Does your life play out in a spreadsheet? Are numbers in columns and rows what make or break you in the work world?

If you answered yes to either of these questions, then Special Edition Using Microsoft Office Excel 2003 is the book that will make it all better. Learn quickly and efficiently from a true Excel master using the tried and true Special Edition Using formula for success. Here, you'll find information that's undocumented elsewhere - even in Microsoft's own Help systems. You'll learn from finely crafted, real-life examples built by an author who lives and dies by the integrity of his spreadsheets.
Copyright
About the Author
We Want to Hear from You!
Introduction
  New Features and Enhancements in Excel 2003
  How This Book Is Organized
  Conventions Used in This Book
Part I: Getting Started with Excel 2003
  Chapter 1. Getting Around Excel
    Starting and Exiting the Excel Program
    Identifying Workbook Elements
    Working with Workbooks
    Understanding Cell Basics
    Entering Text
    Saving Excel Data
    Controlling Your Worksheet View
    Troubleshooting
    Excel in Practice
  Chapter 2. Spreadsheet Basics
    Selecting Cells
    Selecting Columns and Rows
    Selecting Noncontiguous Ranges
    Selecting Ranges on Grouped Worksheets
    Naming Ranges for Fast Access
    Troubleshooting
    Excel in Practice
  Chapter 3. Editing Spreadsheets
    The Clipboard Viewer
    Editing with the Keyboard
    Creating a Data Series
    Creating a Custom Fill Series
    Creating a Custom Fill to Define Linear or Growth Trends
    Creating a Custom List or Series
    Replacing Data
    Tracking Changes Made by Multiple Users
    Using Comments to Explain Cell Content
    Linking Excel Data
    Troubleshooting
    Excel in Practice
Part II: Formatting and Printing Excel Worksheets
  Chapter 4. Applying Number and Date Formats
    Applying Common Numeric Formats from the Toolbar
    Applying Built-In Formats
Creating Custom Formats
Applying Custom Currency
Working with Large Numbers
Pasting In Custom Characters
Creating Custom Conditions Codes
Repeating Characters
Excel in Practice

Chapter 5. Formatting and Printing
Why Change the Formatting?
Changing the Font, Point Size, and Font Styles
Working with Styles
Applying and Drawing Borders and Shading
Using AutoFormat to Enhance Your Worksheets
Using the Drawing Toolbar
Ordering, Grouping, Moving, and Resizing Drawn Objects
Combining Drawing Tools with Charts and Worksheets
Printing a Worksheet
Previewing the Print Job
Using Page Break Preview
Working with Page Setup Options
Troubleshooting
Excel in Practice

Part III: Using Formulas and Functions
Chapter 6. Function Fundamentals
The Basic Parts of a Formula
Using the AutoSum Feature
Editing Formulas
Writing Multiple Copies of a Formula
Using AutoCalculate for Quick Totals
Relative Versus Absolute Referencing
Using the Watch Window
Referencing Values in Other Worksheets and Workbooks
Troubleshooting
Excel in Practice

Chapter 7. Database Functions
Database Functions Overview and Syntax
DAVERAGE
DCOUNT
DGET
DMAX
DMIN
DPRODUCT
DSUM
GETPIVOTDATA
Troubleshooting
Excel in Practice

Chapter 8. Date and Time Functions
Date and Time Functions Overview
DATE
DAYS360
EDATE
MONTH
NETWORKDAYS
TODAY
WEEKDAY
YEAR
Troubleshooting
Excel in Practice

Chapter 9. Engineering Functions
Engineering Functions Overview
BESSELI
BIN2DEC
COMPLEX
CONVERT
DEC2BIN
DELTA
GESTEP
HEX2BIN
IMCONJUGATE
IMPOWER
IMPRODUCT
IMSUB
IMSUM
OCT2BIN
Troubleshooting
Excel in Practice

Chapter 10. Financial Functions
Financial Functions Overview
ACCRINT
ACCRINTM
COUPDAYBS
COUPDAYS
COUPNCD
COUPNUM
CUMIPMT
DISC
DURATION
FV
IPMT
MDURATION
NPER
NPV
ODDFPRICE
PMT
PRICE
PV
RATE
RECEIVED
TBILLPRICE
TBILLYIELD
YIELD
YIELDMAT
Troubleshooting
Excel in Practice

Chapter 11. Information Functions
Information Functions Overview
CELL
COUNTBLANK
Chapter 12. Logical Functions
Logical Functions Overview
AND
IF
NOT
OR
Troubleshooting
Excel in Practice

Chapter 13. Lookup and Reference Functions
Lookup and Reference Functions Overview
CHOOSE
HLOOKUP
INDEX (Array Form)
INDEX (Reference Form)
Using the Lookup Wizard
LOOKUP (Array Form)
LOOKUP (Vector Form)
OFFSET
Auto Update Charts Using the OFFSET Function
TRANSPOSE
VLOOKUP
Troubleshooting
Excel in Practice

Chapter 14. Math and Trigonometry Functions
Math and Trigonometry Functions Overview
ABS
ACOS
ASIN
COMBIN
COUNTIF
DEGREES
LN
MODE
PERMUT
PI
RAND
ROMAN
SQRT
SUBTOTAL
SUM
SUMIF
TAN
Troubleshooting
Excel in Practice

Chapter 15. Text Functions
Text Functions Overview
CONCATENATE
EXACT
FIND
Chapter 16.  Statistical Functions

Statistical Functions Overview

AVERAGE
BINOMDIST
CHIDIST
CONFIDENCE
CORREL
COUNT
COVAR
EXPONDIST
FDIST
FORECAST
FREQUENCY
GEOMEAN
GROWTH
INTERCEPT
LARGE
LINEST
LOGEST
MAX
MEDIAN
MIN
MINA
MODE
NORMDIST
NORMINV
PERCENTILE
PERCENTRANK
POISSON
RANK
SLOPE
SMALL
STDEV
STDEVA
TREND
VAR
VARA

Troubleshooting
Excel in Practice

Part IV: Using Excel's Analysis Tools

Chapter 17.  Setting Up a List or Database in Excel

Using Excel as a Database Program
Building an Effective List
Creating Structured Lists from Data Contained in One Cell
Working with the Data Form
Viewing and Printing the List
Troubleshooting
Excel in Practice
Chapter 18. Using Excel's Data-Management Features
   Data Management in Excel
   Using Conditional Formatting with Lists
   Using Formulas with Conditional Formatting
   Using Formulas with Conditional Formatting to Create Timelines
   Managing Data Using Text To Speech
   Sorting a List
   Filtering a List
   Adding Form Controls to Your Worksheets
   Troubleshooting
   Excel in Practice
Chapter 19. Outlining, Subtotaling, and Auditing Worksheet Data
   Organizing and Auditing Your Data
   Grouping or Outlining Data
   Consolidating Data
   Creating Automatic Subtotals
   Validating and Auditing Data Entry
   Troubleshooting
   Excel in Practice
Part V: Creating and Modifying Charts
Chapter 20. Building Charts with Excel
   An Overview of Excel Charts
   Creating Charts with the Chart Wizard
   Excel Chart Types
   Printing Charts
   Troubleshooting
   Excel in Practice
Chapter 21. Modifying Excel Charts
   Options for Improving Your Charts
   Changing the Chart Type
   Changing a Data Series
   Adding a Secondary Axis to the Chart
   Value Axis Scaling
   Category Axis Scaling
   Changing the Series Order
   Adding a Trendline to a Data Series
   Troubleshooting
   Excel in Practice
Chapter 22. Formatting Charts
   An Overview of Formatting Charts
   Formatting Lines: Axes, Tick Marks, High/Low Lines, and Error Bars
   Formatting Text: Data Labels, Titles, Legends, and Text Boxes
   Enhancing Charts with Shapes
   Formatting Data Series
   Changing the Border, Color, or Fill of a Chart Item
   Formatting 3D Charts
   Troubleshooting
   Excel in Practice
Chapter 23. Professional Charting Techniques
Formatting Charts for a Professional Look
Creating Column Depth
Pie Chart Techniques
Using Fill Effects to Show Variance in 3D Charts
Using Form Controls with Charts
Stacking Multiple Charts
Creating Cost and Production Curves with Charts for Variance
Linking Chart Text to Worksheet Cells
Charting Hidden Data
Creating Effective Multiple-Combination Charts
Troubleshooting
Excel in Practice

Part VI: Using Excel in Business
Chapter 24. Using PivotTables and PivotCharts
Understanding PivotTables
Using the PivotTable and PivotChart Wizard
Creating PivotCharts
Modifying PivotTables and PivotCharts
Working with Dates in PivotTables
Creating a PivotTable from Multiple Ranges
Saving and Editing PivotTables in HTML Format
Troubleshooting
Excel in Practice

Chapter 25. Using Analysis Tools: Goal Seek, Solver, and Data Tables
Analyzing Your Data with Excel
Using Goal Seek
Using Solver
Creating Amortization Tables to Calculate Mortgage Payments
Using the Analysis ToolPak Add-In
Excel in Practice

Chapter 26. Using Excel in Business
Important Tools for Any Business
Value Chains
Value Matrices
Excel in Practice

Chapter 27. Customizing Excel to Fit Your Working Style
Why Customize Excel?
Changing the Default Excel Settings
Web Options Button
Changing Workbook Settings
Changing the Excel Window Settings
Recent Option Tabs
Modifying Toolbars
Customizing the Excel Menus
Troubleshooting
Excel in Practice

Part VII: Integrating Excel with Other Applications
Chapter 28. Building Presentations with Excel
Using Excel with Other Microsoft Office Programs
Copying Excel Data to a Word Document
Copying Excel Data to a PowerPoint Presentation
Copying Word and PowerPoint Data to an Excel Worksheet
Combining Word, Excel, and PowerPoint Files with Hyperlinks
Troubleshooting
Excel in Practice
Chapter 29.  Using Excel with Access and Other Databases
Using Excel with Database Software
Using Access to Complement Excel
Exporting Excel Data into Other Databases
Retrieving Data from Access and Other Relational Databases
Importing Data from Text Files
Troubleshooting
Excel in Practice
Chapter 30.  Retrieving Data from OLAP Servers
What Is OLAP?
Server Versus Client OLAP
Creating an OLAP Data Source Definition
Creating an OLAP PivotTable
Using OLAP PivotTables
Using OLAP PivotCharts
Saving Offline Cubes from Server Cubes
Performing OLAP Analysis on Database Data
Excel in Practice
Chapter 31.  Recording and Editing a Macro
Create Your Own Commands with Macros
Creating a Macro with the Macro Recorder
Macro Playback
Editing a Macro
Deleting Macros, Custom Buttons, and Custom Menu Items
Macros to Help You Work Faster
Troubleshooting
Excel in Practice
Chapter 32.  Creating Interactive Excel Applications with VBA
Why Write Macros Rather Than Record Them?
Introduction to Object-Oriented Programming
Variables and Constants
Understanding the Visual Basic Editor
Getting Help with Visual Basic
VBA Procedures
Control Structures
Code-Writing Tips
Debugging
Automatic Execution of VBA Code
Excel in Practice
Part VIII:  Appendix
Appendix A.  What's on the CD
What is WOPR?
Index

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Dedication

To Jim Kvistad, who's been serving his country during the last six months and has had to endure countless hours away from his family.

About the Author


A member of The Academy of Interactive Arts and Sciences, he spent several years in interactive media development with Disney Interactive in Southern California.
For the last several years he's been working with America Online as part of the AOL products group and resides in Northern Virginia.

We Want to Hear from You!

As the reader of this book, you are our most important critic and commentator. We value your opinion and want to know what we're doing right, what we could do better, what areas you'd like to see us publish in, and any other words of wisdom you're willing to pass our way.

As an associate publisher for Que, I welcome your comments. You can email or write me directly to let me know what you did or didn't like about this book as well as what we can do to make our books better.

Please note that I cannot help you with technical problems related to the topic of this book. We do have a User Services group, however, where I will forward specific technical questions related to the book.

When you write, please be sure to include this book's title and author as well as your name, email address, and phone number. I will carefully review your comments and share them with the author and editors who worked on the book.

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Introduction

New Features and Enhancements in Excel 2003

How This Book Is Organized

Conventions Used in This Book

New Features and Enhancements in Excel 2003

Under the hood there have been a lot of improvements to Office Excel 2003 that will allow corporations and users to further customize Excel to fit their personal working environment.

Enhancements and new features you'll find in Excel 2003:

- Richer development tools

  Power users and IT departments can now further customize Excel using XML and InfoPath. This customization allows users and developers to build structured templates based on XML thus providing a more in-depth application development environment. Ultimately, this will make it easier for companies to collect and share data.
Enhanced document management

Rights management has become a common occurrence in daily business; with Excel 2003 you can control the policies for reading, printing, and copying documents to further put the creator of the document in control.

In-depth cube analysis tools

Access to Enterprise data enables you to create OLAP PivotTables, and use Excel's OLE DB, ActiveX Data Objects (ADO), DAO Data Access Objects, and data access technologies in an SQL Server environment.

New Research task pane

The new Research task pane allows you to research information on the Web or through a series of encyclopedias.

Shared workspaces

Available only with Windows Server 2003 running, users can save workbooks to shared workspaces to better collaborate in a team environment.

Windows Sharepoint integration

Use Sharepoint to manage an edit lists of information in Excel or transfer over to a Windows Sharepoint Service site.

Permissions

Available if you're running Windows Server 2003. Control your work and the distribution of your work with enhanced permissions that control whether a workbook can be saved, copied, or emailed with Windows Rights Management Services.

Enhanced File recovery

When a file becomes corrupt or crashes, the files are analyzed for errors and all recoverable documentation is saved with Excel's new Document Recovery feature.

Improved encryption

The encryption feature allows you to select a CryptoAPI-based encryption type with which you can create passwords up to 255 characters in length. This provides an ultra-secure workbook.

Improved Help

Through the improved Help task pane you can access client-side help or access Microsoft's online assistance from the Microsoft Web site.

Enhanced collinearity detection

Enhanced numerical detection allows Excel to identify calculations of the sum of squared deviations, normal distributions, and continuous probability distribution functions.

Enhanced smart tags

You can now associate smart tag actions with specific sections within a workbook. The smart tag will only appear when you hover over the smart tag with your mouse in that desired workbook section.

Enhanced Clipboard viewer

The enhanced Clipboard viewer is similar to the Excel 2002 Clipboard, except that the viewer is in the form of the task pane with multiple options for media and management. The new viewer allows you to manage clip art, photographs, movies, and sounds.

Programmable task panes
Using XML support in Excel 2003, you can program task panes to relate specifically to your business and or project.

How This Book Is Organized

Special Edition Using Microsoft Office Excel 2003 is divided into logically ordered and carefully divided sections. This makes it easier for you to find the topics you need, and ensures that the book flows from basic to advanced topics in a manner that enables you to read the book from start to finish, effectively building your Excel skills.

Part I: Getting Started with Excel 2003

Chapter 1, "Getting Around Excel," Chapter 2, "Spreadsheet Basics," and Chapter 3, "Editing Spreadsheets," take you around some of Excel's new features and give you basic fundamentals to get around and manipulate the program on its basic levels. From adding and formatting worksheets to a workbook to using the new worksheet task pane, these chapters give you the basics. You'll also learn how to use the new smart tags that appear on your spreadsheet based on certain commands performed.

Part II: Formatting and Printing Excel Worksheets

In Chapter 4, "Applying Number and Date Formats," you'll learn all the basics from applying number and date formats to creating your own custom number and date formats. Chapter 5, "Formatting and Printing," takes you into the use of spreadsheets with drawing tools. From standard layouts to formatting cells, fonts, and styles, this is where you'll find it. After you learn these basics, you'll also learn the ins and outs of printing all elements in a spreadsheet.

Part III: Using Formulas and Functions

Chapters 6 through 16 take you through just about all the functions Excel offers. You start off with Chapter 6, "Function Fundamentals," and move into all the function categories by chapter including Chapter 7, "Database Functions," Chapter 8, "Date and Time Functions," Chapter 9, "Engineering Functions," Chapter 10, "Financial Functions," Chapter 11, "Information Functions," Chapter 12, "Logical Functions," Chapter 13, "Lookup and Reference Functions," Chapter 14, "Math and Trigonometry Functions," Chapter 15, "Text Functions," and Chapter 16, "Statistical Functions." With tons of examples, you should find just about every solution you'll need to solve problems in any business.

Part IV: Using Excel's Analysis Tools

Chapter 17, "Setting Up a List or Database in Excel," Chapter 18, "Using Excel's Data-Management Features," and Chapter 19, "Outlining, Subtotaling, and Auditing Worksheet Data," focus on Excel's data analysis and data-management features. Learn how to build a database or list; edit, sort, and filter the list; and use advanced filters to manipulate just about any list or database. Use form controls in conjunction with functions learned in previous chapters to automate and create custom form bid sheet models.
Part V: Creating and Modifying Charts

Chapters 20 through 23 take you on a comprehensive tour of Excel's considerable charting tools. From building a simple bar or pie chart to stacking multiple charts, you'll learn which chart type best depicts your data (Chapter 20, "Building Charts with Excel") and how to manipulate its appearance and content to express your numeric data effectively (Chapter 21, "Modifying Excel Charts" and Chapter 22, "Formatting Charts"). Learn professional techniques for making your charts stand out visually as well as in terms of their content, communicating complex data in a dynamic visual format. Also learn how to tie form controls such as drop-downs and radio buttons into your charts for automatic data manipulation (Chapter 23, "Professional Charting Techniques").

Part VI: Using Excel in Business

In Chapters 24 through 27, you learn how to build and manage a database with PivotTables. Take advantage of Excel's new PivotTable task pane and improved PivotChart tools for data analysis to support your business decisions (Chapter 24, "Using PivotTables and PivotCharts"). Use Goal Seek, Solver, and Analysis ToolPak tools to solve simple or complex business and resource-loading problems (Chapter 25, "Using Analysis Tools: Goal Seek, Solver, and Data Tables"). Create cascading schedules and time-management tools found only in this book (Chapter 26, "Using Excel in Business"). Learn how to create custom functions that have relevance only to your business (Chapter 27, "Customizing Excel to Fit Your Working Style").

Part VII: Integrating Excel with Other Applications

Chapters 28 through 32 show you how to end your isolation and branch out using Excel data in your PowerPoint presentations and Access tables. Chapter 28, "Building Presentations with Excel," provides the fundamentals for porting data over into other office applications for presentations or linked information. Chapter 29, "Using Excel with Access and Other Databases," focuses extensively on Excel's database access capabilities and on retrieving data from the Web. Learn how to build database queries and retrieve information from Access and from other databases. Chapter 30, "Retrieving Data from OLAP Servers," introduces you to OLAP PivotTables and data stores, how to create them, and how to use them. Use Excel's Cube Wizard to build and use cubes for quick data access and analysis offline. Chapter 31, "Recording and Editing a Macro," introduces you to recording and editing macros, while Chapter 32, "Creating Interactive Excel Applications with VBA," offers a crash course on using Visual Basic in Excel. Finally, Chapter 33 "Using Excel on the Web," shows you how to take advantage of new Web query options that allow you to manage your stock portfolios in Excel with simple refresh commands.

Web Content

Most readers of this book will be content to use Excel exactly as it comes out of the box. Therefore, many chapters deal only with customization that can be done simply by making choices in dialog boxes. But for those using Excel as a development environment, we have a special introduction chapter for going beyond the basic macro recordings using VBA. You can find this and other valuable information at http://www.quepublishing.com.

[ Team LiB ]
[ Team LiB ]
Conventions Used in This Book

The special conventions used throughout this book are designed to help you get the most from the book as well as Excel 2002.

Text Conventions

Different typefaces are used to convey various things throughout the book. They include the following:

In this book, key combinations are represented with a plus sign. If the action you need to take is to press the Ctrl key and the S key simultaneously, the text tells you to press Ctrl+S.

Special Elements

Throughout this book, you'll find Tips, Notes, Cautions, Cross-References, and Troubleshooting Tips. These elements provide a variety of information, ranging from warnings you shouldn't miss to ancillary information that will enrich your Office experience but isn't required reading.

"Signature" Tips

Tip From

Tips point out special features, quirks, or software tricks that will help you increase your productivity with Excel 2003.

Notes

Note

Notes contain extra information or alternative techniques for performing tasks that we feel will enhance your use or understanding of the current topic.

Cautions

Caution

If there is a potential problem with a feature or something you should be aware of to avoid errors or unwanted results, you'll find both a description of the situation and how to resolve or avoid it in the Caution format.
Troubleshooting

At the end of most chapters, you'll encounter a "Troubleshooting" section. This is where you learn how to solve or avoid common problems you might typically face with Excel 2003.

Excel in Practice

At the end of many chapters, you'll find an example of how to use that chapter's features to improve the overall functioning, legibility, and effectiveness of your worksheets. Often appearing in the form of before-and-after figures with explanatory callouts, these samples offer advice and practical examples for your own implementation.

Cross-References

Cross-references direct you to other locations in this book that provide supplemental or supporting information. They look like this:

For details on how to create custom number formats, see "Creating Custom Formats," p. 97

Part I: Getting Started with Excel 2003

Chapter 1. Getting Around Excel

In this chapter

Starting and Exiting the Excel Program
Identifying Workbook Elements
Working with Workbooks
Understanding Cell Basics
Entering Text
Saving Excel Data
Controlling Your Worksheet View
Starting and Exiting the Excel Program

If you're new to Excel, it won't be long before you're accustomed to performing various spreadsheet tasks simply and quickly. You'll want to start the program with as much speed and simplicity as possible. Choose one of the following methods to start Excel:

- From the Start menu, choose All Programs, and then select Microsoft Excel from the list. This method isn't the fastest, but you don't need to do anything special to use it — the menus are set up for you through your installation of Microsoft Office.
- Choose New Office Document from the Start menu, and choose the Blank Workbook icon from the General tab. Click OK to open Excel. Again, this isn't the fastest method, but the tools are already set up for you.
- Open an existing Excel workbook from within Windows Explorer, My Computer, or by using a desktop shortcut to that particular file.

To learn how to open an existing workbook file, see "Saving Excel Data," p.34.

- Create and use a shortcut icon on the desktop that takes you right into Excel. This requires you to create the icon in the first place, but you have to do that only once. From then on, you have the fastest method of starting Excel right on your desktop. To create a shortcut, follow these steps:

1. Right-click any empty spot on your Windows desktop.
2. Choose New, then Shortcut from the shortcut menu.
3. In the Command Line text box, enter the path and filename for Excel, which should be in a Microsoft Office folder on your local drive. The default path is C:\Program Files\Microsoft Office\Office11\.

Note

If you're not sure of the exact location, click Browse. When you've found the program file (Excel.exe), double-click it or click Open to return to the Create Shortcut dialog box.
4. Click Next.
5. Type a name for your shortcut, or accept the default name as it appears in the Select a Name for the Shortcut text box.
6. Click Finish. Your shortcut appears on the desktop. (You can tell a shortcut from a program icon by the small arrow in the lower-left corner of the icon image. Only shortcuts have this arrow.)

Note

You could also place the shortcut on the Windows task pane if you do not want to place on the desktop.
When you start Excel, you are immediately presented with a blank Excel workbook, ready for you to begin entering and editing your data.

You can exit Excel in any of the following ways:

- Choose File, Exit. Any open and unsaved workbooks will result in a prompt, asking you whether you want to save your work. After you respond to these prompts, the program will close.
- Click the Close button in the upper-right corner of the Excel application window. Using this button also results in prompts asking you to save any unsaved work, after which the application will be shut down. If you see two Close buttons, be sure to click the one on the Excel title bar; otherwise, you'll just close the workbook window.
- Right-click the taskbar icon for each of your Excel workbooks (a separate button appears on the taskbar for each open workbook) and choose Close from the shortcut menu for each open workbook. When all workbooks are closed, right-click the remaining Excel application button on the taskbar, and choose Close. The application will now be closed.
- Press Alt+F4 to exit the program.

If you need to close only the workbook you're working on and want to keep Excel open to work on other workbook files, choose File, Close from the menu, or press Ctrl+F4. If you haven't saved your work, you'll be prompted to do so before the workbook is closed. Find out more about saving your workbooks in Chapter 2, "Spreadsheet Basics."

Identifying Workbook Elements

Before you start entering any text or numbers into your blank Excel workbook, it's a good idea to become familiar with the entire Excel window. Your Excel window contains the elements shown in Figure 1.1, all of which are part of a typical blank Excel workbook.

Figure 1.1. This is the view upon opening the Excel 2003 default window and toolbars.
When a workbook is open and maximized, the Excel window contains two sets of Minimize, Maximize, and Close buttons. The uppermost set is associated with the Excel application (program), and the lower set controls the workbook window.

Tip From

If you're using a wheeled mouse, such as the Microsoft IntelliMouse, you can hold down the wheel button and drag up, down, left, or right within the window to scroll through your worksheet. You can also roll the wheel to scroll.

Using ScreenTips and What’s This? Help

You can point to almost any element in your Excel window and, after a brief pause, a ScreenTip will appear to tell you the name of that particular element (see Figure 1.2).

Figure 1.2. Use ScreenTips to help familiarize yourself with the names of your Excel window elements.

To gain access to Excel's full set of help files, choose Help, Microsoft Excel Help or press F1. When the Office Assistant is enabled, it shows as an icon on the operating system tray. If the Office Assistant has been disabled or you're using the standalone version of Excel, this command displays the Help task pane.

In the task pane, you can search by topic using the search field, or if you're online you can access Microsoft's communities, assistance center, or training site. I would suggest using the search field to get started.

The New Workbook Task Pane

The New Workbook task pane enables you to do several things from one pane, from retrieving last-used workbooks to creating and storing Web templates. If you do not see the task pane you can access it by choosing View and then Task Pane or by selecting Ctrl+F1. You can also use the small drop-down menu at the top of the task pane next to the “X” to access these panes: Getting Started, Help, Search Results, Clip Art, Research, Clipboard, New Workbook, Template Help, Document Actions, Shared Workspace, Document Updates, and XML Source.

The task pane was created to help users have one centralized place for a host of tasks. The viewers available and their descriptions follow.

After you close the task pane, you access it again by selecting Task Pane from the View menu. In addition, the task pane is considered a toolbar and can be turned on