MISE EN PLACE

A place for everything and everything in its place.

Tips for Improving Productivity in Excel

585 924 8470 | www.m-e-p.com

TIPS FOR IMPROVING PRODUCTIVITY IN EXCEL

Table of Contents

Formulas Connecting Multiple Worksheets 3
Multiple Paragraphs in One Cell 3
Hide Columns and Rows..... 4
Add Special Formatting 4
Transposing Rows and Columns..... 5
Freeze Panes 6
Make Changes to Multiple Worksheets at Once 7
Identifying Cells Used in Formulas 8

Formulas Connecting Multiple Worksheets

Let's take a look at an example. We have three worksheets in this *one* Excel file (or workbook). You can tell by looking at the different tabs in the lower left portion of your screen.

1. Financial Overview
2. Income detail by month
3. Expense detail by month

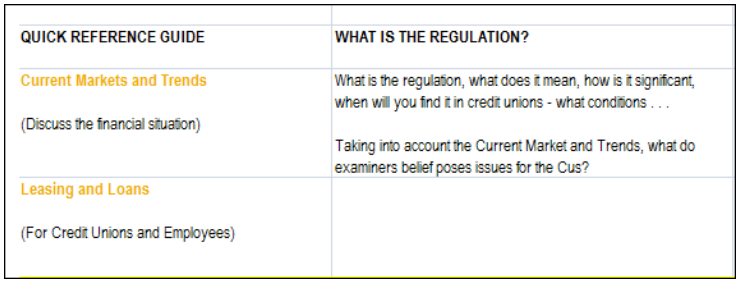
To pull totals, or formulas, from the Income or Expense spreadsheet into the Overview page, all you have to do is:

- Put your cursor in the cell of the worksheet you would like the total from another worksheet to appear.
- Type the equal (=) symbol.
- Move to the worksheet where you would like to pull the formula from.
- Place your cursor in that cell and press *Enter* on the keyboard (you will notice moving lines around the cell).
- You will be taken back to the original worksheet where you have pulled the new formula.
- To check and see if the calculation is correct, *highlight* the cell where the formula was created and you'll see the formula appear. In our example it is =Income!F8 which shows us that the formula is = to the worksheet named "Income" and it is pulling cell "F8".

Multiple Paragraphs in One Cell

ALT + Enter is the Answer

Normally if you're in a cell and press Enter, it goes to the next cell. However, if you want to enter another line of text in the *same* cell of an Excel document . . .



QUICK REFERENCE GUIDE	WHAT IS THE REGULATION?
Current Markets and Trends (Discuss the financial situation)	What is the regulation, what does it mean, how is it significant, when will you find it in credit unions - what conditions . . . Taking into account the Current Market and Trends, what do examiners belief poses issues for the Cus?
Leasing and Loans (For Credit Unions and Employees)	

- Enter the first line or paragraph of text.
- On your keyboard, press and hold the **ALT** key when you press **Enter**.
- If you want to go down *another* line to create mores space before typing: "Alt + Enter"
- Type your next line or paragraph of text.

Hide Columns and Rows

Hide and Unhide

To Hide:

- Highlight the columns or rows that you want to hide. **NOTE:** Be sure to select the entire column. You don't want to hide just cells.
- Leaving the cursor in the highlighted area, *RIGHT* click; select **Hide.**

To Unhide:

1. Highlight the column just to the *left* and to the *right* of the hidden columns.
2. Then *right* click again and choose **Unhide**.

The Secret to Unhiding Column A

TIP: If you have ever hidden **Column A** you may have gotten stuck trying to figure out how to unhide it — as you can't highlight the column to the left of it. You just can't GET to column A. Highlighting the number bar doesn't do it.

So how do you unhide column A?

- On the **Home** tab, go to the Editing section and click on the Find & Select option (pictured with a pair of binoculars).
- Drop down and choose the **Go To** option. The Go To box will open.
- Type in the **Reference** field: A1 (to go to the hidden column A; 1st cell), click **OK**
- Now from the Home tab again, in the toolbar, go to the **Cells** section and select **Format**, then **Hide & Unhide** and Unhide columns.

Your Column A will now appear!

Add Special Formatting

Have you ever entered numbers in a cell and they don't display correctly? For example if you enter a zip code that starts with "0" like 04952, the leading 0 will disappear once you leave the cell.

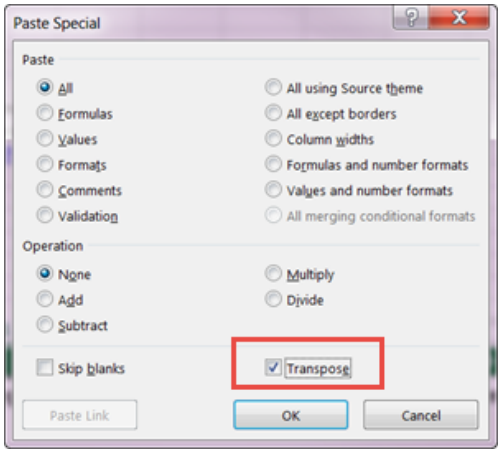
You need to use Special Formatting for this, and other types of number display options.
If you look closely, there is a Formatting option called **"Special"** where a lot of the miscellaneous options have been collected. You will find formatting choices for Zip Codes, Phone numbers and even Social Security numbers.

To apply the correct format for a column of Zip Code numbers:

- **Highlight** the cell or column
- *Right*-click and choose **Format Cells**
- Go to the **Number** tab click **Special**
- Highlight the **Type** - either Zip Code or Zip Code + 4
- Click **OK** and your data will convert to a Zip Code format

Follow the same process for Telephone or Social Security numbers by selecting these choices in the Format Type.

Transposing Rows and Columns



You've set up your spreadsheet, but now that you look at it, it would really work better if you *switched* it around so that data in the columns was displayed in the rows and vice versa.

Transposing your columns and rows is easy. All you have to do is:

1. Highlight the *range* you would like to *transpose*.
2. *Right* click and choose **Copy**.
3. Click on a cell *outside* the range that you have copied.
4. *Right* click again then select **Paste Special**.
5. Click the **Transpose** box.

The *reordered* range of cells you highlighted will now appear in the spot where you clicked.

Freeze Panes

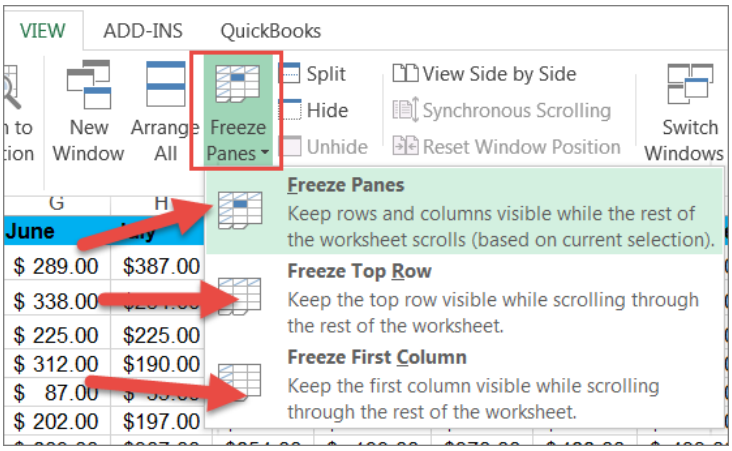
Have you ever been viewing a long Excel spreadsheet and had to scroll all the way back up to the top just to see the descriptive name of the column? Or maybe you had a document that had a lot of rows and found that you lost sight of the title when looking at the data … several columns to the right. Wouldn't it be great if you could see the column name (or the row descriptions) regardless of where you are in the spreadsheet? You can! It's called freezing the panes.

To freeze BOTH the Column AND Row descriptions:

- Click in the cell beyond those that you want to freeze. Typically this is cell B2 if you have a one row header and one column description.
- Go to the **View** tab, in the **Window** section and choose the first option: **Freeze Panes.**

If you want to freeze only the first Row descriptions in your spreadsheet:

- Click the cell right *below* the header row (the one you want to freeze, typically A2).
- Go to the **View** tab, in the **Window** section and choose the second option: **Freeze Top Row.**



And if you want to only freeze the first Column descriptions:

- Click to the right of the column you want to freeze.
- Again, go to the **View** tab, in the Window section and choose the third option: **Freeze First Column**.

Now when you scroll down, the data will magically flow underneath the header row. And when moving your spreadsheet over to the right, your row descriptions will always be visible.

NOTE: To undo any of the frozen rows or columns, go to **View** tab, in the Window section again under Freeze Panes, there will be an "Unfreeze Panes" selection.

Make Changes to Multiple Worksheets at Once

Have you ever been working in an Excel document that has multiple worksheets and you wanted to make the same change to all of the pages? Well, Excel has a cool trick with multi-sheet grouping, so you can make changes one time and apply them to all of the pages!

NOTE: An Excel file is known as a **Workbook** and the individual pages (or tabs) are called **Worksheets**.

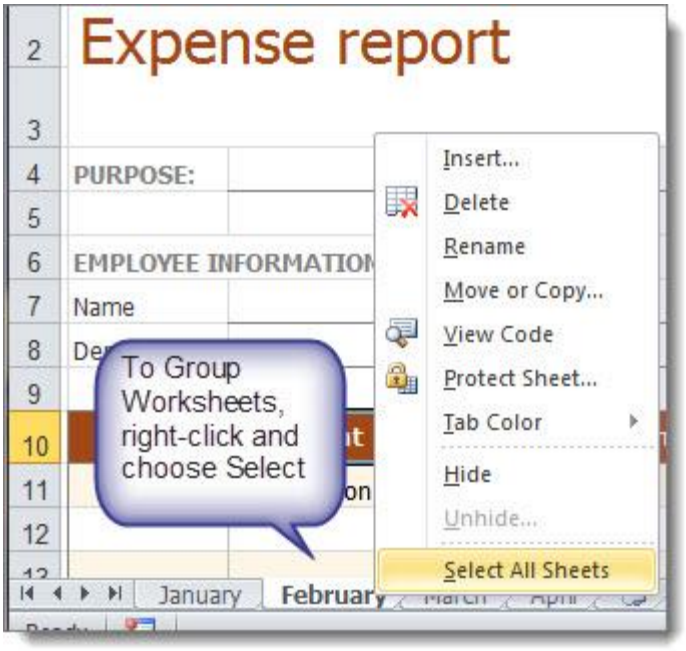
For example, say you had a workbook with one worksheet (tab) for each of the 12 months of the year. If you need to add a line for a new expense category row, instead of going to each tab and adding it manually, you could group the worksheets and add it to one page… and it would apply to ALL of them!

Excel lets you add content, or apply formatting, to two or more worksheets by "grouping" the pages together. By using this function, any content or formatting changes (fonts, row height, header changes, etc…) that you make to one worksheet automatically appears in all of the others in the group. You can choose every page in your document, or just a few.

Group Your Worksheets

To be able to make changes that affect all of your worksheets, first you need to group them.

- With an open Excel file, hover your mouse over any of the worksheet tabs in the lower left of your document, right-click and choose the *Select All Sheets* option.
- **TIP:** If you want to group only a few sheets (not all of them), hold down the **Ctrl** key and click on the worksheet tabs that you want to be grouped together.
- The tabs will now all be in color as the sheets are all grouped.
- Make any changes you want in formatting and content and you'll see them appear in all of the sheets you grouped.



Once you are done, be sure to turn OFF the group function so that future changes or content that you want to add to individual pages are not applied to all of them. To do this, again right-click on any of the grouped sheets and select **Ungroup** Sheets.

NOTE: You will notice that when you have grouped worksheets, in the title bar at the top showing the name of your document, Excel adds the word [Group] at the end. This is a good reminder that your worksheets are connected together so that you don't accidentally make changes to all sheets when you only want to include just one.

Identifying Cells Used in Formulas

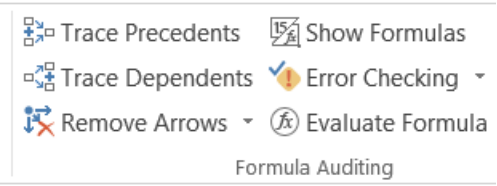
Have you ever received a complex spreadsheet and wanted to see what went into the formulas? Or perhaps you do the creating and want to check that the equations are calculating appropriately? If so, you probably highlighted the cell with the formula in it, and read the long stream of data locations, which looked something like this:

=J9*H3/12

Unless you're particularly skilled at reading these, the list can be a little hard to figure out. Where is J9? How does it relate to column H?

You can find out with the Formula Auditing section. on the **Formula** Tab.

With this tool you'll be able to see colored arrows that start in one cell and point to related cells. You will even be able to tell which ones are dependent on another — and which ones precede (contribute to) a formula.



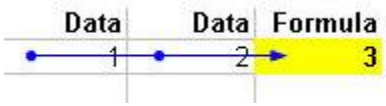
However, there is no way to turn on ALL the relationships at once. You must click into each cell that you want to investigate. If you have formulas that are related to cells in other spreadsheets, you're out of luck as well. This tool is self-contained to one worksheet.

Let's look at a couple of examples. Our formula: 1 + 2 = 3

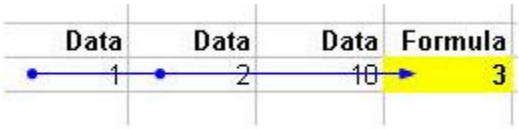
Precedents

- When you click on a FORMULA (here it's the cell with yellow highlight),
- And you choose to see the precedents of the formula (we clicked on Trace Precedents),

• You'll see the data cells that precede that formula.



Notice that when a particular cell is *not* part of the formula (such as Data: 10 in the example below), a line may go through it, but the item will NOT have a blue dot in it. That means the cell doesn't play a role in driving the equation. It just happens to be in the path of the line.



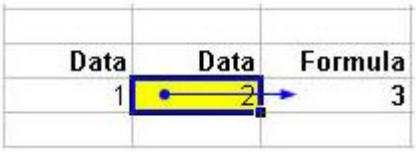
TIP: You MUST be in a formula to trace precedents. If your cursor is in a data cell or an empty cell you'll get an error message.

However, if you choose to click on **Trace Precedents** multiple times, you'll get earlier and earlier levels of relationships – assuming you have formulas that drive one another. Look where the arrows end (in this case the highlighted cell). This is where your cursor was when you started tracing precedents. Check out how what series of dots and arrows leads up to it.

Dependents

To see the dependent cells, you'll have to click on a location with DATA in it – making sure it is part of a calculation — but is NOT the formula cell itself, nor a stand-alone number.

- In the Formula tab, in the Formula Auditing section, click on **Trace Dependents**.
- Now you're able to see what formula results from this data cell.
- You will not see all the cells that create the formula (that's what you get with tracing precedents).



Clicking multiple times on **Trace Dependents** will give you all the subsequent formulas that result from the cell you clicked. All of them are "dependent" on that point.

And if the cell you've clicked on has a calculation error in it, you'll find out because the color of the dependent errors will turn red. Look for the source (the dot) to find the problem cell.

For more information on improving your organization and productivity visit www.m-e-p.com or call 585.924.8470.