Course Description

There are a lot of features in Excel which help you manage your worksheets better. In class we will go over quite a few of these features. Listed below are all the items which we will cover today.

Objectives:

- AutoComplete
- Pick From a List
- Ctrl + Enter
- AutoFill
- Custom Lists
- Conditional Formatting
- Shading Cells
- Suppress Errors
- Range
- Precedents vs. Dependents
- Watch Window
- Filter
- Text to Columns
- Organizing Data into Levels
- Research Tool
- Comments
- Freezing Column and Rows
- Splitting Windows
**AutoComplete**

The AutoComplete function allows you to repeat entries which were previously entered in the same column. As you start typing your entry, if there is a similar match in the column, Excel will fill in the entry for you. By pressing the Enter key, the item is accepted, but if you continue to type, the auto complete item will be replaced.

**Pick From a List**

As a set of data is typed into a column of a worksheet, Excel keeps track of these items as a list. As long as no spaces are added between the entries, an item can be retrieve from the list without retyping the entry.

1. Right click in the cell.
2. Choose **Pick From Drop-down list**.
3. Select the item you want to enter in the cell.

**Ctrl + Enter**

This option will give you the ability to type an item once and have it repeat numerous times in the selected area just by using **Ctrl + Enter**.

1. Select a group of cells by clicking and dragging over the selection.
2. Type your text in the active cell.
3. Hit **Ctrl + Enter** and all the cells will fill in with the information you typed.

**AutoFill**

The AutoFill function allows you to copy constant values or formulas in the same way you would use the copy and paste function.

1. Select the cell that contains the data or formula you wish to copy.
2. Place the mouse pointer over the fill handle of the active cell.
3. Click with the left mouse button and drag.
4. The data or formula has been copied.

- Be careful of Relative vs. Absolute cell referencing.
Custom List

Excel allows you to create your own custom series. Custom Lists are considered to be “Global” so this allows the entire list to be available for each workbook.

- **Importing a Custom List**
  1. Open the file with the list to be added as a custom list.
  2. Select the cells which contain the list.
  3. Click the **Microsoft Office Button**.
  4. Choose **Excel Options**.
  5. Select the **Popular** button.
  6. Under the Top options for working with Excel, click **Edit Custom Lists**.
  7. Click the **Import** button.
  8. Click **OK** twice to close the dialog boxes.

- **Creating a Custom List from Scratch**
  1. Click the **Microsoft Office Button**.
  2. Choose **Excel Options**.
  3. Select the **Popular** button.
  4. Under the Top options for working with Excel, click **Edit Custom Lists**.
  5. Click **NEW LIST** from the Custom Lists box.
  6. Type the entries in the List entries box, pressing **Enter** after each item.
  7. Click the **Add** button.
  8. Choose **OK** twice to close dialog boxes.
• **Create a Series of Text Entries**

Excel has a number of built-in series functions for creating lists. Some series include: days of the week, months of the year, and quarterly abbreviations.

1. Enter the first text entry in your active cell.

2. Hit **Enter**.

3. Select the cell.

4. Place the mouse pointer over the fill handle of the active cell.

5. Click with the left mouse button and drag.

6. Release the mouse button and the range of cells are now filled with the series.

• **Create a Series of Sequences**

Excel also allows you to create a series of sequences, such as 1, 2, 3; 1998, 1999, 2000, 2001; and dates.

1. Enter the first entry of the series in your active cell.

2. Hit **Enter**.

3. Enter the second entry of the series in the next cell (*either below or to the right*).

4. Hit **Enter**.

5. Select both cells.

6. Place the mouse pointer over the fill handle of the selected cells.

7. Click the left mouse button and drag the fill handle to select the destination cells.

8. Release the mouse button, the range of cells is now filled with the series.

• If a cell contains only text and the AutoFill feature is used, it will copy the cell’s data as it is. If however, the cell contains text and numeric information, the numeric information will change by the interval requested.
**Conditional Formatting**

There are times when you want Excel to automatically format text for you based on what is inside the cell. Conditional Formatting gives Excel this capability. Conditional Formatting will be based on the contents of the cell and not on the formula in the cell.

1. Select the cells you want to apply the condition(s) to.
2. Select the **Home** tab.
3. Click the **Conditional Formatting** button from the Styles group.
4. Hover over an option from the drop down list.
5. Choose a subdivision.

**Adding Shading to Cells**

If shading cells by using the Conditional Formatting feature sounds too cumbersome or you want each cell to contain a solid color, then the cells can be shaded manually.

1. Choose the cell(s) you want to shade.
2. Select the **Home** tab.
3. Click the **Format** button from the Cells group.
4. Select **Format Cells**.
5. Choose the **Fill** tab.
6. Select the shading color and pattern you want to use.
7. When you like the results you see, click **OK**.

**Suppress Errors**

You can choose whether or not to show comments or cell errors when you print your worksheet.

1. From the **Page Layout** tab.
2. Click the Dialog Box Launcher from the Page Setup group.
3. Choose the **Sheet** tab in the dialog box.
4. Click the down arrow beside **Cell errors as:** or **Comments.**
**Range**

When the document is huge and you want to make calculations based on sets of data, you can define a range for each set of data and refer to each named range within formulas.

You can create a range in a number of ways. The first is used when you have a label for your column.

1. Choose the data.
2. Select the **Formulas** tab.
3. Click the **Create from Selection** button from the Define Names group.
4. Choose where to pick up the name for the range.
5. Click **OK**.

The second one here is used when you don’t have a specific column heading for the set of data.

1. Choose the data.
2. Select the **Formulas** tab.
3. Click the **Define Name** button from the Define Names group.
4. Fill in a Name for the range.
5. Choose a **Scope** for the range.
6. Enter in a comment.
7. Change the **Refers to** field if the incorrect data is specified.
8. Click **OK**.

- To insert the range use the Use in Formula button from the Formulas tab in the Defined Names group.

**Precedents vs. Dependents**

Have you ever looked at a total in a worksheet and wondered what cells made up the result? Excel can trace the precedents and dependents for you.

- **To Show Precedents**
  1. Select the cell you want to trace the Precedents for.
  2. Select the **Formulas** tab.
  3. Click the **Trace Precedents** button from the Formula Auditing group.

- **To Show Dependents**
  1. Select the cell you want to trace the Dependents for.
  2. Select the **Formulas** tab.
  3. Click the **Trace Dependents** button from the Formula Auditing group.
Show Watch Window

When you set a watch on a cell, you want to show how changes affect a specific item.
1. Select the cell you want to watch.
2. Select the Formulas tab.
3. Click the Watch Window button.
4. Choose the Add Watch button.
5. Select Add.

Filter

The filter feature now allows an easier method of sorting and extracting data than previous versions or other spreadsheet applications. With a filter, the rows containing the data that do not meet the criteria are hidden from view, not redefined.
1. Select the cells with the column heading in it.
2. Choose the Data tab.
3. Click on the Filter button from the Sort & Filter group.
4. Select the pull down arrow in the column which you wish to filter.
5. Choose one of the values or options.
6. The results are shown, with the data not matching the criteria hidden.

Text to Columns

When our worksheet was created, the first and last names were grouped together in one cell. We would like to have one column for first names and another for last names. To accomplish this, we use the Text to Columns feature in Excel. Verify you have 2 or 3 blank columns to the right of the text you wish to “breakup”. If not, insert 2 or 3 blank columns.
1. Select the text you want to “breakup”.
2. Click the Data tab.
3. Select the Text to Columns button from the Data Tools group to start the wizard.
4. Wizard will say Step 1 of 3 – click Delimited if it is not already selected.
5. Click Next.
6. Wizard will say Step 2 of 3 – select the correct separator such as a space, comma, semicolon, etc. The Preview window will show you how the text will be split.
7. Click Next.
8. Wizard will say Step 3 of 3 – Verify that it is split correctly.
9. Click Finish.
**Organizing Data into Levels**

Instead of trying to figure out a formula to subtotal a group of cells, let Excel do it for you. Use the Outline group of the Data tab to accomplish this task.

1. Highlight the rows you want to subtotal.
2. Select the **Data** tab.
3. Click the **Subtotals** button from the Outline group.
4. Fill out the subtotal dialog box that appears.
5. Click **OK**.
- The minus sign will collapse the group and the plus sign will expand the group.

- **Add Levels**
1. Highlight the rows you want to group.
2. Select the **Data** tab.
3. Click the **Group** button.

**Research Tool**

Excel has added a Research Tool to assist with vocabulary. Using the Thesaurus, a person can find a word for the meaning they are trying to convey. Using the Encarta Dictionary, find a meaning to a word. Various other research tools are also available.

1. Click the **Review** tab.
2. From the Proofing group choose **Research**.
3. Type in the word(s) in the **Search for:** box.
4. Click the down arrow to choose a specific research tool.
5. Hit Enter or the go arrow to search for your item.
If you have a question or comment about data in a cell, insert a comment to indicate your remark.

- **Add Comment**
  1. Click on the cell where you want to place the comment.
  2. Select the **Review** tab.
  3. Choose the **New Comment** button.
  4. Type the comment in the box that appears next to the cell.
  5. Click anywhere else in the worksheet to close the comment box.

- **Delete Comment**
  1. Click on the cell with the little red triangle.
  2. Select the **Review** tab.
  3. Click the **Delete Comment** button.

- **Edit Comment**
  1. Click on the cell with the little red triangle.
  2. Select the **Review** tab.
  3. Click the **Edit Comment** button.
  4. Add or change information.
  5. Click anywhere else in the worksheet to close the comment box.
**Freezing Column and Row Labels**

The next two items are similar in nature but give some varying results. If you want to be able to view the top row with your heading as you scroll down in your worksheet then one of these options is for you.

1. Click the cell to the right of the column labels and/or below any row labels you want to freeze.
2. Select the **View** tab.
3. Click the **Freeze Panes** button.
4. Choose Freeze Panes, Freeze Top Row or Freeze First Column.

- To unfreeze follow the same steps but choose Unfreeze Panes on the last step.

**Splitting Worksheets**

1. Click and drag either the vertical or the horizontal split box.
2. Release the mouse button.

   **OR**

1. Click the cell to the right of the column labels and/or below any row labels you want to split.
2. Select the **View** tab.
3. Click the **Split** button from the Window group.