

Excel best practices for business

[Business](#)



The container for Excel spreadsheets — the grid where numbers, text, and formulas reside and calculations are performed — is a file called a workbook with a default filename of Book1. xls. When Excel is started, a new workbook is created and displays a blank worksheet. Within Excel, we can create a new workbook from scratch, use a template that defines a design for a workbook, or open an existing workbook and modify it. Data is the core of Excel, yet before we can calculate data, chart it, analyze it, and otherwise use it, we have to place it on a worksheet.

Data comes in several forms — such as numbers, text, dates, and times — and Excel handles the entry of each form uniquely. After we enter data into Excel's worksheets, we might want to make changes or verify accuracy, so Excel offers automatic tools to assist us along the way. In an Excel worksheet, text is used to identify, explain, and emphasize numeric data. It comprises characters that cannot be used in calculations. We enter text by typing just as we would in a word processing program.

Numbers are numerical data, from the simplest to the most complex. Excel provides several features to help us more easily work with numbers used to represent values in various categories, such as currency, accounting, and mathematics. Besides that Excel lets us easily perform powerful calculations using formulas and functions. Formulas are mathematical statements that follow a set of rules and use a specific syntax. An Excel worksheet is a matrix, or grid, of lettered column headers across its top and numbered row headers down its side.

The first row of a typical worksheet is used for column headings. The column headings represent categories of similar data. The rows beneath a column

heading contain data further categorized by a row heading along the leftmost column, or listed below the column heading. Worksheets can also be used to set up databases, where columns are referred to as fields and each row represents a unique record of data. A workbook is an entire Excel file. Each workbook contains worksheets. Workbook supplies a stack of worksheet pages.

To flip through these pages, we can use the sheet tabs, which appear to the left of the horizontal scroll bar. We just click a tab to move a particular worksheet to the top of the stack. There are usual and popular items in the workbook window, but there are a few more hidden features. The vertical split box and horizontal split box split the workbook window into two chunks, or panes, which we can scroll independently. By splitting a window into panes, we can view and compare nonadjacent portions of the workbook.

To use either the vertical or horizontal split box, drag the split box up and down or left and right. (To remove a split, we drag the split box back to its original position.) The Tab split box lets us change the number of sheet tabs that can be displayed and the size of the horizontal scroll bar. To make this change, just drag the Tab split box left or right. The worksheets are named on a bottom tab (Sheet 1, Sheet 2, Sheet 3 however, we can rename these). Each worksheet can contain whatever data we want.

We need using more than one worksheet in a workbook when we want to place related data together in one file. For example, one could track income and expenses for a year in a workbook and use a worksheet for each month. A thirteenth worksheet could contain yearly totals.

References:

Abdulezer, Loren. Excel Best Practices for Business : Covers Excel 2003, 2002, And 2000. Hoboken, NJ, USA: John Wiley & Sons, Incorporated, 2003.
<http://www.mum.edu/helpdesk/tutorials/excel-tut.html>