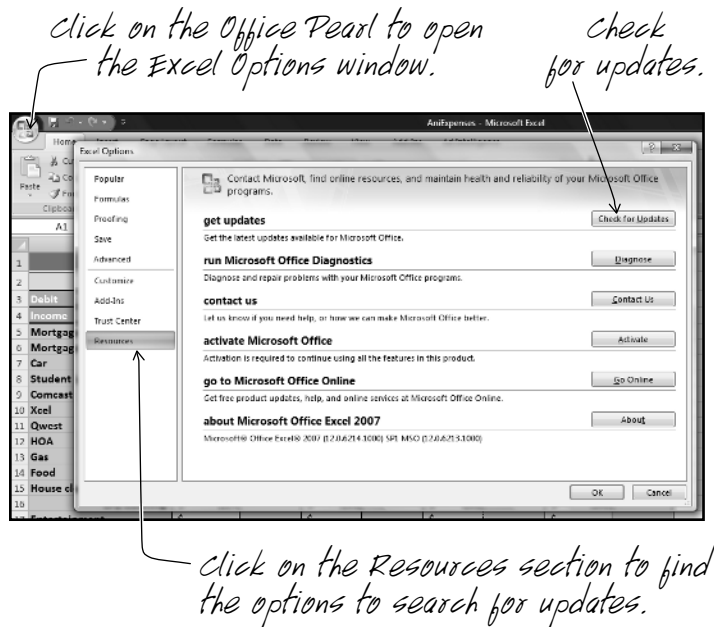

Click on the Office Pearl to open the Excel Options window.

Check for updates.

Click on the Resources section to find the options to search for updates.

Figure 1-13

Relax, Refresh, Reward

You have made it through the first chapter. Hopefully you're inspired and looking at your favorite handbag with a whole new perspective. You've learned about some of the coolest new features in Excel 2007 and are ready to move on to something new. Reward yourself with a soy Chai latte.

Did you know the word Chai is Farsi, and it means tea? For those of you who have seen it with the Indian culture, yes, the same word in India is used to mean "tea with milk." So the truth is when you order Chai tea, you are actually ordering a "tea tea," kind of like a mahi mahi. Funny thing is in Farsi Mahi means fish, so you are then saying "fish fish."

So why soy and not regular Chai? Because it's fat free and very low in calories. After all, soy is a bean. The cool thing is, you have to walk somewhere to get a soy Chai, and not too many places have it either. So as you walk around trying to find your soy Chai, you get the exercise too, and that keeps good oxygen flowing in your body and burns extra calories, and you may meet a lot of nice people along the way. When you look at the calories of a regular latte, compared to a soy Chai latte (this is what most places call it), you will see a big difference.