

Excel 2016 Advanced

Shelley Fishel



SHELLEY FISHEL

EXCEL 2016 ADVANCED

Excel 2016 Advanced

1st edition

© 2016 Shelley Fishel & bookboon.com

ISBN 978-87-403-1199-0

CONTENTS

	About Shelley Fishel	8
	About Excel 2016 Advanced	9
1	Apply Conditional Logic in formula	10
1.1	IF Function (IF Statement)	10
1.2	Nested IF Function	11
1.3	Countif Function	13
1.4	Sumif Function	14
2	Create and apply Range Names	16
2.1	Defining a Named Cell or Range of Cells	16
2.2	Using a Named Cell in a formula	17
2.3	Naming a range of cells	20
2.4	Editing and renaming a named range	23
2.5	Define a Name Using the Dialogue Box	25

CMO INSPIRED CONFERENCE
25 OCTOBER | DE VERE BEAUMONT ESTATE | OLD WINDSOR UK

Join Over 100 Chief Marketing Officers & Digital Innovators

3	Charts	28
3.1	Using Quick Analysis	28
3.2	Recommended Charts	28
3.3	Creating charts with the keyboard	30
3.4	Creating line charts	32
3.5	Creating and editing a column chart	34
3.6	Creating pie charts	35
3.7	Modifying charts using the Ribbon	37
3.8	Modifying charts using icons	43
3.9	Formatting charts – Task Pane	46
4	Apply and manipulate illustrations	50
4.1	Pictures in Excel	50
4.2	Resize the picture – dragging	53
4.3	Modify a picture	55
4.4	Reset a picture	61
5	SmartArt	62
5.1	SmartArt	62
6	Shapes	66
6.1	Inserting shapes into a workbook	66
7	Screenshots	69
7.1	Inserting a screenshot	69
8	Manage comments	72
8.1	Inserting and editing comments	72
8.2	Deleting comments	74
8.3	Show/Hide Comments	75
8.4	Moving between comments	76
8.5	Printing comments	77
9	Sorting data	79
9.1	Databases in Excel – introduction	79
9.2	Sort data	79
9.3	Sort on font colour	84
9.4	Sort on cell colour	85
9.5	Sort on cell icon	86

10	Filtering data	87
10.1	Filter data – the filter icon	87
10.2	Filter on text	88
10.3	Filter on more than one column	90
10.4	Remove the filter	91
10.5	Filter data on colour	93
10.6	Text filters	96
10.7	Number filters	98
10.8	Date filters	99
11	Format as table	102
11.1	Reasons to use Tables in Excel 2016	102
11.2	Format as table icon	103
11.3	Insert a table	104
11.4	Change table style	106
11.5	Remove formatting	108
11.6	Name the table	109
11.7	Calculated columns	109
11.8	Add a total row	111
11.9	Convert back to a range (remove automatic functionality)	113
12	Filter a table	115
12.1	Filter a table	115
12.2	Filter a table with a total row	116
12.3	Insert a slicer	117
12.4	Customize a slicer	121
12.5	Delete a slicer	122
13	Grouping and outlining	123
13.1	Outlining	123
13.2	Create an automatic outline	126
14	Subtotals	128
14.1	Why use subtotals?	128
14.2	Sort first	128
14.3	Remove subtotals	133
15	Apply conditional formatting	134
15.1	Conditional formatting	134
15.2	Top and bottom rules	137

15.3	Data bars	140
15.4	Colour scales	140
15.5	Icon sets	142
15.6	Clear conditional formatting	146
15.7	Use a formula to control conditional formatting	148
16	Sparkline charts	151
16.1	Sparkline line chart	151
16.2	Column spark lines	155
16.3	Creating a win/loss spark line chart	155
16.4	Remove a spark line chart	157
17	Text functions	158
17.1	Text functions – an introduction	158
17.2	Concatenate	158
17.3	Trim	161
17.4	Upper	164
17.5	Lower	164
17.6	Proper	165
17.7	Right	166
17.8	Left	166
17.9	Mid	167
18	Quick analysis	168
18.1	Quick analysis	168
18.2	Quick analysis Formatting	169
18.3	Quick analysis totals	169
18.4	Quick analysis Charts	171
18.5	Quick analysis Tables	172
18.6	Quick analysis sparklines	173
19	Macros	174
19.1	What is a Macro	174
19.2	Macro security	175
19.3	Get ready	176
19.4	Get set and go	179
19.5	Run the macro	180
	Index	182

ABOUT SHELLEY FISHEL



Shelley Fishel has 18 years' experience in helping people to get more from their computers. After working for an IT training organization Shelley decided to 'do her own thing' when she realized the limitations of delivering standard courses.

"Why waste time and money on training people in areas that are not relevant to them? It's common sense to invest that time and effort on what they really need."

That was the 'light bulb moment' and the IT Training Surgery's unique approach has resulted in a growing business with a team of highly qualified IT trainers.

"If trainees get bored they forget most of what they learn. We like to offer a range of training approaches to suit different people and, most of all; we aim to make training fun!"

Shelley and her team have worked hard to achieve accreditation by the Learning and Performance Institute for the IT Training Surgery, as a recognized high quality provider of IT training,

To find out more about our training give us a call on 020 8203 1774 or visit our website www.theittrainingsurgery.com

ABOUT EXCEL 2016 ADVANCED

This user guide will introduce you to some of Excel's more complex functionality. Specifically when analysing data.

You will learn how to:

- Use Conditional Logic in a formula – IF statements
- Use the SumIF and CountIF functions
- Produce a chart
- Sort and filter
- Apply subtotals
- Introduction to Pivot Tables
- Introduction to Macros

1 APPLY CONDITIONAL LOGIC IN FORMULA

1.1 IF FUNCTION (IF STATEMENT)

An If function asks Excel to consider if something is true or false. If it is true it will return one answer, if it is false it will return a different answer.

For example: *Can my company afford to buy 10 new computers?* There are 2 possible outcomes – if it is within the budget then the answer is “yes”, if it is outside of the budget then the answer is “no”.

1.1.1 THE STRUCTURE OF AN IF FUNCTION

=IF(B6<=\$B\$3,"yes","no")

The structure of an IF statement always contains the same five elements.

- Starts with =IF(
- The **Logical Test** followed by a comma
- What to do if the logical test is **True** followed by a comma
- What to do if the logical test is **False**
- Close brackets

To make this IF function easier to understand the logical test is in one colour, the **true** part is in another colour and the false part is in a third colour.

1.1.2 OPERATORS YOU CAN USE IN A LOGICAL TEST

Operator	Explanation
=	Equal to
<>	Not equal to
>	Greater than
<	Less than
>=	Greater than or equal to
<=	Less than or equal to

1.1.3 TYPING IN AN IF FUNCTION

1. Click in the cell where you want the answer
2. Type in the =IF(
3. Type in your logical test
4. Type a comma
5. Type in what Excel must do if this is true
6. Type a comma
7. Type in what Excel must do if this is false
8. Close the brackets
9. Press Enter

If Excel is to display text for the true or false result then you must enclose the text in inverted commas.

You can also put a formula in the IF statement for the True or False result.

For example:

I want to know how much bonus each member of staff will receive:

=IF(B2>\$H\$1,C2*\$H\$2,0)

	A	B	C	D	E	F	G	H	I
1	Name	Hours	Rate	Pay	Bonus		Standard Hours	25	
2	Jill	35	£ 10.00	£ 350.00	=IF(B2>\$H\$1,C2*\$H\$2,0)		Overtime Rate	1.1	
3	Alice	15	£ 15.00	£ 225.00	IF(logical_test, [value_if_true], [value_if_false])				
4	Jason	20	£ 10.00	£ 200.00	0				
5	Chip	38	£ 10.00	£ 380.00	11				
6	Dilip	10	£ 25.00	£ 250.00	0				
7									

Figure 1 – working out the bonus amount

1.2 NESTED IF FUNCTION

A nested IF Function is an IF function nested inside another IF function.

The basic IF function only allows for two possible answers: either the logical test is met or it is not. When we want more than these two basic answers then we need to *nest* the formula, i.e. put one =IF inside another.

You can nest up to sixty four IF functions inside one another, but if you were going to go so far, you would be more likely to use a HLOOKUP or VLOOKUP.

1.2.1 THE STRUCTURE OF A NESTED IF FUNCTION

=IF(B5>=\$G\$2,"OAP",If(B5<=\$G\$3,"Child","Adult"))

A nested IF Function is just a lot of single IF functions strung together. The structure of nested IFs is always as follows:

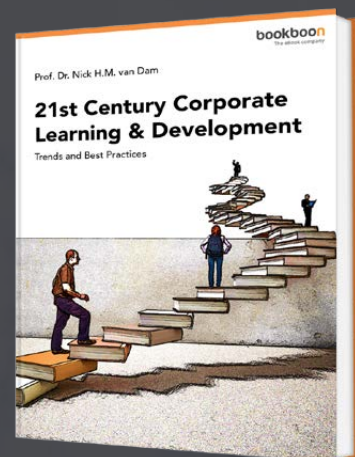
- Start with =IF(
- First logical test followed by a comma
- What to do if the first logical test is true
- If the first logical test is false then Excel has to move onto the next logical test which will always start with IF(
- Second logical test followed by comma
- If the second logical test is also false Excel moves onto the next logical test and this process repeats until you come to the last logical test
- At the end of the nested IF there will be your last logical test
- What to do if the last logical test is true
- What to do if the last logical test is false

You must type in a closing bracket at the end of the nested IF for each logical test you have entered.

Free eBook on Learning & Development

By the Chief Learning Officer of McKinsey

Download Now



1.3 COUNTIF FUNCTION

The COUNTIF function combines the COUNT function and the IF function. Use it when you want to count any cells that match a certain condition.

	A	B	C	D	E	F	G
1							
2	Contracted Hours	15					
3							
4	Name	Hours	Overtime Rate	Overtime?	Overtime Pay		
5	Barbara	15	£ 12.00	No Overtime		Barbara	
6	Mina	20	£ 18.00	Overtime		Mina	
7	George	26	£ 30.00	No Overtime		George	
8	John	35	£ 10.00	Overtime		John	
9	Keith	14	£ 11.00	No Overtime		Keith	
10	Lucy	30	£ 12.00	Overtime		Lucy	
11	Mick	26	£ 13.00	No Overtime		Mick	
12	Paul	25	£ 15.00	Overtime		Paul	
13	Peter	12	£ 18.00	No Overtime		Peter	
14	Raf	16	£ 20.00	No Overtime		Raf	
15	Steven	13	£ 23.00	No Overtime		Steven	
16	Tina	23	£ 28.00	Overtime		Tina	
17							
18	Total					Total	
19							
20	Number of people with overtime	=COUNTIF(D5:D16,"Overtime")					
21		COUNTIF(range, criteria)					
22							

Figure 2 – count how many people have overtime

In the example, we want Excel to count how many people have worked enough hours to qualify for overtime. So we set up a COUNTIF Function to count how many times the word “Overtime” occurs in the Overtime column.

1.3.1 THE STRUCTURE OF A COUNTIF FUNCTION

=COUNTIF(C6:C9,"yes")

This says, look in the cells C6 to C9, and if you find the word yes in them count how many times.

The structure of a COUNTIF always contains the same four elements.

- Starts with =COUNTIF(
- The range of cells that Excel is to look at
- The criteria which Excel will use to count
- Close brackets

To make this COUNTIF function easier to understand in this example, the range is in **purple** text and the criteria is **orange** text.

1.3.2 TYPING IN A COUNTIF FUNCTION

19			
20	Number of people with overtime	=COUNTIF(D5:D16,"Overtime")	
21		COUNTIF(range, criteria)	
22			

Figure 3 – type the Countif function directly into the cell

1. Click in the cell where you want the answer
2. Type =COUNTIF(
3. Highlight the range of cells you are counting from
4. Type in your criteria
5. Press Enter

1.4 SUMIF FUNCTION

This function will add the value of cells that meet a certain criteria.

For example, suppose we want to calculate the total salary cost of all females:

	A	B	C	D	E	F	G	H
1	Name	Gender	Salary					
2	John	Male	£35,000.00					
3	Jillian	Female	£36,000.00					
4	Serina	Female	£25,000.00					
5	Kieren	Male	£34,000.00					
6	Sonny	Male	£28,500.00					
7	Gemma	Female	£34,000.00					
8								
9	Total Female Salaray		=SUMIF(B2:B7,"Female",C2:C7)					
10			SUMIF(range, criteria, [sum_range])					
11								

Figure 4 – Sumif adds up all the rows that meet your criteria

If the range B2 to B7 says Female then add up all of the salaries that correspond.

The answer for the Total Female Salaries = £95,000.

1.4.1 THE STRUCTURE OF A SUMIF FUNCTION

The syntax for the SUMIF function is as follows:

=SUMIF(Range,Criteria,Sum Range)

Range: The range of cells that Excel is to look at

Criteria: The criteria that the cells must meet in order to be added

Sum Range: The cells to Sum



Discover the truth at www.deloitte.ca/careers

Deloitte.

© Deloitte & Touche LLP and affiliated entities.



2 CREATE AND APPLY RANGE NAMES

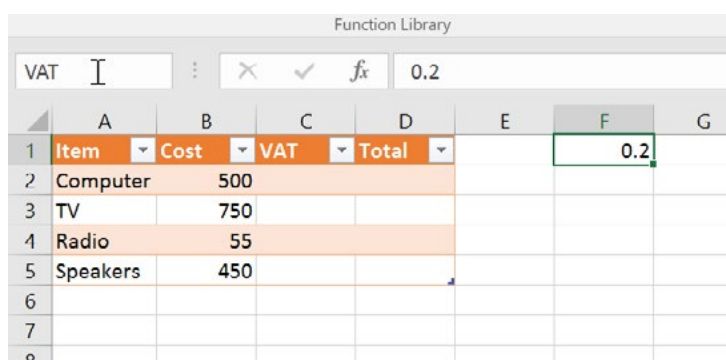
2.1 DEFINING A NAMED CELL OR RANGE OF CELLS

A Named Cell or Range of Cells can help in different ways. When a cell is named it behaves as an Absolute Cell Reference, by giving the cell a name such as VAT or Price, Excel knows to refer to that particular cell when you use it in a formula.

Name a Range of Cells and you can navigate around easily. When used in a formula Excel will pick up the right cell in the formula.

Named Ranges are also handy for summarizing data quickly or finding a piece of data at the intersection between two ranges. Read on to learn how this works.

2.1.1 NAME A SINGLE CELL



	A	B	C	D	E	F	G
1	Item	Cost	VAT	Total		0.2	
2	Computer	500					
3	TV	750					
4	Radio	55					
5	Speakers	450					
6							
7							
8							

Figure 5 – Name a cell for easy to read formula

1. Click on the cell you want to name (in our example F1)
2. Click into the Name Box (to the left of the Formula Bar)
3. Over type the cell reference with the Name for the cell (In our example VAT)
4. Press Enter to confirm the name

Now I have a cell called VAT which can be seen from the drop down arrow in the Name Box

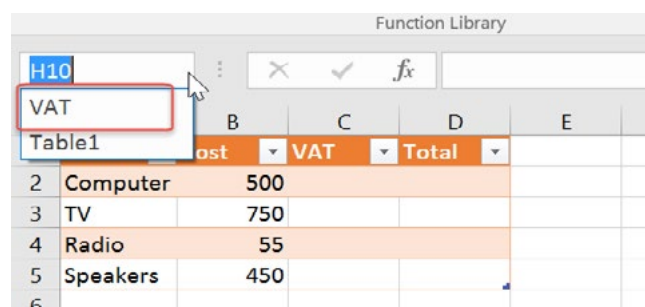


Figure 6 – see names cells in the name box

To move the cursor to the cell called VAT – I can select it from the drop down list.

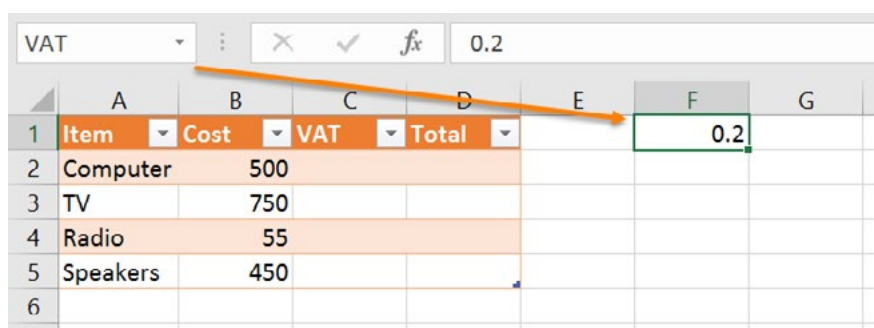


Figure 7 – use named cells to navigate around

Here you can see that I have now jumped to the cell called VAT and this is where the cursor is now positioned.

2.2 USING A NAMED CELL IN A FORMULA

I can now use my named cell in a formula to:

- Make it more readable
- Use it as an Absolute Cell Reference

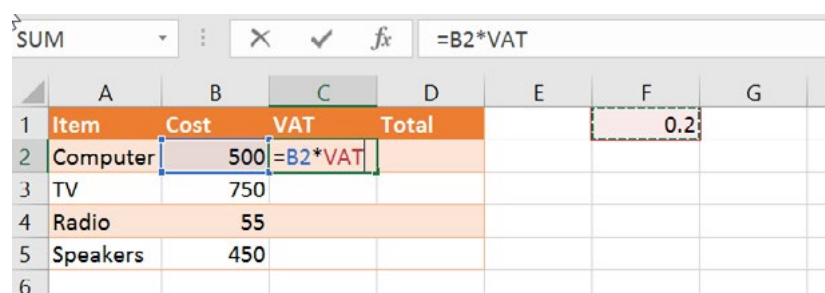


Figure 8 – Named cells are absolute

Create the formula as you normally would.

1. Click into the cell where the result will display
2. Type an = sign
3. Click on the first cell to include
4. Type the mathematical Operator (in our example an Asterix for multiply)
5. Click on the cell with the multiplier in (F1 which is called VAT) Notice that Excel calls the cell by its name not the cell reference
6. Press Enter

© 2013 Accenture. All rights reserved.

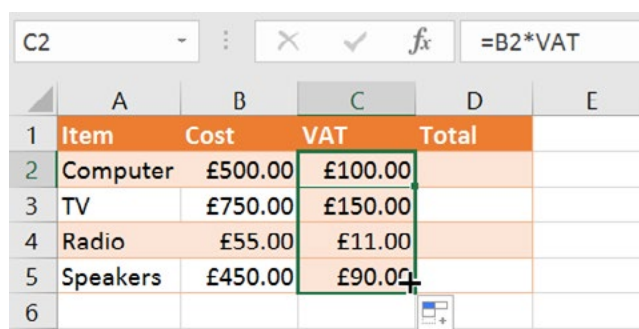
be > your degree

Bring your talent and passion to a global organization at the forefront of business, technology and innovation. Discover how great you can be. Visit accenture.com/bookboon

Be greater than.
consulting | technology | outsourcing

accenture
High performance. Delivered.

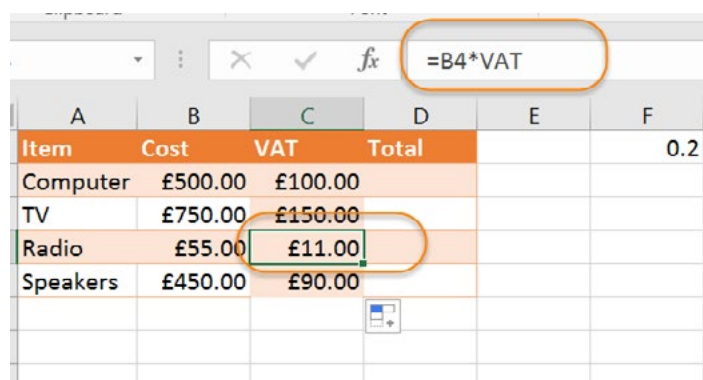
2.2.1 AUTO FILL THE FORMULA



	A	B	C	D	E
1	Item	Cost	VAT	Total	
2	Computer	£500.00	£100.00		
3	TV	£750.00	£150.00		
4	Radio	£55.00	£11.00		
5	Speakers	£450.00	£90.00		
6					

Figure 9 – as an Absolute reference the named cell allows you to Auto fill your list

Use the Auto fill Handle (the little black plus sign in the bottom right hand corner of the cell to copy the formula down all the other rows).



	A	B	C	D	E	F
	Item	Cost	VAT	Total		0.2
	Computer	£500.00	£100.00			
	TV	£750.00	£150.00			
	Radio	£55.00	£11.00			
	Speakers	£450.00	£90.00			

Figure 10 – all the cells have the correct references in the formula

Notice that each of the rows has adjusted the first part so B2 then B3 then B4 etc however all of the formula reference the cell called VAT.

2.3 NAMING A RANGE OF CELLS

Named ranges can be used to navigate and select and they can also be used in formula to make them more understandable. Named cells are absolute and so make copying formula really simple.

2.3.1 CREATE A NAMED RANGE FROM A SELECTION

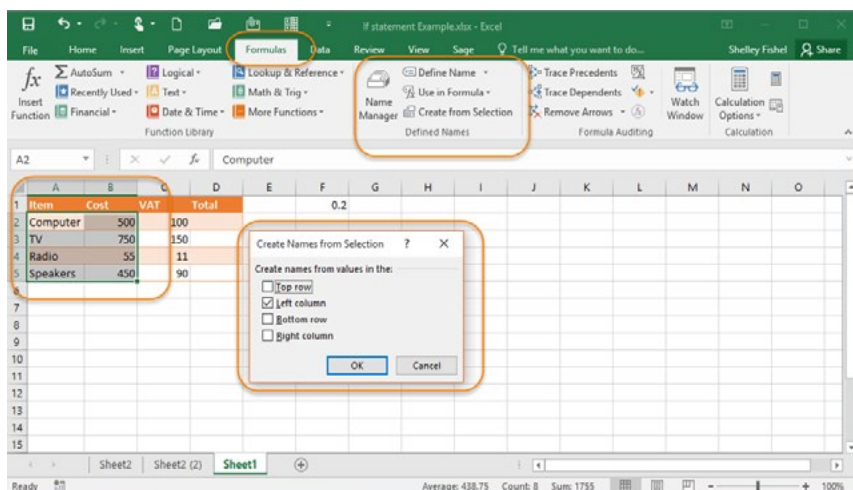


Figure 11 – name, cells or ranges of cells

I already have a cell called VAT and I would like to make creating my formula even easier.

I would like the formula to read: Computer*VAT, or TV*VAT

I need to Create Names from Selection – here is how:

1. Select the cells to name along with the cells that contain the labels
2. Click on the Formulas Ribbon
3. In the Defined Names group click on Create from Selection
4. In the Dialogue box that pops up, select the correct position for the name (in our case Left Column)
5. Click OK

2.3.2 USE A NAME IN A FORMULA

	A	B	C	D	E	F
1	Item	Cost	VAT	Total		
2	Computer	500	=Computer*VAT			0.2
3	TV	750	=TV*VAT			
4	Radio	55	=Radio*VAT			
5	Speakers	450	=Speakers*VAT			
6						

Figure 12 – names in formula

All the cells show the correct function using the named cells. Much easier to read and makes so much more sense.

What if you could build your future and create the future?

The innovation accelerator

One generation's transformation is the next's status quo. In the near future, people may soon think it's strange that devices ever had to be "plugged in." To obtain that status, there needs to be "The Shift."

.....Alcatel-Lucent

www.alcatel-lucent.com/careers

However if I name each individual cell I need to create each VAT formula individually. When using Autofill to copy the formula down, it will copy the exact reference from the row above. This means you will end up with Computer*VAT in every row. The reason for this is that by naming the cells they are absolute.

How do we get round this and make each cell adjust? Name the column. When naming the column, Excel knows that each row is referenced separately. It will pick up whatever is in that column on each row.

Let's see this in action to make it clearer. Using the same example I will name the columns as Item and Cost. Select the columns including the headings then click on Create Names from Selection as before and choose Top Row then click OK.

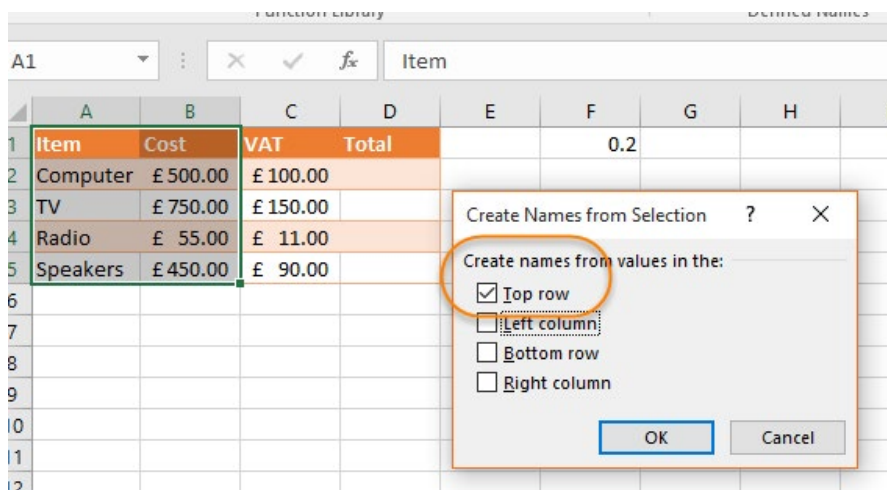


Figure 13 – name columns

Now I have a list of names including Item and Cost and I can use these in the formula.

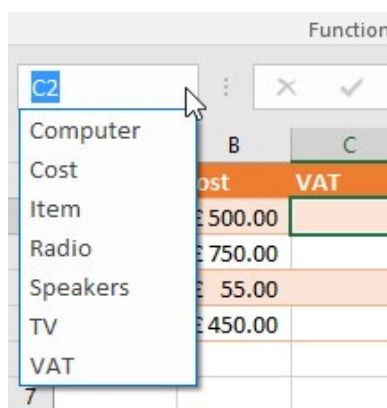


Figure 14 – names in list

I will use the formula =Cost*VAT

	A	B	C	D	E	F	G
1	Item	Cost	VAT	Total		0.2	
2	Computer	£ 500.00	=cost*VAT				
3	TV	£ 750.00					
4	Radio	£ 55.00					
5	Speakers	£ 450.00					

Figure 15 – names in formula

In each cell in the VAT column I now have =Cost*VAT this takes the item on each row for the Cost column and multiplies it by the value in the cell named VAT.

	A	B	C	D
1	Item	Cost	VAT	Total
2	Computer	500	=Cost*VAT	
3	TV	750	=Cost*VAT	
4	Radio	55	=Cost*VAT	
5	Speakers	450	=Cost*VAT	
6				
7				

Figure 16 – named cells in formula

2.4 EDITING AND RENAMING A NAMED RANGE

If you want to you can edit a range, maybe it needs to refer to a different group of cells or you need to give it a different name, using the Name Manager.

2.4.1 THE NAME MANAGER

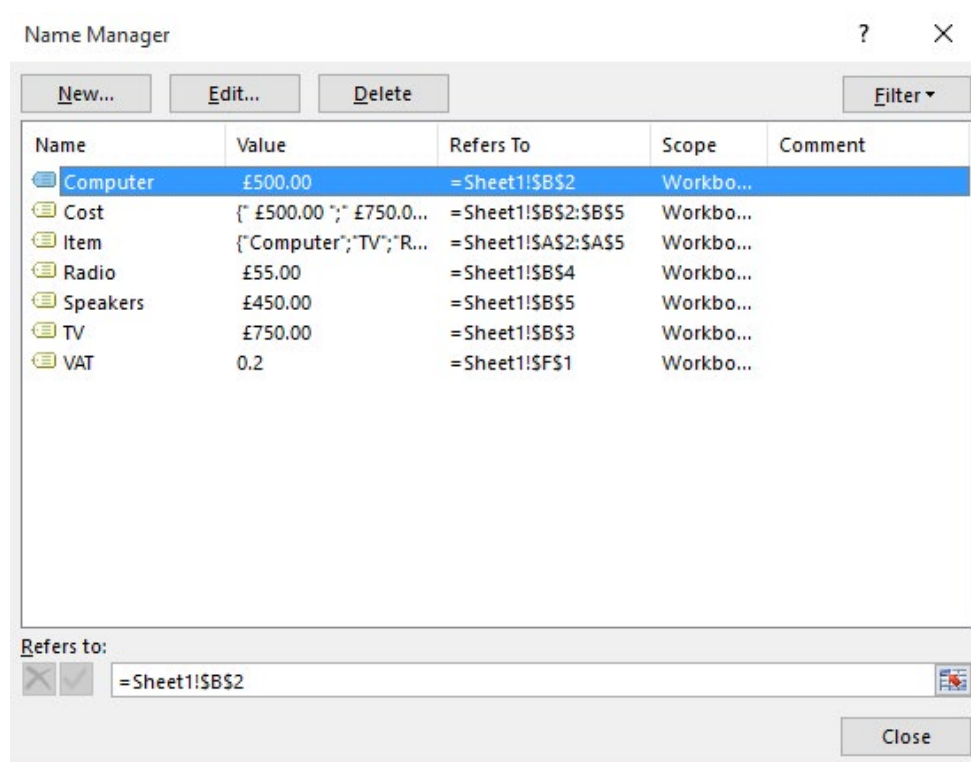


Figure 17 – use the name manager

The Wake

the only emission we want to leave behind

Low-speed Engines Medium-speed Engines Turbochargers Propellers Propulsion Packages PrimeServ

The design of eco-friendly marine power and propulsion solutions is crucial for MAN Diesel & Turbo. Power competencies are offered with the world's largest engine programme – having outputs spanning from 450 to 87,220 kW per engine. Get up front! Find out more at www.mandieselturbo.com

Engineering the Future – since 1758.

MAN Diesel & Turbo

Click on the Name Manager Icon and in the dialogue box that appears decide what you want to do:

Rename a range – click the range to rename then click Edit and type a new name for the range.

Change the cells referenced – Click the range to change then click Edit and select the cells to use.

Delete a Range – if you no longer need that range you can delete it entirely.

2.5 DEFINE A NAME USING THE DIALOGUE BOX

In my spreadsheet I already have a cell called VAT and now I want to create a couple of new ranges. I will use the Define Name icon.

2.5.1 DEFINE A NAME

1. Click on Define Name in the Define Names group
2. Type a name for the new range in the Name box
3. Select the cells to which the new name refers
4. Click OK

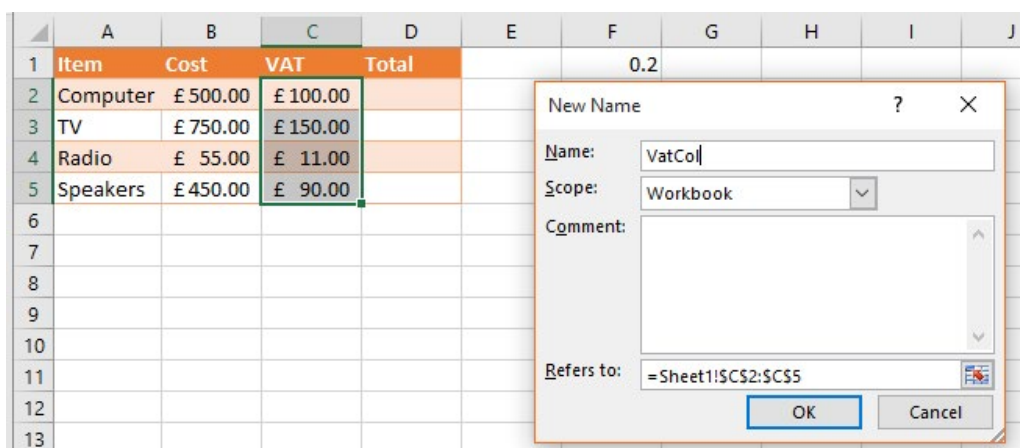


Figure 18 – new range created

Here is my new range

Name: VAT col (I already have a cell called VAT)

Refers to: =VAT!\$C\$2:\$C\$5

Sheet1! Is the worksheet the range is on and \$C\$2:\$C\$5 is the range of cells it refers to.

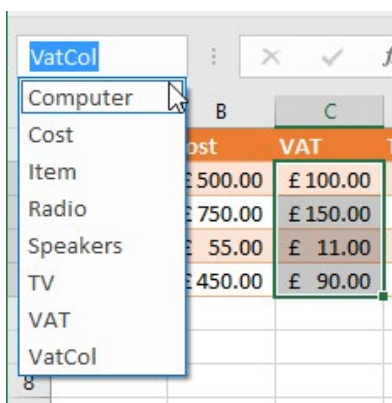


Figure 19 – new name in the list in the name box

2.5.2 SUM A RANGE

Now that I have a defined name for both the VAT column and the Cost Column I can get Excel to add them all up.

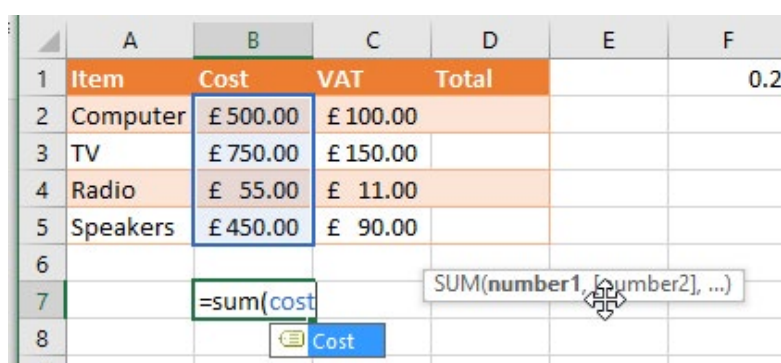
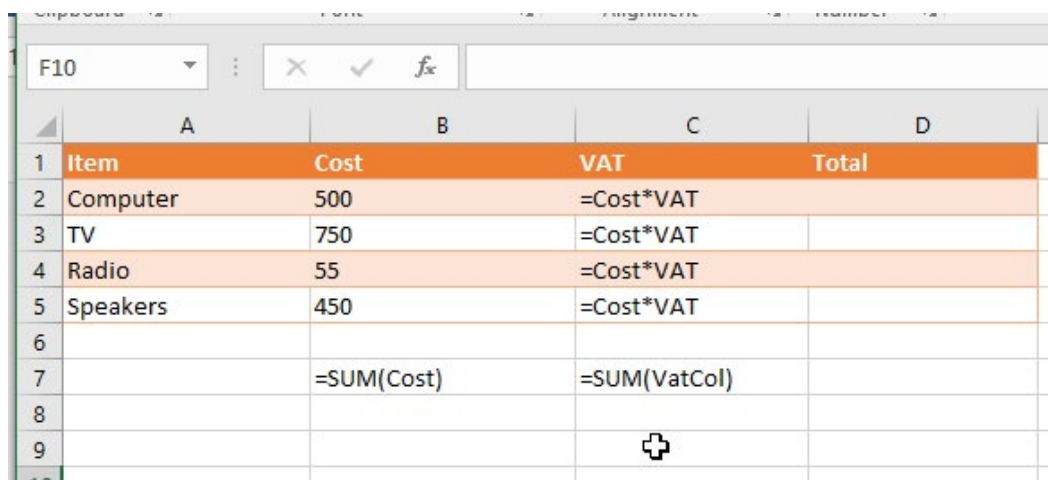


Figure 20 – sum a range

1. Click into the cell where the answer will display
2. Type an = sign
3. Type Sum followed by an open bracket
4. Start to type the name of the range and you will see a yellow label pop up, You can double click on the label to include it or carry on typing the name of the range to sum.
5. Close the brackets
6. Press Enter

I can now do the same for the Vat Column.

Voila! Here are the totals and not a cell reference in sight!



	A	B	C	D
1	Item	Cost	VAT	Total
2	Computer	500	=Cost*VAT	
3	TV	750	=Cost*VAT	
4	Radio	55	=Cost*VAT	
5	Speakers	450	=Cost*VAT	
6				
7		=SUM(Cost)	=SUM(VatCol)	
8				
9				
10				

Figure 21 – here are the formula displayed so you can see what is going on behind the function



**UNLEASHING
CHANGE
MANAGEMENT**

OCTOBER 18 & 19, 2018

DE RODE HOED
AMSTERDAM

Global
Executive
Events

3 CHARTS

3.1 USING QUICK ANALYSIS

As we have seen elsewhere in this book, Quick Analysis also offers a choice of Charts depending on the data that you select first.

3.1.1 QUICK ANALYSIS CHARTS

Select the data and then click on the small Quick Analysis button – choose Charts and then hover over the different recommended charts to see what they look like. Find the one that does the job and click on it.

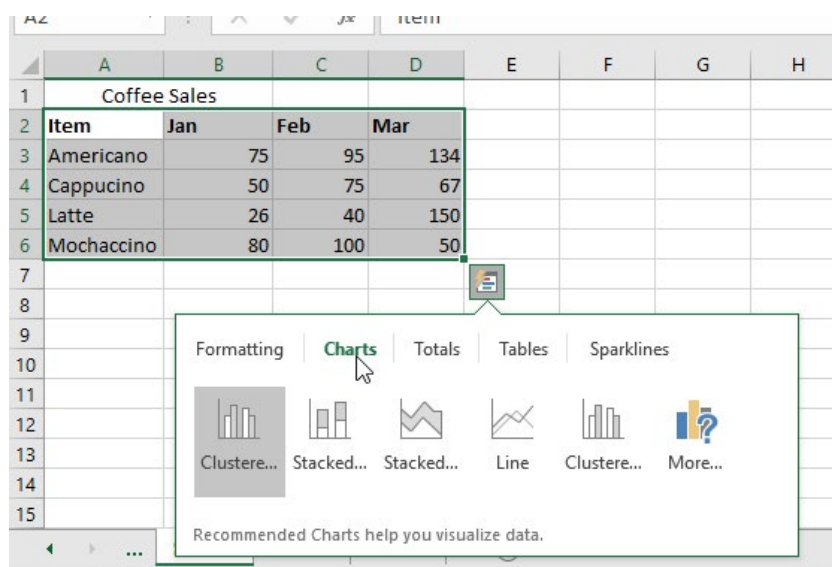


Figure 22 – Quick Analysis offers a selection of recommended charts

3.2 RECOMMENDED CHARTS

When creating a chart, it is sometimes a challenge to decide which chart type to use. In Excel 2016, you can now get a recommendation and see samples of the charts that Excel thinks fit your data. It is quite useful to see what it looks like before deciding if it is the right one for you.

3.2.1 LET EXCEL RECOMMEND A CHART

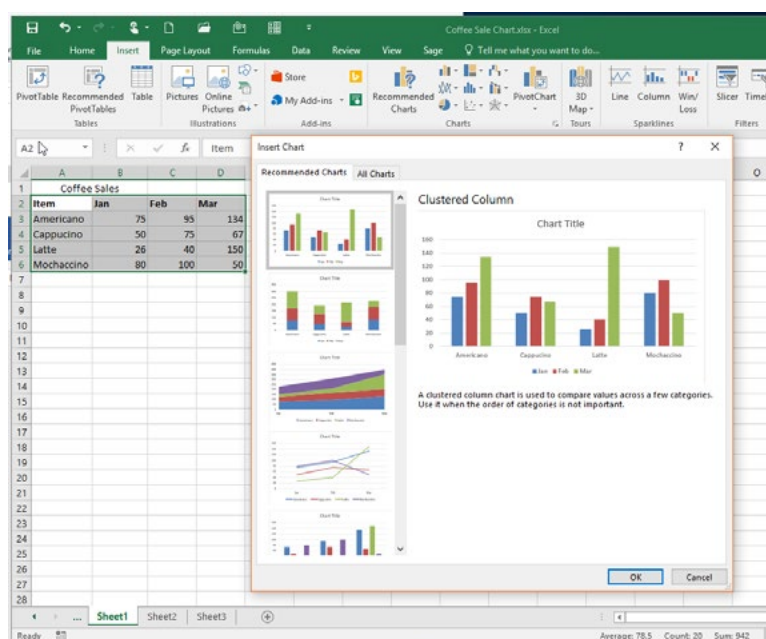


Figure 23 – Excel will recommend charts based on your data selection

1. Select the data for the chart
2. Click on the Insert Ribbon
3. Click on Recommended Charts
4. Choose one of the charts that Excel suggests
5. Click OK

3.2.2 THE CHART APPEARS – MAGIC!

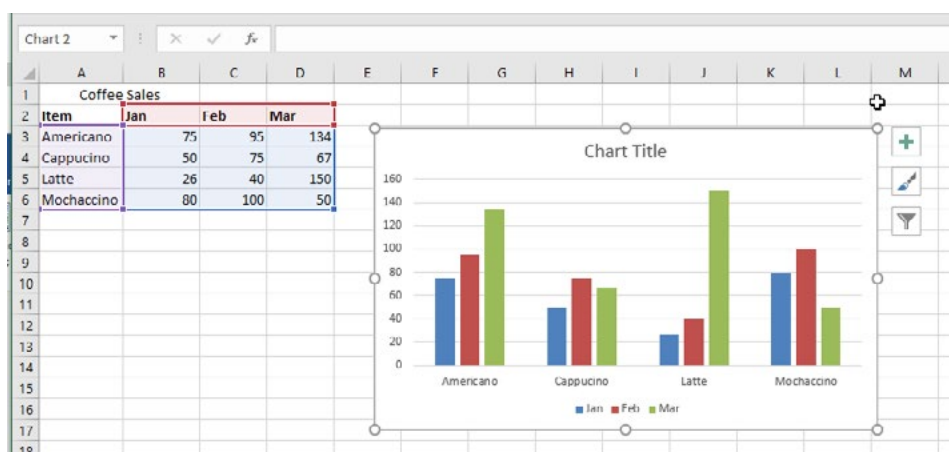


Figure 24 – Recommended chart appears

The chart type selected now appears on the spreadsheet next to the data, ready for a Chart Title or to be reformatted to match your style.

3.3 CREATING CHARTS WITH THE KEYBOARD

A very quick and simple way to create a column chart in Excel is to use the keyboard shortcut F11.

Simply highlight the data for the chart and press the F11 key. F11 is one of the function keys along the top of your keyboard.

3.3.1 CREATE A CHART USING THE KEYBOARD

	A	B	
1	Coffee Sales		
2	Item	Jan	Feb
3	Americano	75	
4	Cappuccino	50	
5	Latte	26	
6	Mochaccino	80	
7			

Figure 25 – select your data

bookboon.com

Corporate eLibrary

See our Business Solutions for employee learning

[Click here](#)

Management

Time Management

Problem solving

Self-Confidence

Effectiveness

Project Management

Goal setting

Motivation

Coaching

Download free eBooks at bookboon.com

[Click on the ad to read more](#)

Highlight the data for the chart

Press the F11 key

The chart appears on a new worksheet

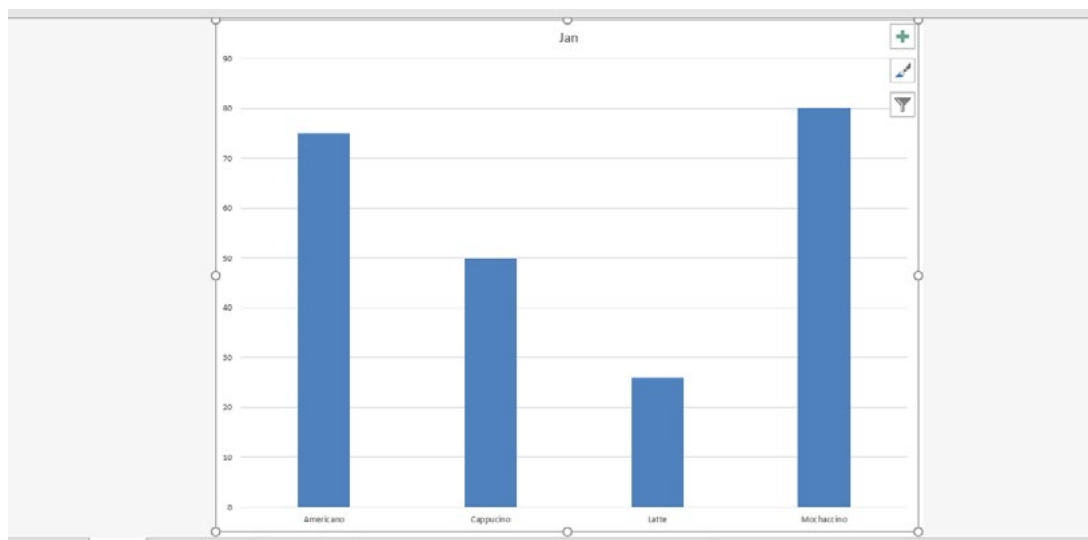


Figure 26 – it is magic

Edit as normal

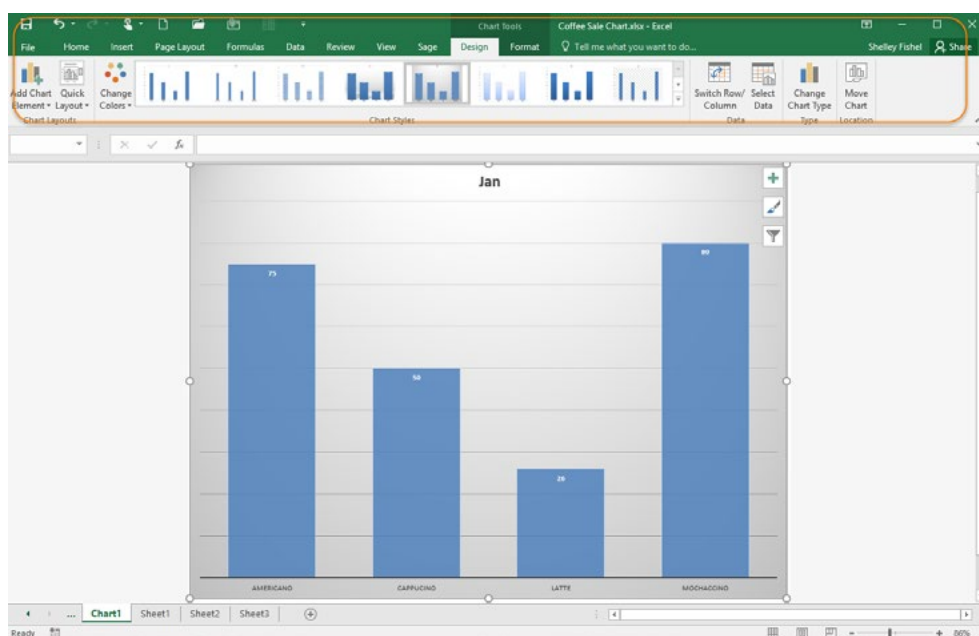


Figure 27 – edit the chart in the normal way

3.4 CREATING LINE CHARTS

To create a line chart, you need to select the data and then the type of chart to create.

3.4.1 LINE CHART

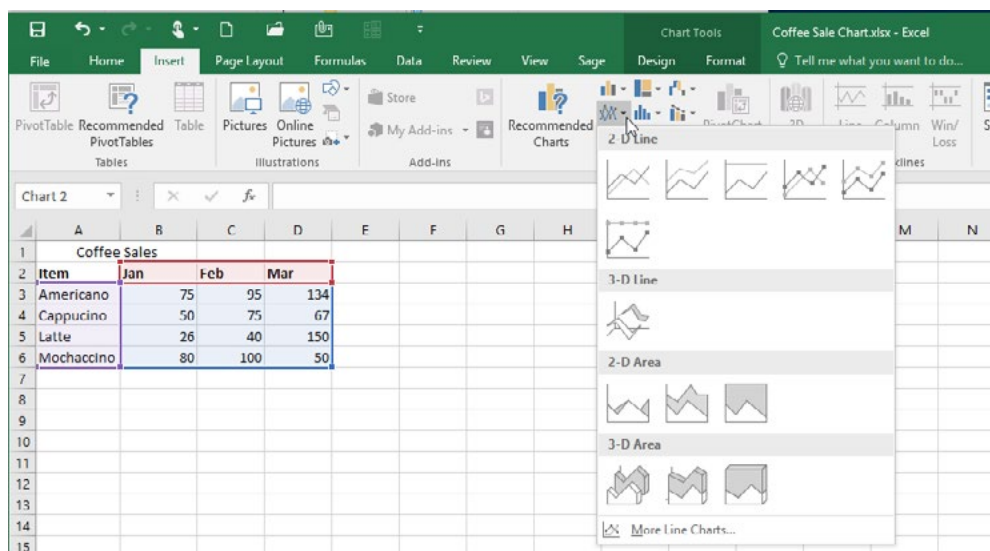


Figure 28 – Choose the Line Chart Icon

To create a line chart:

1. Select the data
2. Click on the Insert Ribbon
3. Click on the drop down arrow under Line Chart
4. Choose the type of line chart you require

3.4.2 THE LINE CHART

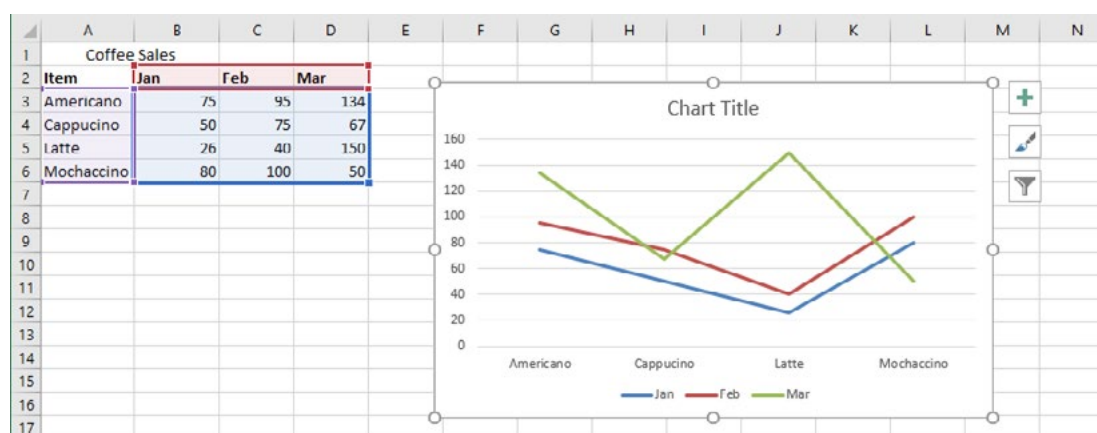


Figure 29 – the Line Chart chosen appears

Here is the line chart I just created. It looks almost fine to me. The only thing is, the way the data is arranged does not make as much sense to me as I would like. I need to switch the rows and columns. At the moment the chart is showing me the series of Jan, Feb and Mar Sales. The lines are the different total sales. I would prefer to see the coloured lines as the types of coffee sold.

To achieve this I can click on Switch Row/Columns and Excel will change it in a second.



Struggling to get interviews?

Professional CV consulting & writing assistance from leading job experts in the UK.

[Visit site](#)

 Take a short-cut to your next job!
Improve your interview success rate by 70%.

 **TheCVagency**
Visit thecvagency.co.uk for more info.

3.4.3 SWITCH ROW/COLUMNS

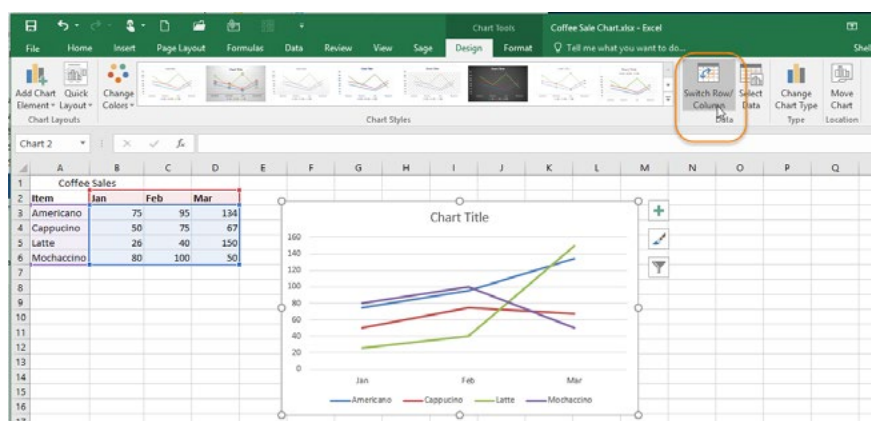


Figure 30 – Switch Rows/Columns

I clicked on Switch Row/Column and now the series are the types of coffee so I can see how each coffee is performing here in the Line Chart.

3.5 CREATING AND EDITING A COLUMN CHART

Column charts are great when used with data that has up to 12 data points. If your data has fewer than 12 data points or ranges then choose a column chart.

3.5.1 INSERT A COLUMN CHART

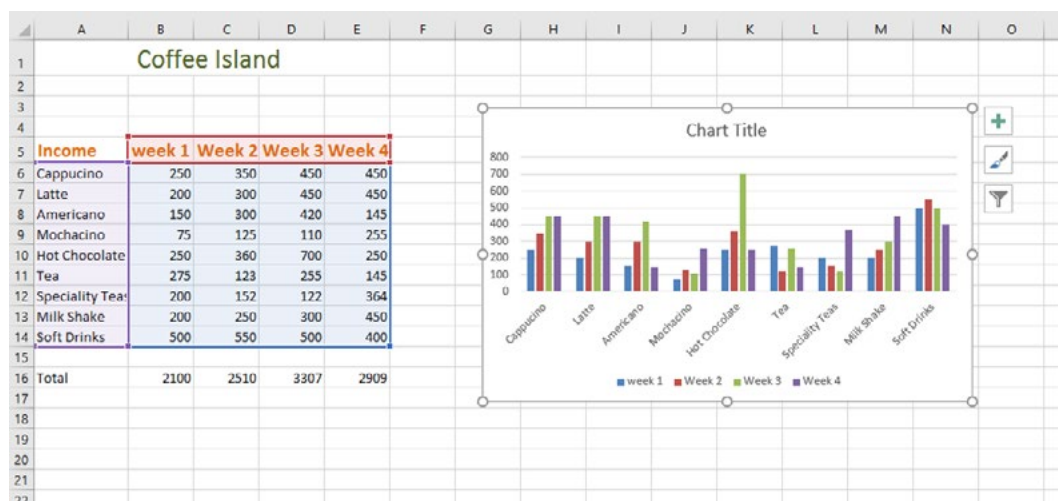


Figure 31 – Sales of each type of drink sold at Coffee Island

1. Select the data you want to chart
2. Click on the Insert Ribbon Tab
3. Select the type of column chart you want to use – note that Excel does help by giving you pointer on when to use each type of chart
4. The chart is placed on your spreadsheet immediately

3.5.2 EDIT THE CHART

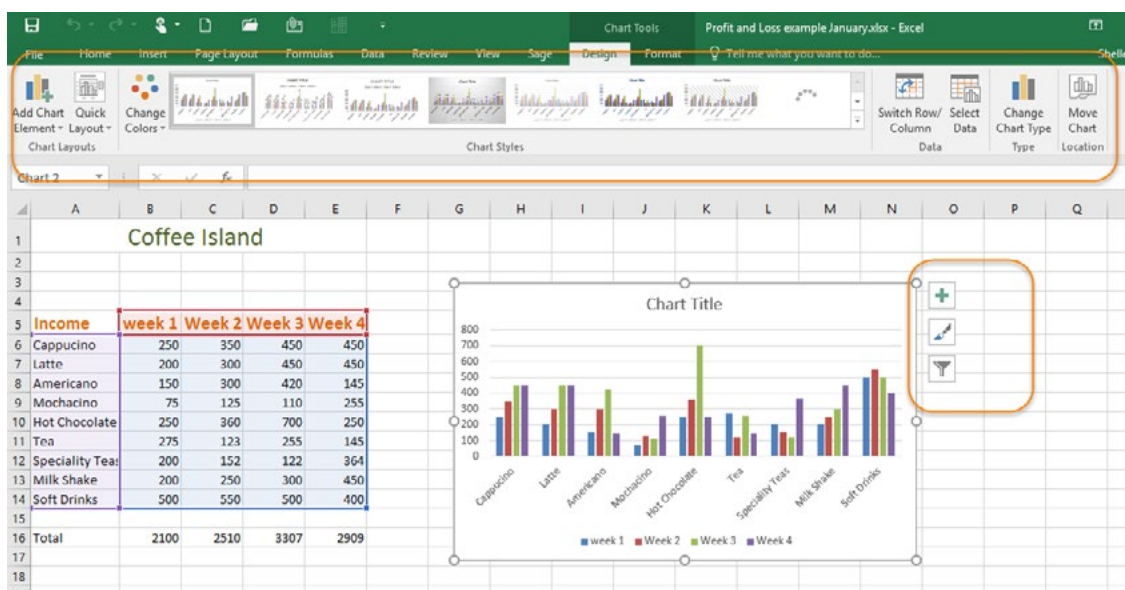


Figure 32 – many ways to format a chart

In Excel 2016 there are more ways to get to the various customization options.

When you add a chart Excel pops up two new Ribbons, Design and Format. Use these Ribbons to change the way your chart looks and is formatted.

You can also add and change chart elements from the pop out icons next to the chart itself.

3.6 CREATING PIE CHARTS

A pie chart is great for showing the way that 100% is divided between the items you are charting. I can either see how the coffee sales divide up among the months, or how each month divides up amongst the coffee types. As a pie chart looks at just 100% it is not used to compare, in the same way a column or bar chart are used.

3.6.1 PIE CHART

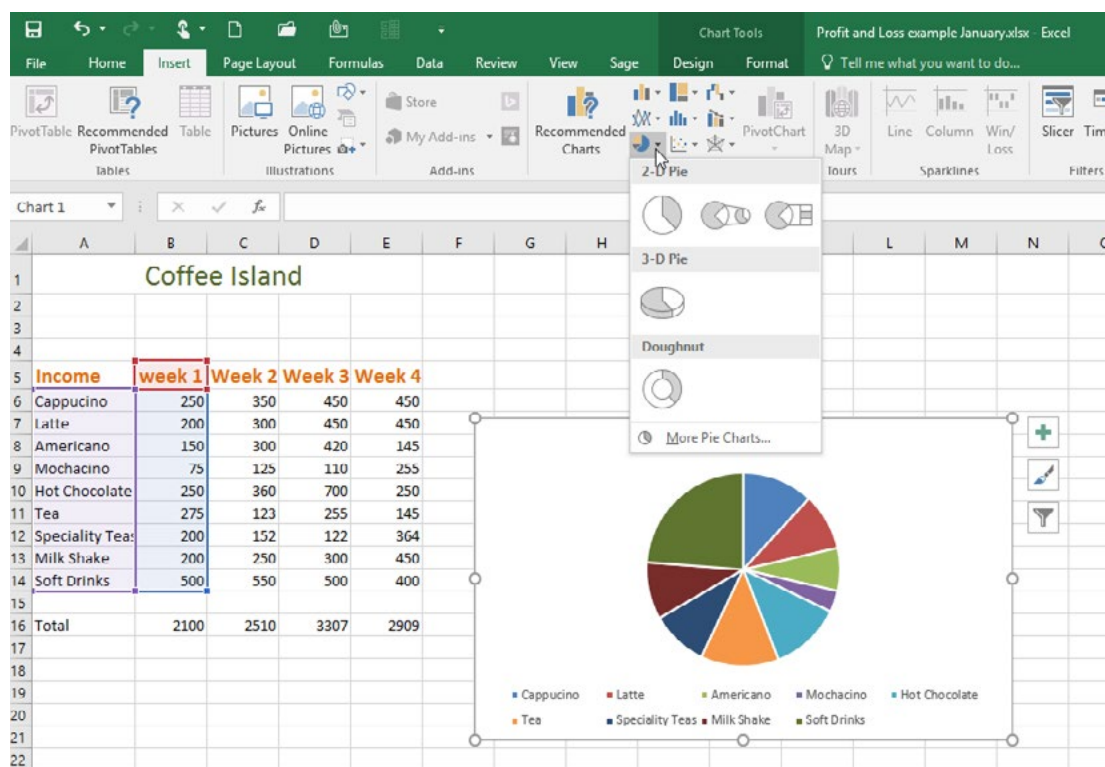


Figure 33 – a pie chart divides 100% into segments

e-learning for kids

- The number 1 MOOC for Primary Education
- Free Digital Learning for Children 5-12
- 15 Million Children Reached

About e-Learning for Kids Established in 2004, e-Learning for Kids is a global nonprofit foundation dedicated to fun and free learning on the Internet for children ages 5 - 12 with courses in math, science, language arts, computers, health and environmental skills. Since 2005, more than 15 million children in over 190 countries have benefitted from eLessons provided by EFK! An all-volunteer staff consists of education and e-learning experts and business professionals from around the world committed to making difference. eLearning for Kids is actively seeking funding, volunteers, sponsors and courseware developers; get involved! For more information, please visit www.e-learningforkids.org.

1. Select the data
2. Click on the Insert Ribbon
3. Click on the drop down below the Pie Chart Icon
4. Choose which type of pie chart you want to use
5. The pie chart Appears!

I am looking at how the different types of coffee divide up in January so I selected just the January figures with the types of coffee labels.

3.7 MODIFYING CHARTS USING THE RIBBON

The way that charts are modified follows the same general process for all chart types. There are two ways to modify charts:

- The Ribbon
- The Chart Tools on the worksheet next to the chart.

3.7.1 USING THE RIBBON

When you have added a chart to your worksheet, you will notice the appearance of two new Ribbon Tabs under the general heading Chart Tools.

The Design Tab and the Format Tab.

3.7.2 THE DESIGN RIBBON

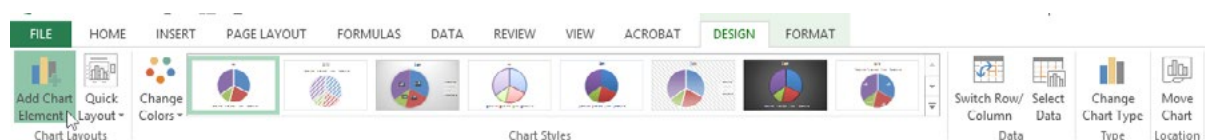


Figure 34 – The Design Ribbon

The Design Ribbon offers you lots of ways to customize the chart and make it your own style.

3.7.3 ADD CHART ELEMENTS

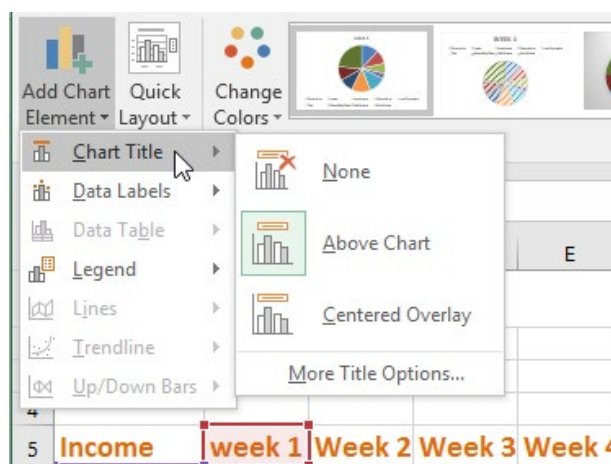


Figure 35 – add Chart Elements to make the chart easier to read

Chart Elements allow you to add elements to your chart to make it easier to read or style

Chart Title – decide if you want a title and where it goes

Data Labels – again you decide how they are placed and where

Data Table – this depends on the type of chart you are working with – it allows you to add the data underneath the chart – try it out and see

Legend – allows you to add a legend and decide on its placement

Lines – this will be available if you have a chart that supports it

Trend line – again if you have data and the right type of chart this will be live

Up Down Bars – in a Line Chart you can add Up Down Bars to show movement

Grid lines – this option is available when you have a chart that supports displaying grid lines

3.7.4 QUICK LAYOUT

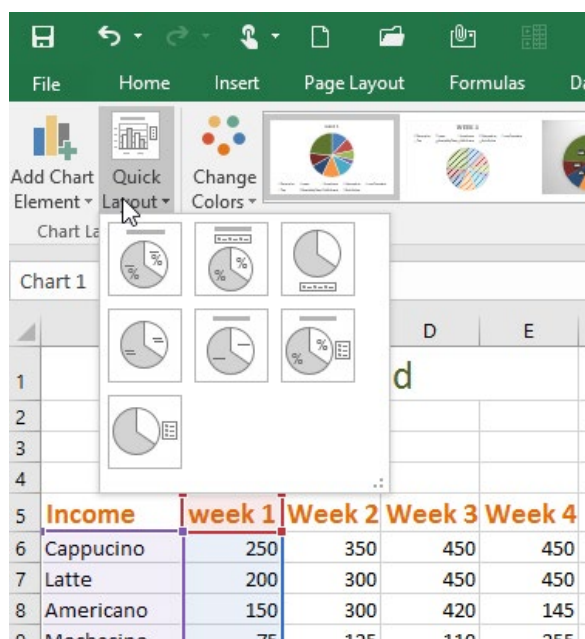


Figure 36 – change the way the chart looks quickly

Use the Quick Layout to change the way the data is set out – you can choose from a selection of presets.



Are you working in academia, research or science? And have you ever thought about working and moving to the Netherlands?

Arriving

33

Living

50

Studying

51

Working

101

Research

50

Factcards.nl offers all the **information** that you need if you wish to proceed your **career** in the **Netherlands**.

The information is ordered in the categories arriving, living, studying, working and research in the Netherlands and it is freely and easily accessible from your smartphone or desktop.

VISIT FACTCARDS.NL

3.7.5 CHANGE COLOURS

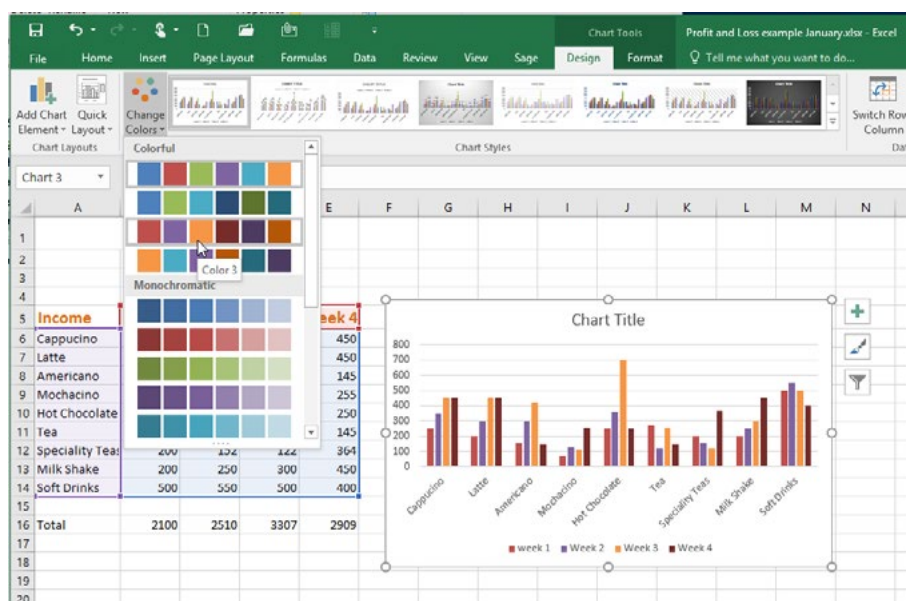


Figure 37 – modify colours to match your style

Change the colours of the bars or lines in your chart with the Change Colours icon. Select from colourful or monochrome themes.

3.7.6 CHART STYLES

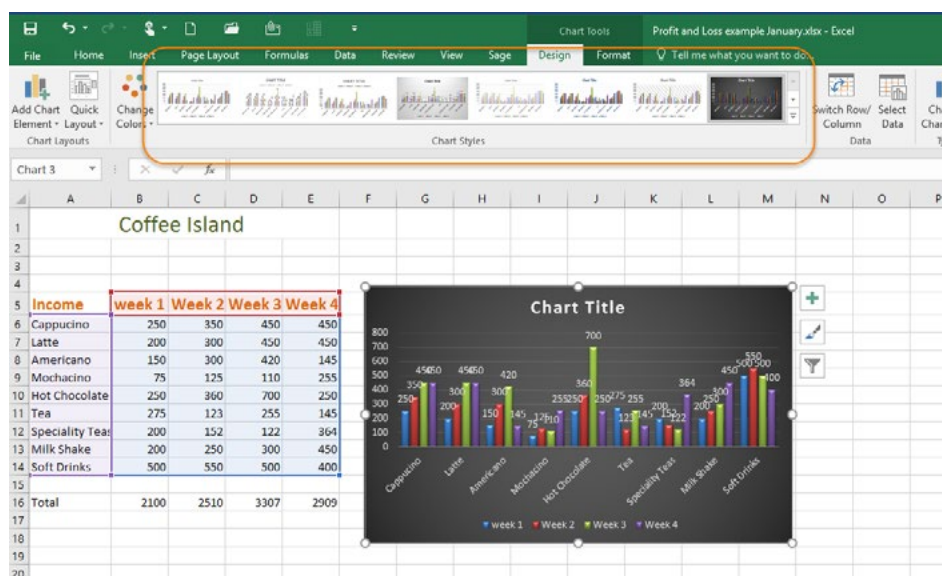


Figure 38 – make a chart your own by changing the style

Select from one of the preset chart styles in the gallery to change how your chart displays. You will see a live preview of how it looks as you hover over the different styles and by clicking on the style it is applied.

3.7.7 SWITCH ROW/COLUMN

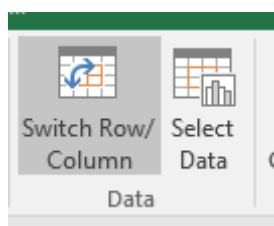


Figure 39 – change how the chart uses your data

In the chart I have the months as the series and the types of coffee in clusters – if I want to see the data the other way around I can Switch Row/Columns.

3.7.8 SELECT DATA

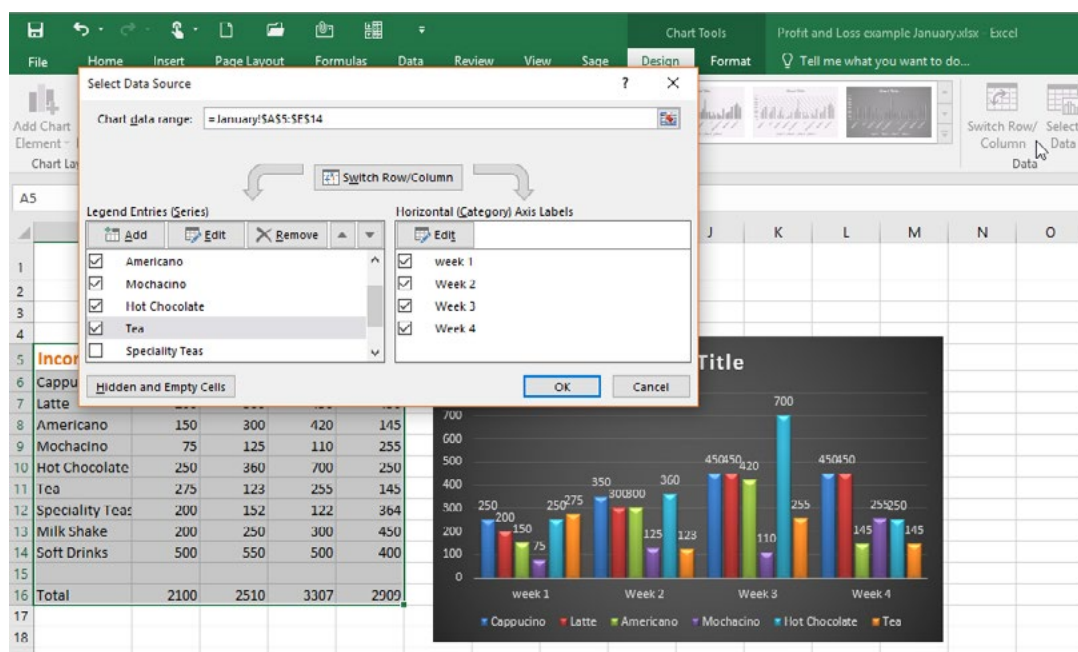


Figure 40 – add or remove extra series or data to or from a chart

In the event that you created a chart and forgot to include some data or you have added data to the range for the chart at a later date and now want to include it, you can use the Select Data button to add more data. You may also wish to exclude data as I have done in my example. I unticked the names of the columns to exclude.

1. Select the data including the new data you want to add
2. Click the Select Data button
3. Your new range will appear in the list and be added to the chart when you click OK

3.7.9 CHANGE CHART TYPE

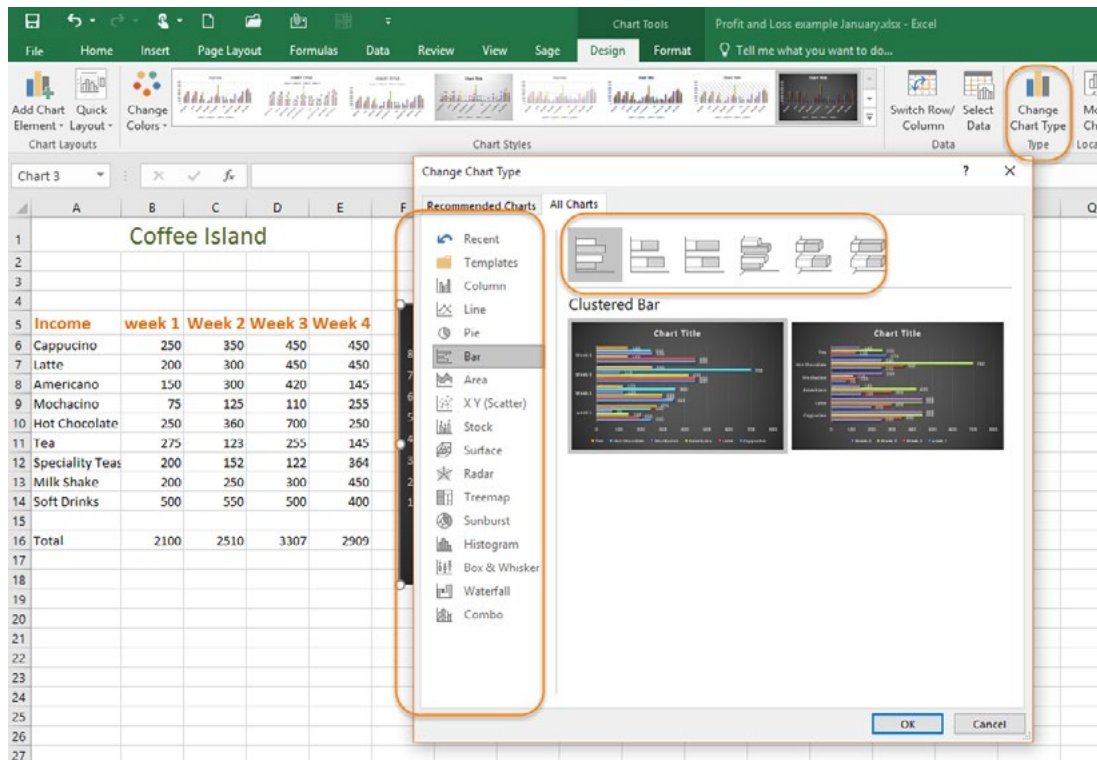


Figure 41 – wrong chart – no problem, just change it!

Brain power

By 2020, wind could provide one-tenth of our planet's electricity needs. Already today, SKF's innovative know-how is crucial to running a large proportion of the world's wind turbines.

Up to 25 % of the generating costs relate to maintenance. These can be reduced dramatically thanks to our systems for on-line condition monitoring and automatic lubrication. We help make it more economical to create cleaner, cheaper energy out of thin air.

By sharing our experience, expertise, and creativity, industries can boost performance beyond expectations. Therefore we need the best employees who can meet this challenge!

The Power of Knowledge Engineering

Plug into The Power of Knowledge Engineering.
Visit us at www.skf.com/knowledge

If you decide that the type of chart you selected does not fit the purpose you need, change the type of chart altogether.

1. Click Change Chart Type
2. Choose a different chart from within the charts offered
3. Click OK

3.7.10 MOVE CHART

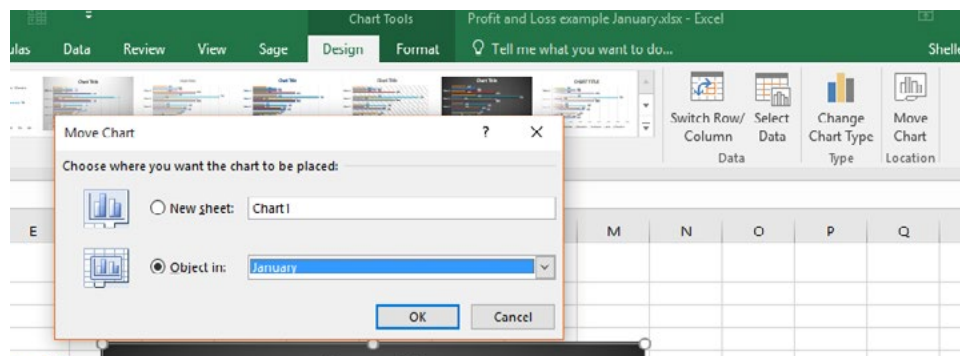


Figure 42 – move it to another location

If you want to move the chart to another worksheet or location you can use the Move Chart button.

3.8 MODIFYING CHARTS USING ICONS

When you add a chart to your worksheet, three icons pop up alongside: Elements, Style and Filter. These allow you to work with the chart directly without having to go up to the Ribbon.

3.8.1 ICONS

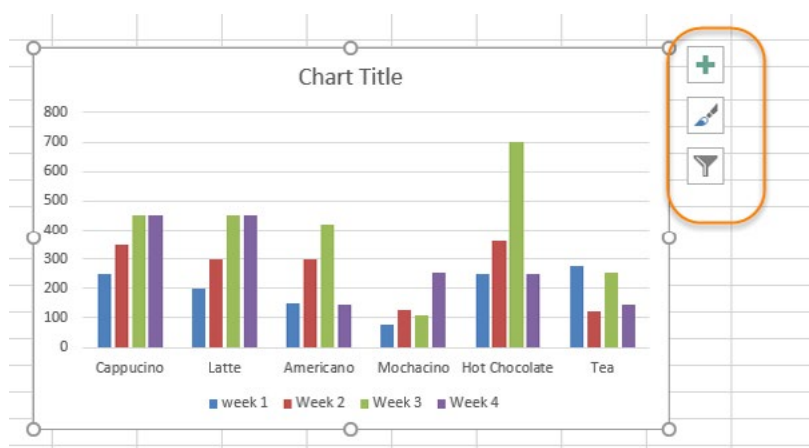


Figure 43 – use the icons to modify the chart right on your screen

1. Elements
2. Styles
3. Filter

3.8.2 ELEMENTS

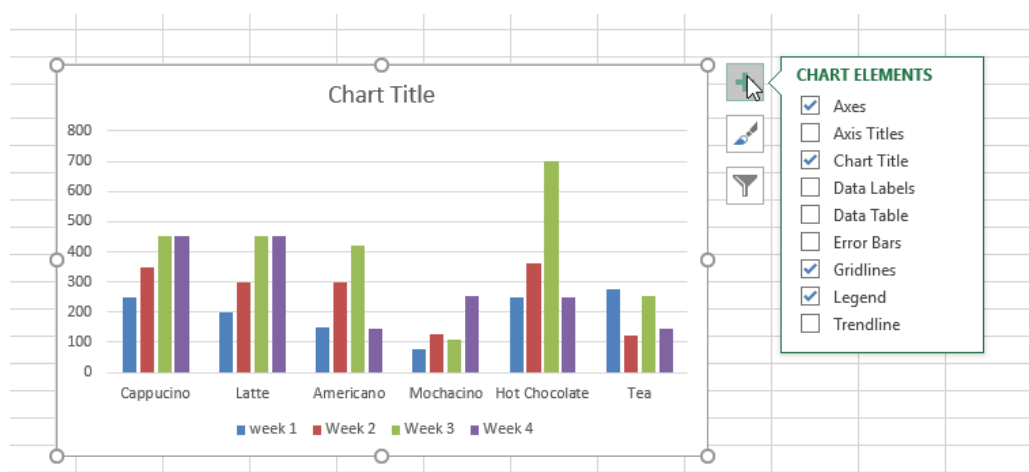


Figure 44 – add or remove different elements

Click on the icon to select the different types of elements you can add to a chart. You will be offered the elements that are relevant to the chart type you used.

3.8.3 STYLES

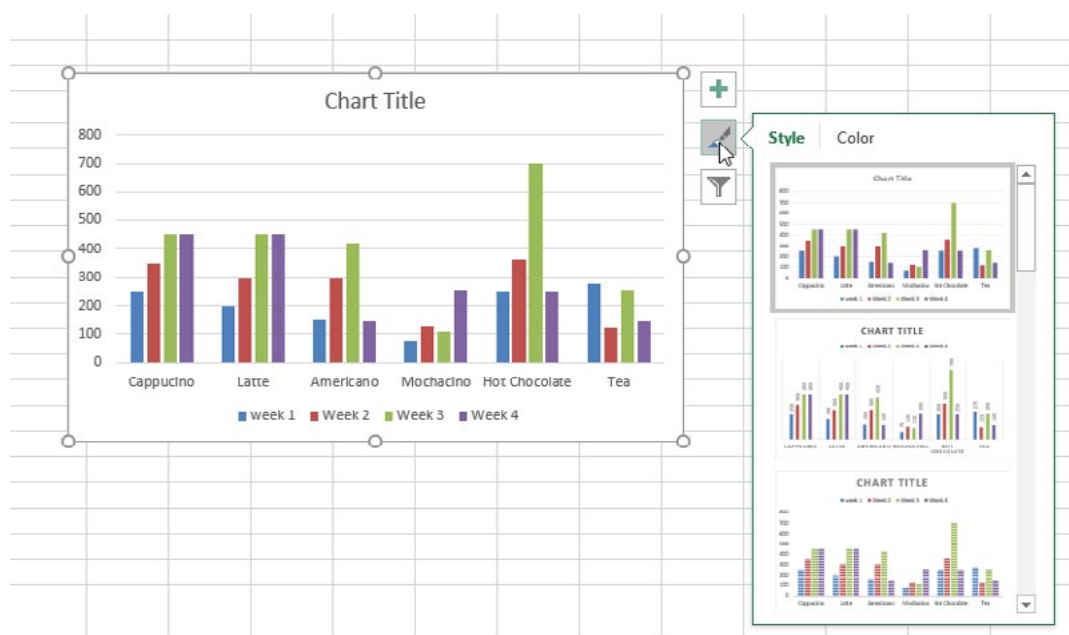


Figure 45 – change the style

Click the style icon to see the different style options. You can also change the colours here by clicking on Colour in the header and then selecting the one you want to use.

Cynthia | AXA Graduate

AXA Global Graduate Program

Find out more and apply

redefining / standards

3.8.4 FILTER

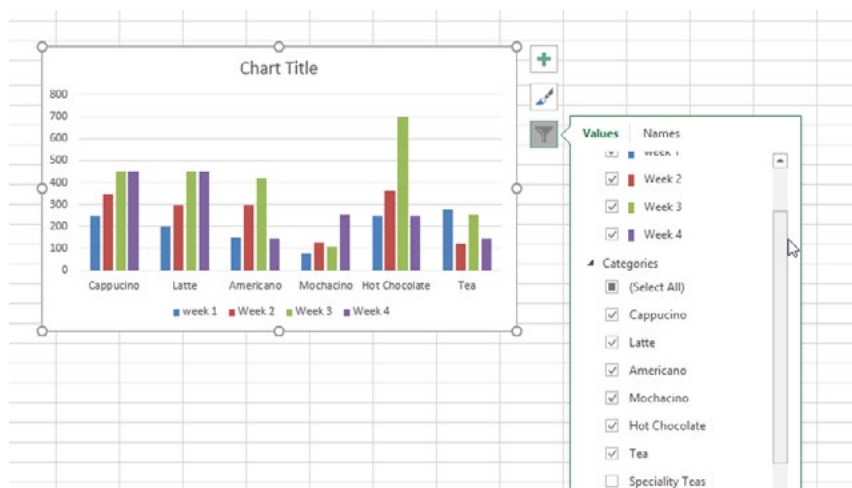


Figure 46 – you can even apply a filter!

Use the filter icon to display or hide different parts of the data. Simply un-check the series or categories you want to remove and then click Apply.

3.9 FORMATTING CHARTS – TASK PANE

When you double click on parts of a chart you will be offered a task pane with formatting options to choose from.

3.9.1 FORMAT THE CHART AREA

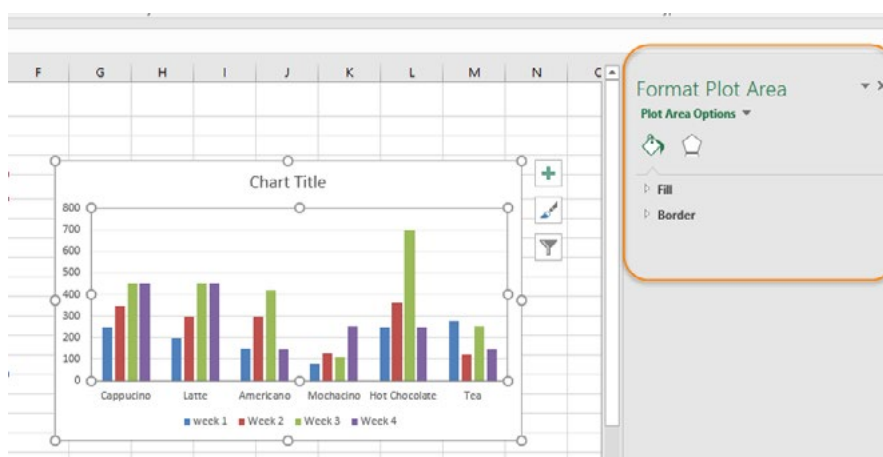


Figure 47 – use the task pane for more detailed changes

Double click on the chart area and the Format Chart Area task pane appears. Here you can change all kinds of formatting – chart and text options, fill, border, shadow, size, font colour, font outline etc.

Click on the different areas within the task pane to expand them and experiment with what they do.

3.9.2 FORMAT DATA SERIES

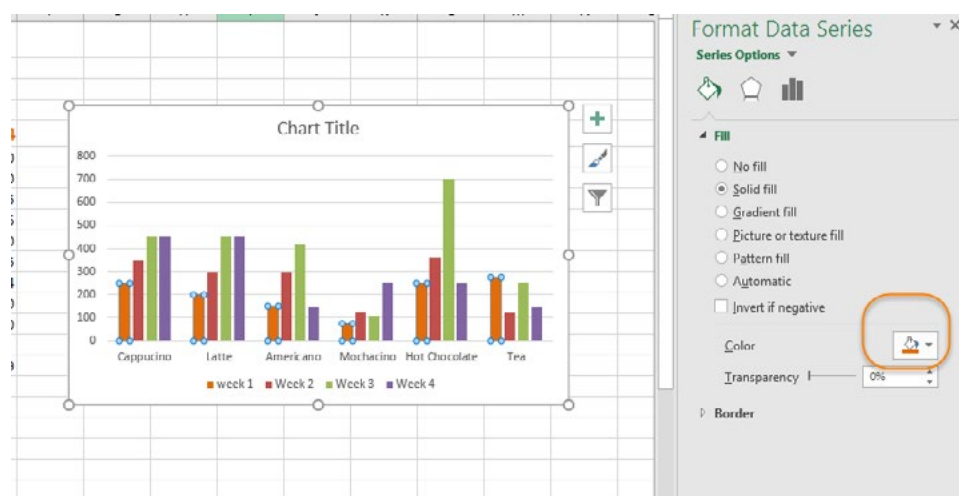


Figure 48 – change just one data series

Double click on a data series – in this example I double clicked on the blue columns for Americano. Now I can change how this series looks. If I want it to be in a different colour I can change that by selecting a different colour from the drop down next to Colour.

Test out the different options to see how they work.

3.9.3 FORMAT PLOT AREA

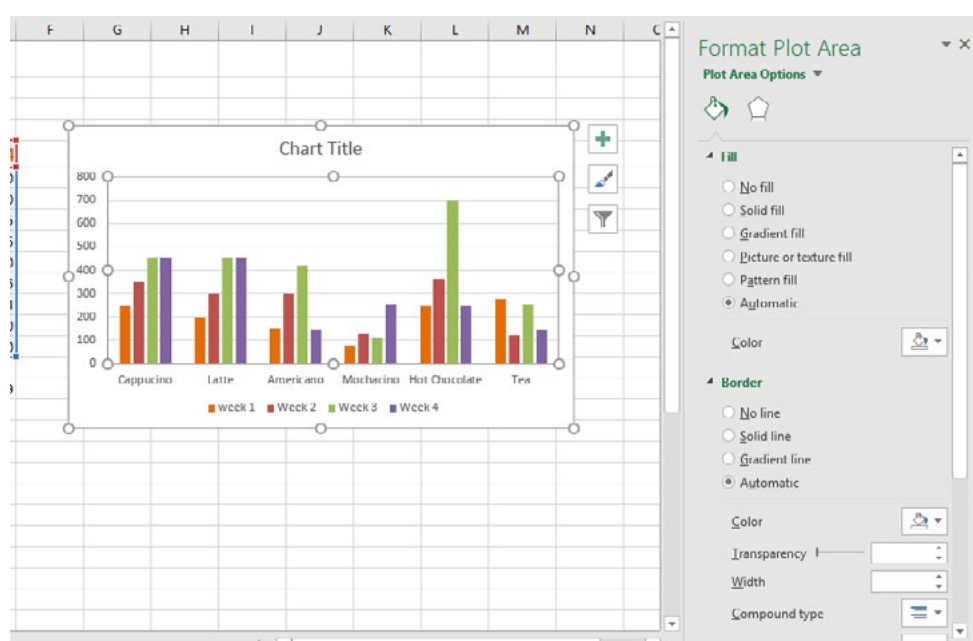


Figure 49 – format the plot area – add fill or borders and more

Double Click on the plot area and the Plot Area Task Pane opens up with options to change.

3.9.4 FORMAT MAJOR GRID LINES

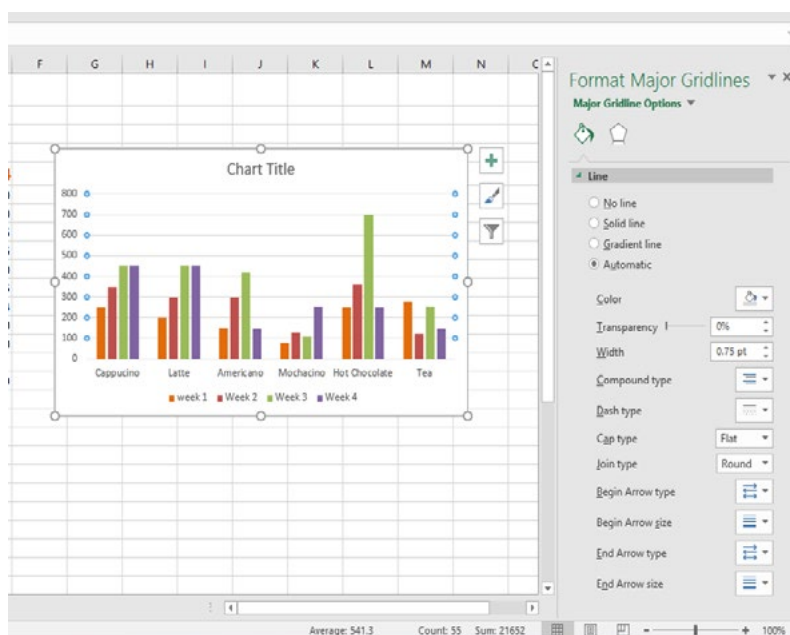


Figure 50 – Add major gridlines to help with readability and format them

Double click the major grid lines to get the Format Major Grid lines task pane with all of the available options.

TURN TO THE EXPERTS FOR SUBSCRIPTION CONSULTANCY

Subscribe is one of the leading companies in Europe when it comes to innovation and business development within subscription businesses.

We innovate new subscription business models or improve existing ones. We do business reviews of existing subscription businesses and we develop acquisition and retention strategies.

Learn more at [linkedin.com/company/subscribe](https://www.linkedin.com/company/subscribe) or contact Managing Director Morten Suhr Hansen at mha@subscribe.dk

SUBSCRIBE - to the future

3.9.5 FORMAT AXIS

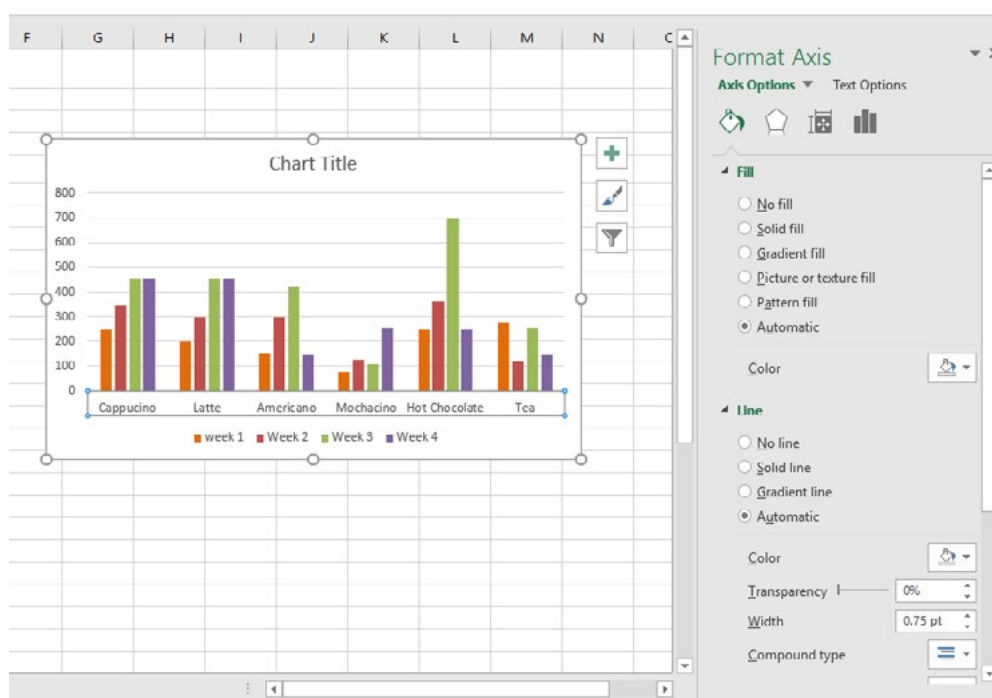


Figure 51 – add an axis or change how the axis looks

Double click on the axis you want to format, and the Format Axis task pane displays. Here you will see options to format the axis or the text. In my example, I have changed the text to orange to make it stand out a bit more. Try out all the different options.

4 APPLY AND MANIPULATE ILLUSTRATIONS

4.1 PICTURES IN EXCEL

In Excel, as in the other Microsoft Office programs, you can add pictures to make your work more interesting. You might want to add a logo or a piece of Smart Art to illustrate a point. Familiar tools from other applications are available in Excel 2016.

4.1.1 INSERT A PICTURE FROM A FILE ON YOUR COMPUTER

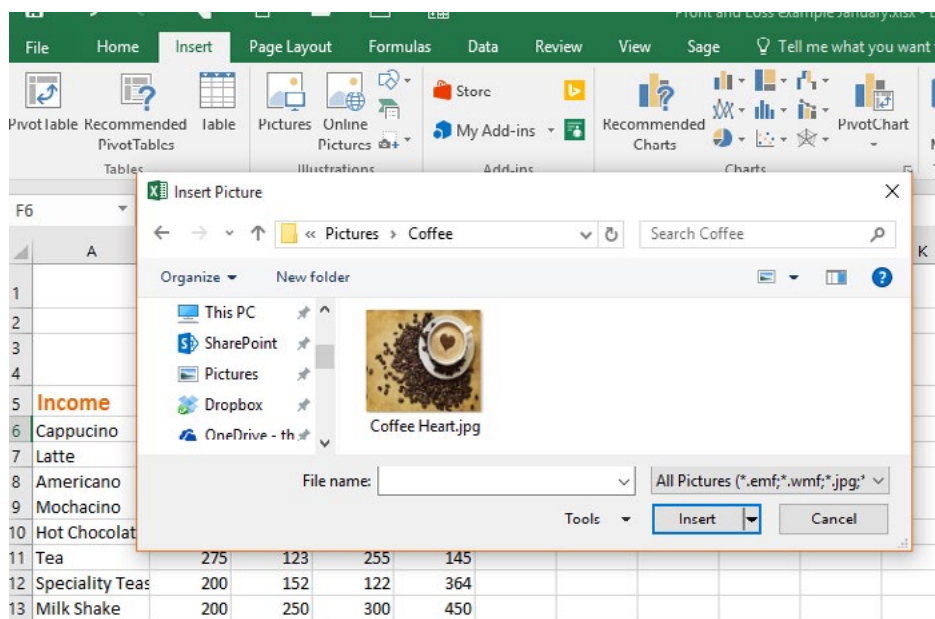


Figure 52 – insert picture from file

1. Place the cursor where you want the picture to appear
2. Click on the Insert Ribbon
3. Click on Pictures
4. Navigate to the folder where your picture is stored (mine is in a folder called Coffee in my Pictures Library)
5. Click Insert

4.1.2 INSERT AN ONLINE PPCTURE

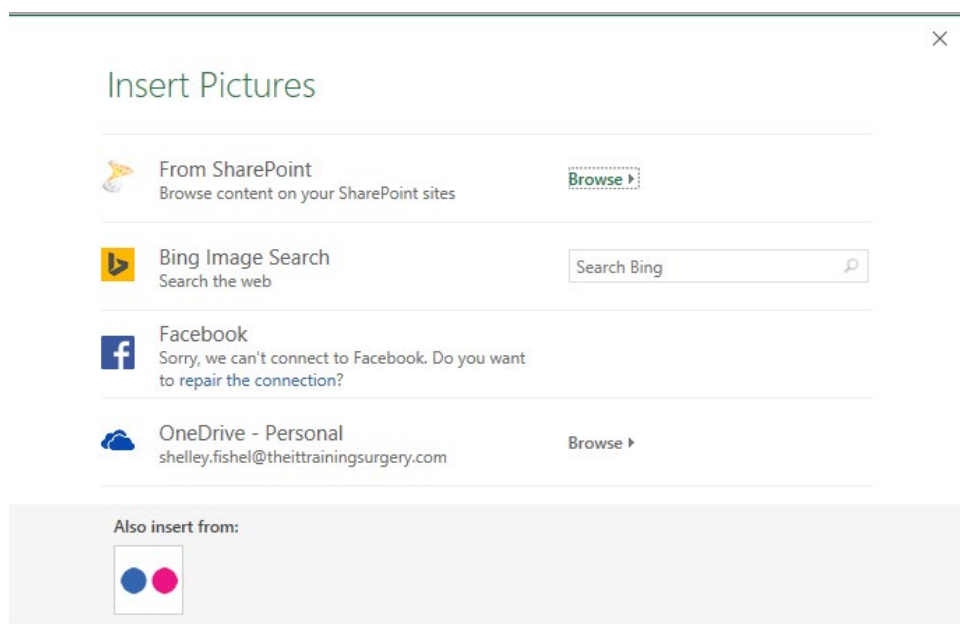


Figure 53 – add an online picture

Losing track of your leads?

Bookboon leads the way
Get help to increase the lead generation on your own website. Ask the experts.



Interested in how we can help you?
email ban@bookboon.com 

If you don't have a picture on your computer you can go online for more options.

- **From SharePoint** – if you are using SharePoint in your organization, you may have pictures stored there and you can search for them by clicking Browse. This will take you to the File Explorer showing your OneDrive for Business folder. There you can select from any images you have stored. You can also navigate to a SharePoint folder if you have synchronised this with your computer.
- **Bing Image Search** – type your keyword here and click on the Magnifying Glass to search.
- **Facebook** – if you are connected to Facebook this will appear and you can select from one of your Facebook images.
- **OneDrive Personal** – This shows up if your computer is connected to your personal OneDrive Account.

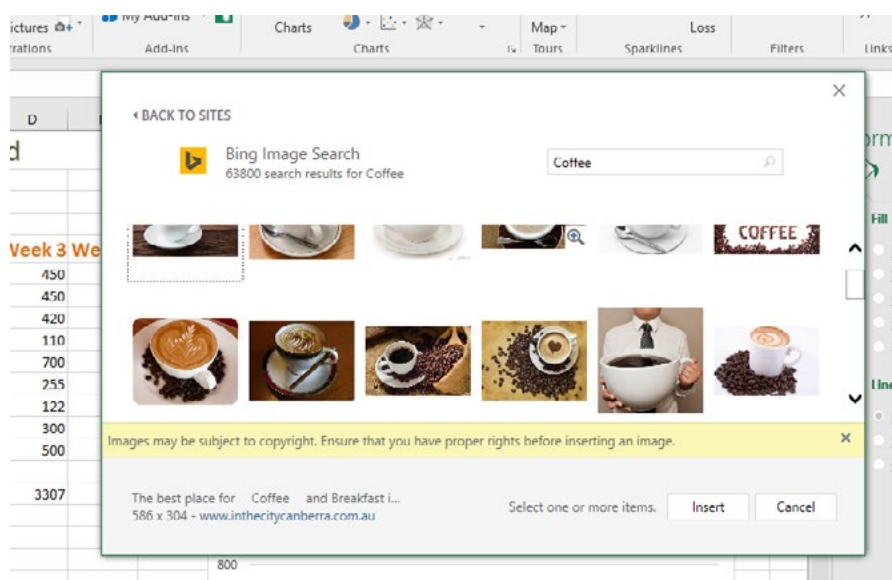


Figure 54 – images from Bing

Bing will offer you a selection of images and a warning about copyright. Make sure you comply!

Click on the image you want to use and click Insert. The picture is downloaded and inserted into your document. You may well need to resize it too!

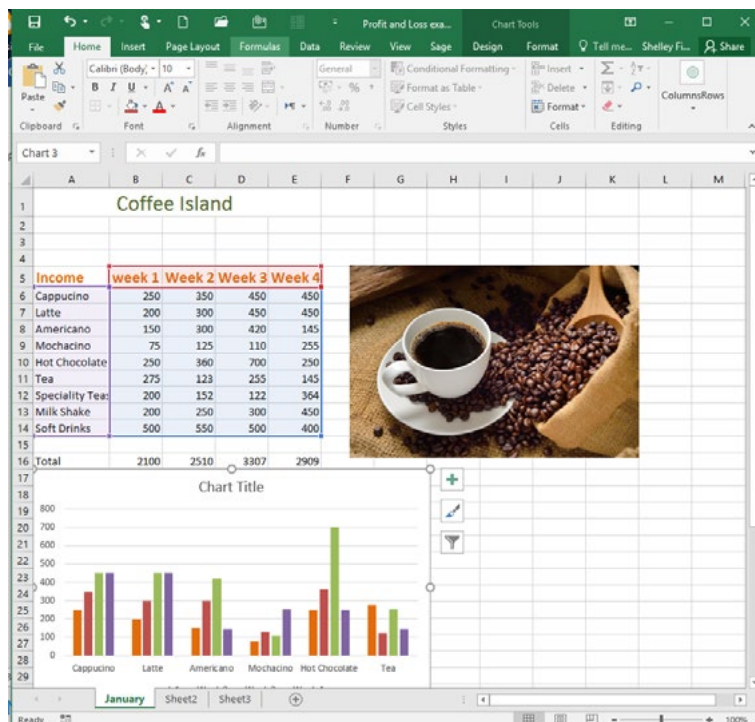


Figure 55 – image added

4.2 RESIZE THE PICTURE – DRAGGING

Pictures will pop into your spreadsheet and often be far too large. Use the following methods to resize them.

4.2.1 RESIDE THE PICTURE – DRAGGING



Figure 56 – click and drag on the diagonal to keep proportion

Grab the corner and when you see the diagonal white arrow drag the cursor down and to the right – keeping the ratio of the long and short edges proportional.

4.2.2 RESIZE THE PICTURE USING THE RIBBON

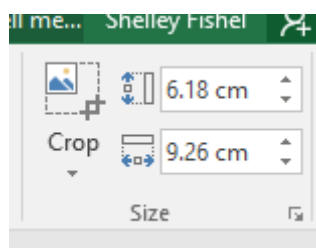


Figure 57 – set an actual size on the Ribbon

1. Click on the picture to select it
2. Click into the height or width box in the Size Group on the Picture Tools Format Ribbon
3. Type the size you want the picture to be
4. Excel will automatically change the other value to keep the picture proportional

"I studied English for 16 years but...
...I finally learned to speak it in just six lessons"

Jane, Chinese architect

ENGLISH OUT THERE

Click to hear me talking before and after my unique course download

4.3 MODIFY A PICTURE

Excel 2016, like the other Microsoft Office applications, offers many ways to modify and enhance your pictures. Use the Picture Tools Format Ribbon to make changes.

4.3.1 PICTURE TOOLS FORMAT RIBBON

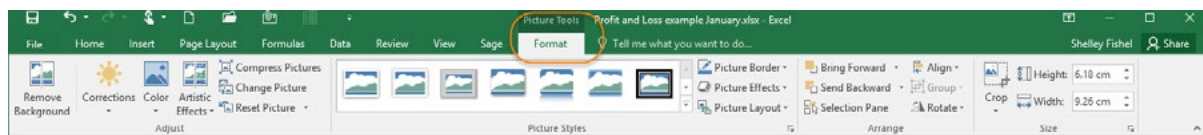


Figure 58 – The picture tools Format Ribbon

Here you can add a picture style, a border, and picture effects such as shadow change the picture layout. You can also send images backwards and bring them forwards if you have several.

Crop an image to remove the parts you don't need and adjust the size.

4.3.2 ADD A STYLE TO A PICTURE

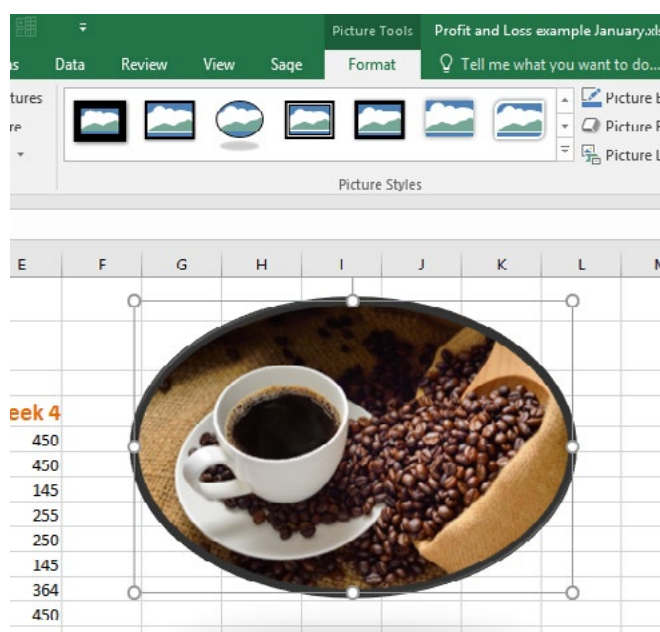


Figure 59 – style your picture

Select the picture and then hover over the styles in the Picture Styles Gallery and see how your picture will look. When you find one that you like, click on it to apply.

4.3.3 CHANGE BORDER COLOUR

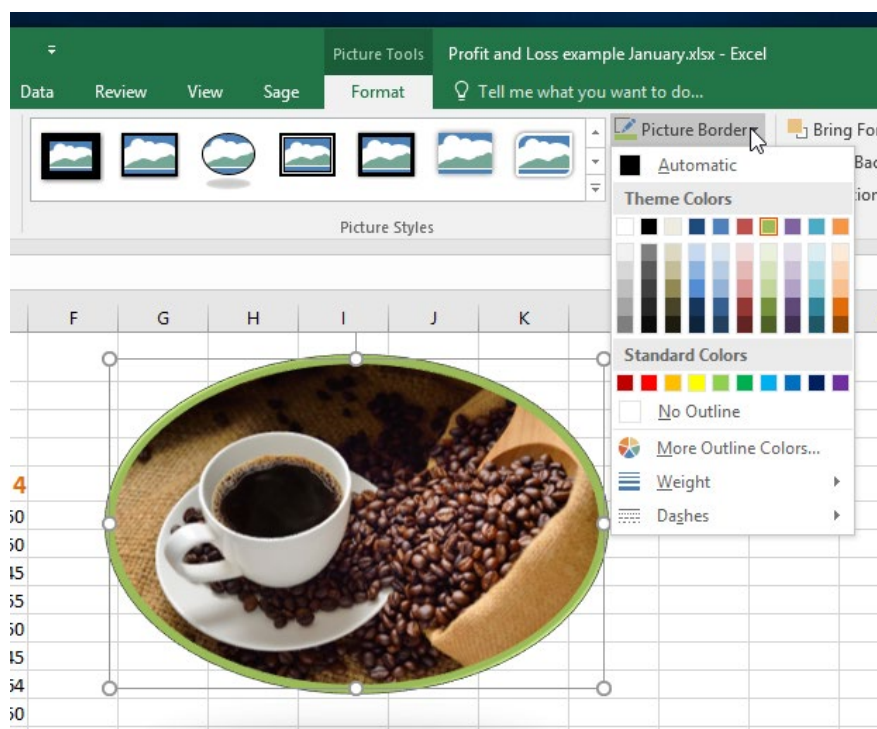


Figure 60 – give the picture a border

1. Click on the picture
2. Click on the drop down next to Picture Border
3. Choose a colour

You can choose many more colour options and even change the weight and type of line that makes up the border.

Try out the different options.

4.3.4 PICTURE EFFECTS

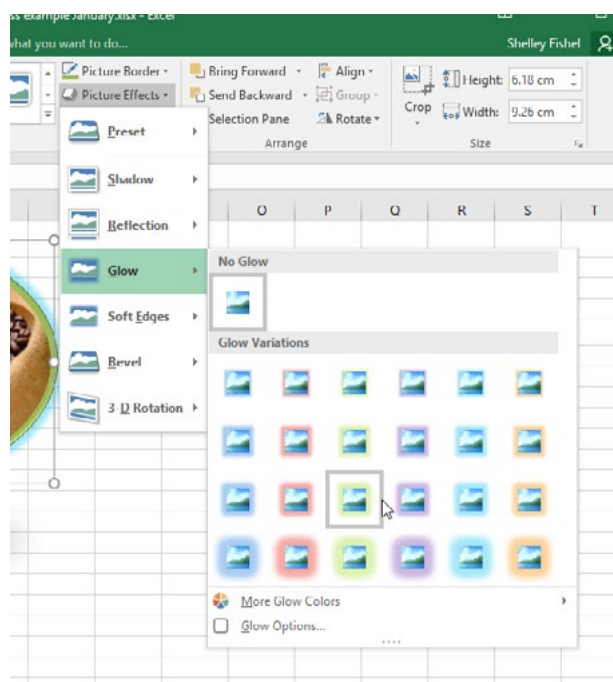


Figure 61 – change picture effects

These add shadow, glow, bevelled and different colour effects.

This e-book
is made with
SetaPDF



PDF components for PHP developers

www.setasign.com



4.3.5 CROP A PICTURE

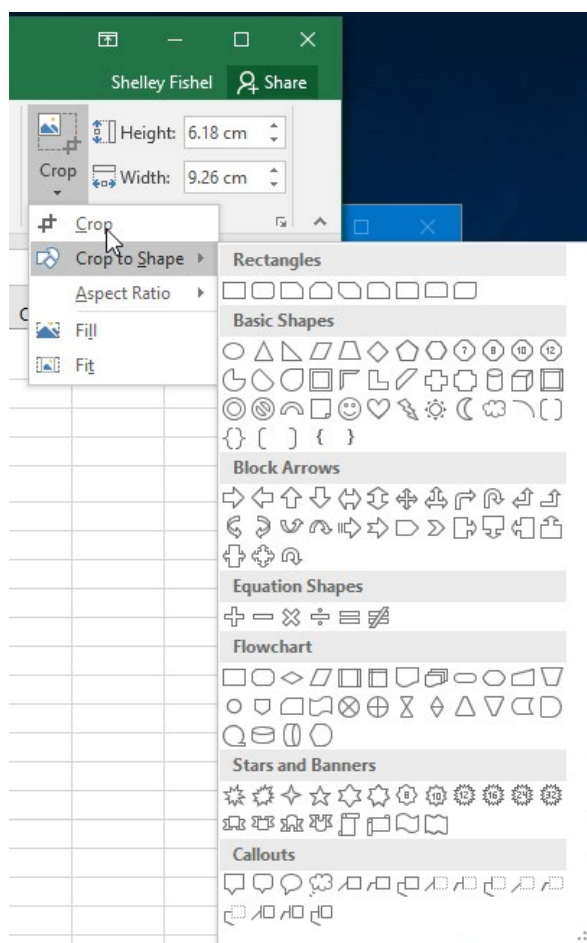


Figure 62 – crop to remove unwanted parts

When you want to remove parts of a picture rather than re size it, you can crop it. Click the Crop icon and then drag the crop handles that appear around the picture to remove parts. You can also crop the picture to fit a shape!

4.3.6 BRIGHTNESS SHARPNESS AND CONTRAST

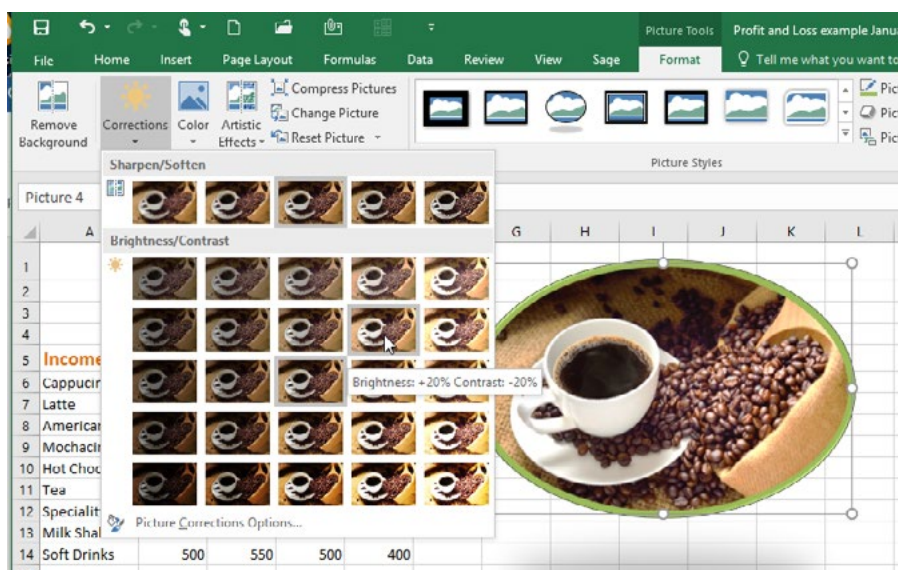


Figure 63 – make the picture brighter or sharper here

You can change the sharpness or saturation of an image, the brightness and the contrast. Click the icon and make a choice. Live Preview will show you what the picture will look like and when you find what works, click on the icon to apply.

4.3.7 ADJUST THE COLOUR

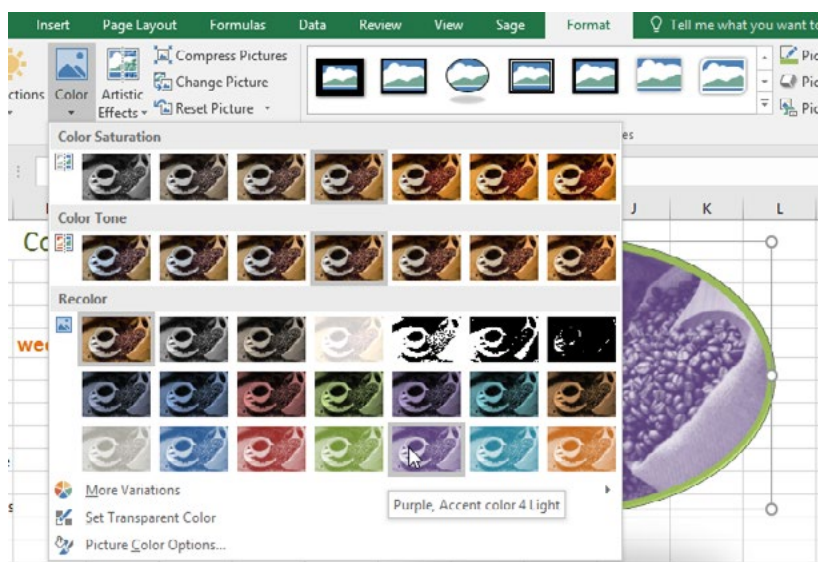


Figure 64 – if you want to recolour the picture, do it here

If you want to change the colour of the picture, perhaps to match the theme of your spreadsheet, you can select a colour tone, or recolour the picture from the colour button. Test out some of the other options here.

4.3.8 APPLY ARTISTIC EFFECTS

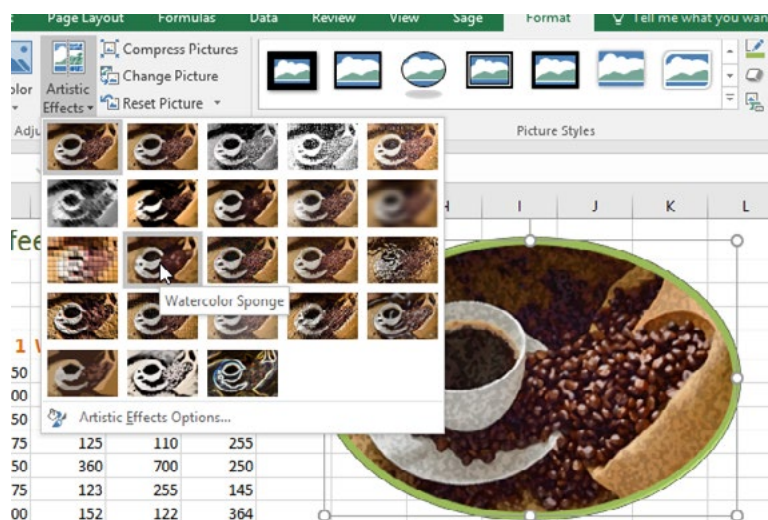


Figure 65 – use Artistic Effects to really change how it looks

You can change the picture in other ways by selecting from one of the artistic effects available.

1. Click on the Picture
2. Click the drop down arrow next to Artistic Effects
3. Select the effect you want to apply

gaiteye
Challenge the way we run

**EXPERIENCE THE POWER OF
FULL ENGAGEMENT...**

.....

**RUN FASTER.
RUN LONGER..
RUN EASIER...**

**READ MORE & PRE-ORDER TODAY
WWW.GAITEYE.COM**

4.4 RESET A PICTURE

If you are anything like me, you will try out all sorts of different effects on your picture and then decide that you like it just the way it was. In this case you need to Reset the Picture to its original state.

4.4.1 RESET A PICTURE

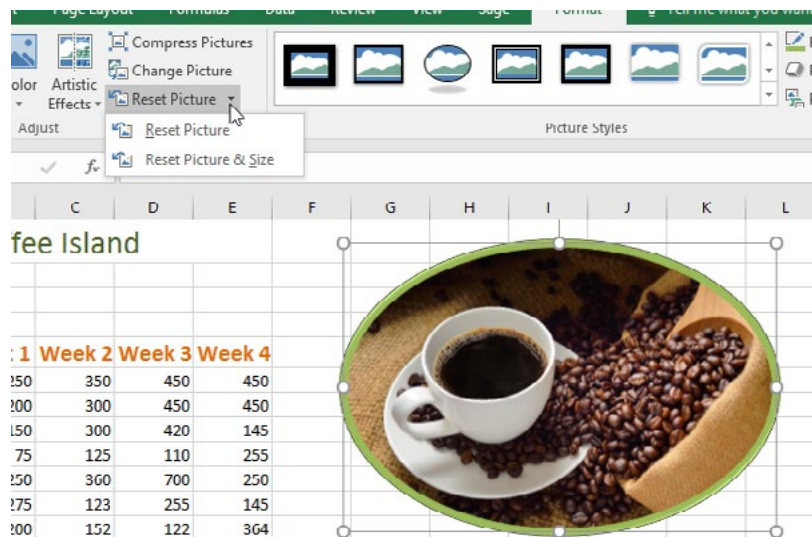


Figure 66 – reset the picture to how it started out

Click the Reset Picture icon

Choose whether to simply reset the colour/brightness back to how it was – or if you also resized the picture, you can choose to take it back to its original size too.

5 SMARTART

5.1 SMARTART

SmartArt is a way of presenting data such as a process, a hierarchy or an idea visually. It can jazz up a boring spreadsheet.

5.1.1 ADD PROCESS SMARTART

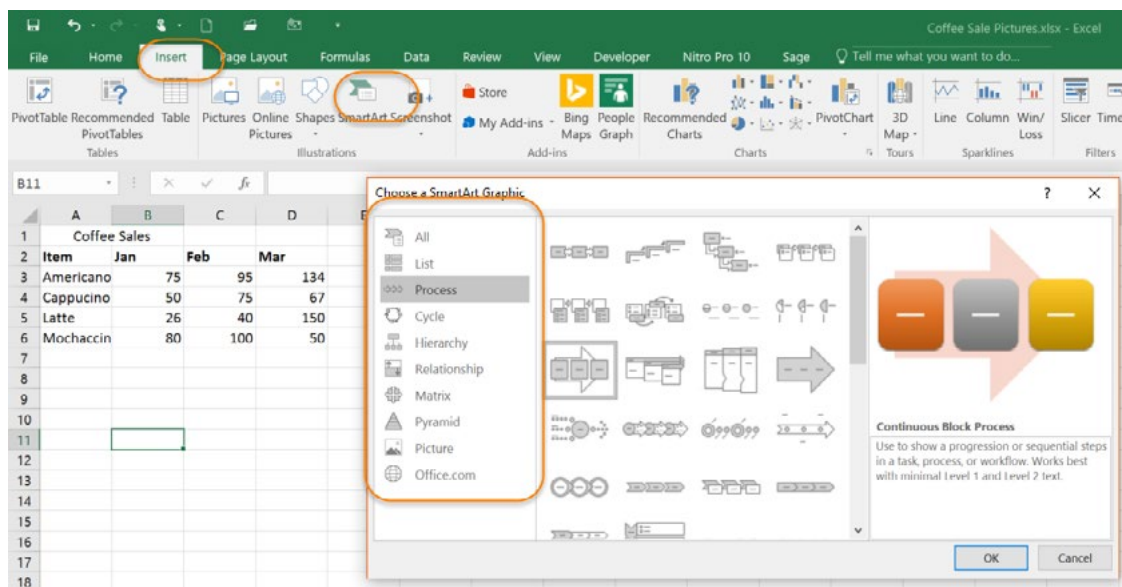


Figure 67 – create a process diagram

On the Insert Ribbon

1. Click SmartArt
2. Choose a style from those on offer
3. Click OK

5.1.2 ADD TEXT

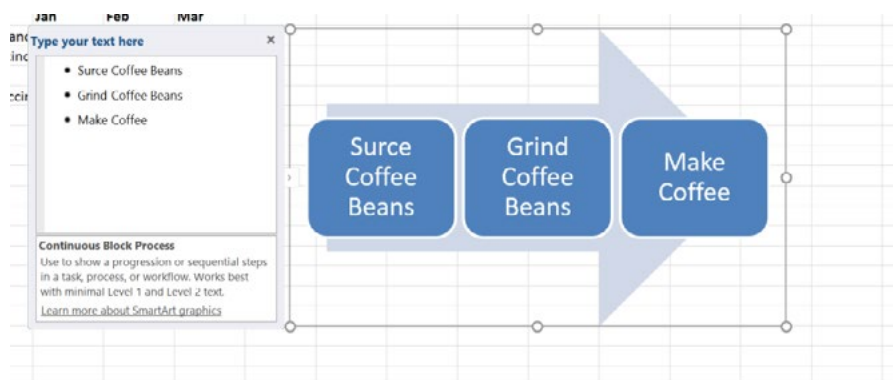


Figure 68 – add text

A text pane pops out of the left side of SmartArt and you can type your text in here – or you can type directly into the shapes.

The advertisement features a background image of three smiling people in a meeting. The Wethrive.net logo is in the top left. The main headline reads 'How to retain your top staff' with a sub-headline 'FIND OUT NOW FOR FREE'. On the right, a white box titled 'DO YOU WANT TO KNOW:' contains three questions, each with an icon: 'What your staff really want?' (head with dots), 'The top issues troubling them?' (checkmark), and 'How to make staff assessments work for you & them, painlessly?' (clock). At the bottom of this box is a green button that says 'Get your free trial' and a dark gray box below it that says 'Because happy staff get more done'.

5.1.3 CHANGE THE COLOUR OF SMARTART

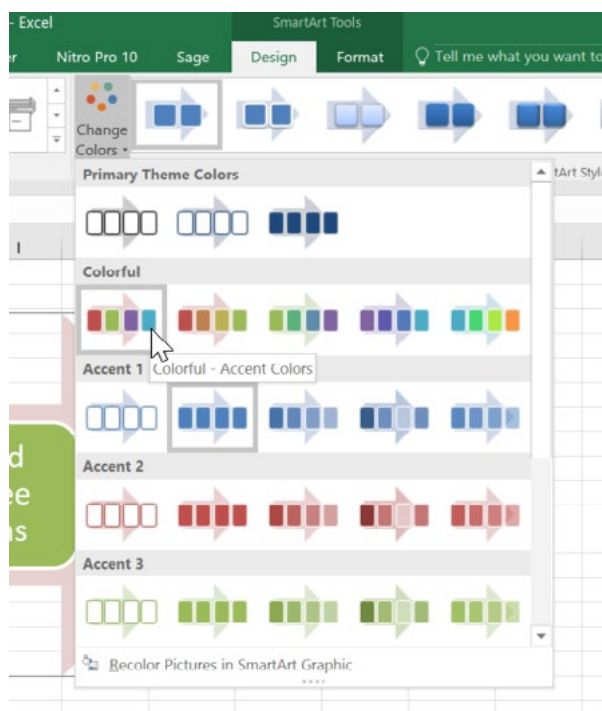


Figure 69 – change the colour

On the SmartArt Tools Design Ribbon that pops up, you can select a different colour set for the SmartArt.

5.1.4 MAKE OTHER CHANGES

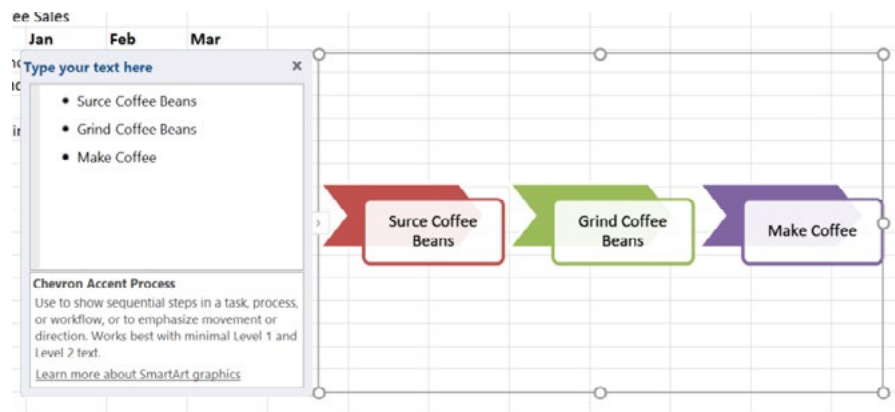


Figure 70 – Smart Art design

Other changes you can make to SmartArt on the Design Ribbon are:

- Adding more shapes
- Changing the overall layout
- Change the colours
- Change SmartArt styles
- Reset to how it started out once you made changes
- Convert to Shapes takes away the automatic functionality of SmartArt and turns the SmartArt into one big shape

On the Format Ribbon you can:

- Change the individual shapes
- Change the shape styles – border and shading
- Format the Word Art within the shapes
- Apply text formatting
- Arrange and align
- Re-size

6 SHAPES

6.1 INSERTING SHAPES INTO A WORKBOOK

Shapes can be drawn onto a worksheet to illustrate a point or to look like a button or label.

6.1.1 INSERT SHAPES

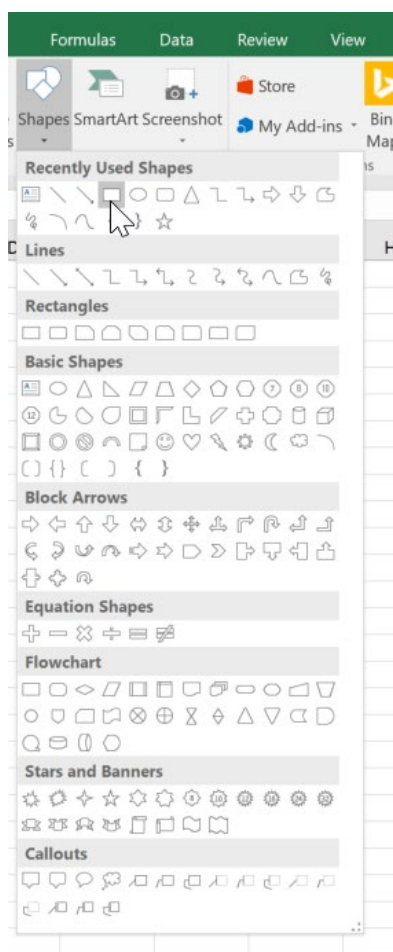


Figure 71 – add shapes

1. Click on the Insert Ribbon
2. Click the drop down arrow next to Shapes
3. Choose a shape

6.1.2 DRAW THE SHAPE

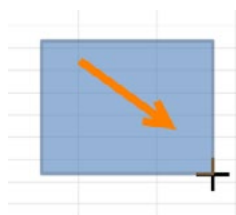


Figure 72 – drag to draw the shape

Click and drag out the shape until it reaches the size you want.

6.1.3 FORMAT THE SHAPE

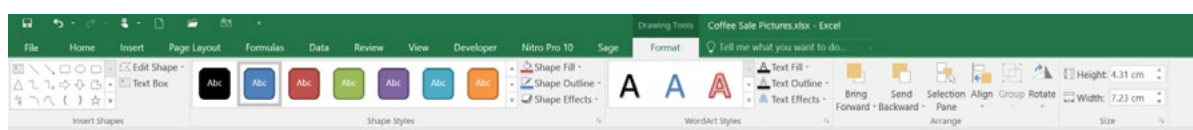


Figure 73 – the Format Ribbon

You can now use the Drawing Tools Format Ribbon to make changes to how your shapes appear. Change the colour, the border the fill, how any text looks and any alignment and size.

6.1.4 ADD TEXT TO A SHAPE

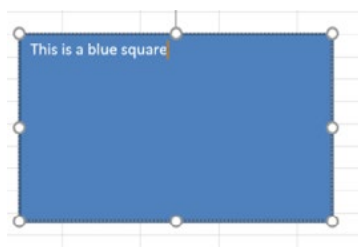


Figure 74 – add text

To add text simply start to type as soon as you have finished drawing out the shape.

6.1.5 EDIT TEXT

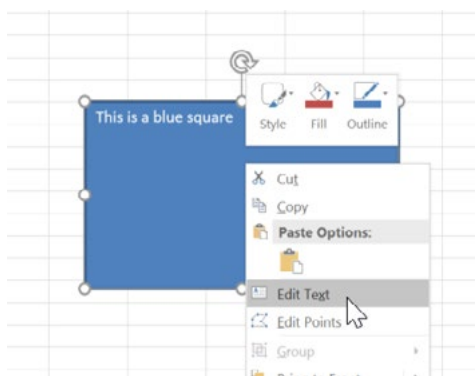


Figure 75 – Edit the text

There are two options, you can click into the shape and continue typing or you can right click on the shape and click Edit Text – you can now change what you had already entered.

7 SCREENSHOTS

7.1 INSERTING A SCREENSHOT

Sometimes, when you need to illustrate a point, it would be handy to have a screen shot to show what you mean. With Office 2016 you can now add screen shots just about anywhere.

7.1.1 TAKE A SCREEN CLIPPING OF PART OF A WINDOW

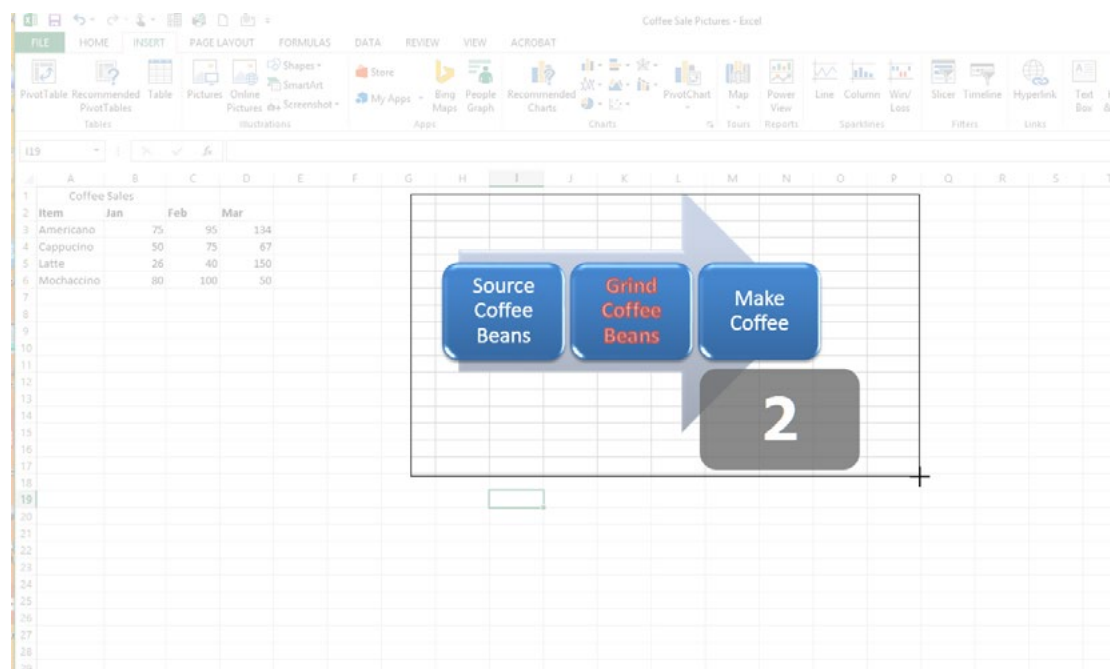


Figure 76 – get a screen clipping

Here I have gone to a different workbook which is open behind the one where I want to place the clipping. Having clicked on Screen Clipping at the bottom of the menu I then clicked into the worksheet for which I want to get a screen shot. The screen goes white. I can then click and drag over the white area to get what I want and that part of the screen goes bright as you can see in the image above. When I let go the image is placed in the worksheet I started from.

7.1.2 ADD A SCREEN SHOT

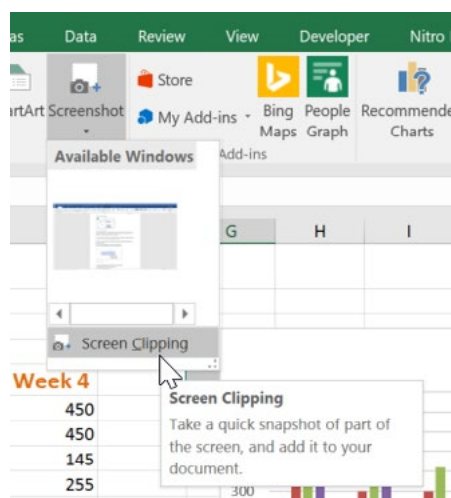


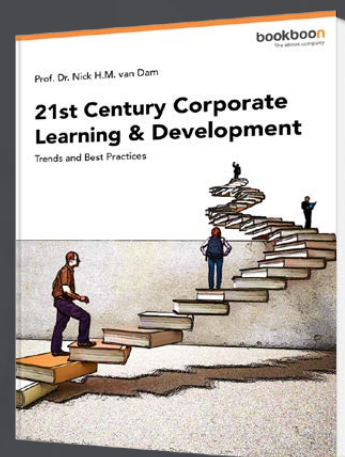
Figure 77 – add a screen clipping

The Screen Clipping tool works by taking a screen shot of the whole screen or by allowing you to draw the area that you want to clip. As Excel 2016 works with each workbook opening in its own instance it is easy to get a clipping of just part of a window.

Free eBook on Learning & Development

By the Chief Learning Officer of McKinsey

Download Now



To get a picture of the whole of the screen in another application, web page or workbook click on the window you want to capture in the Available Windows section.

If however you want to get just part of the screen, then use the Screen Clipping command at the bottom of the window.

7.1.3 TAKE A SCREEN CLIPPING OF A SECTION OF THE SCREEN

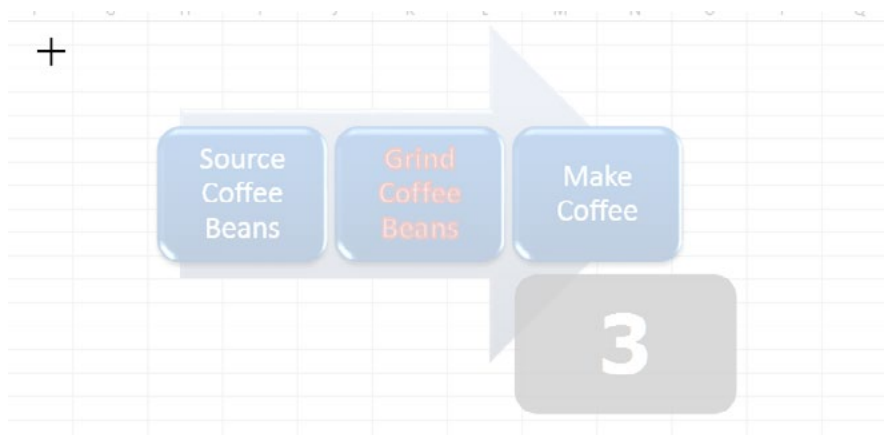


Figure 78 – clip a section

1. Click Screen Clipping at the bottom of the insert screen shot menu
2. Then switch to the screen you want to clip from
3. You will see a big black plus sign
4. Click and drag over the area you want to clip – note that the screen has gone white and the area you select goes bright
5. When you let go, the clipping will appear in the worksheet you started from

8 MANAGE COMMENTS

8.1 INSERTING AND EDITING COMMENTS

Comments are like little yellow post it notes that sit in your spreadsheet. They are useful to remind yourself what you did or for explaining changes made to those who are using the spreadsheet.

8.1.1 ADD A COMMENT

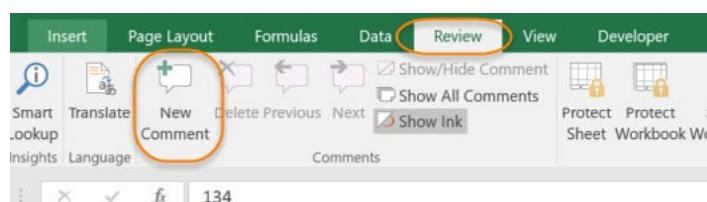


Figure 79 – adding comments

1. Click on the Review Tab
2. Click New Comment



Discover the truth at www.deloitte.ca/careers

Deloitte.

© Deloitte & Touche LLP and affiliated entities.

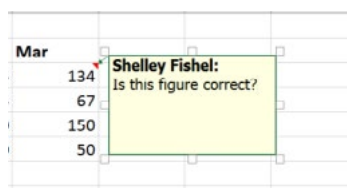


Figure 80 – a red comment indicator and yellow comment

A yellow comment is added to the worksheet and a small red triangle is displayed top right of the cell. Type the comment into the yellow post it note.

8.1.2 HOW DO I KNOW IF THERE IS A COMMENT?



Figure 81 – the red triangle indicates a comment

The cell containing the comment has a small red triangle to show that a comment exists.

8.1.3 TO SEE THE COMMENT

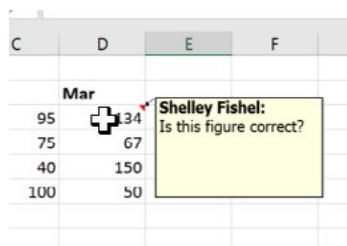


Figure 82 – hover to see the comment

Hover or click on the cell with the comment indicator.

8.1.4 EDIT A COMMENT

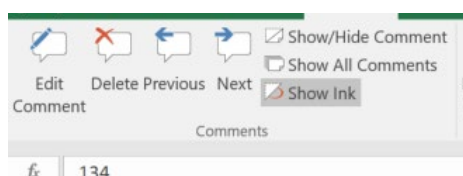


Figure 83 – use the Ribbon to edit a comment

Click on Edit Comment, the comment will then pop up on the worksheet so that you can change what is written inside.

You can also Right Click with the mouse on the cell with the comment indicator and select Edit Comment.

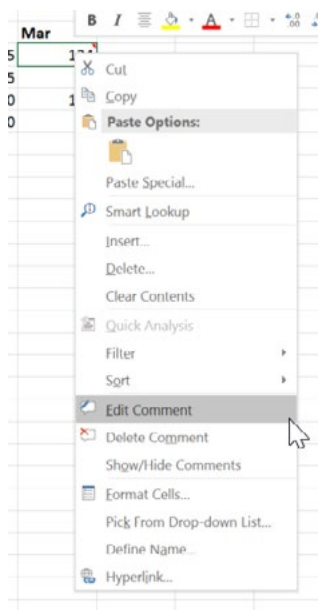


Figure 84 – right click to edit a comment

8.2 DELETING COMMENTS

8.2.1 DELETE A COMMENT VIA THE RIBBON

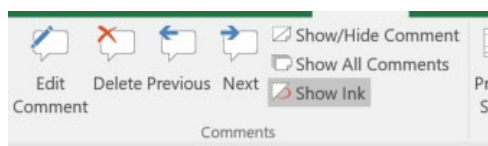


Figure 85 – Delete a comment via the Ribbon

1. Click on the cell with the comment
2. On the Review Ribbon click on the Delete icon

8.2.2 DELETE COMMENT VIA RIGHT CLICK

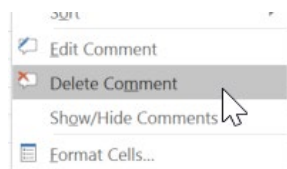


Figure 86 – Delete a comment with a right click

1. Right click on the cell with the comment
2. Select Delete Comment

8.3 SHOW/HIDE COMMENTS

If you want to see the comments displayed on the screen all the time you can choose to show them. Then when you no longer need to see them you can hide them.

8.3.1 SHOW COMMENTS

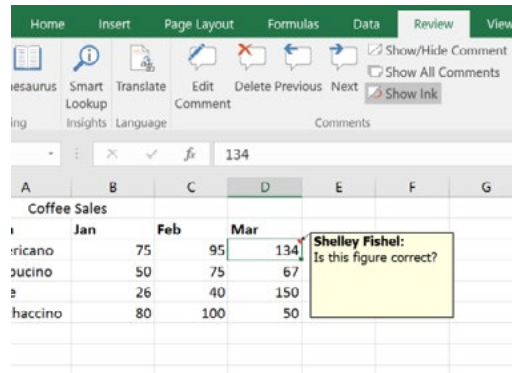


Figure 87 – display the comments permanently

1. Click on the cell with the comment indicator
2. Click on Show/Hide Comments

The comment is now displayed on screen and if you move to another cell it stays put!

be > your degree

Bring your talent and passion to a global organization at the forefront of business, technology and innovation. Discover how great you can be.

Visit accenture.com/bookboon

Be greater than.
consulting | technology | outsourcing

accenture
High performance. Delivered.

© 2013 Accenture. All rights reserved.

8.3.2 HIDE COMMENTS

Click on the cell with the comment showing and then click on Show/Hide Comments – the comment is now hidden.

8.3.3 SHOW ALL COMMENTS

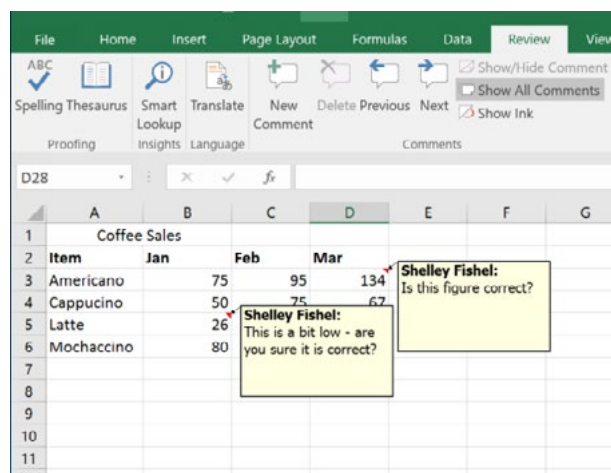


Figure 88 – display all comments

To display all comments together rather than going through them one-by-one, you can click on Show All Comments.

To hide them again click Show All Comments again.

8.4 MOVING BETWEEN COMMENTS

When you have lots of comments on your spreadsheet, it can be useful to display them one after the other.

8.4.1 MOVE TO NEXT OR PREVIOUS COMMENT

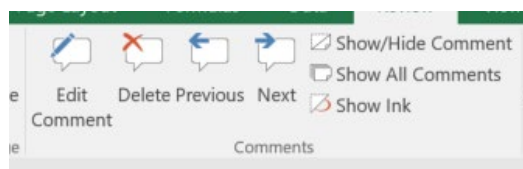


Figure 89 – next and previous to move between comments

From the first comment cell – click on Next and to go back click Previous.

8.5 PRINTING COMMENTS

Comments do not print. They are there on screen as a reminder. You can however choose to print them. Should you wish to print the comments, you can specify whether to print them on the worksheet as they appear on screen or to make them, print at the end of the sheet.

8.5.1 PRINT COMMENTS ON THE WORKSHEET

1. Display the comments on the worksheet first
2. Click File
3. Click Print
4. Click on Page Setup

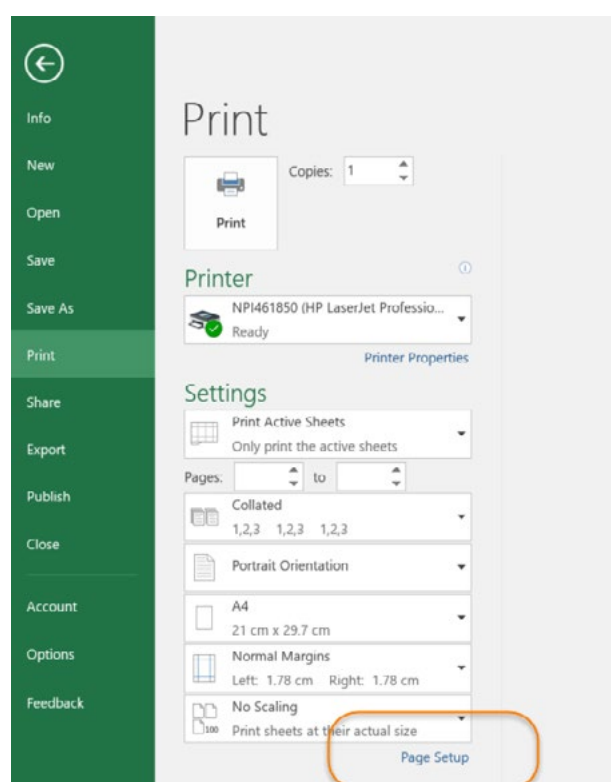


Figure 90 – click page setup in print options

In the dialogue box that is now displayed

1. Click on the Sheet tab
2. Select As displayed on sheet
3. Click OK

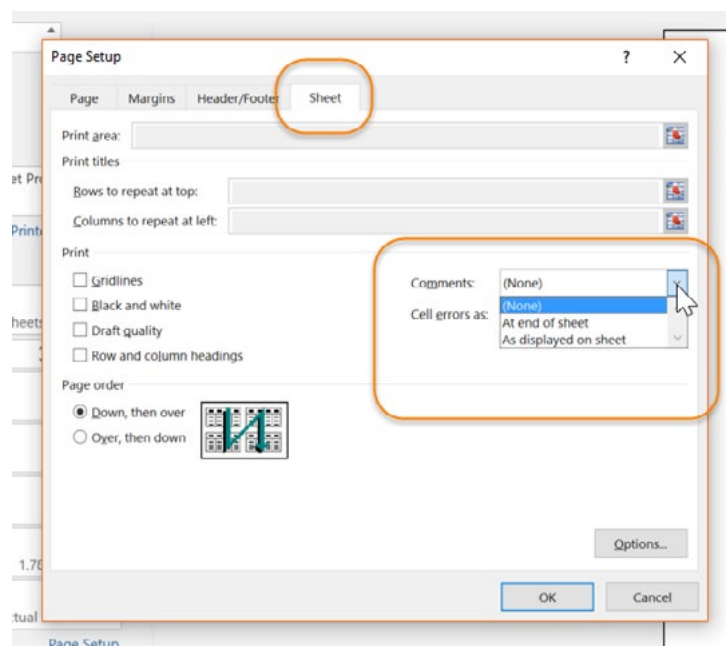


Figure 91 – choose where to print the comments

What if you could build your future and create the future?

The innovation accelerator

One generation's transformation is the next's status quo. In the near future, people may soon think it's strange that devices ever had to be "plugged in." To obtain that status, there needs to be "The Shift".

.....Alcatel-Lucent 

www.alcatel-lucent.com/careers

9 SORTING DATA

9.1 DATABASES IN EXCEL – INTRODUCTION

A **Database** is a structured collection of information.

The data is broken up into separate **Fields** that can be applied to every record in the database e.g. an addresses database might have fields for first name, last name and so on. These fields make up the columns of the database. The field names are usually in the first row of the database.

Each subsequent row contains the data for each **Record** – one record per row.

Databases or lists have NO blank Columns and NO blank Rows. It is possible to have a blank cell, however as soon as Excel detects a blank row or a blank column the rest of the data is treated as a separate list.

	A	B	C	D	E	F	G	H
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales
2	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40
3	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60
4	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.80
5	10/10/2011	Leeds	North	Hot Drinks	Latte	153	£1.85	£283.05
6	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£1.95	£1,708.20
7	18/10/2011	London	ly	Hot Drinks	Machiato	56	£1.95	£109.20
8	12/08/2010	London	South	Milkshake	Strawberry	337	£2.50	£842.50
9	14/11/2011	Glasgow	South	Milkshake	Strawberry	344	£2.50	£860.00
10	14/09/2011	Glasgow	North	Milkshake	Vanilla	200	£2.50	£500.00
11	10/10/2011	Manchester	North	Milkshake	Vanilla	644	£2.50	£1,610.00
12	11/11/2010	Leeds	North	Milkshake	Chocolate	225	£1.99	£447.75
13	18/10/2011	Manchester	North	Hot Drinks	Americano	120	£1.00	£120.00
14	12/08/2010	Manchester	North	Hot Drinks	Americano	699	£1.90	£1,328.10
15	14/11/2011	London	South	Cold Drinks	Orange Juice	628	£0.85	£532.10
16	14/06/2011	Glasgow	North	Cold Drinks	Apple Juice	170	£1.00	£170.00
17	10/10/2011	Bath	South	Cold Drinks	Coca Cola	654	£0.85	£555.90
18	11/11/2010	Bath	South	Cold Drinks	Coca Cola	118	£0.85	£100.30
19	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
20	12/08/2010	London	South	Hot Drinks	Machiato	907	£1.95	£1,768.65
21	14/11/2011	Bath	South	Hot Drinks	Latte	267	£1.85	£493.95
22	14/06/2011	Manchester	South	Hot Drinks	Americano	112	£1.90	£212.80
23	10/10/2011	Bath	South	Milkshake	Strawberry	565	£2.50	£1,412.50
24	11/11/2010	Bath	South	Milkshake	Strawberry	938	£2.50	£2,345.00
25	18/10/2011	London	South	Milkshake	Vanilla	149	£2.50	£372.50

Figure 92 – structure of a database

1. Field Names in the first row
2. Records – one separate record in each subsequent row

9.2 SORT DATA

In the Coffee Island sales list, there are different columns. Depending on the type of data analysis that needs to be done, the data will need to be sorted in different ways.

There are several ways to get to the tools to sort data. There is a Sort on the Home Tab, more detailed Sort options on the Data tab and of course there is a right click option. You can also add the Sort Icons to the Quick Access Toolbar.

9.2.1 TO PERFORM A SIMPLE SORT FROM THE HOME TAB

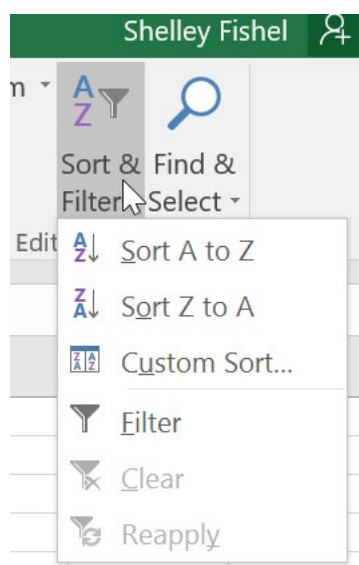


Figure 93 – click into the column to sort by and then sort

1. Click anywhere in the column you want to sort by
2. Click on the Home tab
3. Click on the Sort & Filter button
4. Select Sort A to Z, Or
5. Select Sort Z to A

9.2.2 TO PERFORM A SIMPLE SORT USING THE DATA TAB

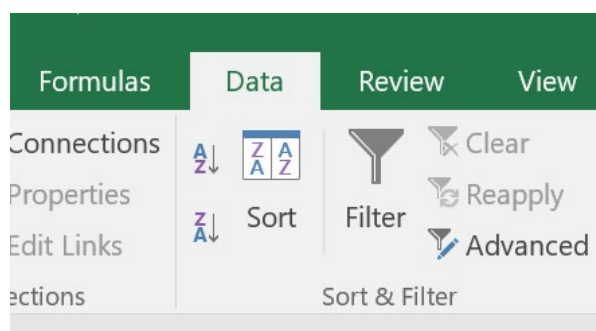


Figure 94 – sort from the Data Ribbon

1. Click anywhere in the column you want to sort by
2. Click on the Data tab on the Ribbon
3. Go to the Sort & Filter group
4. Select Sort A to Z, Or
5. Select Sort Z to A

9.2.3 SORT WITH A RIGHT CLICK

	Centr				Number Sold	Cost per Item	Sales
11	Mancl				120	£1.00	£120
10	Manchester	North	Hot Drinks	Americano	699	£1.90	£1,328
11	Mancl			mericano	112	£1.90	£212
10	Londc			mericano	92	£1.90	£174
11	Glasg			mericano	571	£1.90	£1,084
10	Bath			mericano	109	£1.90	£207
10	Bath			mericano	109	£1.90	£207
11	Mancl			mericano	120	£1.00	£120
10	Mancl			mericano	699	£1.90	£1,328
11	Mancl			mericano	112	£1.90	£212
10	Londc			mericano	92	£1.90	£174
11	Glasg			mericano	571	£1.90	£1,084
10	Bath			mericano	109	£1.90	£207
10	Bath			mericano	109	£1.90	£207
11	Mancl			mericano	120	£1.00	£120
10	Mancl			mericano	699	£1.90	£1,328
11	Mancl			mericano	112	£1.90	£212
10	Londc			mericano	92	£1.90	£174
11	Glasg			mericano	571	£1.90	£1,084
10	Bath			mericano	109	£1.90	£207
10	Bath			mericano	109	£1.90	£207
11	Mancl			mericano	120	£1.00	£120
10	Mancl			mericano	699	£1.90	£1,328
11	Mancl			mericano	112	£1.90	£212
10	Londc			mericano	92	£1.90	£174
11	Glasg			mericano	571	£1.90	£1,084
10	Bath			mericano	109	£1.90	£207
10	Bath			mericano	109	£1.90	£207
11	Mancl			mericano	120	£1.00	£120
10	Mancl			mericano	699	£1.90	£1,328
11	Mancl			mericano	112	£1.90	£212
10	Londc			mericano	92	£1.90	£174
11	Glasg			mericano	571	£1.90	£1,084
10	Bath			mericano	109	£1.90	£207
10	Bath			mericano	109	£1.90	£207
11	Mancl			mericano	120	£1.00	£120
10	Mancl			mericano	699	£1.90	£1,328
11	Mancl			mericano	112	£1.90	£212
10	Londc			mericano	92	£1.90	£174
11	Glasg			mericano	571	£1.90	£1,084
10	Bath			mericano	109	£1.90	£207
10	Bath			mericano	109	£1.90	£207
11	Mancl			mericano	120	£1.00	£120
10	Mancl			mericano	699	£1.90	£1,328
11	Mancl			mericano	112	£1.90	£212
10	Londc			mericano	92	£1.90	£174
11	Glasg			mericano	571	£1.90	£1,084
10	Bath			mericano	109	£1.90	£207
10	Bath			mericano	109	£1.90	£207
11	Mancl			mericano	120	£1.00	£120
10	Mancl			mericano	699	£1.90	£1,328
11	Mancl			mericano	112	£1.90	£212
10	Londc			mericano	92	£1.90	£174
11	Glasg			mericano	571	£1.90	£1,084
10	Bath			mericano	109	£1.90	£207
10	Bath			mericano	109	£1.90	£207
11	Mancl			mericano	120	£1.00	£120
10	Mancl			mericano	699	£1.90	£1,328
11	Mancl			mericano	112	£1.90	£212
10	Londc			mericano	92	£1.90	£174
11	Glasg			mericano	571	£1.90	£1,084
10	Bath			mericano	109	£1.90	£207
10	Bath			mericano	109	£1.90	£207
11	Mancl			mericano	120	£1.00	£120
10	Mancl			mericano	699	£1.90	

Figure 95 – sort on a right click

1. Click into the column you want to sort by
2. Right Click
3. Click on Sort
4. Select how you want to sort the data

9.2.4 TO PERFORM A CUSTOM SORT (MULTI LEVEL SORTING)

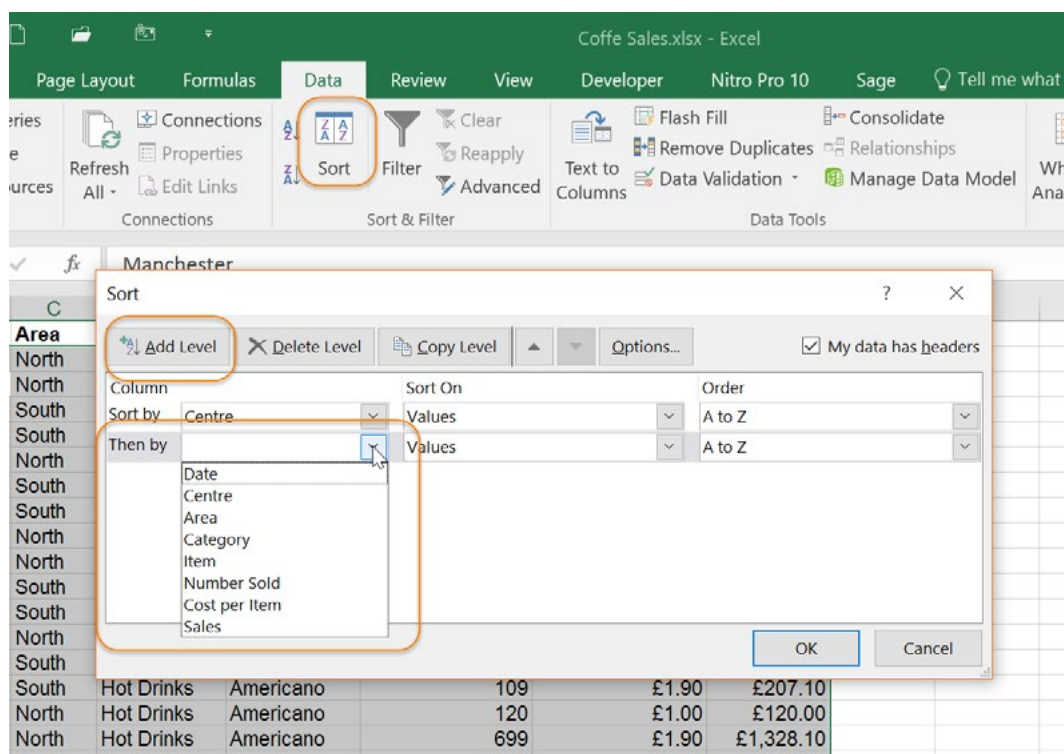


Figure 96 – custom or multi-level sort

The Wake

the only emission we want to leave behind

Low-speed Engines Medium-speed Engines Turbochargers Propellers **Propulsion Packages** PrimeServ

The design of eco-friendly marine power and propulsion solutions is crucial for MAN Diesel & Turbo. Power competencies are offered with the world's largest engine programme – having outputs spanning from 450 to 87,220 kW per engine. Get up front! Find out more at www.mandieselturbo.com

Engineering the Future – since 1758.

MAN Diesel & Turbo

1. Click on the Data tab
2. Click on the Sort button
3. Click on the down arrow by Sort to select the Column you want to sort by
4. Choose what you want to sort on – Values, Cell Colour, Font Colour, Cell Icon
5. Select the Order you want to sort by, A–Z, New to Old, Z–A, Old to New depending on the data.
6. **If you want to sort on more than one column:** Click on the Add Level button
7. Repeat steps 3–5
8. Click OK

To delete a level, click on the Delete Level button.

You can also access the Custom Sort via the right click option.

9.2.5 CHANGE THE ORDER OF THE SORT LEVELS

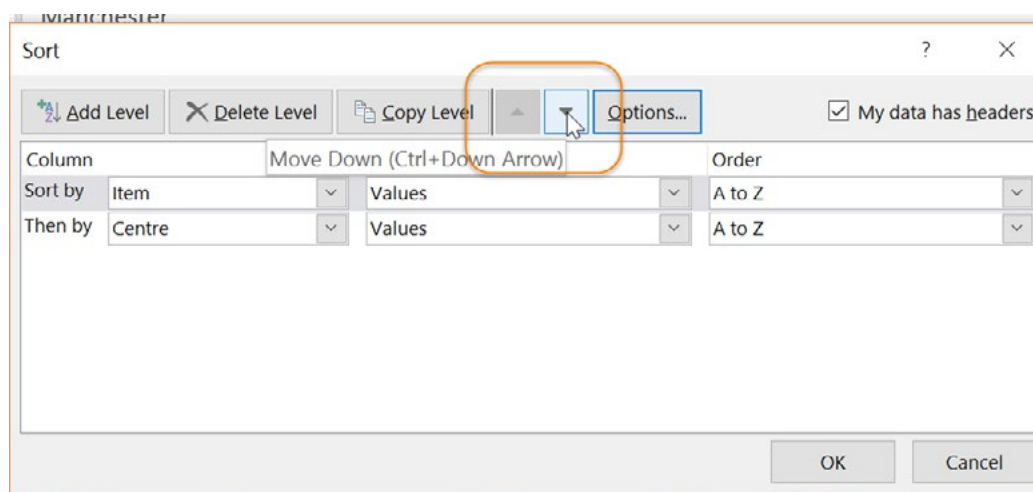


Figure 97 – change the order

If you want to change the sort order, click on the up or down arrows along the top of the Multi-Level sort box. Here I have changed the order to Item first then CentreCentre.

9.3 SORT ON FONT COLOUR

If you have changed the font colour of certain parts of your data you can sort by font colour.

9.3.1 SELECTED FONT COLOUR ON TOP

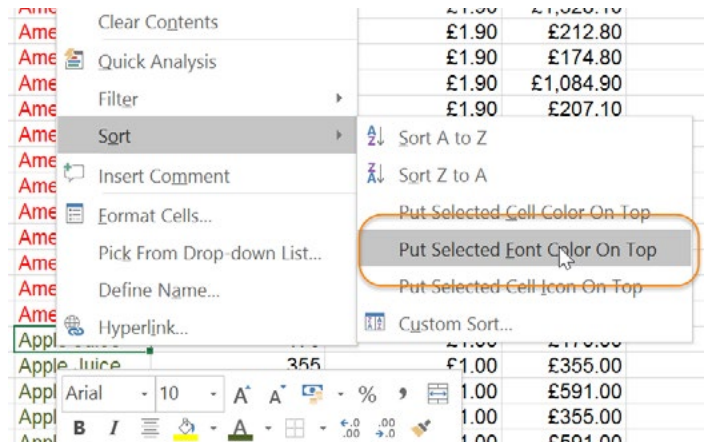


Figure 98 – sort by font colour

1. Right Click on the cell with the font colour you want to have at the top of your list
2. Click Sort
3. Then Choose Put Selected Font Colour on Top



9.4 SORT ON CELL COLOUR

If you have shaded in some cells you can have them appear at the top of the list.

9.4.1 PLACE CELL COLOUR ON TOP

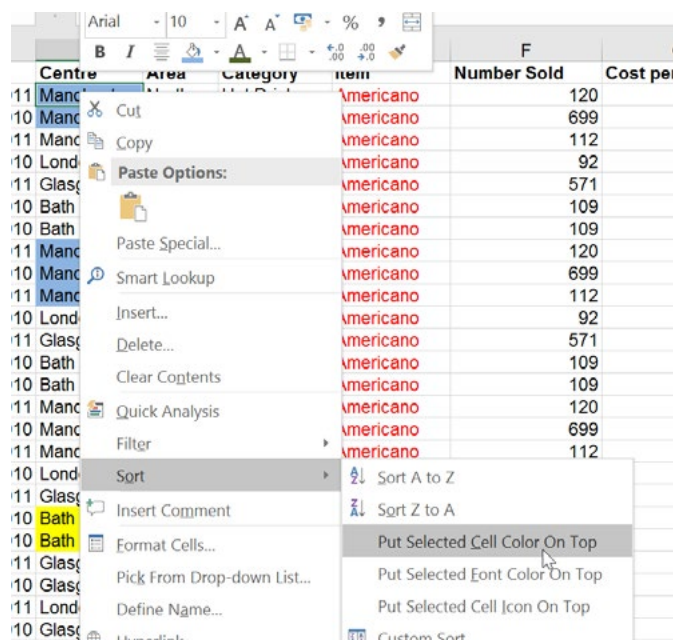


Figure 99 – sort on Cell Colour

1. Right click on the cell with the shading
2. Click Sort
3. Select Put Selected Cell Colour on Top

	A	B	C	D	E	
1	Date	Centre	Area	Category	Item	Numb
2	18/10/2011	Manchester	North	Hot Drinks	Americano	
3	12/08/2010	Manchester	North	Hot Drinks	Americano	
4	18/10/2011	Manchester	North	Hot Drinks	Americano	
5	12/08/2010	Manchester	North	Hot Drinks	Americano	
6	14/06/2011	Manchester	South	Hot Drinks	Americano	
7	14/06/2011	Manchester	South	Hot Drinks	Americano	
8	11/11/2010	London	South	Hot Drinks	Americano	
9	18/10/2011	Glasgow	North	Hot Drinks	Americano	
10	11/11/2010	Bath	South	Hot Drinks	Americano	
11	11/11/2010	Bath	South	Hot Drinks	Americano	
12	11/11/2010	London	South	Hot Drinks	Americano	
13	18/10/2011	Glasgow	North	Hot Drinks	Americano	
14	11/11/2010	Bath	South	Hot Drinks	Americano	
15	11/11/2010	Bath	South	Hot Drinks	Americano	

Figure 100 – coloured cells appear at the top of the list

All of the cells shaded blue are now at the top of the list.

9.5 SORT ON CELL ICON

If you have used conditional formatting to add icons to cells, you can use these to sort by.

9.5.1 PUT SELECTED CELL ICON ON TOP

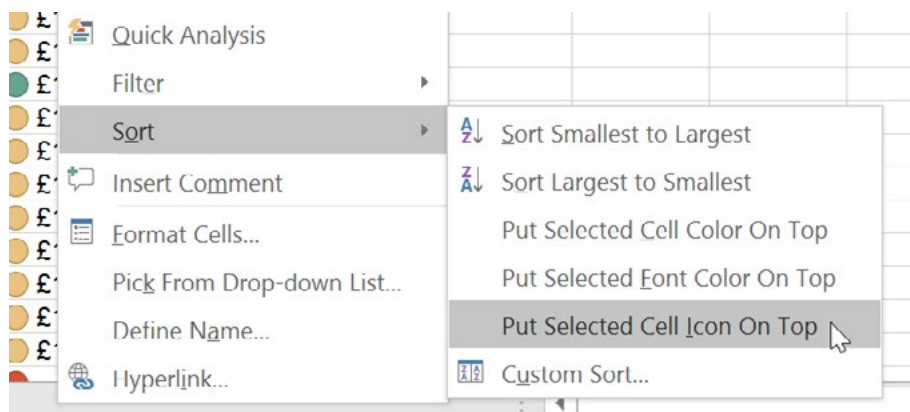


Figure 101 – sort on cell icon – conditional format

1. Right click on the cell with the icon you want to have at the top of the list
2. Click on Sort
3. Select Put Selected Cell Icon on Top

	A	B	C	D	E	F	G	H
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales
2	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
3	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
5	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80
6	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
7	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80
8	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84
27	11/11/2010	Bath	South	Milkshake	Strawberry	938	£2.50	£2,345.00
28	11/11/2010	Bath	South	Milkshake	Strawberry	938	£2.50	£2,345.00
29	10/10/2011	Manchester	North	Milkshake	Vanilla	644	£2.50	£1,610.00
30	10/10/2011	Manchester	North	Milkshake	Vanilla	644	£2.50	£1,610.00
31	10/10/2011	Manchester	North	Milkshake	Vanilla	644	£2.50	£1,610.00
32	18/10/2011	Manchester	North	Hot Drinks	Americano	120	£1.00	£120.00
33	12/08/2010	Manchester	North	Hot Drinks	Americano	699	£1.90	£1,328.10
34	18/10/2011	Manchester	North	Hot Drinks	Americano	120	£1.00	£120.00
35	12/08/2010	Manchester	North	Hot Drinks	Americano	699	£1.90	£1,328.10
36	14/06/2011	Manchester	South	Hot Drinks	Americano	112	£1.90	£212.80
37	14/06/2011	Manchester	South	Hot Drinks	Americano	112	£1.90	£212.80
38	11/11/2010	London	South	Hot Drinks	Americano	92	£1.90	£174.80
39	18/10/2011	Glasgow	North	Hot Drinks	Americano	571	£1.90	£1,084.90
40	11/11/2010	Bath	South	Hot Drinks	Americano	109	£1.90	£207.10
41	11/11/2010	Bath	South	Hot Drinks	Americano	109	£1.90	£207.10

Figure 102 – all sorted!

My green dots are now at the top of the list.

10 FILTERING DATA

10.1 FILTER DATA – THE FILTER ICON

Filtering allows you to hide the information that you do not want to see. So if I want to see sales of Cappuccino in London only, I can use the filter option to do just that. Then I can change the filter to suit my needs and refocus on different sets of data.

10.1.1 FILTER ON THE HOME TAB

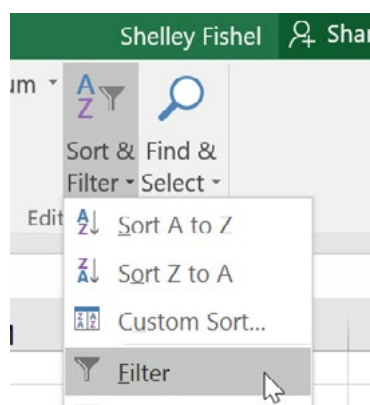


Figure 103 – filter from the Home Ribbon

bookboon.com

Corporate eLibrary

See our Business Solutions for employee learning

[Click here](#)

Management

Time Management

Problem solving

Self-Confidence

Effectiveness

Project Management

Goal setting

Motivation

Coaching

Download free eBooks at bookboon.com

[Click on the ad to read more](#)

1. Click anywhere inside your list
2. On the Home Tab click Sort and Filter
3. Click Filter

10.1.2 FILTER ON THE DATA TAB

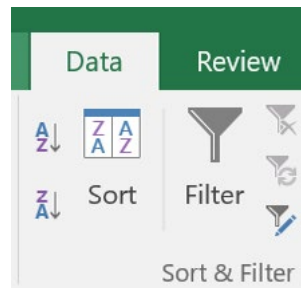


Figure 104 – switch on the filter via the Data Ribbon

1. Click anywhere inside your list
2. Click on the Data Icon
3. Click Filter in the Sort and Filter Group

10.2 FILTER ON TEXT

Now that you know where the filter lives, let's use it to find sales of Cappuccinos.

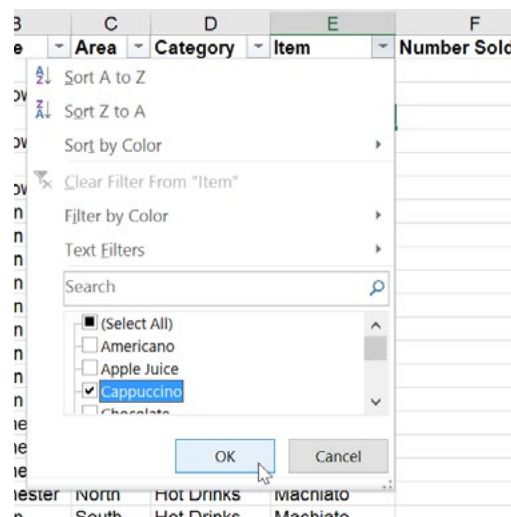


Figure 105 – pull out the records you want to see

1. Click on the drop down arrow by the column heading you want to filter
2. Un-check Select All
3. Select the item on which you want to filter
4. Click OK

	A	B	C	D	E	F	G	H	I
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	
2	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	
3	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	
5	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	
6	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	
7	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	
68	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40	
69	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60	
70	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£1.90	£1,026.00	
71	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£1.90	£1,098.20	
72	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£1.90	£1,105.80	
73	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	
74	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	
75	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	
76	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	
77	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	
78	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	
79	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40	
80	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60	
81	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£1.90	£1,026.00	
82	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£1.90	£1,098.20	
83	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£1.90	£1,105.80	
84	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	
85	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	
86	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	
87	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	
88	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	
89	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	
90	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40	
91	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60	
92	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£1.90	£1,026.00	

Figure 106 – records that do not match criteria are hidden

I now have only rows where the value in the Item column is Cappuccino.

10.2.1 USE THE RIGHT CLICK

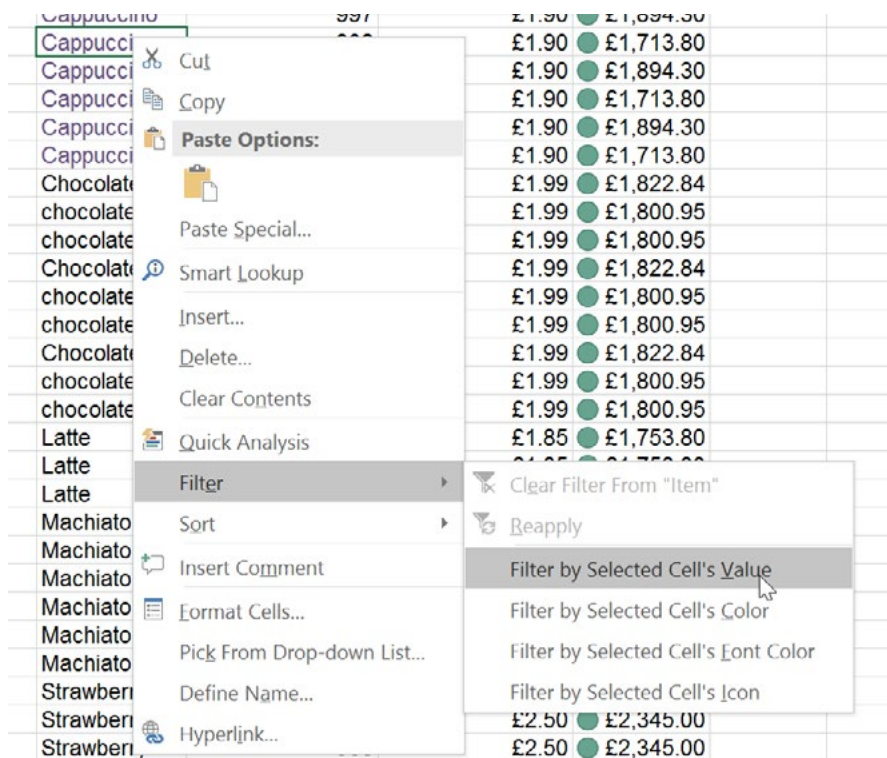


Figure 107 – filter is also on the Right Click

1. Right click on the cell with the value you want to filter out – in my example, I have clicked on a cell with Cappuccino
2. Click Filter
3. Click on Filter by Selected Cell's Value

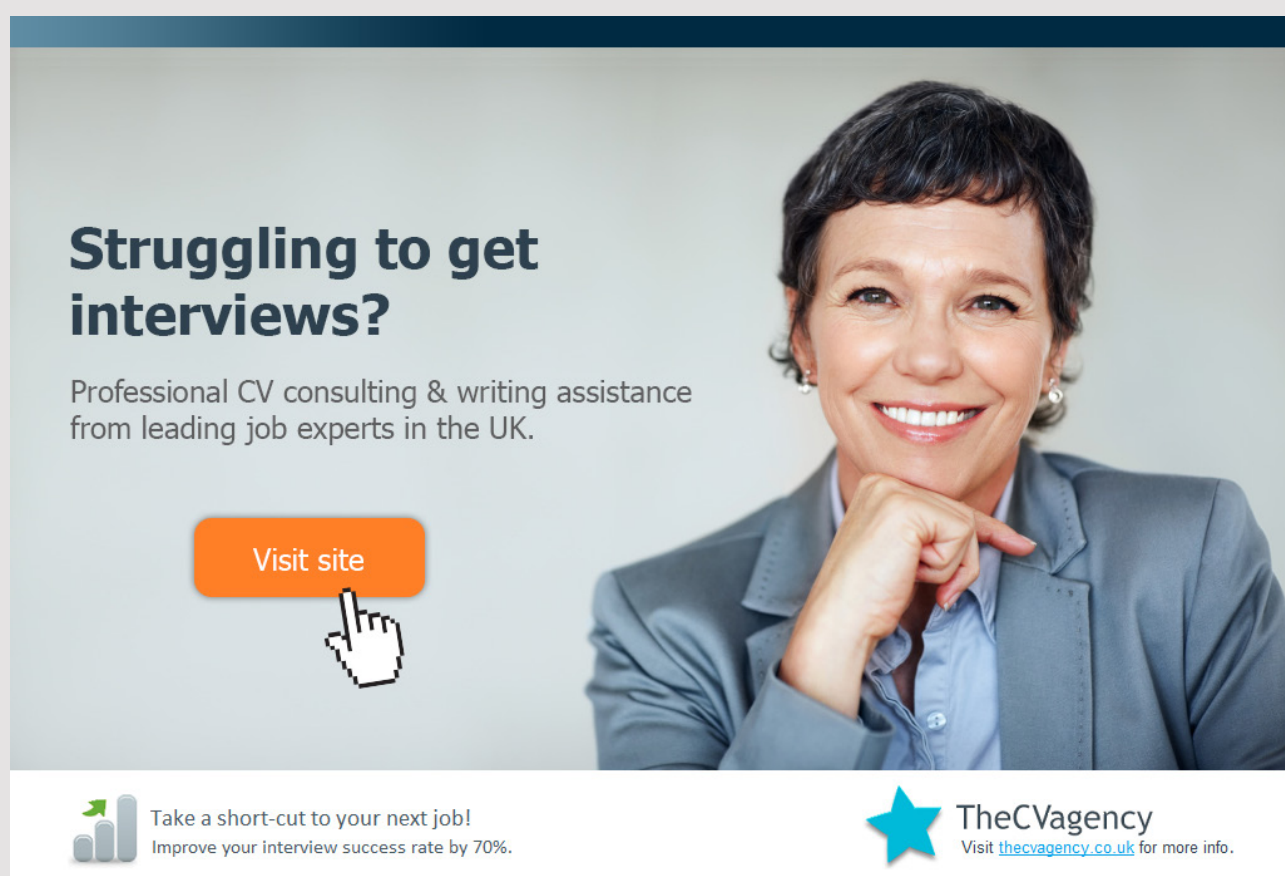
You will now see only rows with the value you chose.

10.3 FILTER ON MORE THAN ONE COLUMN

I would now like to see the sales of Cappuccino in Manchester only. I will apply the filter to both the Item and the Centre columns.

10.3.1 APPLY THE FILTER TO ANOTHER COLUMN

1. Click on the drop down arrow next to the second column to filter on
2. Un-check Select All
3. Click to select the item on which you want to filter
4. Click OK



Struggling to get interviews?

Professional CV consulting & writing assistance from leading job experts in the UK.

[Visit site](#)

 Take a short-cut to your next job!
Improve your interview success rate by 70%.

 **TheCVagency**
Visit thecvagency.co.uk for more info.

	A	B	C	D	E	F	G	H	I	J
	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales		
40	10/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50		
65	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50		
119	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50		
136	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50		
190	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50		
207	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50		
215										
216										
217										

Figure 108 – filtered out Cappuccino in Manchester

I now have only rows where Cappuccino was sold in Manchester. You can tell that rows have been hidden by looking at the row numbers – which will also have turned blue.

10.4 REMOVE THE FILTER

Now I want to see all of the data. There are a few ways to clear the filter.

10.4.1 CLEAR THE FILTER

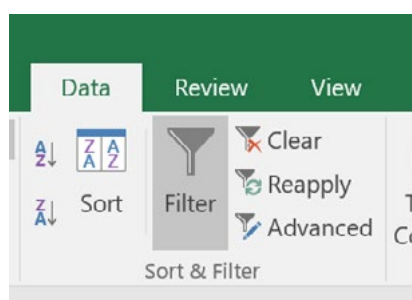


Figure 109 – clear a filter

Click on Clear

All the data comes back with the Auto filter arrows still in place.

10.4.2 TURN OFF THE FILTER

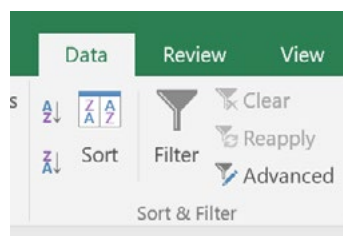


Figure 110 – turn off the filter altogether

Click on the Filter icon

The filter is cleared and the auto filter arrows are removed.

10.4.3 CLEAR THE FILTER FROM ONE COLUMN ONLY

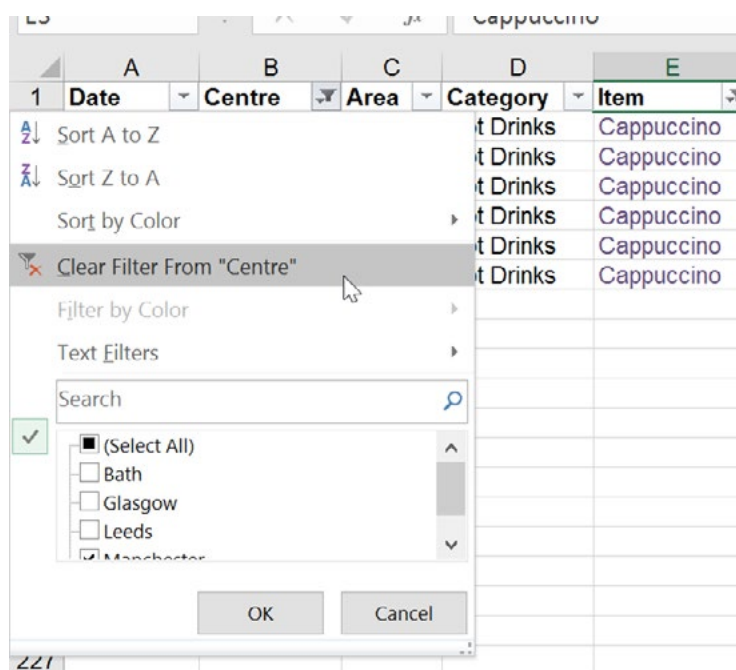


Figure 111 – clear just one filter

1. Click the drop down arrow of the column whose filter you want to clear
2. Select Clear Filter From “the field name”
3. Click OK

10.4.4 REMOVE WITH RIGHT CLICK

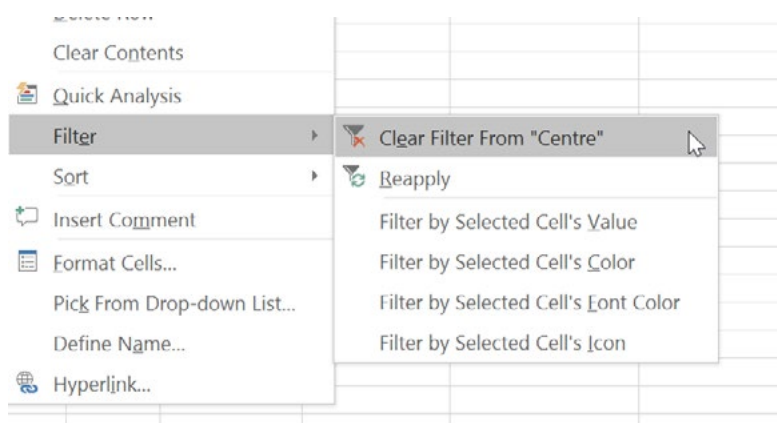


Figure 112 – use the right click

1. Right click in the column you have filtered
2. Select Filter
3. Select Clear Filter From “Name of Column” (in our example it is from the Centre Column)

10.5 FILTER DATA ON COLOUR

If you have applied conditional formatting to your list to show data with certain cell colours, or font colours, you can make Excel show you just those cells. Just like when sorting by colour.

10.5.1 FILTER ON FONT COLOUR

Category	Item	Number Sold	Cost per Item	Sales
lot	Sort Smallest to Largest		£1.90	£1,894.30
lot	Sort Largest to Smallest		£1.90	£1,713.80
lot	Sort by Color		£1.90	£1,894.30
lot	Clear Filter From "Number Sold"		£1.90	£1,894.30
lot	Filter by Color		£1.90	£1,713.80
lot	Number Filters			
lot	Search			
lot	☒ (Select All) ☒ 4 ☒ 46 ☒ 56 ☒ 62			
lot	OK			
lot	Cancel			
lot	Drinks	Macnato	£1.85	£1,753.80
lot			£1.95	£1,708.20

Figure 113 – filter on font colour






- The number 1 MOOC for Primary Education
- Free Digital Learning for Children 5-12
- 15 Million Children Reached

About e-Learning for Kids Established in 2004, e-Learning for Kids is a global nonprofit foundation dedicated to fun and free learning on the Internet for children ages 5 - 12 with courses in math, science, language arts, computers, health and environmental skills. Since 2005, more than 15 million children in over 190 countries have benefitted from eLessons provided by EFK! An all-volunteer staff consists of education and e-learning experts and business professionals from around the world committed to making difference. eLearning for Kids is actively seeking funding, volunteers, sponsors and courseware developers; get involved! For more information, please visit www.e-learningforkids.org.

In my Number Sold column I have changed some values to show in Red text.

1. Click the drop down of the column you want to filter
2. Click on Filter by Selected Cell's Font Colour
3. Click OK

	A	B	C	D	E	F	G
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item
2	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£
3	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£
5	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£
6	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£
7	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£
8	12/08/2010	London	South	Milkshake	Chocolate	916	£
9	10/10/2011	London	South	Milkshake	chocolate	905	£
10	10/10/2011	London	South	Milkshake	chocolate	905	£
14	12/08/2010	London	South	Milkshake	Chocolate	916	£
20	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£
21	12/08/2010	London	South	Hot Drinks	Machiato	907	£
22	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£
23	12/08/2010	London	South	Hot Drinks	Machiato	907	£
24	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£
25	12/08/2010	London	South	Hot Drinks	Machiato	907	£
26	11/11/2010	Bath	South	Milkshake	Strawberry	938	£

Figure 114 – only rows in red show up

Only cells that have a red font are shown.

10.5.2 FILTER ON CELL COLOUR

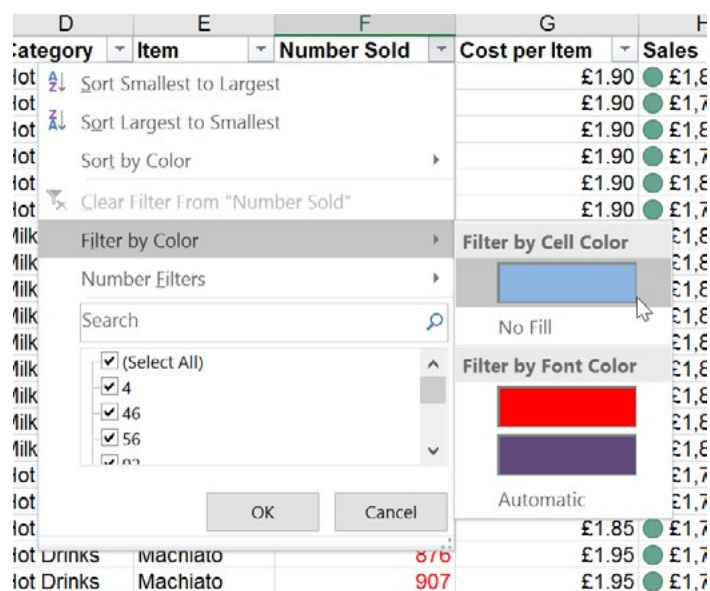


Figure 115 – filter on shaded rows

I have coloured some cells in blue and now want to see just those cells displayed.

1. Click the drop down of the column you want to filter
2. Click on Filter by Cell Colour
3. Choose the Colour you want to see
4. Click OK

	A	B	C	D	E	F	G	H	I
	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	
11	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84	
12	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95	
13	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95	
27	11/11/2010	Bath	South	Milkshake	Strawberry	938	£2.50	£2,345.00	
28	11/11/2010	Bath	South	Milkshake	Strawberry	938	£2.50	£2,345.00	
29	10/10/2011	Manchester	North	Milkshake	Vanilla	644	£2.50	£1,610.00	
30	10/10/2011	Manchester	North	Milkshake	Vanilla	644	£2.50	£1,610.00	
31	10/10/2011	Manchester	North	Milkshake	Vanilla	644	£2.50	£1,610.00	

Figure 116 – only shaded rows shown

10.5.3 CLEAR THE FILTER

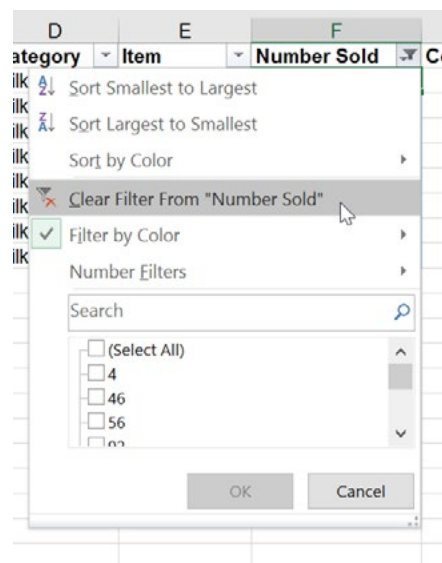


Figure 117 – clear the filter

1. Click the drop down arrow on the column you want to clear the filter from
2. Click Clear Filter from “name of column”

Remember you can also clear the filter with a Right Click or via the Data Tab and Clear Filter.

10.6 TEXT FILTERS

Say you need to filter out rows that begin with a certain letter or contain a particular value, that contain a particular word or in fact do not contain a particular word. These can all be done from the drop down arrows.

Here we will take a look at Text Filters.

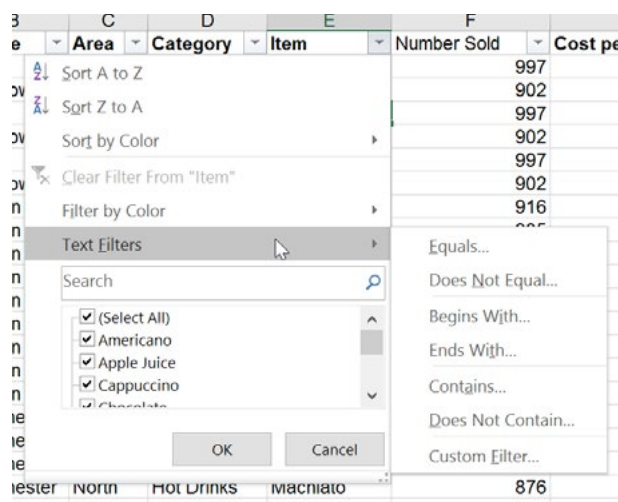


Figure 118 – different text filters available



Are you working in academia, research or science? And have you ever thought about working and moving to the Netherlands?

Arriving

33

Living

50

Studying

51

Working

101

Research

50

Factcards.nl offers all the **information** that you need if you wish to proceed your **career** in the **Netherlands**.

The information is ordered in the categories arriving, living, studying, working and research in the Netherlands and it is freely and easily accessible from your smartphone or desktop.

VISIT FACTCARDS.NL

1. Click the drop down arrow on the heading of the column to filter
2. Select Text Filters
3. Choose the filter you want to apply

I want to find all rows where the item begins with C.

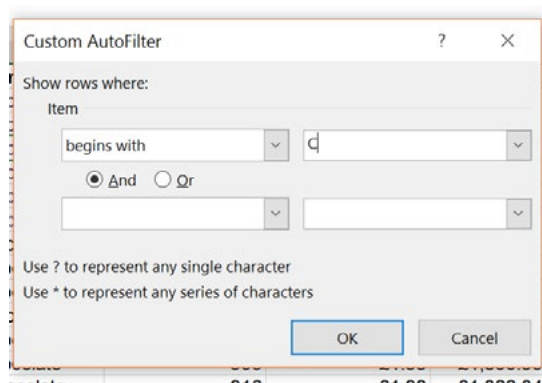


Figure 119 – set criteria

1. In the Custom Auto Filter box that appears
2. Type the criteria
3. Click OK

2/08/2010	Glasgow	North	Hot Drinks	Cappuccino	90
3/03/2011	Bath	South	Hot Drinks	Cappuccino	90
2/08/2010	Glasgow	North	Hot Drinks	Cappuccino	90
3/03/2011	Bath	South	Hot Drinks	Cappuccino	90
2/08/2010	Glasgow	North	Hot Drinks	Cappuccino	90
2/08/2010	London	South	Milkshake	Chocolate	90
2/10/2011	London	South	Milkshake	chocolate	90
2/10/2011	London	South	Milkshake	chocolate	90
2/08/2010	London	South	Milkshake	Chocolate	90
2/10/2011	London	South	Milkshake	chocolate	90
2/10/2011	London	South	Milkshake	chocolate	90
2/08/2010	London	South	Milkshake	Chocolate	90
2/10/2011	London	South	Milkshake	chocolate	90
2/10/2011	London	South	Milkshake	chocolate	90
7/02/2011	Glasgow	North	Hot Drinks	Cappuccino	60
3/03/2010	Leeds	North	Hot Drinks	Cappuccino	30
4/06/2011	Leeds	North	Hot Drinks	Cappuccino	50
2/10/2011	Leeds	North	Hot Drinks	Cappuccino	50
3/06/2010	Bath	South	Hot Drinks	Cappuccino	50
3/10/2011	Manchester	North	Hot Drinks	Cappuccino	60
2/08/2010	Leeds	South	Hot Drinks	Cappuccino	80
3/10/2011	Glasgow	North	Hot Drinks	Cappuccino	60
3/10/2011	Manchester	North	Hot Drinks	Cappuccino	60
2/08/2010	Leeds	South	Hot Drinks	Cappuccino	80
3/10/2011	Glasgow	North	Hot Drinks	Cappuccino	60
7/02/2011	Glasgow	North	Hot Drinks	Cappuccino	60
3/03/2010	Leeds	North	Hot Drinks	Cappuccino	30
4/06/2011	Leeds	North	Hot Drinks	Cappuccino	50
2/10/2011	Leeds	North	Hot Drinks	Cappuccino	50

Figure 120 – text filter applied

I now only see rows where the item begins with C.

10.7 NUMBER FILTERS

Excel has many more filters for numbers than a simple select all rows with this number option. We can look for rows with a value greater than one we specify, or less than, equal to or between.

10.7.1 NUMBER FILTERS

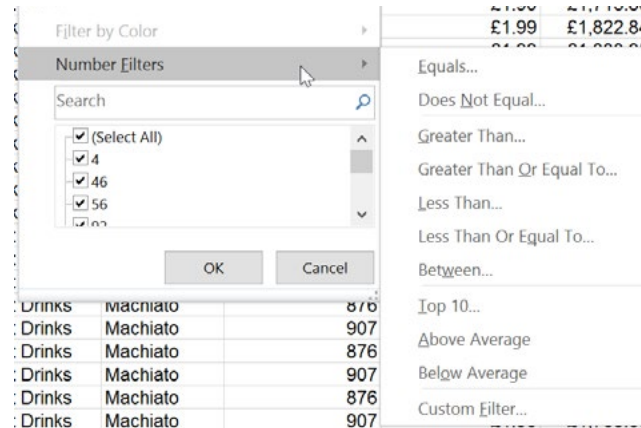


Figure 121 – number filters

1. Click the drop down arrow on the heading of the column you want to filter
2. Select Number Filters
3. Choose the filter that matches your criteria

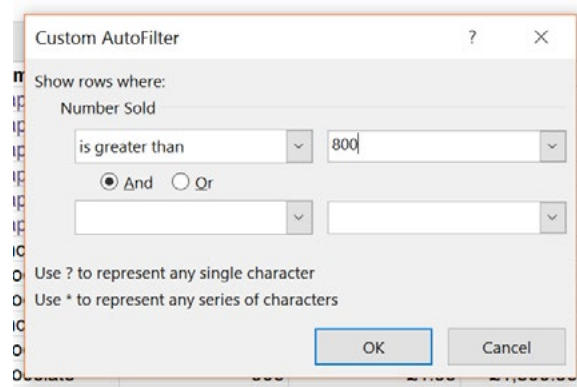


Figure 122 – set criteria

1. In the dialogue box type in the criteria – in my case greater than 800
2. Click OK

10	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
11	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84
12	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
13	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
14	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84
15	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
16	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
17	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.80
18	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.80
19	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.80
20	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£1.95	£1,708.20
21	12/08/2010	London	South	Hot Drinks	Machiato	907	£1.95	£1,768.65
22	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£1.95	£1,708.20
23	12/08/2010	London	South	Hot Drinks	Machiato	907	£1.95	£1,768.65
24	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£1.95	£1,708.20
25	12/08/2010	London	South	Hot Drinks	Machiato	907	£1.95	£1,768.65
26	11/11/2010	Bath	South	Milkshake	Strawberry	938	£2.50	£2,345.00
27	11/11/2010	Bath	South	Milkshake	Strawberry	938	£2.50	£2,345.00
28	11/11/2010	Bath	South	Milkshake	Strawberry	938	£2.50	£2,345.00
74	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90
77	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90
85	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90
88	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90
96	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90
99	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90

Figure 123 – Result matches my criteria

Now I only see rows where the value is greater than 800 in the Number Sold column.

10.8 DATE FILTERS

What about finding all sales that happened in a particular month or range of dates? Yes with Excel's date filters you can do just that.

Brain power



By 2020, wind could provide one-tenth of our planet's electricity needs. Already today, SKF's innovative know-how is crucial to running a large proportion of the world's wind turbines.

Up to 25 % of the generating costs relate to maintenance. These can be reduced dramatically thanks to our systems for on-line condition monitoring and automatic lubrication. We help make it more economical to create cleaner, cheaper energy out of thin air.

By sharing our experience, expertise, and creativity, industries can boost performance beyond expectations.

Therefore we need the best employees who can meet this challenge!

The Power of Knowledge Engineering

Plug into The Power of Knowledge Engineering.
Visit us at www.skf.com/knowledge



10.8.1 DATE FILTERS

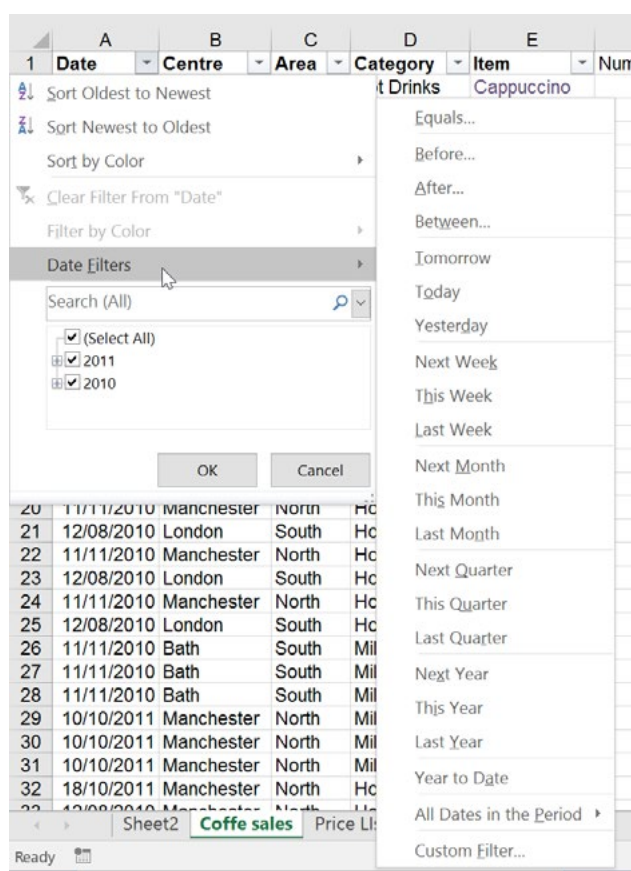


Figure 124 – lots of data filters available

There is a huge choice of date filters.

I will choose Between and look for all sales that occurred in 2010.

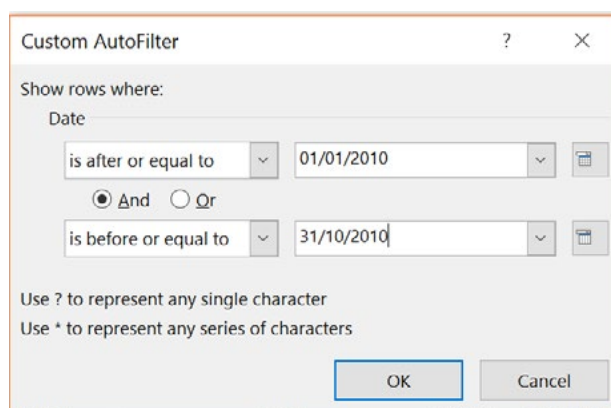


Figure 125 – set criteria

1. Type in the first date of the range – note it says after or equal to – in my example 01/01/2010–First Jan 2010
2. Type in the last date of the range – note it says before or equal to – in my example 31/12/2010–31st December 2010
3. Click OK

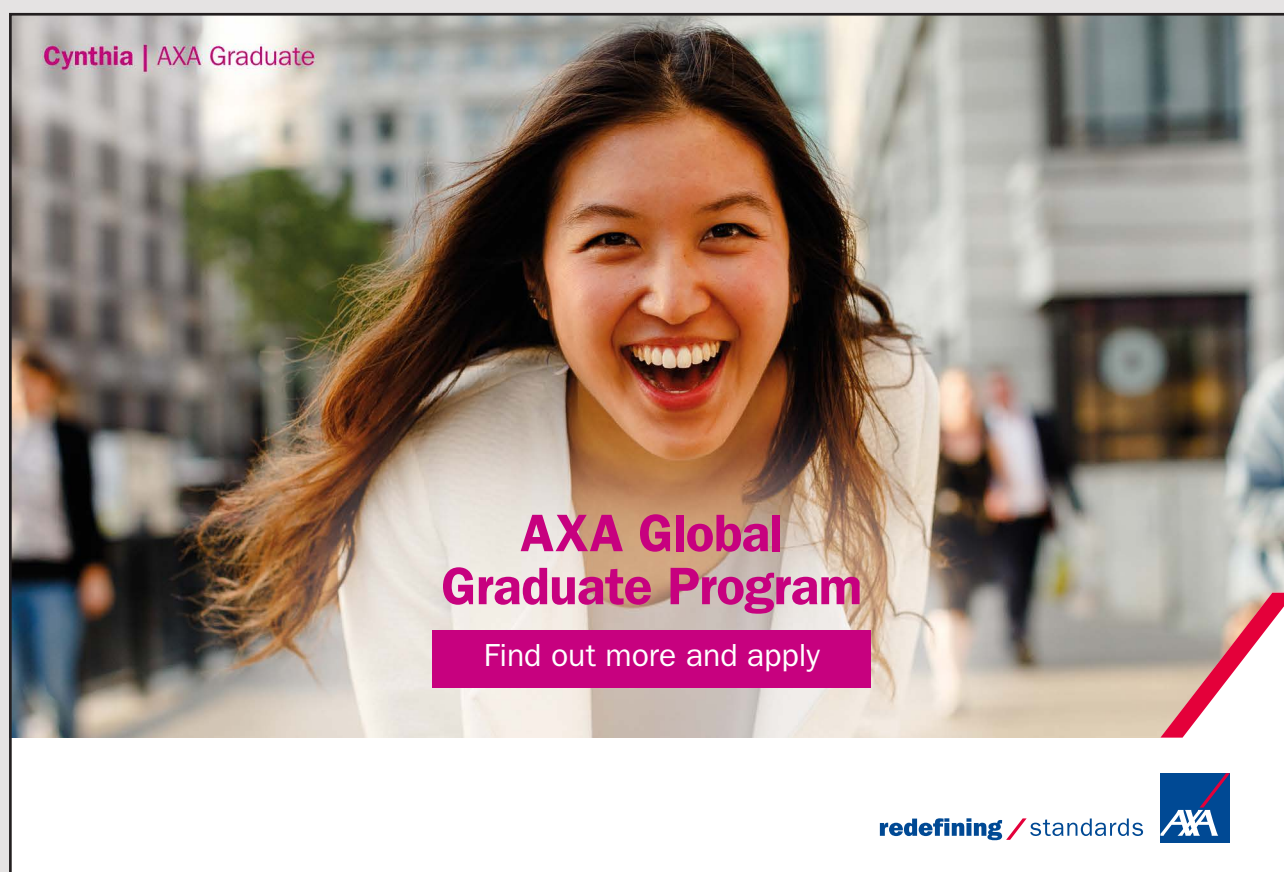
Try out the different date filters to find what works for you.

11 FORMAT AS TABLE

11.1 REASONS TO USE TABLES IN EXCEL 2016

- A filter is switched on as soon as you format the data as a table
- Easily format the table and apply great looking pre-set styles to the data
- The Header Row stays in view no matter where you scroll
- Apply Banded Columns and Rows easily
- Sort the Table from the drop down of any column
- Add a total row to the bottom of the data and it will perform calculations on the right most column, however you can also add a function to the total row of any numerical column
- The table will expand if you add more columns or rows to it and any chart that you have based on the table will automatically expand as well.
- Calculated columns are added automatically – perform a calculation in the first cell of a new column, press enter and the calculation is repeated in the whole column.

Tables in Excel 2016 are great time savers when you want to analyse your data.



Cynthia | AXA Graduate

AXA Global Graduate Program

Find out more and apply

redefining / standards 

11.2 FORMAT AS TABLE ICON

To turn your list of data into a table, it must have no blank columns or rows. You can have several tables on one worksheet if you have different groups of data.

11.2.1 FORMAT AS TABLE

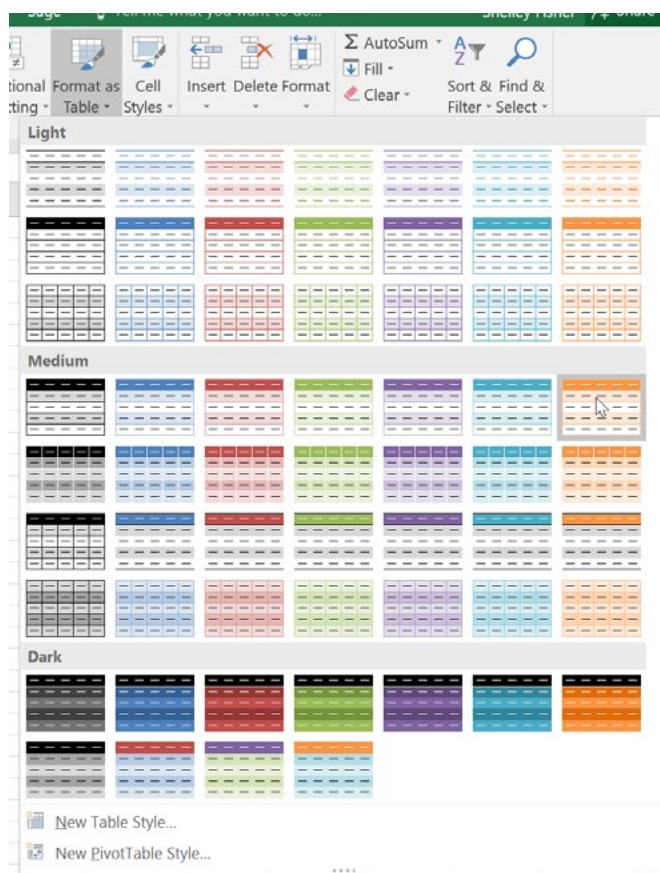


Figure 126 – table styles

1. Click anywhere inside your data list
2. Click on the Format as Table Icon
3. Select a format to apply

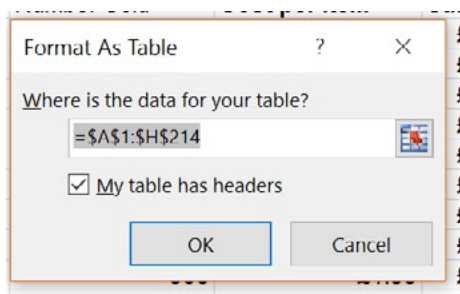


Figure 127 – confirm the range

1. You will be prompted to check if the range that Excel finds is correct.
2. Click OK if it is.

	A	B	C	D	E	F	G	H
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales
2	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.31
3	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.81
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.31
5	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.81
6	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.31
7	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.81
8	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84
9	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
10	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
11	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84
12	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
13	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
14	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84
15	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
16	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
17	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.81
18	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.81
19	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.81
20	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£1.95	£1,708.21
21	12/08/2010	London	South	Hot Drinks	Machiato	907	£1.95	£1,768.61
22	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£1.95	£1,708.21
23	12/08/2010	London	South	Hot Drinks	Machiato	907	£1.95	£1,768.61
24	11/11/2010	Manchester	North	Hot Drinks	Machiato	876	£1.95	£1,708.21

Figure 128 – style applied

11.3 INSERT A TABLE

You can insert a Table via the Insert Ribbon and Excel will apply a preset format without giving you the choice of how it looks.

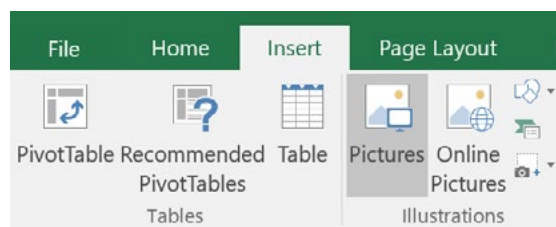


Figure 129 – insert a table

1. Click inside your data
2. Click on Insert
3. Click Table

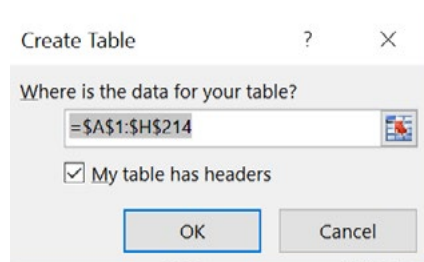


Figure 130 – confirm the range

1. Check the range is correct
2. Click OK

	A	B	C	D	E	F	G	H
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales
2	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
3	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
5	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80
6	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
7	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80
8	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.80
9	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.90
10	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.90
11	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.80
12	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.90
13	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.90
14	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.80
15	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.90
16	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.90
17	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.80
18	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.80
19	09/11/2010	Manchester	North	Hot Drinks	Latte	948	£1.85	£1,753.80

Figure 131 – Table applied

Excel has applied the automatic formatting and added the filter with drop downs. However I was not offered the choice of style for the table as I would have been if I had chosen to Format as Table.

TURN TO THE EXPERTS FOR SUBSCRIPTION CONSULTANCY

Subscribe is one of the leading companies in Europe when it comes to innovation and business development within subscription businesses.

We innovate new subscription business models or improve existing ones. We do business reviews of existing subscription businesses and we develop acquisition and retention strategies.

Learn more at [linkedin.com/company/subscribe](https://www.linkedin.com/company/subscribe) or contact Managing Director Morten Suhr Hansen at mha@subscribe.dk

SUBSCRIBE - to the future

11.3.1 KEYBOARD SHORTCUT

To insert a table with the keyboard first make sure your cursor is inside your data and then do one of the following:

Control + T

Control + L

Notice that this method applies a preset format and does not offer you a choice of style.

11.4 CHANGE TABLE STYLE

It is really simple wantto change the style for a table, either because you created it with the keyboard and you want to choose, or because you don't like the one you have.

11.4.1 SELECT A DIFFERENT TABLE STYLE

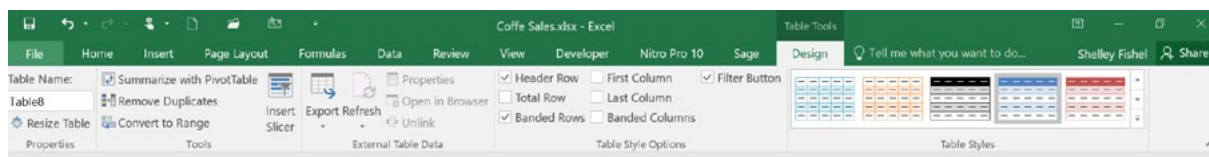


Figure 132 – change style

1. Click inside your table
2. In the Table Tools Design Ribbon go to the Table Styles group and select a different style.

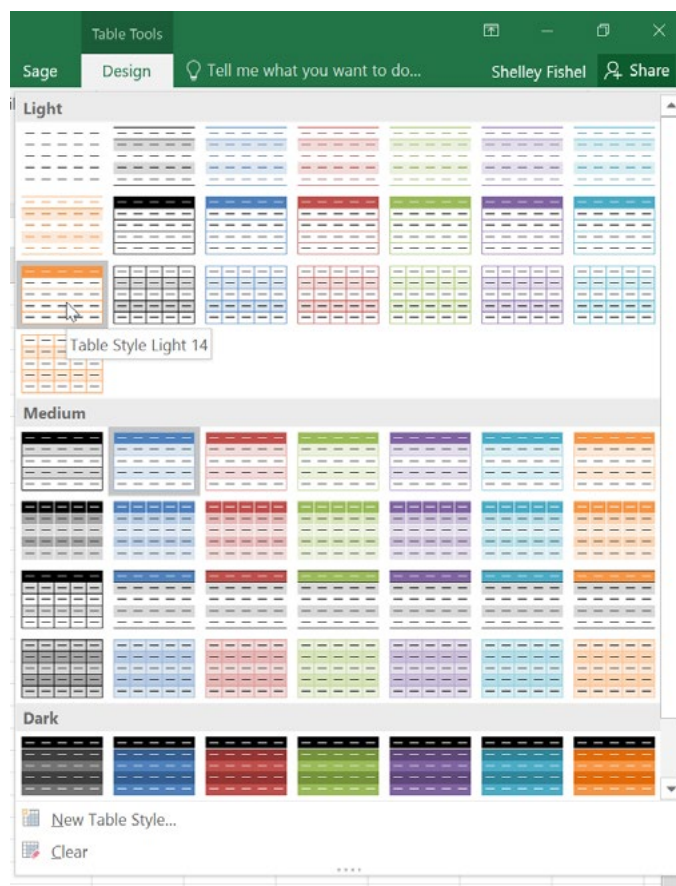


Figure 133 – pick the new style

The new colours and banding will apply immediately.

11.5 REMOVE FORMATTING

The fancy table styles can be removed in favour of plain black and white text without affecting the automatic features of the table.

11.5.1 REMOVE FORMATTING

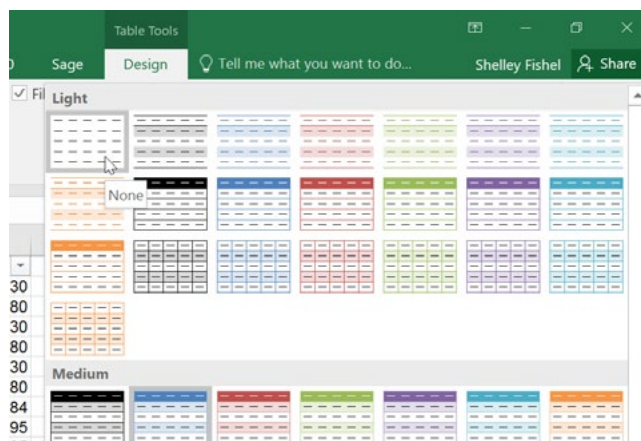


Figure 134 – select None to remove formatting

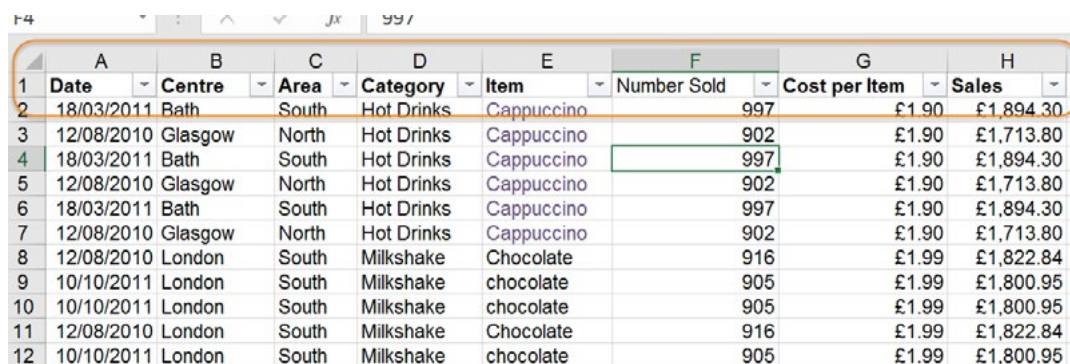
1. Click inside the table
2. In the Table Styles group select the first table labelled None

Losing track of your leads?

Bookboon leads the way

Get help to increase the lead generation on your own website. Ask the experts.

Interested in how we can help you?
email ban@bookboon.com



	A	B	C	D	E	F	G	H
	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales
1	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
2	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80
3	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
4	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80
5	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30
6	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80
7	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84
8	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
9	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
10	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84
11	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95
12								

Figure 135 – this just removes the formatting and leaves functionality

The Table reverts back to plain black and white, however the filter remains and any automatic features are still there.

11.6 NAME THE TABLE

When you add a table to an Excel spreadsheet it is given a generic name which can then be used in formulas to refer to the data in the table.

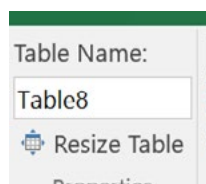


Figure 136 – give the table a name

See the name in the Properties Group on the Table Tools Design Ribbon.

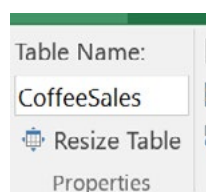


Figure 137 – type it!

Click into the box and type the new name for your table. Avoid spaces if you want to refer to the table from another worksheet later on.

11.7 CALCULATED COLUMNS

An exciting feature of tables in Excel 2016 is the lightning speed at which a new column is added, and the calculation done in the first cell, repeated throughout the column.

In the example below, Coffee Island is increasing all drinks prices by 30% so I have placed 1.3 in cell M1. I will use this to work out the new price for each drink and it will be added to the New Price Column. Then I want to work out the new total sales price which is Number Sold $\times$ New Price per Item.

Excel will do this using Named Ranges in the Table and update the whole column at once.

	F	G	H	I	J	K	L	M	N
	Number Sold	Cost per Item	Sales	New Cost Per Item	New To				
0	997	£1.90	£1,894.30	=[@[Cost per Item]]*\$M\$1				1.3	
0	902	£1.90	£1,713.80						
0	997	£1.90	£1,894.30						
0	902	£1.90	£1,713.80						
0	997	£1.90	£1,894.30						

Figure 138 – type the first formula

- The formula starts with an = and then inside [] square brackets is the formula
- Next comes @[Cost per Item] which is the name of the column referred to in the formula enclosed in square brackets (to show it is the name of a range)
- Then I have multiplied so a *
- Then \$M\$1 as the value needs to be fixed so that it can be copied to all cells in the column.

When I press Enter this formula is replicated automatically down the whole column.

	A	B	C	D	E	F	G	H	I	J
	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New Cost Per Item	New To
	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30		
	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	2.47	
	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	2.47	
	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	2.47	
	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	2.47	
	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	2.47	
	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84	2.587	

Figure 139 – formula to replicate

- The cell M1 is fixed so that it is referenced correctly
- The @[Cost per Item] means that whatever is on **this row** in the column called Cost per Item will be used

When I press Enter it will be replicated down the whole column.

11.8 ADD A TOTAL ROW

Adding a total row to the table makes getting a summary really simple. Not only does the total row create a formula in the total row, it also adjusts the total if a filter is applied. Magic!

To add a total row to the table:

1. On the Table Tools Design Tab
2. Go to the Table Style Options
3. Click on Total Row to switch it on

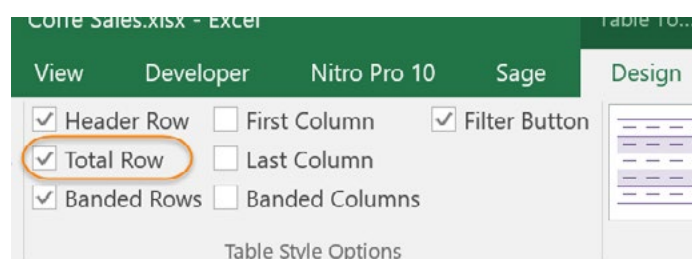


Figure 140 – tick the box for a total row

"I studied English for 16 years but...
...I finally learned to speak it in just six lessons"

Jane, Chinese architect

ENGLISH OUT THERE

Click to hear me talking before and after my unique course download



A total row is added to the bottom of the data and the column on the extreme right has a sum created.

212	18/10/2011	London	South	Milkshake	Vanilla	149	£2.50	£372.50	3.25	
213	14/06/2011	Leeds	North	Milkshake	Vanilla	546	£2.50	£1,365.00	3.25	
214	14/06/2011	Leeds	North	Milkshake	Vanilla	546	£2.50	£1,365.00	3.25	
215	Total							£176,141.22	-	0
216										
217										
218										
219										
220										

Figure 141 – total row is added

11.8.1 CHANGE FROM A SUM TO SOMETHING ELSE

£2.50	£372.50
£2.50	£1,365.00
£2.50	£1,365.00
£176,141.22	
None	
Average	
Count	
Count Numbers	
Max	
Min	
Sum	
StdDev	
Var	
More Functions...	

Figure 142 – change the calculation

You can change the calculation type to any one of the options in the drop down list.

11.8.2 ADD A TOTAL ROW TO ANOTHER COLUMN

Vanilla	149	£2.50	£372.50	3.25	
Vanilla	546	£2.50	£1,365.00	3.25	
Vanilla	546	£2.50	£1,365.00	3.25	
	98430		£176,141.22		0
	None				
	Average				
	Count				
	Count Numbers				
	Max				
	Min				
	Sum				
	StdDev				
	Var				
	More Functions...				

Figure 143 – click the drop down below the column you want to add up

1. Click on the drop down arrow in the total row for the column you want to sum
2. Select the function you want to add
3. Your new total will appear

11.9 CONVERT BACK TO A RANGE (REMOVE AUTOMATIC FUNCTIONALITY)

When you have finished working with your data you may want to remove the automatic functionality and change the data back to a regular range.

11.9.1 CONVERT TO RANGE

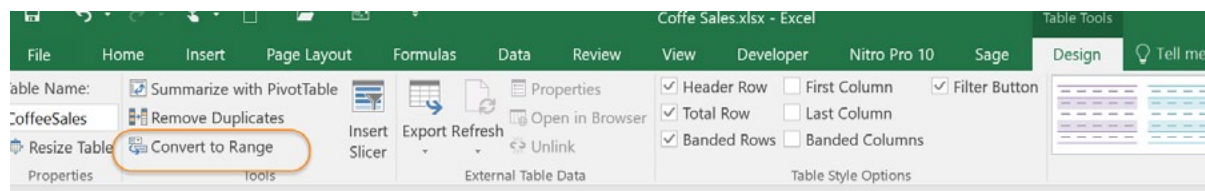


Figure 144 – use the tools group to remove automatic functionality

1. Click inside your table
2. Click on Convert to Range in the Tools Group.

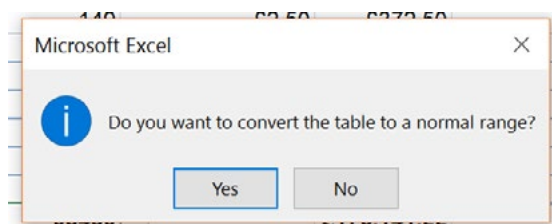


Figure 145-confirm whether you wish to convert to a range or not

Click Yes to confirm that you do want to convert it back.

11.9.2 AUTOMATIC FUNCTIONALITY REMOVED

	A	B	C	D	E	F	G	H	I	J	K	L
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New Cost Per Item	New Total		
2	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30		2.47		
3	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80		2.47		
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30		2.47		
5	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80		2.47		
6	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30		2.47		
7	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80		2.47		
8	12/08/2010	London	South	Milkshake	chocolate	916	£1.99	£1,822.84		2.587		
9	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95		2.587		
10	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95		2.587		
11	12/08/2010	London	South	Milkshake	chocolate	916	£1.99	£1,822.84		2.587		
12	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95		2.587		
13	10/10/2011	London	South	Milkshake	chocolate	905	£1.99	£1,800.95		2.587		

Figure 146 – automatic functionality removed – style remains

The automatic functionality has been removed although the style has been kept.

If you want to remove the fancy formatting select the plain style first before converting to a normal range.

11.9.3 REMOVE FORMATTING BEFORE CONVERTING TO A RANGE



Figure 147 – choose None to remove the fancy formatting

1. Click inside your table
2. Select the first Table Style – it says None when you hover

The Table will revert to Black and White and when you Convert it to a Range, the formatting will be gone along with the automatic features.

This e-book
is made with
SetaPDF



PDF components for PHP developers

www.setasign.com



12 FILTER A TABLE

12.1 FILTER A TABLE

A table can be filtered in exactly the same way as a list. Only with a few magic extras!

12.1.1 FILTER ON ONE COLUMN

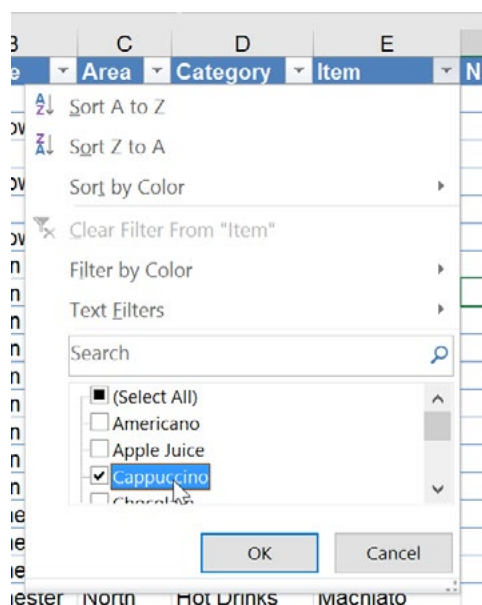


Figure 148 – tick the box of the item you want to filter on

1. Click on the drop down arrow on the column heading you want to filter
2. Un-check Select All
3. Select the check box next to the filter item
4. Click OK

12.1.2 SEE THE RESULTS

	A	B	C	D	E	F	G	H	I	J
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New Cost Per Item	New Total
2	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	2.47	
3	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	2.47	
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	2.47	
5	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	2.47	
6	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	2.47	
7	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	2.47	
68	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40	2.47	
69	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60	2.47	
70	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£1.90	£1,026.00	2.47	
71	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£1.90	£1,098.20	2.47	
72	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£1.90	£1,105.80	2.47	
73	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	2.47	
74	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	2.47	
75	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	2.47	
76	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	2.47	
77	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	2.47	
78	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	2.47	
79	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40	2.47	
80	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60	2.47	
81	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£1.90	£1,026.00	2.47	
82	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£1.90	£1,098.20	2.47	
83	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£1.90	£1,105.80	2.47	
84	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	2.47	
85	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	2.47	
86	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	2.47	

Figure 149 – filter applied

Now I can see just the rows that match the filter criteria.

12.2 FILTER A TABLE WITH A TOTAL ROW

When a total row is added to the table, magic happens! Not only do I get to see just the rows that match my criteria, the total will be adjusted as well.

12.2.1 TOTAL ROW UNFILTERED

211	14/09/2011	Glasgow	North	Milkshake	Vanilla	200	£2.50	£500.00	3.25	
212	18/10/2011	London	South	Milkshake	Vanilla	149	£2.50	£372.50	3.25	
213	14/06/2011	Leeds	North	Milkshake	Vanilla	546	£2.50	£1,365.00	3.25	
214	14/06/2011	Leeds	North	Milkshake	Vanilla	546	£2.50	£1,365.00	3.25	
215	Total					98430		£176,141.22		
216										

Figure 150 – regular total row

Here is my Coffee Sales worksheet with a total row and no filter. The Total Sales is £176,141.22

12.2.2 TOTAL ROW FILTERED

93	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£1.90	£1,098.20	2.47
94	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£1.90	£1,105.80	2.47
95	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	2.47
96	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	2.47
97	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	2.47
98	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	2.47
99	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	2.47
100	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	2.47
215	Total					26583		£50,507.70	
216									
217									

Figure 151 – filter applied

Note that the total row is now £50,507.70! Only the Cappuccino rows have been totalled. Magic!

12.3 INSERT A SLICER

Slicers are cool! Slicers allow you to filter your data from nice big buttons on the spreadsheet. See how to add and use one here.

gaiteye
Challenge the way we run

EXPERIENCE THE POWER OF
FULL ENGAGEMENT...

.....

RUN FASTER.
RUN LONGER..
RUN EASIER...

READ MORE & PRE-ORDER TODAY
WWW.GAITEYE.COM

12.3.1 INSERT A SLICER

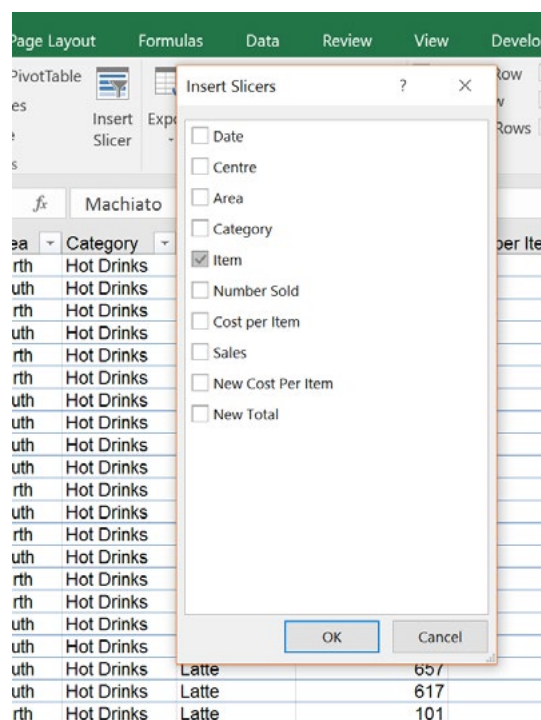


Figure 152 – add a slicer

1. Click Insert Slicer
2. Select the field name you want to use as a filter
3. Click OK

12.3.2 A SLICER

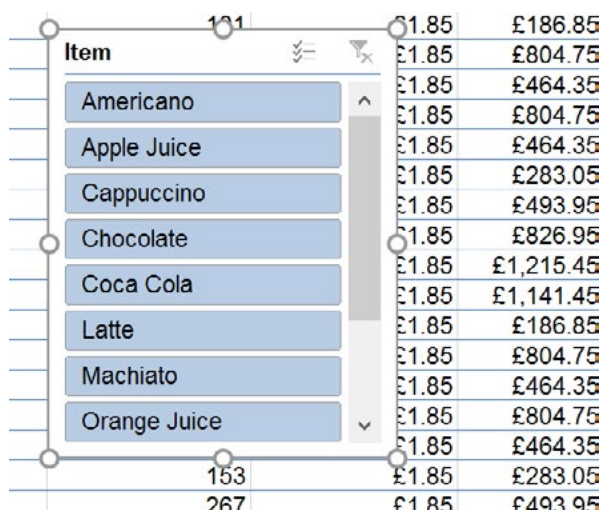


Figure 153 – slicer appears with nice big filter buttons

I now have a slicer. Each of the blue buttons can be used to apply a filter.

12.3.3 FILTER THE TABLE USING THE SLICER

	A	B	C	D	E	F	G	H	I	J
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New Cost Per Item	New Total
2	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	2.47	
3	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	2.47	
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	2.47	
5	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	2.47	
6	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30	2.47	
7	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80	2.47	
68	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40	2.47	
69	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60	2.47	
70	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£1.90	£1,026.00	2.47	
71	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£1.90	£1,098.20	2.47	
72	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£1.90	£1,105.80	2.47	
73	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	2.47	
74	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	2.47	
75	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	2.47	
76	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	2.47	
77	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	2.47	
78	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50	2.47	
79	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40	2.47	
80	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60	2.47	
81	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£1.90	£1,026.00	2.47	
82	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£1.90	£1,098.20	2.47	
83	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£1.90	£1,105.80	2.47	
84	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50	2.47	
85	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90	2.47	

Figure 154 – using a slicer

Having clicked on the button for Cappuccino – the slicer springs into action and shows me just the Cappuccino rows.

12.3.4 ADD ANOTHER SLICER

	A	B	C	D	E	F	G	H	I	J	K
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New Cost Per Item	New Total	
2	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30			
3	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80			
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30			
5	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80			
6	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£1.90	£1,894.30			
7	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£1.90	£1,713.80			
68	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40			
69	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60			
70	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£1.90	£1,026.00			
71	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£1.90	£1,098.20			
72	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£1.90	£1,105.80			
73	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
74	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90			
75	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50			
76	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
77	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90			
78	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50			
79	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40			
80	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£1.90	£729.60			
81	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£1.90	£1,026.00			
82	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£1.90	£1,098.20			
83	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£1.90	£1,105.80			
84	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
85	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90			
86	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50			
87	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
88	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£1.90	£1,540.90			
89	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£1.90	£1,168.50			
90	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	636	£1.90	£1,208.40			

Figure 155 – you can have more than one slicer

Follow the same steps to add a slicer, only this time select a different field.

In the image above I now have one slicer for the Item column and one for the Centre.

12.3.5 FILTER ON A SECOND FIELD

	A	B	C	D	E	F	G	H	I	J	K
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New Cost Per Item	New Total	
73	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
76	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
84	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
87	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
95	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
98	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£1.90	£1,320.50			
215	Total					4170		£7,923.00			
216											
217											
218											
219											
220											
221											
222											
223											
224											
225											
226											
227											
228											
229											
230											
231											
232											
233											
234											
235											
236											
237											
238											

Figure 156 – keep on refining the filter field by field

Simply click on the field on which you want to filter.

In the image above, I have applied two filters, one on the Item field and one on the Centre field – so now I am looking at the sales of Cappuccino in Leeds only.



How to retain your top staff

FIND OUT NOW FOR FREE

DO YOU WANT TO KNOW:

- What your staff really want?
- The top issues troubling them?
- How to make staff assessments work for you & them, painlessly?

Get your free trial

Because happy staff get more done

12.3.6 CLEAR THE FILTER APPLIED VIA SLICER

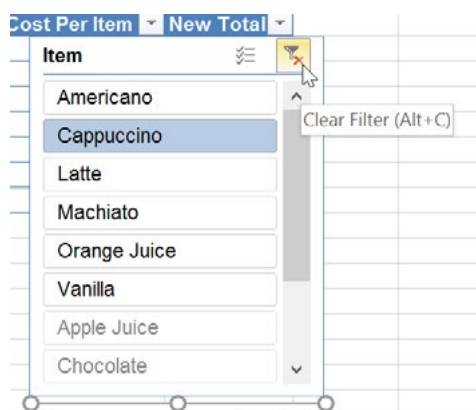


Figure 157 – clear the slicer – click the little red x

Click the red x next to the Filter icon at the top of the slicer.

12.4 CUSTOMIZE A SLICER

If you have more than one slicer you might want to change the colour of the second one to make it easier to differentiate.

12.4.1 FORMAT A SLICER

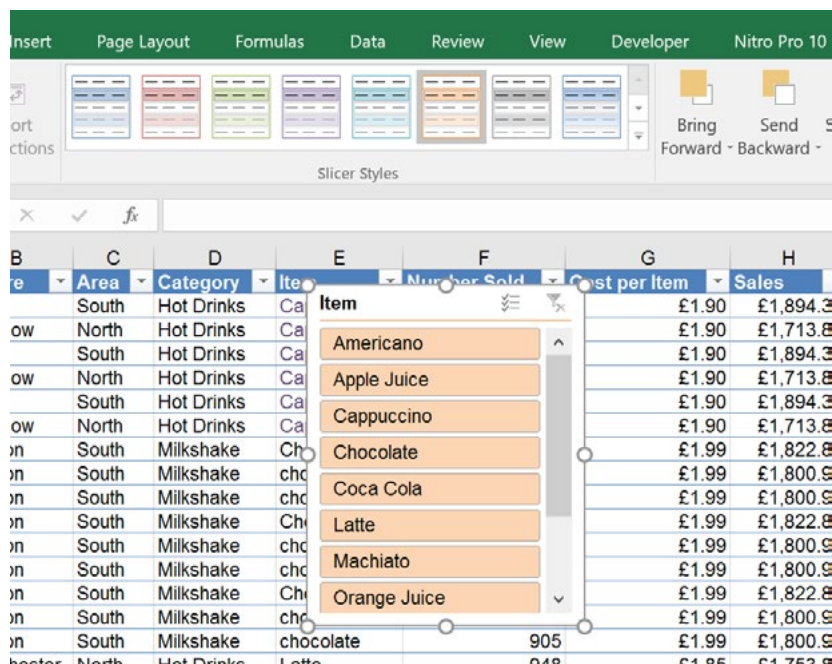


Figure 158 – change the colour of a slicer

1. Click on the slicer to select it
2. Click on the style you want to apply from the Slicer Styles gallery

E	F	G	H	I
Item	Number Sold	Cost per Item	Sales	New Cost P
Ca				
Ca				
Ca				
Ca				
Ca				
Ch				
ch				
ch				
Ch				
ch				
ch				
Ch				
ch				
ch				
chocolate	905	£1.99	£1,800.95	

Figure 159 – two slicers in different colours

12.5 DELETE A SLICER

12.5.1 TO DELETE A SLICER

Click on the slicer and press the Delete Key on the keyboard.

The slicer will be gone!



CMO INSPIRED CONFERENCE
25 OCTOBER | DE VERE BEAUMONT ESTATE | OLD WINDSOR UK





Join Over 100 Chief Marketing Officers & Digital Innovators

13 GROUPING AND OUTLINING

13.1 OUTLINING

If you have a spreadsheet with totals of certain groups of data you can outline those groups so that you can expand and collapse them. You need to have some subtotals applied, and in the following chapter we will see how to get Excel to apply subtotals automatically.

My data assumes that totals have already been generated.

13.1.1 DATA WITH TOTALS

	A	B	C	D	E	F	G	H	I	J
1	Date	Centre	Area	Category	Item	Number	Cost per I	Sales		
2	10/10/2011	Bath	South	Cold Drink	Coca Cola	654	£0.85	£555.90		
3	11/11/2010	Bath	South	Cold Drink	Coca Cola	118	£0.85	£100.30		
4	18/03/2011	Bath	South	Hot Drinks	Cappuccin	997	£1.90	£1,894.30		
5	14/11/2011	Bath	South	Hot Drinks	Latte	267	£1.85	£493.95		
6	10/10/2011	Bath	South	Milkshake	Strawberry	565	£2.50	£1,412.50		
7	11/11/2010	Bath	South	Milkshake	Strawberry	938	£2.50	£2,345.00		
8	Bath Total							£6,801.95		
9	14/06/2011	Glasgow	North	Cold Drink	Apple Juic	170	£1.00	£170.00		
10	14/02/2011	Glasgow	North	Cold Drink	Coca Cola	492	£0.85	£418.20		
11	11/11/2010	Glasgow	North	Cold Drink	Apple Juic	355	£1.00	£355.00		
12	07/02/2011	Glasgow	North	Hot Drinks	Cappuccin	636	£1.90	£1,208.40		
13	12/08/2010	Glasgow	North	Hot Drinks	Cappuccin	902	£1.90	£1,713.00		
14	10/10/2011	Glasgow	North	Hot Drinks	Latte	101	£1.85	£186.85		
15	18/10/2011	Glasgow	North	Hot Drinks	Americano	571	£1.90	£1,084.90		
16	14/11/2011	Glasgow	South	Milkshake	Strawberry	344	£2.50	£860.00		
17	14/09/2011	Glasgow	North	Milkshake	Vanilla	200	£2.50	£500.00		
18	Glasgow Total							£6,497.15		
19	14/11/2011	London	South	Cold Drink	Orange Jui	626	£0.85	£532.10		
20	18/10/2011	London	South	Hot Drinks	Machiato	56	£1.95	£109.20		
21	12/08/2010	London	South	Hot Drinks	Machiato	907	£1.95	£1,768.65		
22	11/11/2010	London	South	Hot Drinks	Latte	447	£1.85	£826.95		
23	18/10/2011	London	South	Hot Drinks	Latte	657	£1.85	£1,215.45		
24	14/06/2011	London	South	Hot Drinks	Latte	617	£1.85	£1,141.45		
25	11/11/2010	London	South	Hot Drinks	Americano	92	£1.90	£174.80		
26	12/08/2010	London	South	Milkshake	Strawberry	337	£2.50	£842.50		
27	18/10/2011	London	South	Milkshake	Vanilla	149	£2.50	£372.50		
28	12/08/2010	London	South	Milkshake	Chocolate	916	£1.99	£1,822.84		
29	London Total							£8,806.44		
30										
31										

Figure 160 – group some or all of the data

Here are some of the rows of data for Coffee Island sales. I have totals for the sales of each centre showing here. If I group the data I can collapse it and see just the outlines.

13.1.2 GROUP DATA

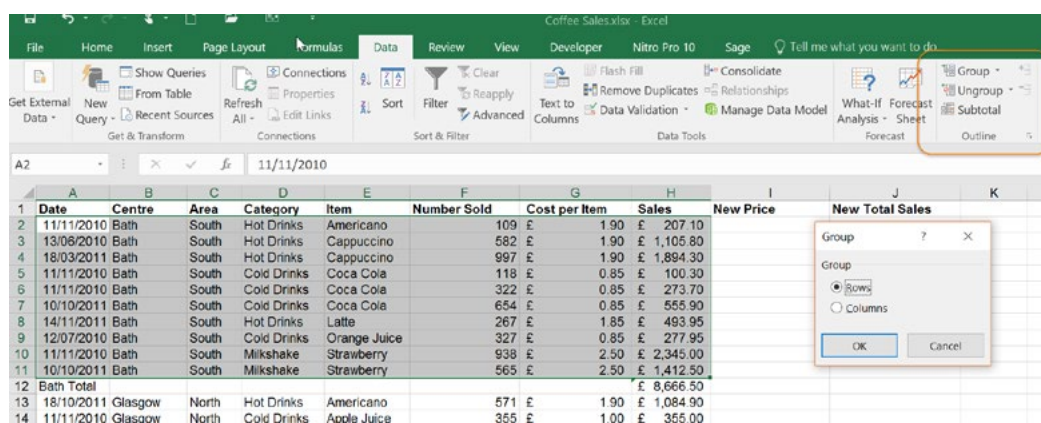


Figure 161 – select what you want to group first

1. Select the data to group – in this case A2:H11
2. Click on the Data Ribbon Tab
3. Click on the drop down under Group and select Group
4. Select Rows or Columns (in my example Rows)
5. Click OK

Continue to create groups for each set of data.

	A	B	C	D	E	F	G	H	I
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New Price
2	11/11/2010	Bath	South	Hot Drinks	Americano	109	£ 1.90	£ 207.10	
3	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£ 1.90	£ 1,105.80	
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£ 1.90	£ 1,894.30	
5	11/11/2010	Bath	South	Cold Drinks	Coca Cola	118	£ 0.85	£ 100.30	
6	11/11/2010	Bath	South	Cold Drinks	Coca Cola	322	£ 0.85	£ 273.70	
7	10/10/2011	Bath	South	Cold Drinks	Coca Cola	654	£ 0.85	£ 555.90	
8	14/11/2011	Bath	South	Hot Drinks	Latte	267	£ 1.85	£ 493.95	
9	12/07/2010	Bath	South	Cold Drinks	Orange Juice	327	£ 0.85	£ 277.95	
10	11/11/2010	Bath	South	Milkshake	Strawberry	938	£ 2.50	£ 2,345.00	
11	10/10/2011	Bath	South	Milkshake	Strawberry	565	£ 2.50	£ 1,412.50	
12	Bath Total							£ 8,666.50	
13	18/10/2011	Glasgow	North	Hot Drinks	Americano	571	£ 1.90	£ 1,084.90	
14	11/11/2010	Glasgow	North	Cold Drinks	Apple Juice	355	£ 1.00	£ 355.00	
15	14/06/2011	Glasgow	North	Cold Drinks	Apple Juice	170	£ 1.00	£ 170.00	
16	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£ 1.90	£ 1,713.80	
17	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	750	£ 1.90	£ 1,425.00	
18	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£ 1.90	£ 1,168.50	
19	14/02/2011	Glasgow	North	Cold Drinks	Coca Cola	492	£ 0.85	£ 418.20	
20	10/10/2011	Glasgow	North	Hot Drinks	Latte	101	£ 1.85	£ 186.85	
21	14/11/2011	Glasgow	South	Milkshake	Strawberry	344	£ 2.50	£ 860.00	
22	14/09/2011	Glasgow	North	Milkshake	Vanilla	200	£ 2.50	£ 500.00	
23	Glasgow Total							£ 7,882.25	
24	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£ 1.90	£ 729.60	
25	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£ 1.90	£ 1,540.90	
26	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£ 1.90	£ 1,026.00	
27	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£ 1.90	£ 1,098.20	
28	11/11/2010	Leeds	North	Milkshake	Chocolate	225	£ 1.99	£ 447.75	

Figure 162 – more than one group

Here is my data with an outline that I created manually. I grouped each set of data.

I now have the small 1 and 2 icons at the top left of the screen.

Also note the lines and the minus signs in the new grey margin.

13.1.3 VIEW THE TOTALS

	1	2	A	B	C	D	E	F	G	H	I
	1		Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New
+	12		Bath Total							£ 8,666.50	
+	23		Glasgow Total							£ 7,882.25	
+	34		Leeds Total							£ 7,568.95	

Figure 163 – collapse to see totals

Click on the 1 in the top left corner and the groups will collapse so that you can see just the total rows.

13.1.4 VIEW A PARTICULAR SET OF DATA

	1	2	A	B	C	D	E	F	G	H	I
	1		Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New
+	12		Bath Total							£ 8,666.50	
-	13		18/10/2011	Glasgow	North	Hot Drinks	Americano	571	£ 1.90	£ 1,084.90	
-	14		11/11/2010	Glasgow	North	Cold Drinks	Apple Juice	355	£ 1.00	£ 355.00	
-	15		14/06/2011	Glasgow	North	Cold Drinks	Apple Juice	170	£ 1.00	£ 170.00	
-	16		12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£ 1.90	£ 1,713.80	
-	17		07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	750	£ 1.90	£ 1,425.00	
-	18		18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£ 1.90	£ 1,168.50	
-	19		14/02/2011	Glasgow	North	Cold Drinks	Coca Cola	492	£ 0.85	£ 418.20	
-	20		10/10/2011	Glasgow	North	Hot Drinks	Latte	101	£ 1.85	£ 186.85	
-	21		14/11/2011	Glasgow	South	Milkshake	Strawberry	344	£ 2.50	£ 860.00	
-	22		14/09/2011	Glasgow	North	Milkshake	Vanilla	200	£ 2.50	£ 500.00	
+	23		Glasgow Total							£ 7,882.25	
+	34		Leeds Total							£ 7,568.95	
	35		11/11/2010	London	South	Hot Drinks	Americano	92	£ 1.90	£ 174.80	

Figure 164 – expand a particular set of data

To expand a particular set of data, and see how it is made up, click the plus sign next to the total.

Here you can see all the rows that belong to the Glasgow group.

13.1.5 REMOVE AN OUTLINE

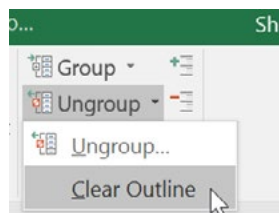


Figure 165 – clear the outline here

1. Click inside the data
2. Click on Un-group
3. Select Clear Outline

13.2 CREATE AN AUTOMATIC OUTLINE

You can make Excel create an outline automatically for you too.

13.2.1 AUTO OUTLINE

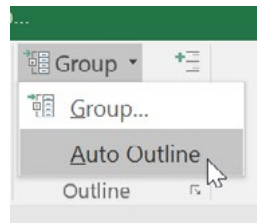


Figure 166 – Excel will create an automatic outline

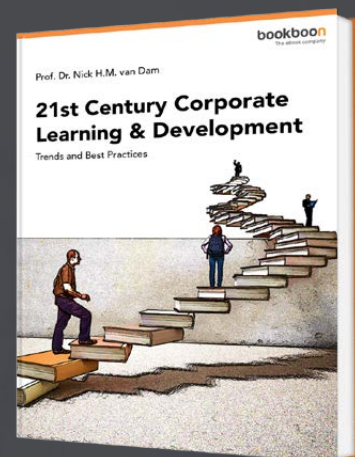
1. Click inside your data
2. Click on the drop down under Group
3. Click on Auto Outline

Your data will now have two outlines, one for rows and one for columns.

Free eBook on Learning & Development

By the Chief Learning Officer of McKinsey

Download Now



13.2.2 AUTO OUTLINE GROUPS

	A	B	C	D	E	F	G	H	I
	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New Price
2	11/11/2010	Bath	South	Hot Drinks	Americano	109	£ 1.90	£ 207.10	
3	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£ 1.90	£ 1,105.80	
4	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£ 1.90	£ 1,894.30	
5	11/11/2010	Bath	South	Cold Drinks	Coca Cola	118	£ 0.85	£ 100.30	
6	11/11/2010	Bath	South	Cold Drinks	Coca Cola	322	£ 0.85	£ 273.70	
7	10/10/2011	Bath	South	Cold Drinks	Coca Cola	654	£ 0.85	£ 555.90	
8	14/11/2011	Bath	South	Hot Drinks	Latte	267	£ 1.85	£ 493.95	
9	12/07/2010	Bath	South	Cold Drinks	Orange Juice	327	£ 0.85	£ 277.95	
10	11/11/2010	Bath	South	Milkshake	Strawberry	938	£ 2.50	£ 2,345.00	
11	10/10/2011	Bath	South	Milkshake	Strawberry	565	£ 2.50	£ 1,412.50	
12	Bath Total							£ 8,666.50	
13	18/10/2011	Glasgow	North	Hot Drinks	Americano	571	£ 1.90	£ 1,084.90	
14	11/11/2010	Glasgow	North	Cold Drinks	Apple Juice	355	£ 1.00	£ 355.00	
15	14/06/2011	Glasgow	North	Cold Drinks	Apple Juice	170	£ 1.00	£ 170.00	
16	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£ 1.90	£ 1,713.80	
17	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	750	£ 1.90	£ 1,425.00	
18	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£ 1.90	£ 1,168.50	
19	14/02/2011	Glasgow	North	Cold Drinks	Coca Cola	492	£ 0.85	£ 418.20	
20	10/10/2011	Glasgow	North	Hot Drinks	Latte	101	£ 1.85	£ 186.85	
21	14/11/2011	Glasgow	South	Milkshake	Strawberry	344	£ 2.50	£ 860.00	
22	14/09/2011	Glasgow	North	Milkshake	Vanilla	200	£ 2.50	£ 500.00	
23	Glasgow Total							£ 7,882.25	
24	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£ 1.90	£ 729.60	
25	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£ 1.90	£ 1,540.90	
26	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£ 1.90	£ 1,026.00	
27	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£ 1.90	£ 1,098.20	
28	11/11/2010	Leeds	North	Milkshake	Chocolate	225	£ 1.99	£ 447.75	
29	10/10/2011	Leeds	North	Cold Drinks	Coca Cola	46	£ 0.85	£ 39.10	

Figure 167 – an automatic outline has been created

In my Auto Outlined data I now have more of the small icons in the top left of the spreadsheet, one set is for the rows, and one for the columns.

I also have a minus icon on the far right – I can collapse the columns here and Excel will hide all the columns except the Sales column which makes it easier to read.

I also have the plus signs in the left margin to expand and collapse the groups.

14 SUBTOTALS

14.1 WHY USE SUBTOTALS?

Subtotals are one of my all-time favorite features in Excel and have been around for quite a while. I am always amazed at how many people have no idea how useful they are.

In the section on grouping and outlining data, see see 123, we wanted to see totals for certain groups of data. To do this we had to use the following process:

- Sort the data by the item on which you want to group
- At the end of each group of data add a row
- In each of the new rows, type the text to describe what it is
- In the column we want totals for, create the Sum on the total row
- Then add the grouping and outlining.

Phew! So much work!

The Subtotals Command does ALL of that automatically with one exception – you have to sort the data first. Excel is very clever and sometimes seems like magic, however it cannot read your mind. So if you want to summarize the types of drink sold you first need to sort the data on that column. Do you want to see subtotals for the centre where the drinks were sold? Sort on that column.

The data does need to be arranged in columns with repeating data so that it can be summarized. In my Coffee Island Sales worksheet, I can summarize by item, centre or area. All I have to do is sort it first!

14.2 SORT FIRST

Sort the data by the column you want to summarize.

1. Click into the column to sort by
2. Click on the Data Ribbon Tab
3. Click the Sort AZ to sort alphabetically

14.2.1 DATA SORTED BY ITEM

	A	B	C	D	E	F	G	H	
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New
2	11/11/2010	Bath	South	Hot Drinks	Americano	109	£ 1.90	£ 207.10	
3	18/10/2011	Glasgow	North	Hot Drinks	Americano	571	£ 1.90	£ 1,084.90	
4	11/11/2010	London	South	Hot Drinks	Americano	92	£ 1.90	£ 174.80	
5	12/08/2010	Manchester	North	Hot Drinks	Americano	699	£ 1.90	£ 1,328.10	
6	14/06/2011	Manchester	South	Hot Drinks	Americano	112	£ 1.90	£ 212.80	
7	18/10/2011	Manchester	North	Hot Drinks	Americano	120	£ 1.00	£ 120.00	
8	11/11/2010	Glasgow	North	Cold Drinks	Apple Juice	355	£ 1.00	£ 355.00	
9	14/06/2011	Glasgow	North	Cold Drinks	Apple Juice	170	£ 1.00	£ 170.00	
10	14/11/2011	London	South	Cold Drinks	Apple Juice	591	£ 1.00	£ 591.00	
11	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£ 1.90	£ 1,105.80	
12	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£ 1.90	£ 1,894.30	
13	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£ 1.90	£ 1,713.80	
14	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	750	£ 1.90	£ 1,425.00	
15	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£ 1.90	£ 1,168.50	
16	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£ 1.90	£ 729.60	
17	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£ 1.90	£ 1,540.90	
18	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£ 1.90	£ 1,026.00	
19	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£ 1.90	£ 1,098.20	
20	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£ 1.90	£ 1,320.50	
21	12/08/2010	London	South	Milkshake	Chocolate	916	£ 1.99	£ 1,822.84	
22	10/10/2011	London	South	Milkshake	chocolate	905	£ 1.99	£ 1,800.95	
23	11/11/2010	Leeds	North	Milkshake	Chocolate	225	£ 1.99	£ 447.75	
24	11/11/2010	Bath	South	Cold Drinks	Coca Cola	118	£ 0.85	£ 100.30	
25	11/11/2010	Bath	South	Cold Drinks	Coca Cola	322	£ 0.85	£ 273.70	
26	10/10/2011	Bath	South	Cold Drinks	Coca Cola	654	£ 0.85	£ 555.90	
27	14/02/2011	Glasgow	North	Cold Drinks	Coca Cola	492	£ 0.85	£ 418.20	
28	10/10/2011	Leeds	North	Cold Drinks	Coca Cola	46	£ 0.85	£ 39.10	
29	14/11/2011	Bath	South	Hot Drinks	Latte	267	£ 1.85	£ 493.95	
30	10/10/2011	Glasgow	North	Hot Drinks	Latte	101	£ 1.85	£ 186.85	
31	10/10/2011	Leeds	North	Hot Drinks	Latte	153	£ 1.85	£ 283.05	
32	14/11/2011	Leeds	South	Hot Drinks	Latte	447	£ 1.85	£ 826.05	

Figure 168 – Sorted data



Discover the truth at www.deloitte.ca/careers

Deloitte.

© Deloitte & Touche LLP and affiliated entities.

14.2.2 INSERT SUBTOTALS

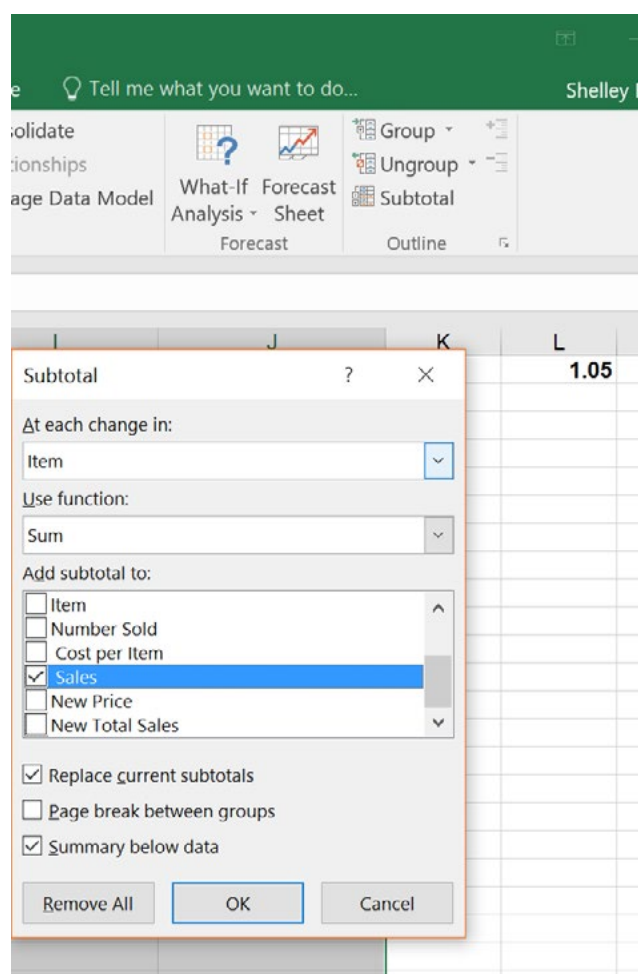


Figure 169 – Subtotals on the Data Ribbon

1. Click inside the data list – this is very important, if you don't Excel does not find any headings.
2. Click on Subtotal
3. Then Complete the dialog box

14.2.3 SUBTOTAL DIALOG BOX

1. Change the – **At each change in** to the field name you want to summarize by – in my case Item
2. Choose the **function** you want to use – I have selected Sum
3. Tick the box for the column you want to summarize – I have ticked the Sales column, you may have more than one column to summarize just tick all the boxes
4. Click OK

What about the other options in the dialog box?

Replace current subtotals – I used the Sum function to total the sales of each type of Item. However I might want to add an Average Sales. If I leave Replace current subtotals ticked, the Sum will be removed and the Average function will replace it. If I would like to see both the Sum and the Average, I need to uptick that box.

Page Break between groups – when printing your subtotals you might want each different group to print on a separate page, tick this box to do that.

Summary below data – this makes sure that the summary row is below the group of data – best to leave this ticked.

14.2.4 GRAND TOTAL

	A	B	C	D	E	F	G	H
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales
66					Grand Total			£46,503.59
67								
68								
69								

Figure 170 – see the grand total only

Click the Number 1 in the top left corner to see just the grand total which Excel added to the data.

14.2.5 SUBTOTALS

	A	B	C	D	E	F	G	H
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales
8					Americano Total			£ 3,127.70
12					Apple Juice Total			£ 1,116.00
23					Cappuccino Total			£13,022.60
27					Chocolate Total			£ 4,071.54
33					Coca Cola Total			£ 1,387.20
43					Latte Total			£ 7,170.60
51					Machiato Total			£ 6,078.15
55					Orange Juice Total			£ 1,222.30
60					Strawberry Total			£ 5,460.00
65					Vanilla Total			£ 3,847.50
66					Grand Total			£46,503.59
67								
68								

Figure 171 – see just the subtotals

Click the Number 2 in the top left corner to see all the subtotals and the grand total.

14.2.6 SEE ALL DATA

	A	B	C	D	E	F	G	H	I
1	Date	Centre	Area	Category	Item	Number Sold	Cost per Item	Sales	New P
2	11/11/2010	Bath	South	Hot Drinks	Americano	109	£ 1.90	£ 207.10	
3	18/10/2011	Glasgow	North	Hot Drinks	Americano	571	£ 1.90	£ 1,084.90	
4	11/11/2010	London	South	Hot Drinks	Americano	92	£ 1.90	£ 174.80	
5	12/08/2010	Manchester	North	Hot Drinks	Americano	699	£ 1.90	£ 1,328.10	
6	14/06/2011	Manchester	South	Hot Drinks	Americano	112	£ 1.90	£ 212.80	
7	18/10/2011	Manchester	North	Hot Drinks	Americano	120	£ 1.00	£ 120.00	
8					Americano Total			£ 3,127.70	
9	11/11/2010	Glasgow	North	Cold Drinks	Apple Juice	355	£ 1.00	£ 355.00	
10	14/06/2011	Glasgow	North	Cold Drinks	Apple Juice	170	£ 1.00	£ 170.00	
11	14/11/2011	London	South	Cold Drinks	Apple Juice	591	£ 1.00	£ 591.00	
12					Apple Juice Total			£ 1,116.00	
13	13/06/2010	Bath	South	Hot Drinks	Cappuccino	582	£ 1.90	£ 1,105.80	
14	18/03/2011	Bath	South	Hot Drinks	Cappuccino	997	£ 1.90	£ 1,894.30	
15	12/08/2010	Glasgow	North	Hot Drinks	Cappuccino	902	£ 1.90	£ 1,713.80	
16	07/02/2011	Glasgow	North	Hot Drinks	Cappuccino	750	£ 1.90	£ 1,425.00	
17	18/10/2011	Glasgow	North	Hot Drinks	Cappuccino	615	£ 1.90	£ 1,168.50	
18	08/03/2010	Leeds	North	Hot Drinks	Cappuccino	384	£ 1.90	£ 729.60	
19	12/08/2010	Leeds	South	Hot Drinks	Cappuccino	811	£ 1.90	£ 1,540.90	
20	14/06/2011	Leeds	North	Hot Drinks	Cappuccino	540	£ 1.90	£ 1,026.00	
21	10/10/2011	Leeds	North	Hot Drinks	Cappuccino	578	£ 1.90	£ 1,098.20	
22	18/10/2011	Manchester	North	Hot Drinks	Cappuccino	695	£ 1.90	£ 1,320.50	
23					Cappuccino Total			£ 13,022.60	
24	12/08/2010	London	South	Milkshake	Chocolate	916	£ 1.99	£ 1,822.84	
25	10/10/2011	London	South	Milkshake	chocolate	905	£ 1.99	£ 1,800.95	
26	11/11/2010	Leeds	North	Milkshake	Chocolate	225	£ 1.99	£ 447.75	
27					Chocolate Total			£ 4,071.54	
28	11/11/2010	Bath	South	Cold Drinks	Coca Cola	118	£ 0.85	£ 100.30	
29	11/11/2010	Bath	South	Cold Drinks	Coca Cola	322	£ 0.85	£ 273.70	
30	10/10/2011	Bath	South	Cold Drinks	Coca Cola	654	£ 0.85	£ 555.90	

Figure 172 – see all data

Click the Number 3 in the top left corner to see all the data.

be > your degree

Bring your talent and passion to a global organization at the forefront of business, technology and innovation. Discover how great you can be. Visit accenture.com/bookboon.

Be greater than.
consulting | technology | outsourcing

accenture
High performance. Delivered.

14.3 REMOVE SUBTOTALS

When you have finished working with subtotals or if you want to see the data totaled by different columns, remove the current subtotals. The data returns to a list and you are now free to re-sort it or get on with something else.

14.3.1 REMOVE SUBTOTALS

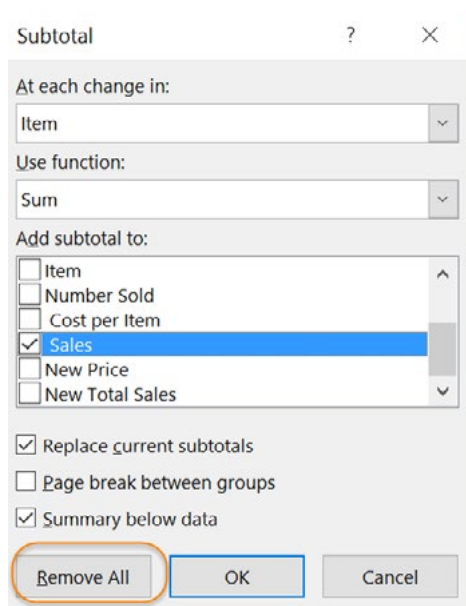


Figure 173 – remove when finished

1. Click inside the data – if you don't Excel will not recognize the subtotals and will not be able to remove them
2. Click on Subtotals
3. Click on Remove All

15 APPLY CONDITIONAL FORMATTING

15.1 CONDITIONAL FORMATTING

Conditional formatting is another one of those really handy tools. Format your data so that you can highlight all entries over a certain value, or below a certain value. Use fancy formatting to show data that matches your criteria. There are several types of Conditional Formatting to choose from.

- **Highlight Cells Rules** – pick this to show cells that match a particular number/text value/date.
- **Top/Bottom Rules** – pick this one, for example, to find the Top 10, Top 10%, Bottom 10 or Bottom 10%.
- **Data Bars** – these shade the cells based on top and bottom values, so the greater the value the more shading in the cell. You can pick the colour scheme to suit.
- **Colour Scales** – use Colour Scales to apply a scale from smallest to largest and set what each colour means.
- **Icon Sets** – Use Icon Sets to show crosses and ticks, traffic lights etc as symbols in the highlighted cells.

15.1.1 HIGHLIGHT CELLS RULES

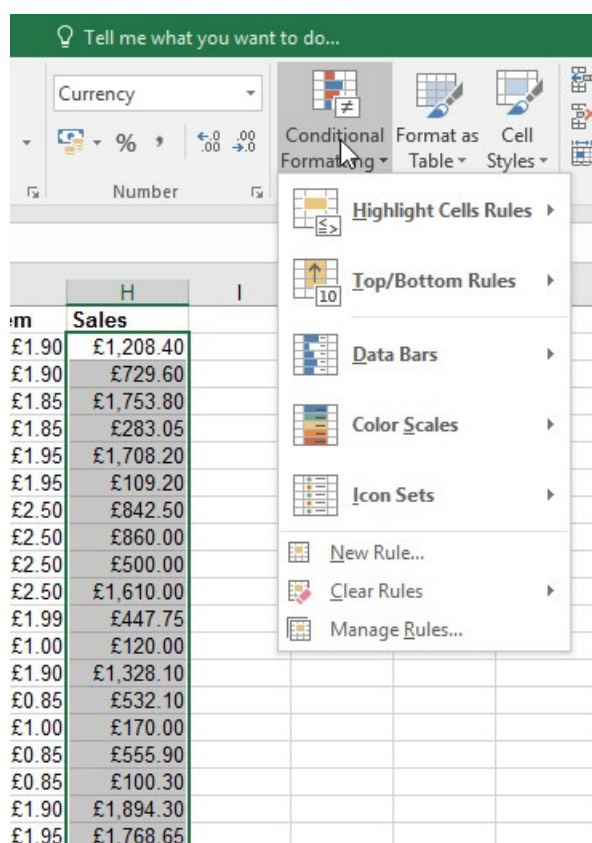


Figure 174 – apply a rule to highlight cells

1. Select the cells to which you want to apply the formatting
2. Click on Conditional Formatting
3. Click on Highlight Cells Rules
4. Choose Greater Than

15.1.2 ADD THE CRITERIA

D	E	F	G	H	I
Category	Item	Number Sold	Cost per Item	Sales	
Hot Drinks	Cappuccino	636	£1.90	£1,208.40	
Hot Drinks	Cappuccino	384	£1.90	£729.60	
Hot Drinks	Latte	948	£1.85	£1,753.80	
Hot Drinks	Latte	153	£1.85	£283.05	
Hot Drinks	Machiato	876	£1.95	£1,708.20	
Hot Drinks	Machiato	56	£1.95	£109.20	
Milkshake	Strawberry	337	£2.50	£842.50	
Milkshake	Strawberry	344	£2.50	£860.00	
Milkshake	Vanilla	200	£2.50	£500.00	
Milkshake	Vanilla	244	£2.50	£610.00	

Greater Than				
Format cells that are GREATER THAN:				
500	with	Light Red Fill with Dark Red Text	OK	Cancel

Hot Drinks	Cappuccino	997	£1.90	£1,894.30
Hot Drinks	Machiato	907	£1.95	£1,768.65
Hot Drinks	Latte	267	£1.85	£493.95
Hot Drinks	Americano	112	£1.90	£212.80
Milkshake	Strawberry	565	£2.50	£1,412.50
Milkshake	Strawberry	938	£2.50	£2,345.00
Milkshake	Vanilla	149	£2.50	£372.50
Milkshake	Chocolate	916	£1.99	£1,822.84
Cold Drinks	Coca Cola	492	£0.85	£418.20

Figure 175 – what criteria should it highlight?

1. Type in the criteria you want to match – in my example I am looking for cells where the value is greater than 500
2. Pick one of the formats – I have left it at the default format of Light Red Fill with Dark Red Text (you can pick a different one or create a custom format)
3. Click OK



What if you could build your future and create the future?

The innovation accelerator

One generation's transformation is the next's status quo. In the near future, people may soon think it's strange that devices ever had to be "plugged in." To obtain that status, there needs to be "The Shift".

.....Alcatel-Lucent 

www.alcatel-lucent.com/careers

15.1.3 REMOVE CONDITIONAL FORMATTING

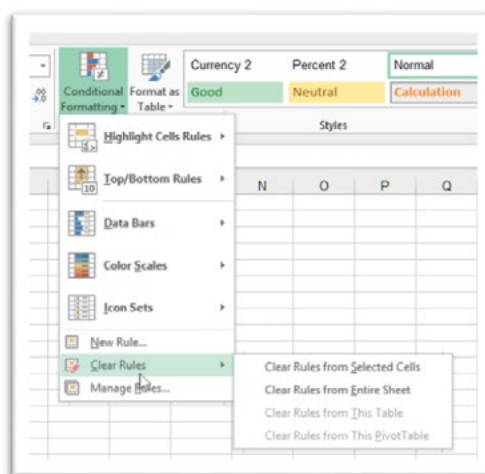


Figure 176 – clear conditional formatting when done

1. Highlight the cells with the formatting
2. Click Conditional Formatting
3. Select Clear Rules
4. Make a choice of Clear Rules from Selected Cells or Clear Rules from Entire Sheet

15.2 TOP AND BOTTOM RULES

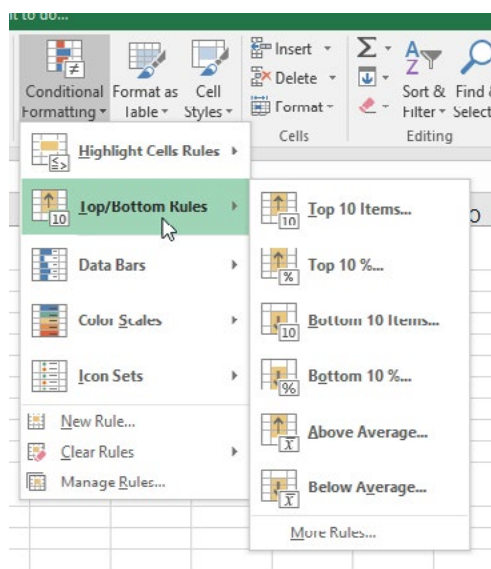


Figure 177 – top 10, bottom 10 etc

1. Select the cells
2. Click Conditional Formatting
3. Click on Top/Bottom Rules

15.2.1 ADD/PICK CRITERIA

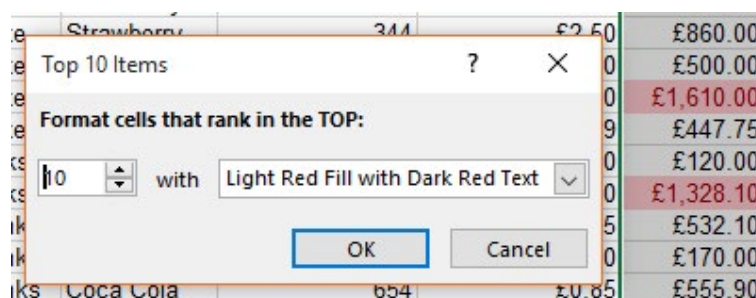


Figure 178 – set criteria

I picked Top 10 Items
Click OK

The Wake

the only emission we want to leave behind

Low-speed Engines Medium-speed Engines Turbochargers Propellers Propulsion Packages PrimeServ

The design of eco-friendly marine power and propulsion solutions is crucial for MAN Diesel & Turbo. Power competencies are offered with the world's largest engine programme – having outputs spanning from 450 to 87,220 kW per engine. Get up front! Find out more at www.mandieselturbo.com

Engineering the Future – since 1758.

MAN Diesel & Turbo



	G	H
	Cost per Item	Sales
5	£1.90	£1,208.40
4	£1.90	£729.60
3	£1.85	£1,753.80
3	£1.85	£283.05
5	£1.95	£1,708.20
5	£1.95	£109.20
7	£2.50	£842.50
4	£2.50	£860.00
0	£2.50	£500.00
4	£2.50	£1,610.00
5	£1.99	£447.75
0	£1.00	£120.00
9	£1.90	£1,328.10
5	£0.85	£532.10
0	£1.00	£170.00
4	£0.85	£555.90
3	£0.85	£100.30
7	£1.90	£1,894.30
7	£1.95	£1,768.65
7	£1.85	£493.95
2	£1.90	£212.80
5	£2.50	£1,412.50
3	£2.50	£2,345.00
9	£2.50	£372.50
5	£1.99	£1,822.84
2	£0.85	£418.20
5	£1.90	£1,026.00

Figure 179 – top 10 values formatted

In this case, the Top 10 values have been formatted.

Try out the other options in the list and see what results you get.

15.3 DATA BARS

Data bars will shade the cells according to their values.

15.3.1 APPLY DATA BARS

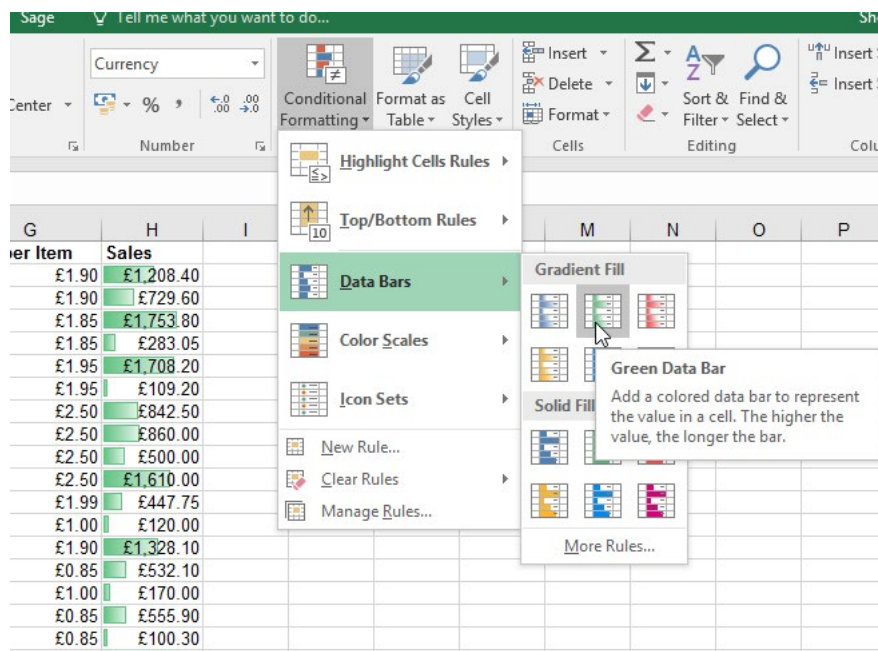


Figure 180 – data bars fill the cells with colour

1. Select the cells you want to use
2. Click Conditional Formatting
3. Click Data Bars
4. Select the colour scheme to suit

You will see the colour applied to the selected cells.

15.3.2 REMOVE CONDITIONAL FORMATTING

1. Select the cells with the formatting
2. Click Conditional Formatting
3. Click Clear Rules
4. Select Clear from Selected Cells or Clear from Entire Sheet

15.4 COLOUR SCALES

Colour scales apply shading to cells using a predefined scale of colour from hot to cold or within a colour palette.

15.4.1 APPLY COLOUR SCALES

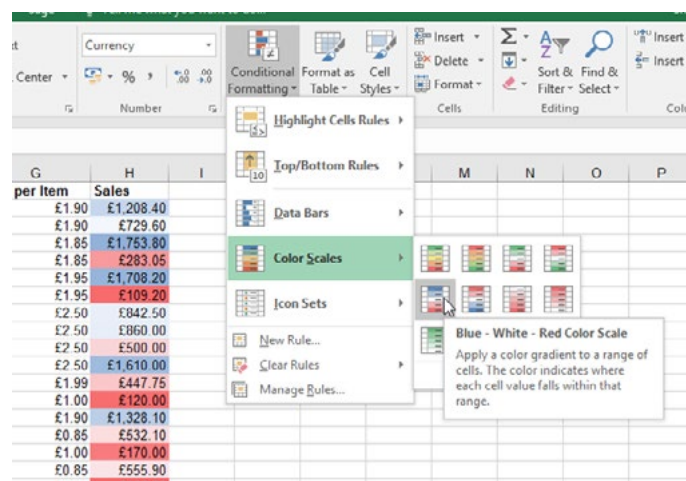


Figure 181 – colour scales are great for presentations

1. Select the data to which you want to apply the format
2. Click Conditional Formatting
3. Click Colour Scales
4. Select the colour scale you want to use

The format will be applied.

15.4.2 REMOVE CONDITIONAL FORMATTING

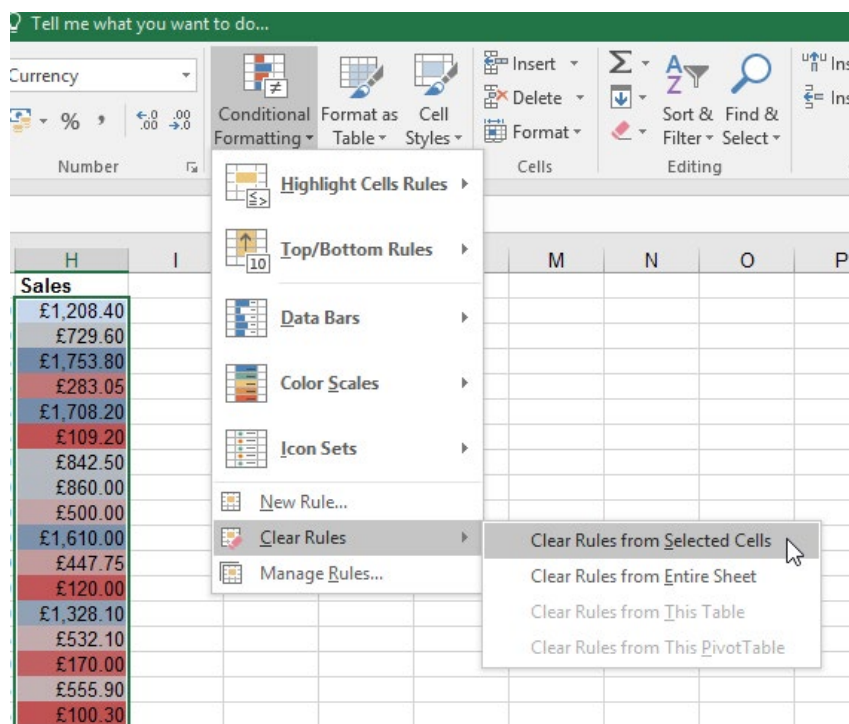


Figure 182 – clear conditional formats

1. Select the cells from which you want to remove Conditional Formatting
2. Click Conditional Formatting
3. Click on Clear Rules
4. Choose whether to Clear Rules from Selected Cells or Clear Rules from Entire Sheet

15.5 ICON SETS

Icon sets can be used to really jazz up your data. Use them when you need to show a visual image – useful when the data is added to a presentation.

15.5.1 APPLY ICON SETS

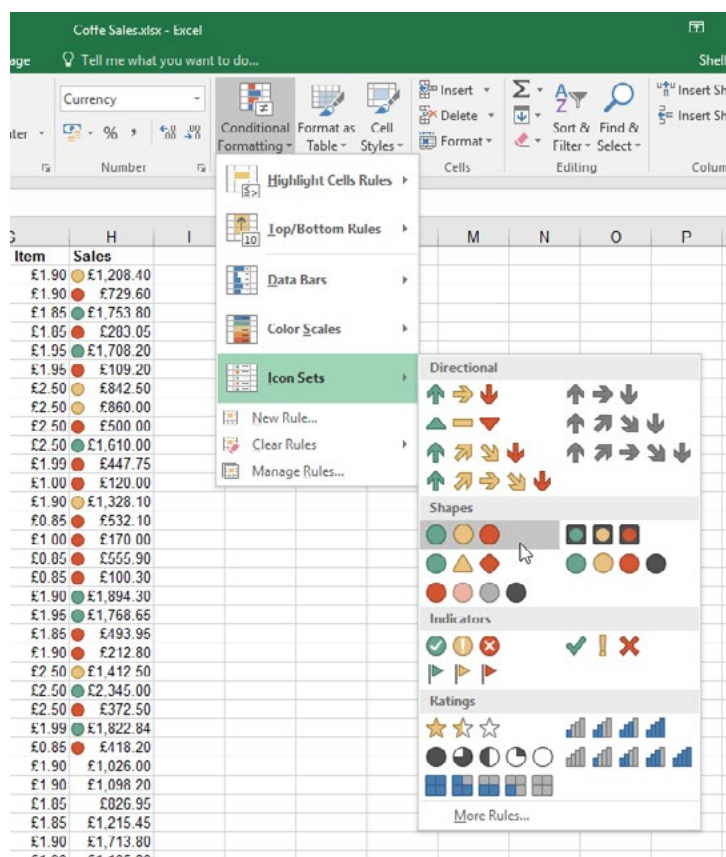


Figure 183 – icon sets add fun to a dull spreadsheet

1. Select the data to which you want to apply Conditional Formatting
2. Click Conditional Formatting
3. Click on Icon Sets
4. Pick the Icon Set you want to use

You may notice hash symbols in some of the cells – the reason for this is that the column is not wide enough to display both the values and the icon. To rectify simply re size the column width.

15.5.2 SHOW THE ICON ONLY

There may be times such as when adding the data to a presentation, or showing it to your boss, that you want to hide the numbers and just show the icons.

In order to do this, you will need to edit the rule.

15.5.3 EDIT THE RULE

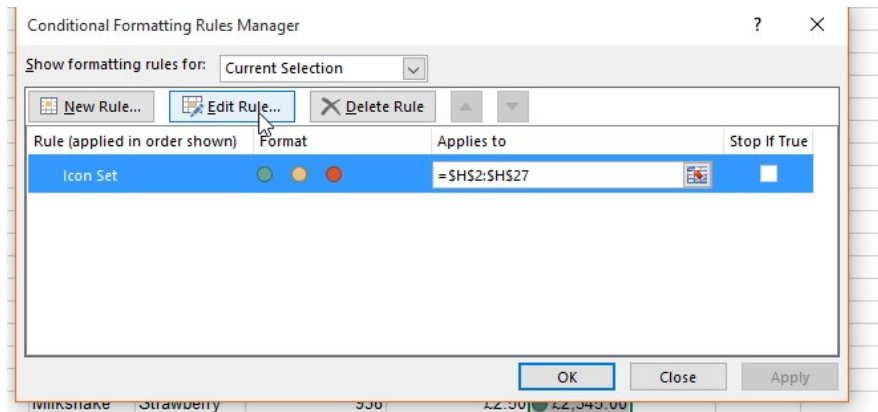


Figure 184 – edit the rule here

1. Select the data with the rule applied
2. Click Conditional Formatting
3. Click Manage Rules (near the bottom)
4. In the dialog box click on the rule you want to Edit
5. Click Edit Rule

bookboon.com

Corporate eLibrary

See our Business Solutions for employee learning

[Click here](#)



Download free eBooks at bookboon.com

[Click on the ad to read more](#)

15.5.4 EDIT FORMATTING RULE DIALOG BOX

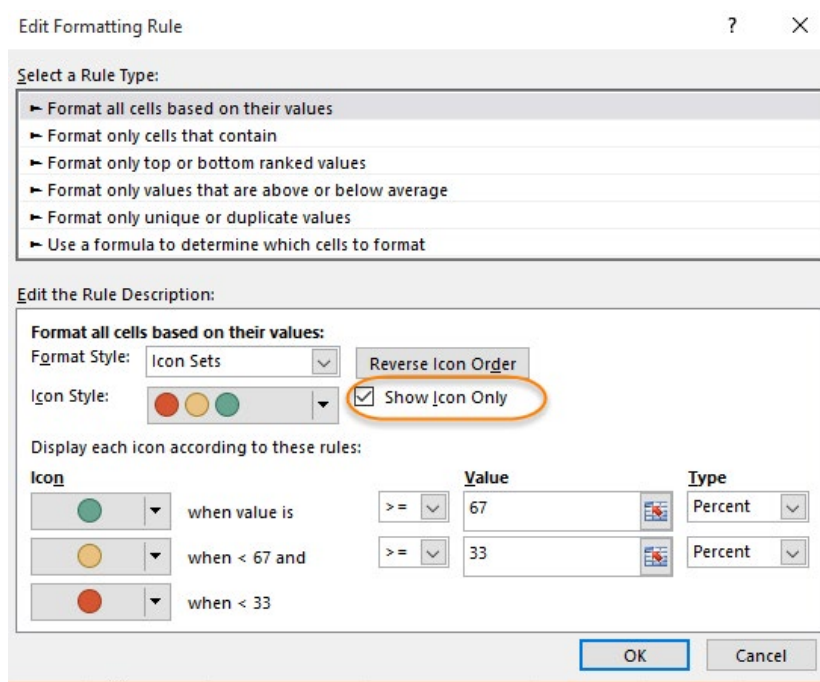


Figure 185 – change elements of the rule

This is where you can change different elements of the rule such as changing the icons used or how they work.

1. For our purposes – check the box Show Icon Only
2. Click OK
3. Then click OK again

E	F	G	H
Item	Number Sold	Cost per Item	Sales
Cappuccino	636	£1.90	
Cappuccino	384	£1.90	
Latte	948	£1.85	
Latte	153	£1.85	
Machiato	876	£1.95	
Machiato	56	£1.95	
Strawberry	337	£2.50	
Strawberry	344	£2.50	
Vanilla	200	£2.50	
Vanilla	644	£2.50	
Chocolate	225	£1.99	
Americano	120	£1.00	
Americano	699	£1.90	
Orange Juice	626	£0.85	
Apple Juice	170	£1.00	
Coca Cola	654	£0.85	
Coca Cola	118	£0.85	
Cappuccino	997	£1.90	
Machiato	907	£1.95	
Latte	267	£1.85	
Americano	112	£1.90	
Strawberry	565	£2.50	
Strawberry	938	£2.50	
Vanilla	149	£2.50	
Chocolate	916	£1.99	

Figure 186 – here are my icons

Back in the spreadsheet the data has gone and only the icons are showing.

15.6 CLEAR CONDITIONAL FORMATTING

When you have finished presenting your data, you may want to remove the conditional formatting. Here is how.

15.6.1 REMOVE CONDITIONAL FORMATTING

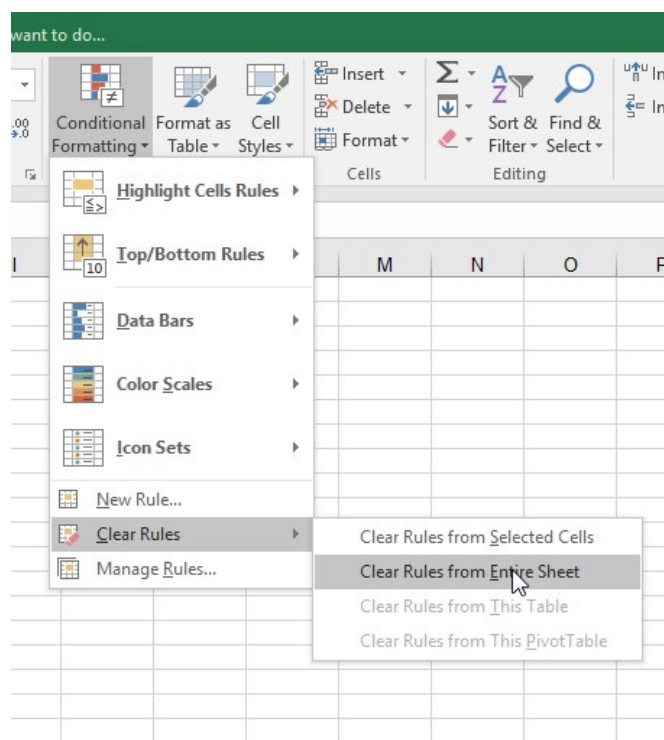


Figure 187 – clear rules from selection or entire sheet

Struggling to get interviews?

Professional CV consulting & writing assistance from leading job experts in the UK.

Visit site





Take a short-cut to your next job!
Improve your interview success rate by 70%.



TheCVagency
Visit thecvagency.co.uk for more info.

1. Select the data with the formatting
2. Click on Conditional Formatting
3. Click on Clear Rules
4. Choose from Clear Rules from Selected Cells or Clear Rules from Entire Sheet

15.7 USE A FORMULA TO CONTROL CONDITIONAL FORMATTING

To add conditional formatting to show a range of colours – I have a list of rooms names Red Yellow and Green and I would like the fill colour to change according to the name of the room. This is handy if you need to keep a visual track of room bookings for example.

15.7.1 CHANGE THE COLOUR FILL



The image shows an Excel spreadsheet with two columns, A and B. Column A contains a list of room names: Room, Red, Green, Yellow, Green, Red, Yellow, Yellow, Green, Red. The cells are color-coded: Red for 'Red', Green for 'Green', and Yellow for 'Yellow'. The text 'Room' is in blue. The spreadsheet shows rows 1 through 11, with row 12 partially visible at the bottom.

	A	B
1	Room	
2	Red	
3	Green	
4	Yellow	
5	Green	
6	Red	
7	Yellow	
8	Yellow	
9	Green	
10	Red	
11		
12		

Figure 188 – use a formula in conditional formatting

I applied three formats to the cells one on top of the other.

If A2:A10 contain the word Red apply Red formatting

If A2:A10 contain the word Yello apply Yellow formatting

If A2:A10 contain the word Green apply Green formatting

15.7.2 APPLY THE FIRST CONDITION

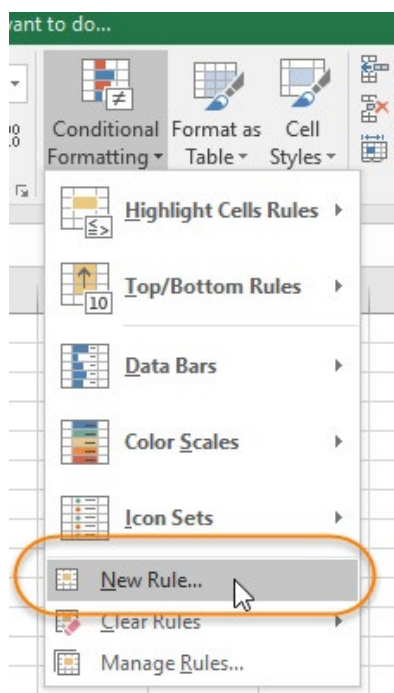


Figure 189 – set first condition

Select the cells to which you want to apply the conditional formatting and then click on Conditional Formatting and select New Rule.

15.7.3 FORMAT CELLS THAT CONTAIN

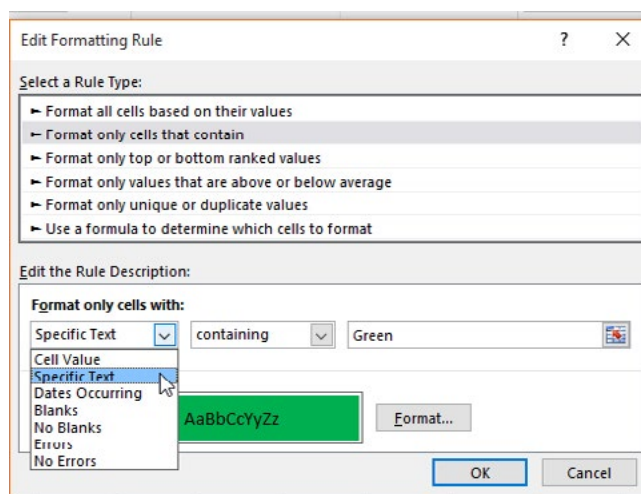


Figure 190 – set the condition

In my example, I selected Format only cells that contain
Then picked Specific Text from the drop down list
Added the word Green in this case
Set the format by clicking Format and going to the Fill tab to pick the colour.

15.7.4 REPEAT FOR THE OTHER CONDITIONS

Go back and add the other two rules to the selected cells. Remember to change the criteria for each accordingly.



- The number 1 MOOC for Primary Education
- Free Digital Learning for Children 5-12
- 15 Million Children Reached

About e-Learning for Kids Established in 2004, e-Learning for Kids is a global nonprofit foundation dedicated to fun and free learning on the Internet for children ages 5 - 12 with courses in math, science, language arts, computers, health and environmental skills. Since 2005, more than 15 million children in over 190 countries have benefitted from eLessons provided by EFK! An all-volunteer staff consists of education and e-learning experts and business professionals from around the world committed to making difference. eLearning for Kids is actively seeking funding, volunteers, sponsors and courseware developers; get involved! For more information, please visit www.e-learningforkids.org.

16 SPARKLINE CHARTS

16.1 SPARKLINE LINE CHART

Spark lines are small charts of the data that are displayed in one cell. They print with the worksheet so they are always visible. Spark lines can help you see a picture of how your data is performing.

I have a spreadsheet with Average Temperatures for the UK in each month for the years 2001 to 2016. I now want to see some charts to give me a visual of the numbers.

16.1.1 DATA WITHOUT SPARK LINES

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Calendar month	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	
2															
3	January	3.9	6.1	4.9	5.5	6.4	4.5	6.9	6.4	3.3	1.5	3.9	5.5	3.9	
4	February	4.8	7.2	4.5	5.6	4.5	4.2	6.0	5.4	4.4	2.8	6.3	4.4	3.4	
5	March	5.5	7.6	7.8	6.6	7.2	5.0	7.1	6.1	6.9	6.1	6.8	8.5	3.0	
6	April	7.8	9.4	9.9	9.6	8.8	8.5	11.2	7.9	9.7	8.9	11.7	7.3	7.4	
7	May	12.4	11.9	12.1	12.1	11.2	11.8	11.9	13.0	11.9	10.8	12.3	11.6	10.6	
8	June	14.0	14.3	15.9	15.3	15.4	15.8	14.9	14.0	14.8	15.3	14.0	13.6	13.9	
9	July	16.7	15.9	17.5	15.7	16.6	19.3	15.2	16.3	16.2	17.0	15.3	15.4	18.2	
10	August	16.7	17.0	18.0	17.4	16.1	16.2	15.5	16.2	16.6	15.3	15.4	16.6	16.9	
11	September	14.1	14.5	14.3	14.8	15.0	16.4	13.9	13.5	14.2	14.0	15.1	13.2	13.9	
12	October	13.6	10.3	9.0	10.6	13.0	12.8	11.0	9.8	11.5	10.4	12.4	9.5	12.5	
13	November	7.9	8.8	8.4	8.0	6.4	8.1	7.5	7.0	8.4	5.4	9.5	6.7	6.4	
14	December	4.1	6.0	5.0	5.7	4.8	6.4	5.0	3.7	3.1	-0.3	5.9	4.8	6.4	
15		10.1	10.7	10.6	10.6	10.5	10.7	10.5	9.9	10.1	8.9	10.7	9.8	9.7	

Figure 191 – data without sparklines

I am going to add the spark lines in a new column in between the month and the first column of numbers. So the first job is to insert a new column between Column A and Column B.

16.1.2 CREATE A SPARK LINE – LINE STYLE

I have added the empty column and it is the new Column B.

1. Select the data that will be shown in the spark lines
2. Click on the Insert Ribbon Tab
3. In the Spark Lines Group click on the type of spark line you want to create – in this example I will select Line

16.1.3 SELECT THE LOCATION FOR THE SPARK LINES

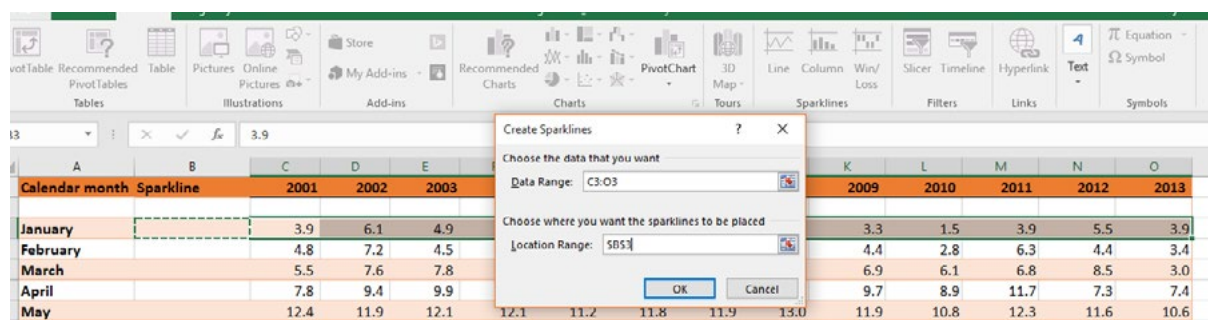


Figure 192 – set location for the sparkline

1. In the dialog box that pops up, confirm that the data range is correct – it should be as you selected it!
2. Then select the range of cells where the spark lines will be placed. You can click the small box to the right of the Location Range to collapse the box and enable you to select on the spreadsheet.
Or click into the cell where you wish to have the sparkline appear.
3. Click OK

16.1.4 SPARK LINES APPEAR

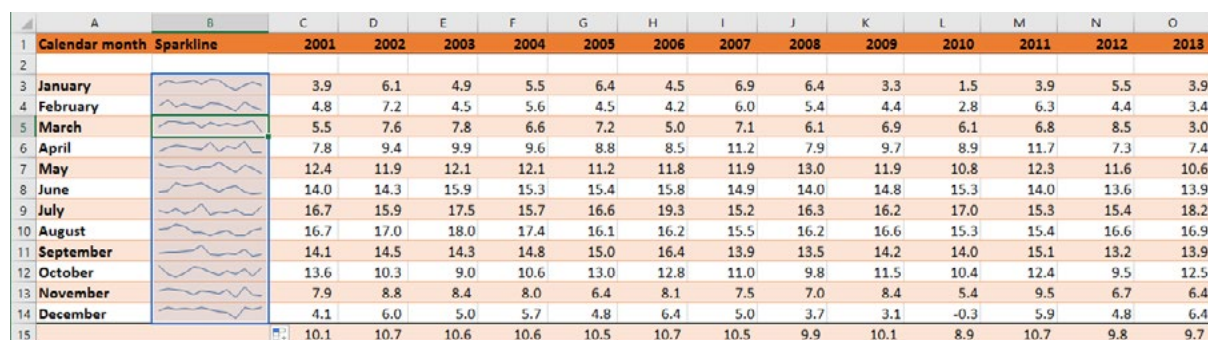


Figure 193 – sparklines appear!

Here you can see the spark lines in Column B. I used Autofill to copy the first one to the rest of the column.

It is possible to edit the spark lines to make them a different colour, show High, Low, First, Last Points and set the marker colour.

16.1.5 CHANGE SPARK LINE STYLE

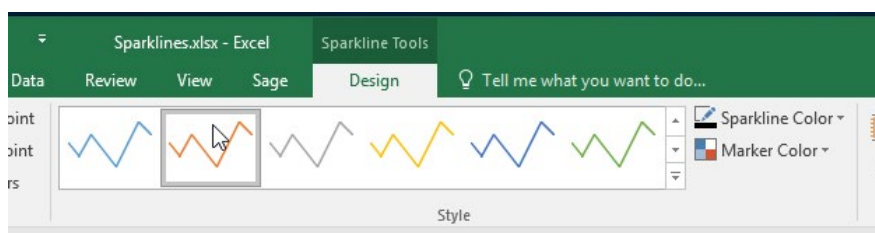


Figure 194 – change the style

1. Click into the spark lines on the spreadsheet
2. Select a different style from the Style Box



Are you working in academia, research or science? And have you ever thought about working and moving to the Netherlands?

Arriving

33

Living

50

Studying

51

Working

101

Research

50

Factcards.nl offers all the **information** that you need if you wish to proceed your **career** in the **Netherlands**.

The information is ordered in the categories arriving, living, studying, working and research in the Netherlands and it is freely and easily accessible from your smartphone or desktop.

VISIT FACTCARDS.NL

16.1.6 SHOW MARKERS ON SPARK LINES

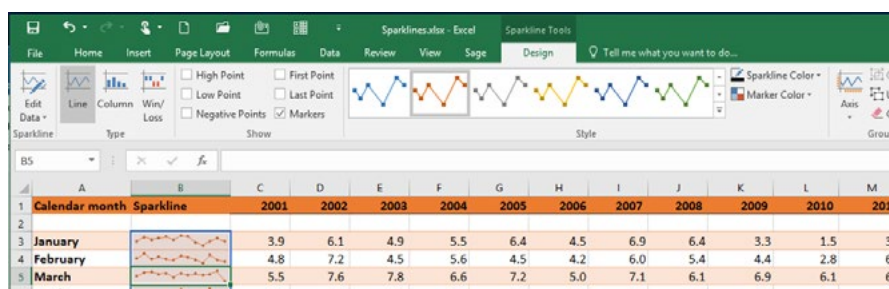


Figure 195 – add markers

To show markers, tick the boxes in the Show Group for the markers you want to see, a sample will be shown in the Style Group so you can see what it looks like. It is also added to the actual Sparklines on the spreadsheet too.

16.1.7 EDIT MARKERS

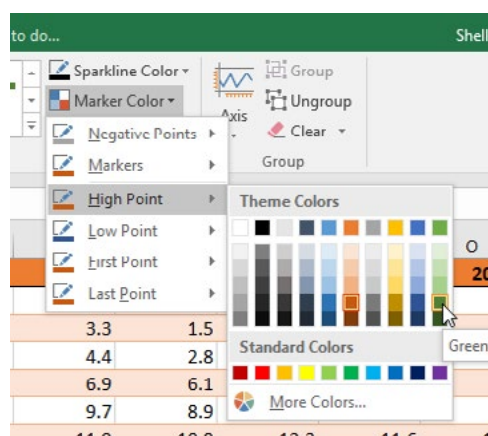


Figure 196 – edit the markers

To change the colour of the markers so that they show up on the spark line easily:

1. Click on Marker Colour
2. Select the Marker to change
3. Choose a colour

16.2 COLUMN SPARK LINES

Here is the same data with column spark lines instead of line. Create them exactly the same way, just click on Column Spark line.

16.2.1 COLUMN SPARK LINE

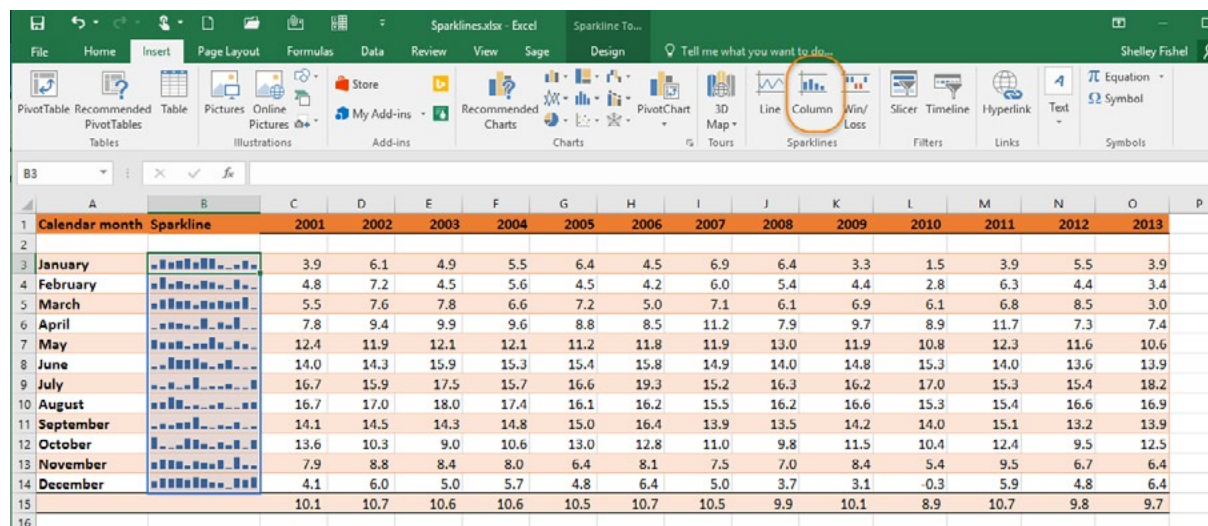


Figure 197 – sparklines as columns

Edit the column spark line in exactly the same way as the line spark line.

16.3 CREATING A WIN/LOSS SPARK LINE CHART

Setting up a win/loss spark line is a little different. The data sets upon which it is based consist of -1, 1, and 0 for no line. So your first job is to set up the data.

I have picked July and August temperatures and put a -1 in the cell where one month was lower and a 1 in the cell in which the corresponding month was higher. So in 2001 July had a lower average temperature than August.

16.3.1 DATA FOR WIN/LOSS SPARK LINE

July	-1	-1	1	-1	-1	1	-1	1	-1	1	1	-1	1	0
August	1	1	-1	-1	1	-1	1	-1	1	-1	-1	-1	1	1

Figure 198 – set the data first

Negative numbers signify a loss and positive numbers a win. If you don't want to show anything for a particular column put a 0 in there.

16.3.2 WIN/LOSS SPARKLINE

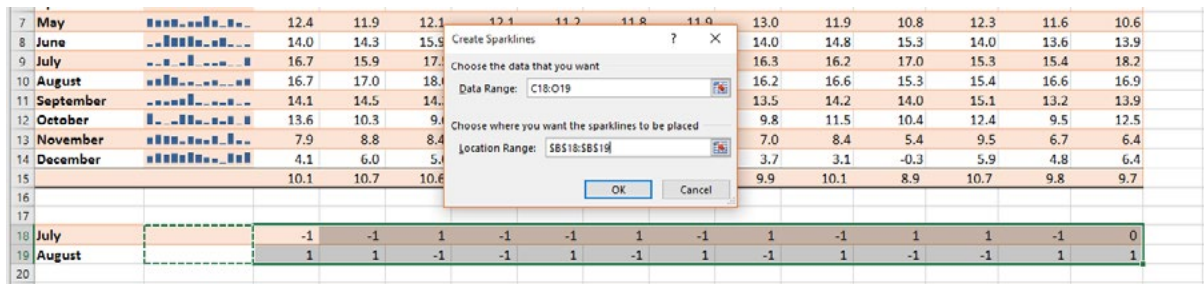


Figure 199 – win loss sparklines are a bit different

The steps are the same:

1. Select the data for the Spark Line Chart
2. Click on the Insert Ribbon Tab
3. Click on Win/Loss Spark Line Icon
4. Complete the dialog box including where you want the spark lines to be placed
5. Click OK

Brain power

By 2020, wind could provide one-tenth of our planet's electricity needs. Already today, SKF's innovative know-how is crucial to running a large proportion of the world's wind turbines.

Up to 25 % of the generating costs relate to maintenance. These can be reduced dramatically thanks to our systems for on-line condition monitoring and automatic lubrication. We help make it more economical to create cleaner, cheaper energy out of thin air.

By sharing our experience, expertise, and creativity, industries can boost performance beyond expectations. Therefore we need the best employees who can meet this challenge!

The Power of Knowledge Engineering

Plug into The Power of Knowledge Engineering.
Visit us at www.skf.com/knowledge

16.3.3 SPARK LINES APPEAR

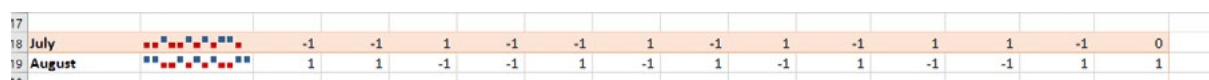


Figure 200 – here they are

In this image, positive numbers are showing up in Blue and negative in Red.

16.4 REMOVE A SPARK LINE CHART

You may want to remove the spark lines from your spreadsheet once they have served their purpose.

16.4.1 REMOVE A SPARK LINE

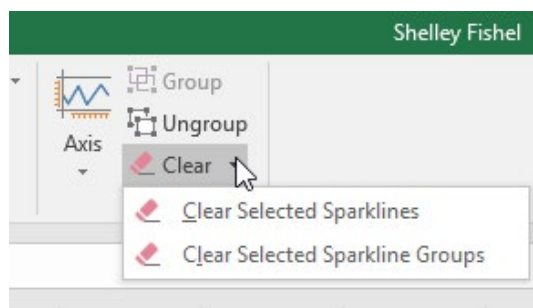


Figure 201 – clear a sparkline

1. Click in to the cells where the spark lines appear
2. Click on Clear
3. Make your selection based on whether you are removing a single spark line or a whole group.

17 TEXT FUNCTIONS

17.1 TEXT FUNCTIONS – AN INTRODUCTION

Text functions in Excel allow you to change the formatting of text, join text up, split text down and lots of other things. In this chapter are some of the text functions that are particularly useful when working with data.

Imagine you have imported data to Excel from another source and it has come in with leading or trailing spaces, use the Trim function to remove them.

You have a volunteer at your organization whose job it is to input names and addresses from a written list into a spreadsheet. They forget to use a first capital letter on the name field, use Proper to rectify this.

If the Post Code should all be in UPPER CASE and has been typed in lower case or a MiXture – you can use UPPER to make all text in Upper Case and the Lower function will turn text written in UPPER case to lowercase.

The Mid, Left and Right Functions, allow you to pull out a specified number of characters from a text entry from the left, the right or the middle of the text.

Working with a database, you may have a First Name field and a Last Name field, however when writing to your list or creating labels for an event, you require a Full Name field. Use the Concatenate Function to join two fields together.

17.2 CONCATENATE

If you keep your contact list in an Excel spreadsheet you may well have it listed in columns such as First Name Surname etc. You really need a column called FullName and Excel can populate this for you using the Concatenate function.

17.2.1 DATA READY TO JOIN UP

	A	B	C	D	E
1	First Name	Last Name	FullName	Date Joined	Email Address
2	John	Smith		12/01/2014	john@smith.com
3	Diane	Lister		12/01/2014	diane@lister.com
4	Lisa	Jones		13/01/2014	lisa.jones@theittrainingsurgery.com
5	Jessica	Rabbit		13/01/2014	jessica@disney.com
6	Bugs	Bunny		13/01/2014	bugs@bunny.com
7					

Figure 202 – set the column up first

I have added the FullName field to Column C

	A	B	C	D	E
1	First Name	Last Name	FullName	Date Joined	Email Address
2	John	Smith	=con	12/01/2014	john@smith.com
3	Diane	Lister			diane@lister.com
4	Lisa	Jones			lisa.jones@theittrainingsurgery.com
5	Jessica	Rabbit			jessica@disney.com
6	Bugs	Bunny			bugs@bunny.com
7					

Figure 203 – start the function

Cynthia | AXA Graduate



AXA Global Graduate Program

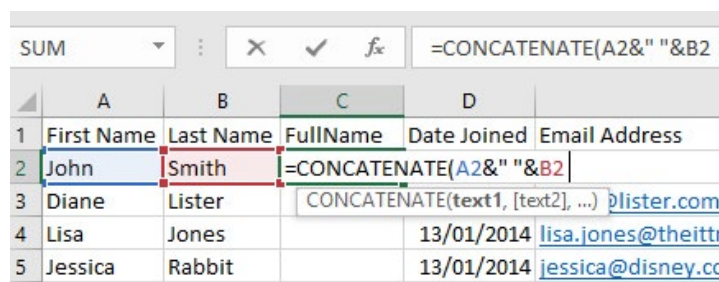
Find out more and apply

redefining / standards 

As this is a function:

1. Type an = sign
2. Start to type Concatenate – Excel will pop up a helpful tip on screen, double click with the mouse over Concatenate (to save typing it all in !)

17.2.2 BUILD THE FUNCTION



	A	B	C	D	E
1	First Name	Last Name	FullName	Date Joined	Email Address
2	John	Smith	=CONCATENATE(A2&" "&B2)		
3	Diane	Lister	CONCATENATE(text1, [text2], ...)		dlist@lister.com
4	Lisa	Jones		13/01/2014	lisa.jones@theit
5	Jessica	Rabbit		13/01/2014	jessica@disney.cc

Figure 204 – build the function

Inside the brackets you must add instructions to tell Excel what to do.

1. Click on the first cell to add – this is the First Name cell A2
2. Then type an & – this tells Excel we are going to add something to cell A2
3. Now I really want a space in between the First Name and Last Name so I have to let Excel know this – type “space bar” a space surrounded by double quotation marks. Whenever text goes inside a formula like this it goes inside double quotation marks.
4. Then type another & – to add something else
5. Finally click on the second cell reference -B2 in this example
6. Close the brackets
7. Press Enter

This is what you see in the formula bar =CONCATENATE(A2&" "&B2)

Next you can use auto fill to copy it to the rest of the cells in the column.

17.2.3 COPY TO THE REST OF THE CELLS

	A	B	C	D
1	First Name	Last Name	FullName	
2	John	Smith	John Smith	
3	Diane	Lister	Diane Lister	
4	Lisa	Jones	Lisa Jones	
5	Jessica	Rabbit	Jessica Rabbit	
6	Bugs	Bunny	Bugs Bunny	
7				

Figure 205 – copy it down

Now I have a full list of FullName.

17.3 TRIM

Remove leading or trailing spaces.

17.3.1 DATA WITH LEADING AND TRAILING SPACES

	A
1	Jane
2	Helen
3	Sam
4	Simon
5	Jerry
6	Gary
7	Mike
8	

Figure 206 – data all wrong

In this list you can clearly see that there are some leading spaces and if I were to sort this list anything with a leading space would be at the top of the list so not a good sort.

17.3.2 TRIM FUNCTION

A	B	C	D
Import	Trim	Value	
Helen	=TRIM(A2)		
Sam	TRIM(text)		
Simon			
Jerry			

Figure 207 – type in the formula

1. In the column next to the one to trim
2. Type an = sign
3. Then start to type Trim – a label will pop up which you can double click to select
4. Click on the cell to trim – in this case A2
5. Press Enter

TURN TO THE EXPERTS FOR SUBSCRIPTION CONSULTANCY

Subscribe is one of the leading companies in Europe when it comes to innovation and business development within subscription businesses.

We innovate new subscription business models or improve existing ones. We do business reviews of existing subscription businesses and we develop acquisition and retention strategies.

Learn more at [linkedin.com/company/subscribe](https://www.linkedin.com/company/subscribe) or contact Managing Director Morten Suhr Hansen at mha@subscribe.dk

SUBSCRIBE - to the future

17.3.3 COPY TO THE REST OF THE COLUMN

	A	B	C
1	Import	Trim	Value
2	Helen	Helen	
3	Sam	Sam	
4	Simon	Simon	
5	Jerry	Jerry	
6	Gary	Gary	
7	Mike	Mike	
8			

Figure 208 – copy down

You can now use auto fill to copy this formula to the rest of the cells. Note that the leading spaces have gone and everything lines up.

However there is one more step to make sure that the data is nice and clean. I want to remove the formula and keep just the results. I will use Paste Special to do this.

	A	B	C	D	E	F
1	Import	Trim	Value			
2	Helen	Helen	Helen			
3	Sam	Sam	Sam			
4	Simon	Simon	Simon			
5	Jerry	Jerry	Jerry			
6	Gary	Gary	Gary			
7	Mike	Mike	Mike			
8						
9						
10						
11						

Figure 209 – Paste Special to the rescue

1. Select all the cells
2. Right click and Copy
3. Then Click into the first cell where you would like the results to show up
4. Right Click and choose Values from the Paste Options – this pastes the result not the formula
5. Press Enter. As the whole range was selected all the values are pasted.

You can now cut and paste the values into the original cells keeping the data nice and clean.

17.4 UPPER

Upper case converts text to Upper Case. Simple!

17.4.1 THE UPPER FUNCTION

	C	D
	Value	
	Helen	=upper(C2)
	Sam	

Figure 210 – convert text to Upper Case

1. Click into the cell which will hold the changed text
2. Type an = sign
3. Type Upper
4. In the brackets click on the cell with the wrongly formatted text
5. Press Enter

See your text change to upper case. Now use auto fill to copy to the rest of the cells.

17.5 LOWER

Lower case is handy if you forget to turn off the Caps Lock key. It turns all text to Lower Case.

17.5.1 LOWER FUNCTION

	A	B	C	D	E	F
1	Import	Trim	Value	Upper	Lower	
2	Helen	Helen	Helen	HELEN	=LOWER(D2)	
3	Sam	Sam	Sam	SAM	s LOWER(text)	
4	Simon	Simon	Simon	SIMON	simon	
5	Jerry	Jerry	Jerry	JERRY	jerry	
6	Gary	Gary	Gary	GARY	gary	
7	Mike	Mike	Mike	MIKE	mike	

Figure 211 – convert text to lower case

1. Click into the cell to hold the newly formatted text
2. Type an = sign
3. Type Lower
4. Inside the brackets click on the cell to change (C2 in my example)
5. Press Enter

Now use auto fill to copy it to the rest of the cells in the range.

17.6 PROPER

If you left the Caps Lock key on, and want to reformat text to have an initial capital letter, then use Proper. It works on all lowercase too.

17.6.1 PROPER FUNCTION

E	F	G
Lower	Proper	
helen	=PROPER(E2)	
sam	S PROPER(text)	
simon	Simon	
jerry	Jerry	
gary	Gary	
mike	Mike	

Figure 212 – convert to first capital letter

1. Click into the cell to hold the newly formatted text
2. Type an = sign

Losing track of your leads?

Bookboon leads the way

Get help to increase the lead generation on your own website. Ask the experts.



Interested in how we can help you?
email ban@bookboon.com 

3. Type Proper
4. Inside the brackets click on the cell to change (E2 in my example)
5. Press Enter

Now use auto fill to copy it to the rest of the cells in the range.

17.7 RIGHT

The Right function allows you to pick up and extract as many characters from the right of a cell as you specify. So if you want to extract the last 4 letters, it would be =Right(F2,4)

17.7.1 RIGHT FUNTION

E	F	G	H
er	Proper	Right	Left
en	Helen	=RIGHT(F2,4)	
	Sam	S RIGHT(text, [nu	
on	Simon	imon	
r	Jerry	erry	
	Gary	Gary	
e	Mike	Mike	

Figure 213 – pick characters from the right

1. Click into the cell where you want the answer to display
2. Type an = sign
3. Type Right(
4. Click on the cell to extract from (F2 in this example)
5. Type a ,(comma)
6. Type the number of characters to extract (in our case 4)
7. Press Enter

17.8 LEFT

The Left function allows you to extract a number of characters that you specify from a cell.

17.8.1 LEFT FUNCTION

F	G	H	I	J
Proper	Right	Left		
Helen	elen	=LEFT(F2,4)		
Sam	Sam	S LEFT(text, [num_chars])		
Simon	imon	Simo		
Jerry	erry	Jerr		
Gary	Gary	Gary		
Mike	Mike	Mike		

Figure 214 – extract number of characters from the left

1. Click into the cell where you want the answer to display
2. Type an = sign
3. Type Left(
4. Click on the cell to extract from (F2 in this example)
5. Type a ,(comma)
6. Type the number of characters to extract (in our case 4)
7. Press Rnter

17.9 MID

The Mid function picks up a number of characters that you specify from the middle of a cell. You tell the function where to start from and how many characters you want to extract.

17.9.1 MID

F	G	H	I	J	K
Proper	Right	Left	Mid		
Helen	elen	Hele	=MID(F2,2,3)		
Sam	Sam	Sam	a MID(text, start_num, num_chars)		
Simon	imon	Simo	imo		
Jerry	erry	Jerr	err		
Gary	Gary	Gary	ary		

Figure 215 – extract from the middle

1. Click into the cell where you want the answer to display
2. Type =Mid(
3. Click on the Cell you want to extract from (F2)
4. Type a comma
5. Type where Excel should start from (in this example from the second character)
6. Type a comma
7. Type the number of characters to extract (3 in our case)
8. Press Enter

18 QUICK ANALYSIS

18.1 QUICK ANALYSIS

Quick analysis arrived on the scene in Excel 2013 and is still here. Quick analysis looks at the data you have selected and offers you various options to analyze and summarize the data. Once you get used to using it, you will wonder what you did before!

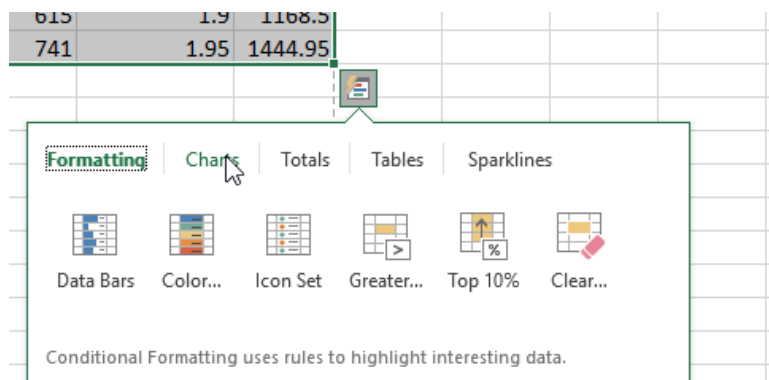


Figure 216 – various quick analysis options

"I studied English for 16 years but...
...I finally learned to speak it in just six lessons"

Jane, Chinese architect

ENGLISH OUT THERE

Click to hear me talking before and after my unique course download

There are five main types of analysis and within each type you will be offered more options.

Formatting – here you can find various conditional formats – Excel will guess which are best suited to the data selected

Charts – A selection of charts will be suggested

Totals – Various calculations

Tables – A selection of tables will be found here

Spark lines – Excel will offer you spark lines to be added to adjacent cells

18.2 QUICK ANALYSIS FORMATTING

18.2.1 FORMATTING

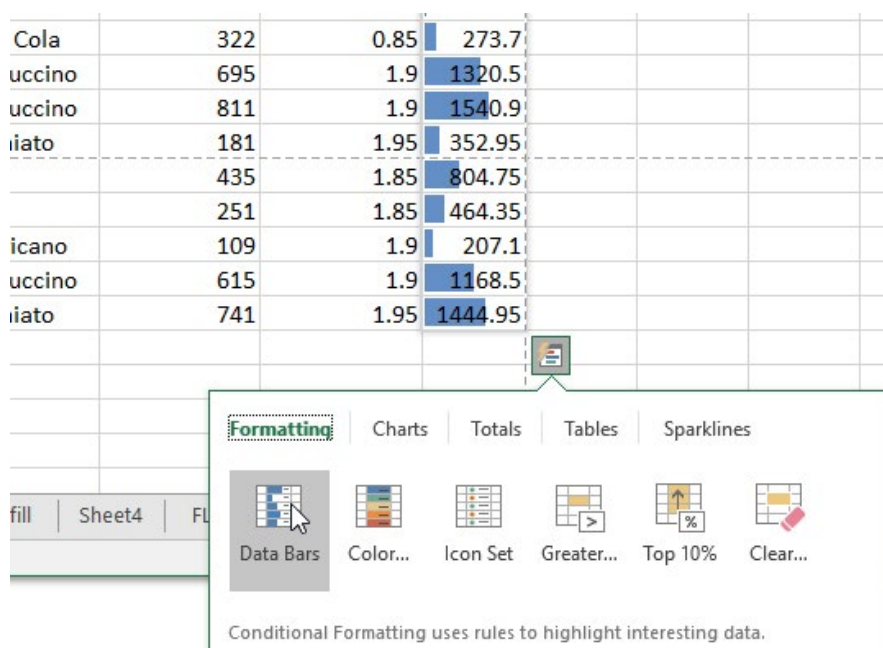


Figure 217 – format data quickly

1. Click the Quick Analysis Smart Tag
2. Click on Formatting
3. Choose from the formats offered – Excel will preview the chosen format on the selected data so you can flip between them before making a decision

18.3 QUICK ANALYSIS TOTALS

With the totals quick analysis you are offered a selection of functions that can be performed on the data. Choose whether to add them underneath the data or in a column to the right.

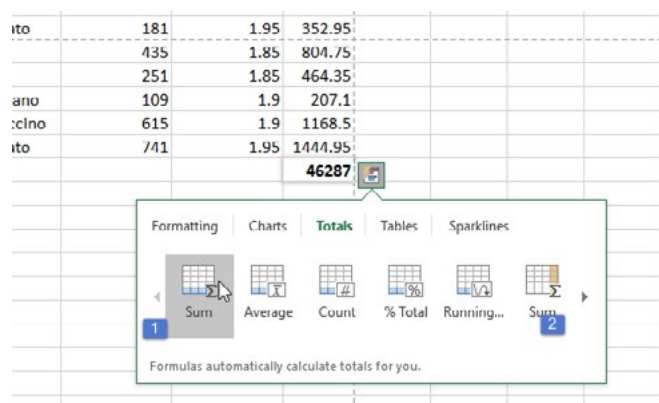


Figure 218 – quick summaries

1. Select the data
2. Click the Quick Analysis Smart Tag
3. Click on Totals
4. Choose the type of total you want to add – Here I selected a Sum note that Excel added a total row to the data with the word Sum and also added the formula to the data

Note the first Sum puts the totals underneath and the second one in a column to the right.

This e-book
is made with
SetaPDF



PDF components for PHP developers

www.setasign.com

18.4 QUICK ANALYSIS CHARTS

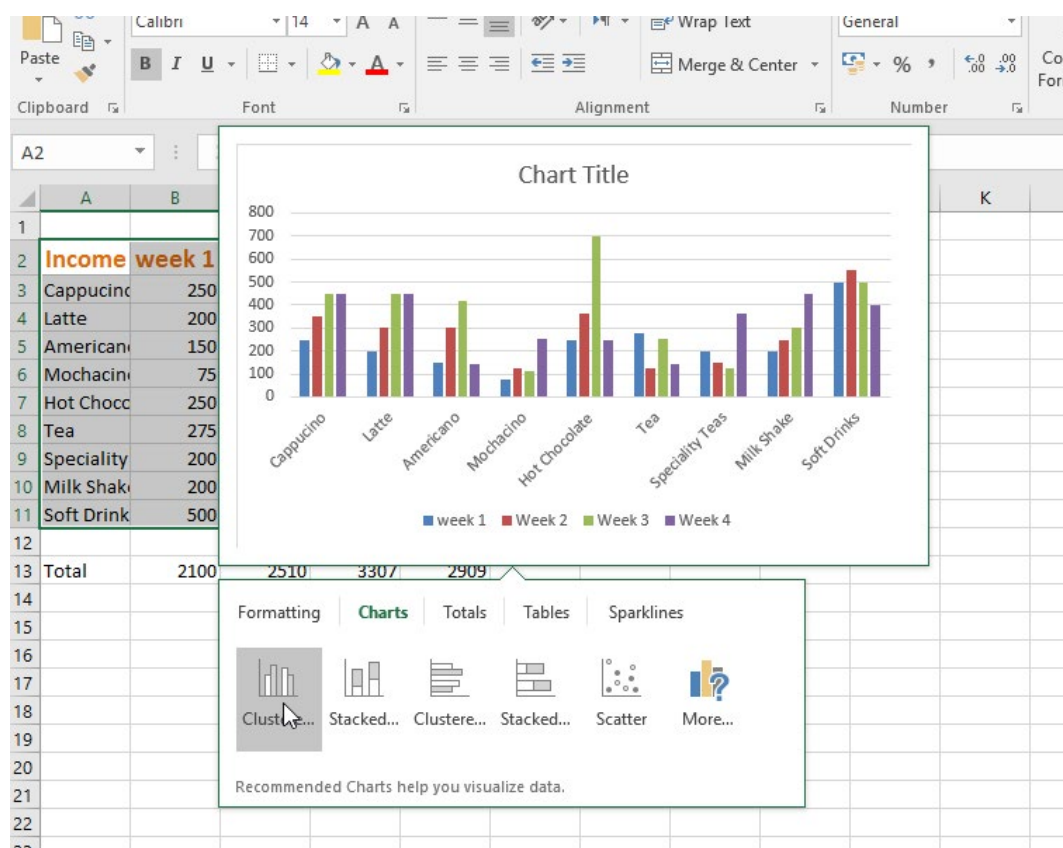


Figure 219 – charts are offered too

1. Select the data
2. Click on the Quick Analysis Smart Tag
3. Click on Charts
4. Hover over the different charts to see a preview of how they will look – to select one click on it
5. The chart is then placed on the spreadsheet

18.5 QUICK ANALYSIS TABLES

Instead of selecting the data and choosing Format as Table from the Home Ribbon you can use quick analysis to get a standard table or a quick pivot table.

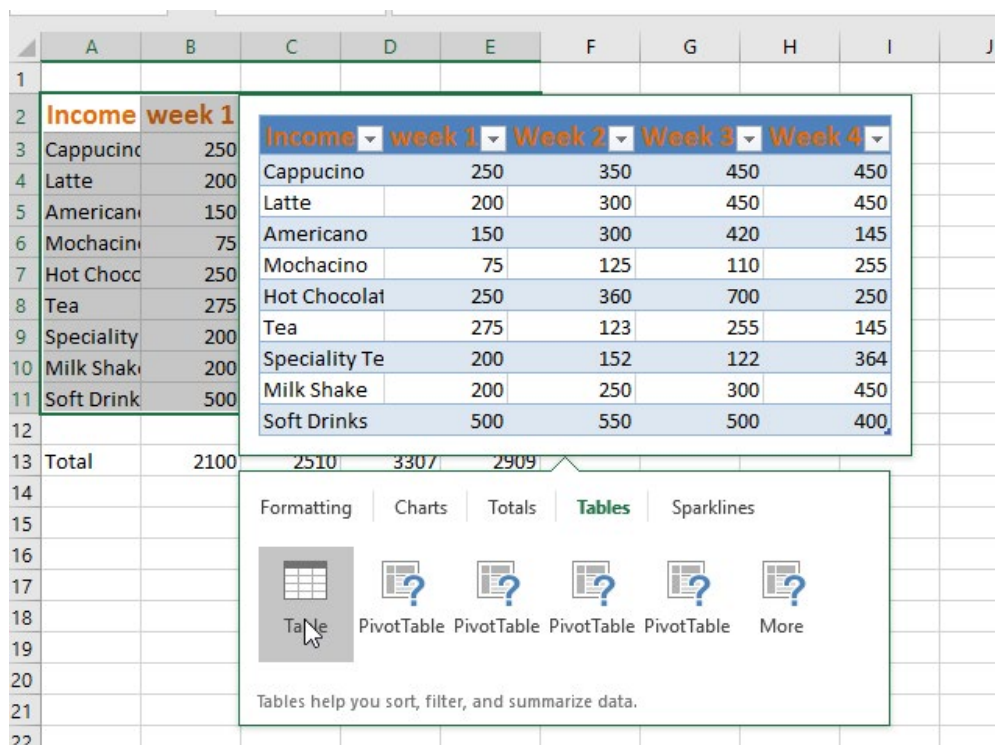


Figure 220 – quick tables

1. Select the data
2. Click the Quick Analysis Smart Tag
3. Click on Tables
4. Click Table and a preview will be placed over the data – click to insert

If you choose Blank Pivot Table, you will find a new blank pivot table inserted on a new worksheet ready for you to build.

18.6 QUICK ANALYSIS SPARKLINES

Get Excel to add spark lines directly from the Quick Analysis Smart Tag.

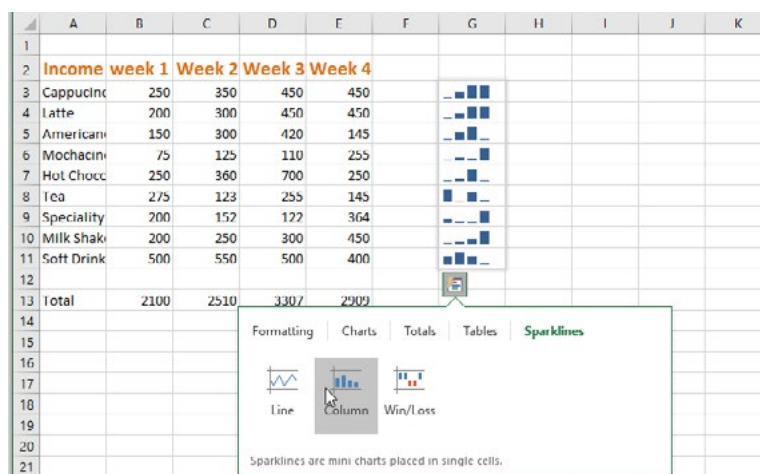


Figure 221 – quick sparklines

1. Select the data
2. Click the Quick Analysis Smart Tag
3. Click on Spark lines
4. Choose the spark line that you want to use
5. Spark lines will be added to the adjacent column

19 MACROS

19.1 WHAT IS A MACRO

A macro is a recording of a series of tasks. Usually repetitive things that can take time and follow the same sequence of events. By recording them into a macro the whole sequence can be performed at the click of a button. For example if you always want to change the spreadsheet to landscape and print three copies – record a macro add it to a button and hey presto just play it back each time.

19.1.1 DEVELOPER RIBBON

In order to record a Macro you must display the Developer Ribbon if it is not already showing.

To do so:

1. Click the File Menu
2. Click Options
3. Click customize the Ribbon
4. Place a tick next to the Developer Ribbon
5. Click OK



gaiteye®
Challenge the way we run

**EXPERIENCE THE POWER OF
FULL ENGAGEMENT...**

.....

**RUN FASTER.
RUN LONGER..
RUN EASIER...**

**READ MORE & PRE-ORDER TODAY
WWW.GAITEYE.COM**

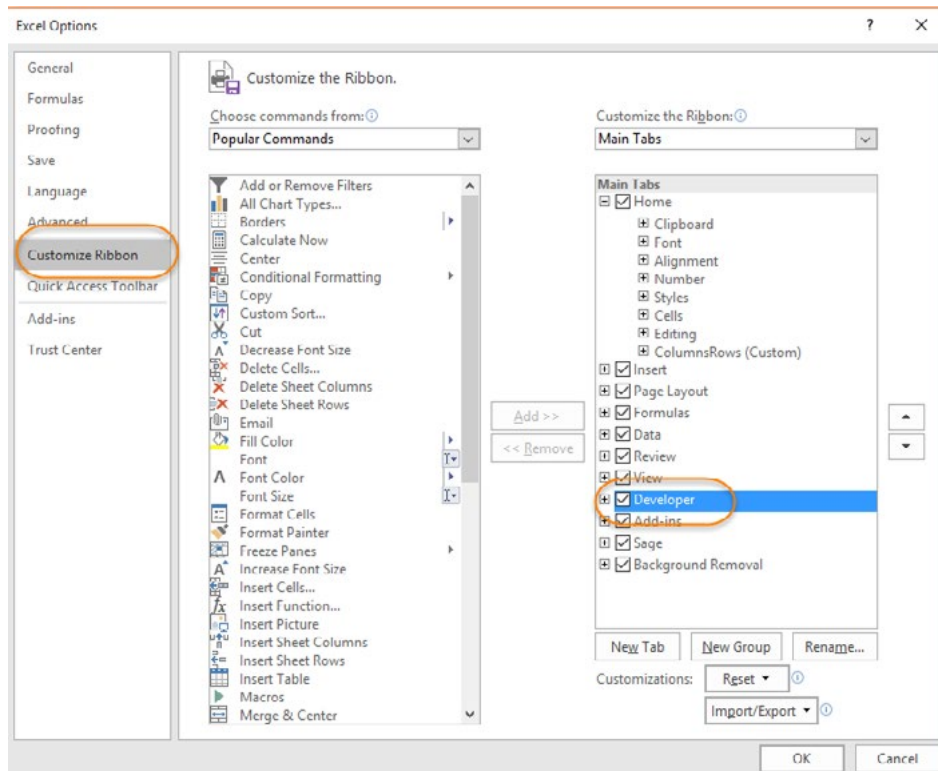


Figure 222 – switch on the Developer Ribbon

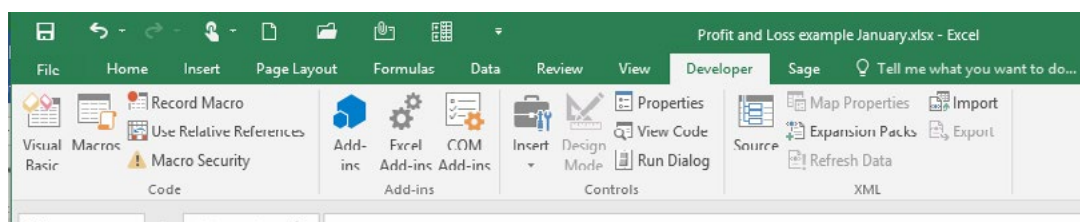


Figure 223 – the Developer Ribbon

19.2 MACRO SECURITY

There is one other thing you must check before you get started with macros and that is the Macro Security. You must let Excel know that you are willing to work with macros.

As macros can potentially run malicious code, you must let Excel know that you would like to run them but you want a little warning to pop up and check in with you before you do.

19.2.1 ENABLE MACRO SECURITY

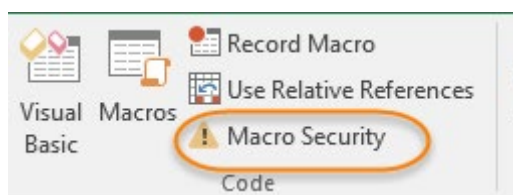


Figure 224 – enable macro security

On the Developer Ribbon click on Macro Security in the Code Group.

19.2.2 DISABLE ALL MACROS WITH NOTIFICATION

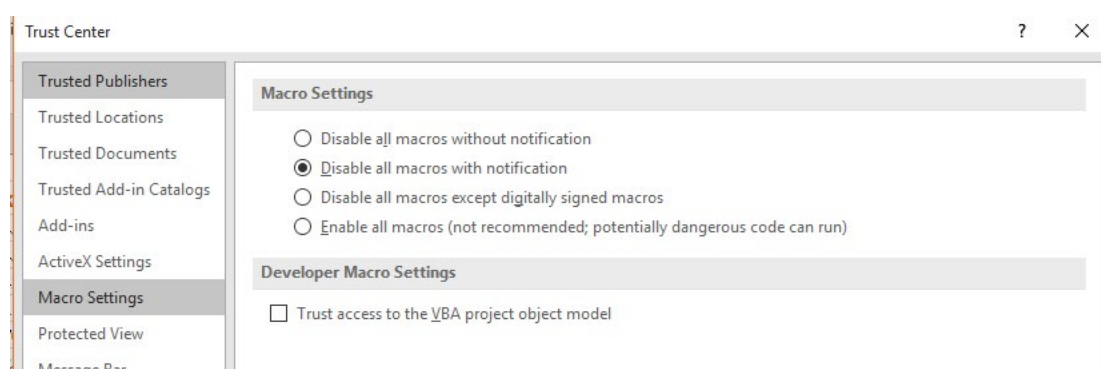


Figure 225 – make sure to set Disable with Notification set

Make sure that the Macro Settings show Disable all macros with notification – this means that Macros will not run unless you enable them. A notification will pop up and alert you.

19.3 GET READY

Now you are almost ready to record a macro. First of all though you need to decide where to store the Macro when it is recorded.

This Workbook (default):

Places the macro on a separate sheet called a module behind the scenes of the current workbook. Macros stored here will only be available when this workbook is open. The benefit of storing the macro in the current workbook is that it will be available to anyone who has access to the workbook, whether shared or sent to them.

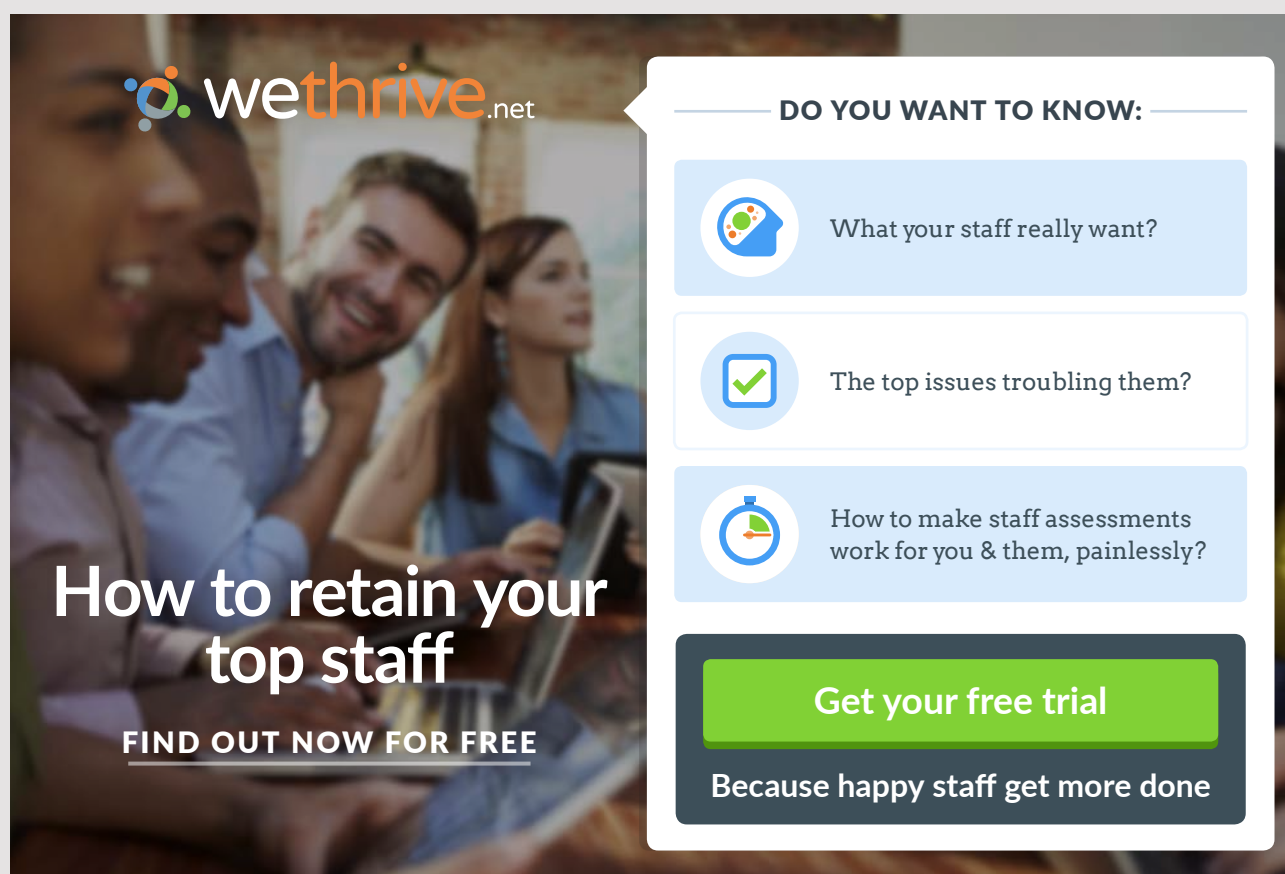
New Workbook:

Opens another workbook and puts the macro there (sometimes used when testing out bits of a macro's code).

Personal Macro workbook:

Creates a special hidden workbook that opens whenever Excel is run on your local machine. The macros stored here are available whenever you use Excel regardless of which workbook you are in. If you store your macros here, they will not be available to others if you share a workbook. You will need to add the macro to the workbook you are sharing in order for it to be available to others.

Having decided where to store it, it is a good idea to practice the steps you are going to record – in fact it is quite a good idea to write them down. As you start recording, the Macro Recorder notes every move you make and also the time it takes – it simply records everything. You want to record the macro with as little fuss as possible. If you make a mistake and correct it, the recorder records that too!



wethrive.net

How to retain your top staff

FIND OUT NOW FOR FREE

DO YOU WANT TO KNOW:

- What your staff really want?
- The top issues troubling them?
- How to make staff assessments work for you & them, painlessly?

Get your free trial

Because happy staff get more done

So for my previous example of printing the spreadsheet landscape and three copies the steps go like this.

Switch to landscape – press Alt + P + o and down arrow and Enter to change to landscape
Press Control + P

Tab into the number of copies and type 3

Press Enter to print

When testing out you will end up printing and then again when you record the macro. That is because we have to perform the steps in order to record them.

You will note that I used the keyboard to create the macro not the mouse. That's because the Macro Recorder records the keyboard moves.

19.3.1 RELATIVE OR ABSOLUTE REFERENCING

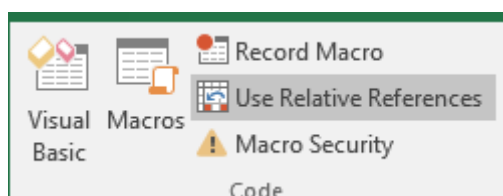


Figure 226 – relative or absolute

Relative References – this means that the macro will perform the actions you record in relation to the starting cell.

Absolute References – this means that the macro will record starting from the same cell every time.

Let's say that you are recording a macro to reformat a spreadsheet. You need to cut information from one place, paste it into another and then repeat the process down several rows. If you record this with Absolute References switched on the macro will record over itself the whole time – if you programmed it to begin in A3 then it will return to A3 each time.

If however you program it with Relative Reference on – then it will work relative to the cell in which your cursor is when you start the macro each time.

19.4 GET SET AND GO

Here we go to record the macro just mentioned.

19.4.1 RECORD MACRO

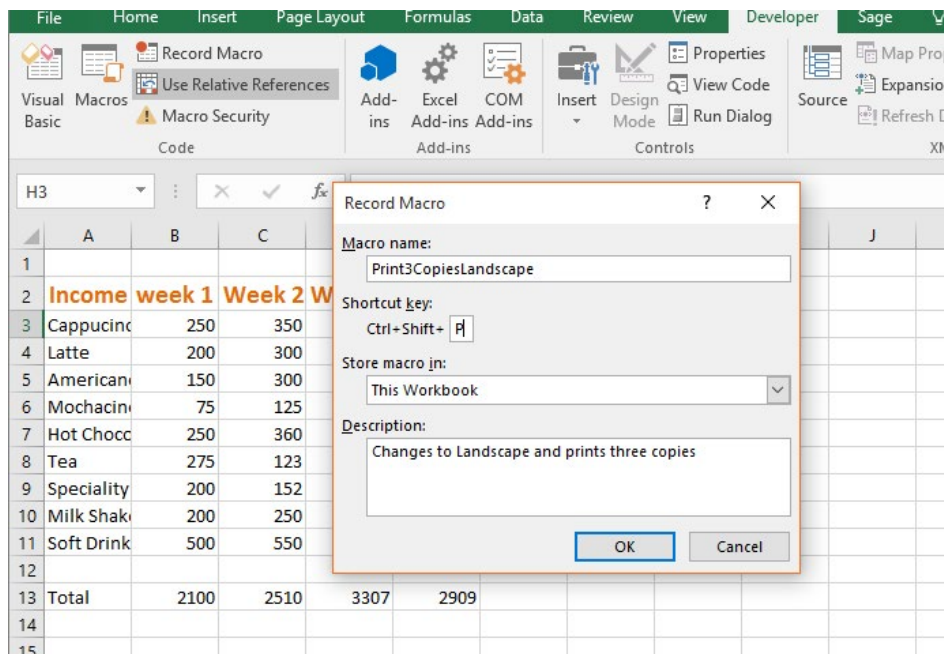


Figure 227 – record a macro

1. Click Record Macro in the Code Group
2. Name the Macro – names must not have any spaces in them. Use capital letters or underscore characters to differentiate between words
3. Assign a keyboard shortcut (Control + Shift + P)
4. Pick where to store the macro
5. Type a description – this is optional
6. Click OK to begin recording

19.4.2 FINISH RECORDING

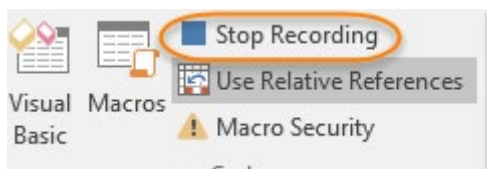


Figure 228 – stop recording

Once you have performed the sequence of steps for the macro click Stop Recording – this button said Record Macro earlier.

19.5 RUN THE MACRO

Now that you have recorded your macro you want to use it. When you created the macro you assigned a keyboard shortcut to it. Now all you have to do is press the keyboard shortcut. For the macro I just recorded the Keyboard Shortcut is Control + Shift + P.

You may however want to add the macro to a button on the Quick Access Toolbar.

19.5.1 PUT THE MACRO ON THE QUICK ACCESS TOOLBAR

Click the drop down arrow on the right of the Quick Access Toolbar

Select More Commands

1. Change the Choose commands from to show macros
2. Click on the macro you want to add to the Quick Access Toolbar
3. Click Add
4. The macro is now on the Quick Access Toolbar

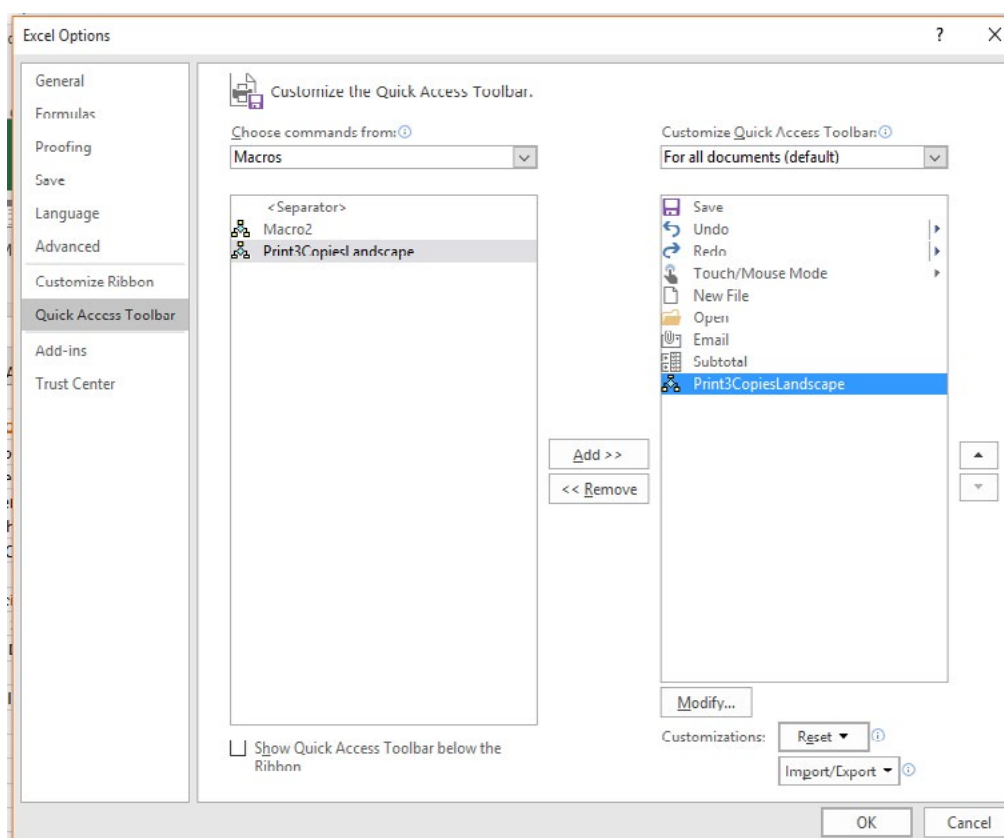


Figure 229 – add a button to the Quick Access Toolbar

19.5.2 MODIFY THE BUTTON

The icon for a macro is the same no matter how many you add so it makes sense to modify the button to something that you recognize.

1. Click Modify
2. Pick an icon
3. Change the text to display if required
4. Click OK
5. Click OK

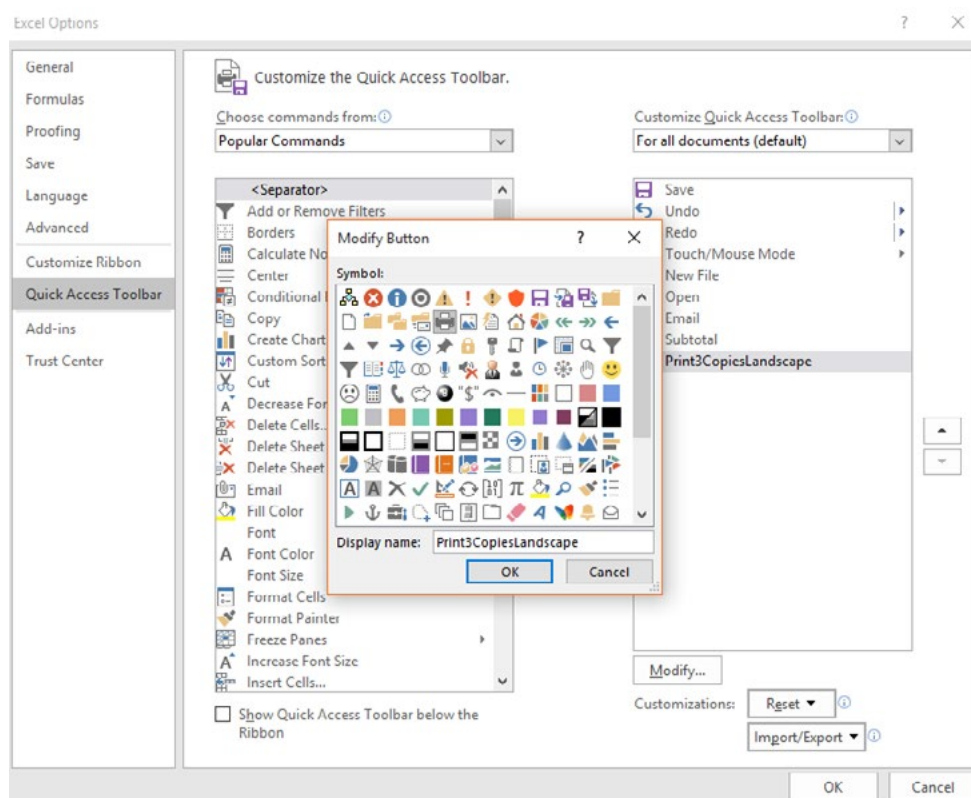


Figure 230 – modify the button

19.5.3 NEW MACRO BUTTON



Figure 231 – new macro button

Here is my new macro button – it has a printer icon and the tooltip shows the name – Print3CopiesLandscape.

INDEX

A

Auto Outline 126

C

Calculated Columns 109

Chart Elements 38

Charts

column 34

formatting 46

line charts 32

modifying using icons 43

modifying with the ribbon 37

pie 35

using the keyboard 30

Comments

adding 72

deleting 74

printing 77

Conditional Formatting 134

Convert to Range 113

COUNTIF 13

D

Data

filtering 87

sorting 79

Delete

comment 74

slicer 122

F

Filter

data 87

date 99

more than one column 90

CMO INSPIRED CONFERENCE
25 OCTOBER | DE VERE BEAUMONT ESTATE | OLD WINDSOR UK

Join Over 100 Chief Marketing Officers & Digital Innovators

- number filters 98
- on colour 93
- remove 91
- table 115
- table with total row 116
- text 88, 96
- Formatting
 - quick analysis 169
 - remove from a table 108

I

- IF Function 10
 - nested 11
 - typing 11

M

- Macro 174
 - record 179
 - relative or absolute 178
 - run 180
 - security 175

N

- Naming
 - range of cells 20

O

- Outlining
 - grouping 123

P

- Picture
 - modify 55
 - reset 61
 - resize - dragging 53
 - resize - ribbon 54
- Pictures in Excel
 - insert from file 50
- Printing
 - comments 77

Q

- Quick Analysis 168
 - charts 28, 171
 - formatting 169
 - sparklines 173
 - tables 172
 - totals 169

R

- Range names
 - editing and renaming 23
- Range Names
 - defining 16
 - using in a formula 17
- Recommended Charts 28

S

- Screenshot 69
- Shapes
 - adding 66
- Slicer
 - add 117
 - customize 121
 - delete 122
- SmartArt
 - add 62
- Sorting
 - cell colour 85
 - cell icon 86
 - multi level sort 82
 - on font colour 84
- Sparklines 151
- Start
 - screen 12, 26, 160
- Subtotals 128
 - remove 133
- Sum a Range 26
- SUMIF 14

T

Table

add a total row 111

insert 104

name 109

style 106

Text Functions 158

concatenate 158

left 166

lower 164

mid 167

proper 165

right 166

trim 161

upper 164

Free eBook on Learning & Development

By the Chief Learning Officer of McKinsey

Download Now

