

EXCEL ADVANCED TRAINING

QUICK TIPS AND TRICKS

FORMATTING

- Select one cell in the first row of the table
- Select Format as Table (*Windows: Home tab/Mac: Table Tab*)
- Select the style
- Select if your data has a header
- Click OK



SORTING AND FILTERING

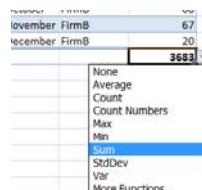
- Once table formatting has been applied, click the drop down arrow for any of the columns to adjust filtering
- Multi-Level sorting can be easily applied. Click Custom Sort. Then add as many levels as you need. (*Windows: Home tab/Mac: Data Tab*)

CONDITIONAL FORMATTING

- Click Conditional Formatting (Home Tab)
- Select New Rule (*Mac: Select Classic style*)
- Select "Format only cells that contain"
- In the Cell Value--- select the criteria (such as cell value is less than 0)
- Click the Format button to select font type, size and color
- Click OK

ADDING TOTAL ROWS

- On the Table Tools Design Tab
- Click Add a Total Row
- To change operator, click the arrow next to the total

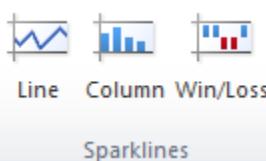


CUSTOM LISTS

- (*Windows*) Click File—options—Advanced>Edit Custom lists
- (*Mac*) Click Excel—Preferences—Custom Lists
- Setup your custom list

SPARKLINES

- Insert a blank column in your table for the sparkline
- Click on a blank row and click the insert tab
- Select the sparkline type and source



SELECTING AND NAVIGATING

- Ctrl + Arrow keys—moves to the top, bottom, far left or far right of the table (*Mac—use Command button and arrow keys*)
- Ctrl + Shift + Arrow keys--- Select the entire set of data (either column, row or table)

A	B	C
1	Year	Quarter
	2009	1 Janua
	2009	1 Febru

- Adjusting Column width to auto fit for entire table: Click the far left corner of the table and then double click any of the boundaries between the columns
- Show or hide all Formulas: Ctrl and Tilda key

VIEWING MULTIPLE WORKSHEETS AT ONCE

- Click the View Tab (*Windows*) or the Window Menu (*Mac*)
- Click New Window (if you want to view different sheets of the same workbook)
- Click Arrange All
- Select Tiles
- Check Windows of Active Workbook (if viewing different sheets of same workbook)
- Click OK

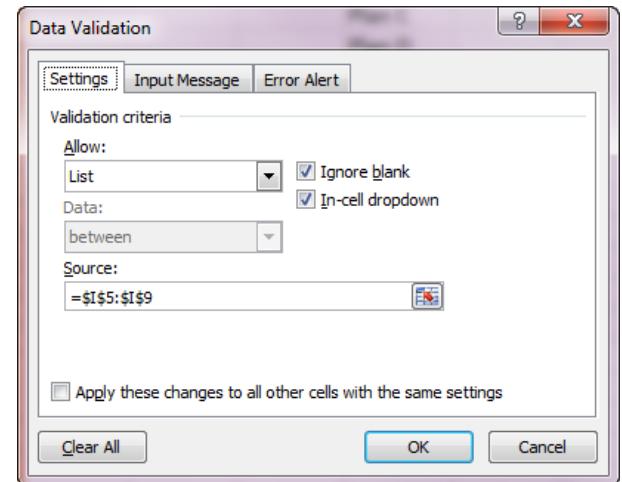
SAVING A CHART TEMPLATE

- Create a new chart and format it using the design tab
- Click Save as Template on the Design tab (*Windows*)or Chart menu (*Mac*)
- To use the new template, click insert and select the dialog launcher under chart types
- Select your template from the template folder

DATA VALIDATION

CREATE A DROP DOWN LIST

1. Create the list choices in a column within the same workbook
2. Click on the cell where the drop down should appear
3. Click the Data Tab
4. Select Data Validation-Data Validation
5. In the Setting tab, select Allow--- List
6. Select your list choices for the source
7. Click OK



INPUT MESSAGE

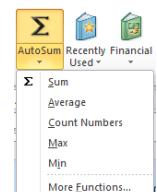
1. Check the box to show the input message when the cell is selected
2. Enter a title (this will be visible)
3. Enter your input message
4. Click OK

ERROR ALERT

1. Check the box to show the error alert
2. Select the Style (Stop, Warning, Information)
3. Enter a title and the error message
4. Click OK

FAVORITE FORMULAS

- To use **absolute references** in a formula, highlight the number and press F4
- The Operator for auto sum can easily be changed
- **Concatenate:** joins several text strings into one
- **If Logic:** Determines the value based on a condition- **IF(condition, value if true, value if false)**
- Vlookup: References value of one cell to values in another table or array and then returns a value from the table
vlookup(cell,table,column to return, matching criteria)



PIVOT TABLES AND CHARTS

1. Format your table using one of the styles
2. On the Table Tools Menu, click Summarize with PivotTable
3. Select either a separate workbook or a new worksheet in that workbook
4. Click OK
5. Drag the fields from the field list to the appropriate sections to build the table
6. To quickly filter data in a table, insert a slicer for that field
7. You can also use filters in pivot charts

