Excel-Specific Tips & Tricks

Viewing Documents – Modifying Screen Settings

Split Screen – This option is the same as above for Word, but will also split the screen vertically so you can view the left/right sides of a spreadsheet.

Freeze panes – This option will lock in rows at the top and/or columns on the left to always be visible no matter what other areas you go to within the spreadsheet. The menu button has three options
   Freeze panes: Based on your current cell selection, rows above and columns to the left will freeze
   Freeze Top Row: Only the top row will be frozen
   Freeze First column: Only the first column will be frozen

Working with Excel Worksheet Tabs

By right clicking on a Worksheet Tab name, several options are available.

Insert - This adds a new Worksheet within the current Workbook.

Delete - This deletes the current Worksheet from the current Workbook.

Rename - This renames the current tab to whatever your preference is. Note that some characters like "/" and "\" are not allowed. You can also rename a Worksheet tab just by double-clicking on it.

Move or Copy - When copying an entire worksheet, all formatting and printing settings remain with the new worksheet tab. Worksheets can be moved or copied within the current Workbook, or put into either a new or currently open Workbook. Be sure to checkmark "Create a Copy" if that is your desired intent.

Tab Color - Coloring your tabs can make them more easily identifiable when you have a Workbook with multiple Worksheet tabs.

Hide - Worksheets can be hidden from view. However, there is no visible notation that a tab has been hidden, unlike when hiding rows or columns.

Select All Sheets - This will allow you to apply formatting changes, etc. to ALL of your Worksheets within the same Workbook at once.

Formulas - Data in other worksheets can be referenced through formulas.

Locking cells

To prevent data or formulas from being overwritten or accidentally deleted, you can "lock" cells.

First, know that ALL cells are inherently "locked". However, if the Worksheet does not have protection enabled, all cells can be edited. You must first unlock the appropriate cells that you do want people to have access to, and then enable protection for the Worksheet, or even the entire Workbook.

To unlock a cell or range of cells, right click on the cell or, after highlighting a range, right click within the range, and select Format Cells. On the Protection tab, uncheck Locked.

Now, protect the Worksheet or Workbook by clicking the appropriate icon from the Review ribbon. You will be presented with the option to password protect this change, so that no one can change your settings, formulas, etc. **Note that this password is not recoverable or retrievable by IT staff.** If you lose/forget it, it is lost forever. Protecting a Workbook locks all cells except for the those you have marked as unlocked. Protecting a Worksheet allows you the additional ability to enable/disable selection of formatting, inserting, deleting, etc. cells.

Printing Selected Cells Only
Highlight the range of cells you want to print. When you select Print Preview, change the settings box from Print Active Sheets to Print Selection

Moving columns & rows
When needing to move columns or rows of data, instead of inserting blank rows or columns, copying in your data, then going back and deleting the original rows/columns, you can easily move rows or columns to insert them in a new location and not have to go back to "clean up" the original data. Instead, begin by highlighting the appropriate column(s) or row(s). Hover your cursor over the edge of the highlighted range until the cursor turns into a 4-pointed arrow instead of the plus sign. Then right-click & hold, and begin dragging your data to where you would like to insert it. When you release the mouse button, a menu will appear. Select "shift down and move" for moving columns, or "shift right and move" for moving rows. (These "down" and "right" directionals apply even if moving the data up or left).

Format as Table
If you would like to have every other row of a data table colored differently for easier viewing, and to allow you to summarize/filter the data within the table by common factors within each column, highlight the data range (or place your cursor in the upper left cell of the table) and select "Format As Table" from the Home ribbon. Here, you will be given a selection option for colors. After choosing a color and intensity, a window will appear allowing you to verify your selection range and checkmark if your table has column headers. After accepting your settings, your table will now have alternating row colors. To insert a new row, just begin typing in any cell in the first available row at the bottom of the table. Also, you will notice dropdown icons at the top of each column. Use these to filter and/or sort the data shown in the table.

Text to Columns To separate data into multiple cells that is currently all displaying in one cell, use the Text To Columns feature on the Data ribbon. (You must first select the data you wish to manipulate) The Convert Text Wizard will appear and allow you to select how the data is currently separated (by commas, spaces, tabs, etc., or if it is fixed width.) Choose the appropriate option and select Next. Most likely, your data will be delimited, so on the next step, select what type of delimiter your data is using. The data preview window will display how your new columns of data will look when the wizard is

completed. At the final step, you will have the option to skip the conversion of specific columns or format the columns if you prefer.

Manipulating Column Sizes (or row sizes)

To make all columns in your data range identical, highlight the columns by clicking and dragging across the letter above each column. Place your cursor between two of the column letters within your range, and when your cursor changes to a beam with arrows pointing left and right, click and drag to the desired column width. When you release, all columns in the range will be identically sized. Alternately, to make all columns "fit-to-width" of the data within each column, highlight the columns as described above. Then, double click when the cursor changes to the beam with left/right arrows between the letters at the top of the columns in your selected range. The above steps apply to adjusting row heights as well.

Creating a series in Excel

To create a series of numbers in an Excel column, you must enter the first two items in the series you wish to create. Numbers could be sequential, or every other one, every third one, etc. Items such as dates, days of the week, and months only need the first item entered if you want sequential items to be created. If you want a pattern of every other one, etc., the first two must be entered. After entering the item(s) and selecting them, then drag down by clicking on the small box in the bottom right corner.
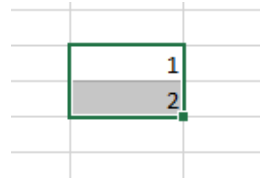
The pattern will be extended, and can be seen in the tool tip visible near the cursor so you can verify your output before unclicking.

If, however, you DO NOT want the pattern extended, but would rather have the items **repeated,** then hold down the CTRL key when dragging down.

Quick Calculations

Select a range of numbers that you want to perform a quick calculation on – either sum, average, or count. Then, look in the lower righthand corner of the screen, and you will see data displayed based on your highlighted range.