

John Walkenbach's Favorite Excel[®] 2007 Tips & Tricks

John Walkenbach



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About the Author

John Walkenbach is a leading authority on spreadsheet software, and principal of J-Walk and Associates Inc., an Arizona-based consulting firm that specializes in spreadsheet application development. John is the author of about 50 spreadsheet books, and has written more than 300 articles and reviews for a variety of publications, including *PC World*, *InfoWorld*, *PC Magazine*, *Windows*, and *PC/Computing*. He also maintains a popular Internet Web site (The Spreadsheet Page, www.j-walk.com/ss), and is the developer of the Power Utility Pak, an award-winning add-in for Microsoft Excel. John graduated from the University of Missouri and earned master's and PhD degrees from the University of Montana.

Acknowledgments

Writing a book that contains Excel tips was much more difficult than I originally thought it would be. The challenge is deciding on what exactly constitutes a tip. If I present a technique that you didn't know about, you may consider it to be a valuable tip. But if you're already familiar with the technique, it's *not* a tip.

I decided to select my tips based on a specific Excel user — a person who really exists but who will remain nameless. This person uses Excel on a regular basis but has never bothered to take the time to dig in and learn how to work more efficiently. I think this target reader has a lot in common with millions of other Excel users. If that's the case, most of them will find this book to be very useful. So, thanks to my anonymous target reader.

I must also acknowledge the world-famous Excel virtuoso Nick Hodge. Over the years, I've mentioned many people in my Acknowledgments sections, but none has responded more enthusiastically than Nick Hodge — who, by the way, holds the European record for having the thickest wallet. Adding his name to this section virtually guarantees a dozen additional sales in the UK.

Finally, thanks are due to the people behind the scenes at Wiley who converted my Microsoft Word files into a tangible book. First, thanks to Greg Croy, my acquisitions editor. This book was Greg's idea, and I'm glad that he chose me to be the author. I also appreciate the help and guidance of Paul Levesque. He and the other editors made many helpful suggestions, which I've incorporated into these pages.

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Introduction

Excel is a very popular program. Millions of people throughout the world use it on a regular basis. But it's a safe bet that the vast majority of users have yet to discover some of the amazing things this product can do. If I've done my job, you'll find enough useful information in this book to help you use Excel on a new level.

This is the second edition of this book, and I added about 50 new tips (and deleted some that no longer apply to Excel 2007). In addition, I beefed up many of the old tips based on feedback from readers of the first edition.

What You Should Know

This book isn't a beginner's guide to Excel. Rather, it's a book for those who already use Excel but realize that they have a lot more to learn. This book is filled with tips and tricks that I've learned over the years, and I'm certain that about 99 percent of all Excel users will find something new and useful in these pages.

If you have absolutely no experience with Excel, this book might not be the best choice for you. To get the most out of this book, you should have some background in using Excel. Specifically, I assume that you know how to accomplish the following tasks with Excel:

- Create workbooks, insert worksheets, save files, and perform other basic tasks.
- Navigate through a workbook.

- Use the Excel Ribbon and dialog boxes.
- Use basic Windows features, such as file management and copy-and-paste techniques.

What You Should Have

To use this book, you need a copy of Microsoft Excel 2007 for Windows. No exceptions. Excel 2007 is so radically different from previous versions that you will probably be very confused if you're using an older version of Excel.

As far as hardware goes for the computer you use to run Excel, the faster, the better. And, of course, the more memory in your system, the happier you'll be.

Conventions in This Book

Take a minute to skim this section and learn some of the typographic conventions used throughout this book.

Formula Listings

Formulas usually appear on a separate line in `monospace font`. For example, I might list the following formula:

```
=VLOOKUP (StockNumber, PriceList, 2, False)
```

Excel supports a special type of formula known as an *array formula*. When you enter an array formula, press Ctrl+Shift+Enter (not just Enter). Excel encloses an array formula in curly braces to remind you that it's an array formula.



NOTE

Do not type the curly braces for an array formula. Excel puts them in automatically.

VBA Code Listings

This book also contains examples of VBA code. Each listing appears in a `monospace font`; each line of code occupies a separate line. To make the code easier to read, I usually use indentation on specific lines. Although indentation is optional, it helps to delineate statements that go together.

If a line of code doesn't fit on a single line in this book, I use the standard VBA line continuation sequence: a space followed by an underscore character, to indicate that the line of

code extends to the next line. For example, the following two lines comprise a single VBA statement:

```
If Right(cell.Value, 1) = "!" Then cell.Value _  
    = Left(cell.Value, Len(cell.Value) - 1)
```

You can enter this code either exactly as shown, on two lines, or on a single line without the trailing underscore character.

Key Names

Names of keys on the keyboard appear in normal type: for example Alt, Home, PgDn, and Ctrl. When you should press two or more keys simultaneously, the keys are connected with a plus sign: “Press Ctrl+G to display the Go To dialog box.”

The Ribbon

Excel 2007 features a brand-new user interface. Menus and toolbars have been replaced by a tab-and-Ribbon interface.

When you need to select a command by using the Ribbon, I describe the command by using the tab name, the group name, and the command name: for example, “Choose Home ⇨ Alignment ⇨ Wrap Text.” This command translates to “Click the Home tab, locate the Alignment group, and then click the Wrap Text button.”

Some commands use a drop-down Ribbon control. For example: Home ⇨ Styles ⇨ Conditional Formatting ⇨ New Rule. In this case, you need to click the down-pointing arrow on the Conditional Formatting control in order to access the New Rule command.

Many commands begin with the word Office. There is no Office tab. Rather, this refers to the round logo in the upper left corner of the Excel window (the Office Button).

Functions, Procedures, and Named Ranges

The names of the Excel worksheet functions appear in all uppercase, like so: “Use the SUM function to add the values in column A.”

Macro and VBA procedure names appear in normal type: “Execute the InsertTotals procedure.” I often use mixed upper- and lowercase to make these names easier to read. Named ranges appear in italic: “Select the *InputArea* range.”

Unless you’re dealing with text inside quotation marks, Excel isn’t sensitive to case. In other words, both the following formulas produce the same result:

```
=SUM(A1:A50)  
=sum(a1:a50)
```

Excel, however, converts the characters in the second formula to uppercase.

Mouse Conventions

The mouse terminology in this book is all standard fare: pointing, clicking, right-clicking, dragging, and so on. You know the drill.

What the Icons Mean

Throughout this book, icons appear in the left margin to call your attention to points that are particularly important.



NOTE

I use Note icons to tell you that something is important — perhaps a concept that can help you master the task at hand or something fundamental for understanding subsequent material.



CAUTION

I use Caution icons when the operation I'm describing can cause problems if you're not careful.



CROSS-REFERENCE

I use the Cross-Reference icon to refer you to other tips that have more to say on a particular topic.



NEW

This icon indicates a feature new to Excel 2007.

Entering VBA Code

Some of these tips and tricks involve *Visual Basic for Applications (VBA)*, a programming language built into Excel. You use the following basic procedure to enter a VBA procedure into a workbook:

1. Press Alt+F11 to activate the VBA editor window.
2. Click your workbook's name in the Project window. If the Project window isn't visible, press Ctrl+R to display it.
3. Choose Insert ⇨ Module to add a VBA module to the project. A code window appears.
4. Type the code in the code window.

When your workbook contains VBA code, you must save it as a macro-enabled workbook. These workbooks have the *.xlsm extension.

When a workbook contains VBA code, you might receive a warning when you open the workbook. This warning depends on your security settings. To view or change your security settings, display the Trust Center dialog box:

1. Choose Office ⇨ Excel Options.
2. In the Excel Options dialog box, click the Trust Center tab.
3. Click the Trust Center Settings button.
4. In the Trust Center dialog box, click the Macro Settings tab.

I recommend the default setting: Disable All Macros with Notification. When this setting is in effect, you have the option to enable or disable macros in every workbook you open. The exception is when the workbook is opened from a trusted location. Specify trusted locations on the Trusted Locations tab of the Trust Center dialog box.

How This Book Is Organized

To provide some semblance of order, I grouped these tips and tricks into 13 parts:

- Part I: Basic Excel Usage
- Part II: Data Entry
- Part III: Formatting
- Part IV: Basic Formulas and Functions
- Part V: Useful Formula Examples
- Part VI: Conversions and Mathematical Calculations
- Part VII: Charts and Graphics
- Part VIII: Data Analysis and Lists
- Part IX: Working with Files
- Part X: Printing Tips
- Part XI: Spotting, Fixing, and Preventing Errors
- Part XII: Basic VBA and Macros
- Part XIII: Sources for Excel Information

How to Use This Book

This book really isn't intended to be read from cover to cover, as you would read a novel — but I'm sure that some people will do so. More likely, you'll want to use it as a reference book and consult it when necessary. If you're faced with a challenging task, you might want to check the index first, to see whether the book specifically addresses your problem. The order of the parts and tips is arbitrary. Most readers will probably skip around and pick up useful tidbits here and there.

About the Power Utility Pak Offer

Toward the back of this book is a coupon that you can redeem for a discounted copy of my award-winning Power Utility Pak — a collection of useful Excel utilities, plus many new worksheet functions. I developed version 7 of this product exclusively for Excel 2007.

You can also use this coupon to purchase the complete VBA source code for a nominal fee. Studying the code is an excellent way to pick up some useful programming techniques. You can take the product for a test drive by downloading the trial version from my Web site at www.j-walk.com/ss.



NOTE

Power Utility Pak version 7 requires Excel 2007 for Windows.

Reach Out

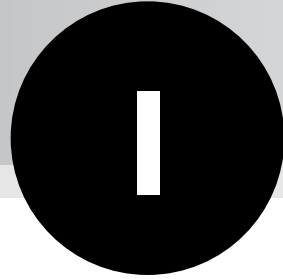
I'm always interested in getting feedback on my books. The best way to provide this feedback is by e-mail. Send your comments and suggestions to john@j-walk.com.

Unfortunately, I cannot reply to specific questions. Posting your question to one of the Excel newsgroups is, by far, the best way to get assistance. See Tip 219 for more information.

Also, when you're out surfing the Web, don't overlook my Web site (The Spreadsheet Page) at www.j-walk.com/ss.

Now, without further ado, it's time to turn the page and expand your horizons.

Part



Basic Excel Usage

In this part, you'll find tips and tricks covering some of the fundamental uses of Excel, from selecting cells and navigating sheets in a workbook to hiding rows and columns, as well as working with the Quick Access Toolbar and changing Excel's color scheme.

Tips and Where to Find Them

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