

Introduction

Most people have Microsoft Excel® installed on their computers and they are increasingly proficient using the software. However, most users do not realize the full capacity and power of computerized spreadsheets in automating and simplifying a multitude of office tasks. Adapting to and becoming competent with computer skills, including using the full capability of Excel®, are analogous to using a power saw rather than a handsaw to build. The knowledge you will gain by reading this book and practicing the examples provided will help you transition to using the power saw.

One of my favorite cartoons shows a medieval general leading his army into battle. The army is arrayed for battle, with shields held high and spears in hand. The general stands next to an aide, who is trying to introduce a salesman to the general. The salesman is peddling a machine gun. The general's aide is trying to catch the attention of the preoccupied general but is waved off. The caption under the cartoon reads, "No! I can't be bothered with new technology . . . we have a battle to fight!"

As a builder, you understand the payoff for the time you spend to sharpen a saw or oil a tool. Likewise, knowing how to apply new technology to your construction business management practices is the only way to maintain your competitive edge. Without this knowledge, you may survive, but your business won't thrive. Although you may win the battle, you will lose the war. That is, although you may be able to break even or perhaps earn a small profit doing construction, you will not attain long-term profitability and growth.

This book presents the basics of using Excel® spreadsheets for new users and it offers tips for experienced users too. It is organized to help you scan for topics you are not familiar with and skip areas in which you are proficient.

The book will teach you how to create customized Excel® spreadsheets that will save you time and increase your professionalism. Following the book's

guidelines, you will be able to create estimates that are both accurate and visually appealing.

You will learn how to set up and organize your spreadsheet estimate into a summary sheet with detail or work-up sheets backed by databases that store the cost information. More specifically, you will learn how to

- create and use formulas that will automatically calculate quantities
- use functions to look up information from databases and detail sheets
- link information
- navigate spreadsheets
- use macros to automate your work
- calculate profit and overhead accurately
- implement controls to add functionality to spreadsheets

To make the most of this book, you will need to have Microsoft Excel® 2007 installed on your computer. You can download a 60-day trial version of Microsoft Excel® 2007 online at www.microsoft.com. Simply search for Excel® 2007. This program will run with either the Windows Vista or Windows XP operating systems.

Each teaching module in this book includes step-by-step examples. Each Microsoft Excel® 2007 workbook on the companion CD corresponds to a chapter in the book and contains the completed worksheets illustrated in the chapter. These worksheets include both detail sheets and databases. The databases are identified by DB at the end of the worksheet names. You will notice that some workbooks are “macro enabled.” (Their icon includes a yellow sheet with an exclamation point.) This means that they have an embedded computer code that will execute with a specific keyboard sequence or after a worksheet object is clicked. To allow the macros to run, you will need to save these workbooks using the save option “Excel® macro-Enabled Workbook.”

To open the files


- Insert the CD into your CD-ROM drive.
- Open Excel®.
- Click the **Office** button, choose **Open**, and select the drive letter where the CD is located.
- Double click the file name, or select the file and click **Open**.
- **Save** a copy of the file to your hard drive.
- Open a blank worksheet, follow the instructions in the book, and compare your results with the completed worksheets on the CD.

Choosing Hardware

Your system hardware will determine how well Excel® performs. Upgrading the random-access memory (RAM) of your computer’s hardware will usually increase the speed of your computer’s processing ability. Newer computers generally are fast enough to accommodate the Excel® spreadsheet application.

In general, you will save yourself from a lot of frustration by upgrading your computer every four to five years. With up-to-date hardware, your software will run much faster and you will be able to work more effectively. You don't need the latest and most expensive computer system, but you should buy high-quality hardware. This will save you money in the long run by extending the useful life of your computer.

Conventions in This Book

- Instructions are listed step-by-step with Excel® commands in **bold** type.
- Formulas are in **bold** type.
- Notes of interest are highlighted using the following symbol .
- Multilevel menu commands are separated by a forward slash (/).