

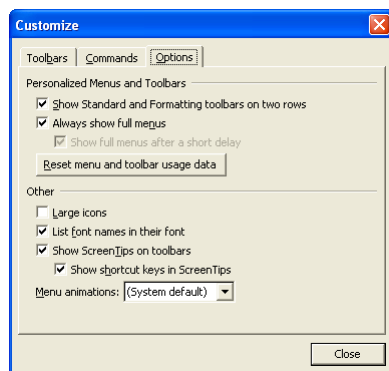
Additional Notes for Microsoft Excel

Mark Simon © Comparity Training

Excel 2003 Menu & Toolbar Options

Tools.Customize ...

Options



- Show Standard and Formatting toolbars on two rows
- Always show full menus

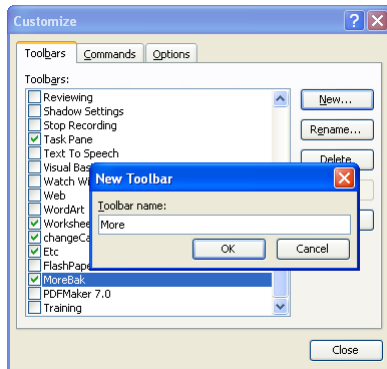
Useful Options

Tools.Options

- General: Recently used file list: 9
- Sheets in new workbook: ...
- Error Checking: Numbers stored as text (See below)

Toolbar

1. Tools.Customize.Toolbars...
2. Toolbars.New...

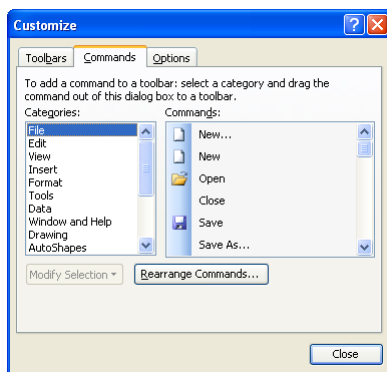


3. Name the toolbar
4. Double-Click the title to dock the toolbar:



Adding Items

Select Commands Tab



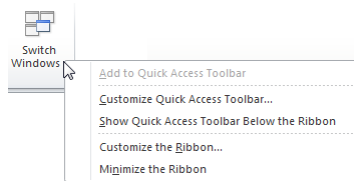
Drag an item from the Commands Pane to the Toolbar:



Make sure that you drag it *inside* the toolbar!

Excel 2007 & 2010: Adding to Quick Access Toolbar

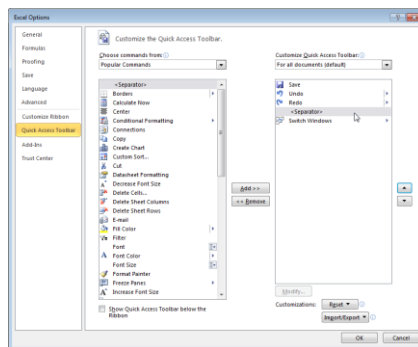
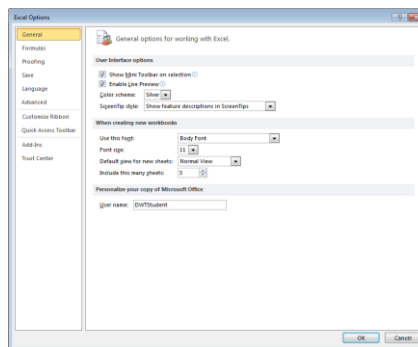
1. Right-Click on Ribbon Item



2. Item now appears in Quick Access Toolbar



Organising the Quick Access Toolbar



Numbers as Text

Certain numbers are not really numbers at all. For example, telephone numbers, postcodes and other identifiers, though they comprise mainly digits, are never used in calculations. These numbers should be stored as text.

Method 1:

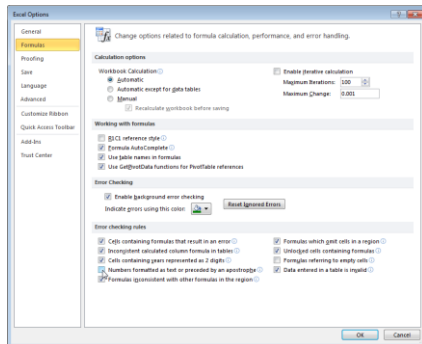
1. Start off the number with a single quote:

'0123

Method 2:

1. Select the range to receive the data.
2. Format.Cells.Number
3. Select Text

Turning off the Error Flag



Misc

Remove Hyperlinks: http://techonthenet.com/excel/macros/delete_hl.php

vlookup

vlookup is the fundamental table lookup in Excel. Its structure is:

vlookup(what, where, which column, ranges?)

what the item to lookup (in the first column of the table)
where the table containing the item and its data
which column the number of the column with the required result
ranges? whether the first column of the table contains exact
 matches, or the beginning of ranges

Looking up by Column Reference

For the column number, you can get Excel to calculate the value with the following technique:

1. **Name the result column.**
2. **Use the following: =vlookup(what,where,column(result),ranges?)**

Looking up by Column Name

For the column number, you can get Excel to calculate the value with the following function:

match(what, where, type)

In this case, we use a match type 0, which means an exact match.

For example, suppose we have a table as follows, located at A1:C4:

Name	Number	Details
fred	3	this
wilma	1	that
betty	4	etc

We can find the Details value of a name (wilma)as follows:

=vlookup("wilma", \$A1:\$C4, match("Details",1:1,0),false)

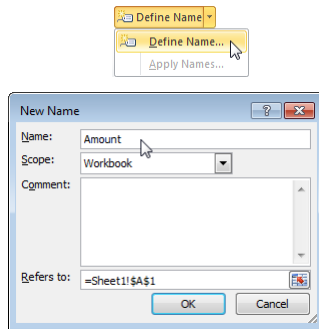
This is more complex, but has the advantage that if the column position should be unknown or change (due to inserting or deleting columns), the formula will still hold up.

Names

Excel supports the naming of cells and ranges. To name a cell or range:

Method 1

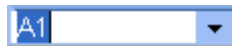
1. Select the Cell
2. **2003** Insert.Names.Define... (Ctrl F3)
2007 Formulas.Define Name... (Ctrl Alt F3)



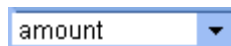
3. Enter the name and press Enter

Method 2

1. Select the cell or range.
2. Click on the name box:



3. Enter a new name:



Press Enter

To delete a name:

1. **2003** Insert.Names.Define... (Ctrl F3)
2007 Formulas.Name Manager... (Ctrl F3)
2. Select the name:
3. Delete

Useful Formulas

Full Name

Given	Family	Full
Fred	Bloggs	=A2 & " " & B2
Wilma	Nurkk	
Betty	Thing	

18 Years Ago

Simple:

```
=today()-18*365.25
```

More Accurate

```
=date(year(today()-18,month(today()),day(today())))
```

Converting a Date to a Month or Day

The Text function will display numeric data, including date data, using the same codes as for Custom Formats (later).

Display Month Name:

```
=text(...,"mmmm")
```

Display Day Name:

```
=text(...,"dddd")
```

Validation Techniques

Validation Lists

Excel is not normally case-sensitive. However, if your validation rule includes a literal list:

NSW,VIC,QLD

then case must match exactly.

If instead your validation list refers to a range:

=A1:A8

then excel will ignore case.

A Validation Rule for Full Names

=not(iserror(find("",trim(A1))))


Custom Formats

Custom number formats allow you to express your numbers in a more particular manner. When creating custom formats, some of the characters are codes. For numbers:

- # any digit
- 0 any digit, even 0

Any character not meant to be a code should be inside double.

Useful number formats:

Format	Data	Display	
0.00	1.234	1.23	Two decimal places
0 "cm"	123	23 cm	Show as centimeters
0 "m ² "	123	123 m ²	Metres squared (use 
0,	1234567	1234	Thousands
0,"K"	1234567	1234K	
0,,	1234567	1	Millions
0,,"M"	1234567	1M	

Useful Date Formats

Excel regards all dates as the number of days since 1 January 1900.

However the following codes help to interpret the date:















Day		Month		Year	
d	Number	m	Number		
dd	2 digits	mm	2 Digits	yy	2 digits
ddd	Name (Short)	mmm	Name (Short)		
dddd	Name (Full)	mmmm	Name (Full)	yyyy	4 digits

The following will display a simple date format which includes a short month name:

d mmm yyyy

Important Shortcuts

General

			Save
		Zap	Undo
			Repeat/Redo
			Select All
			New Document
			Open
			Close
		⌘	Cut
			Copy
		ZXCV	Paste
			Help
			Check Spelling
			Save As...

Excel General

F2 Edit Cell

Names

F3 Paste Name
Ctrl F3 2003: Define Name
Ctrl F3 2007: Name Manager
Ctrl Alt F3 2007: Define Name

Number Format

Alt F8 Macros
Alt F11 VBA

Sheets & Workbooks

Shift F11 New Sheet
F11 New Chart
Ctrl Page Up
Ctrl Page Down Previous/Next Sheet
Ctrl Tab Next Workbook

Formulas

Ctrl ~ Show/Hide Formulas
F2 F9 Convert formula to value
F4 (Inside Formula) Absolute Reference
Shift F3 Insert Function

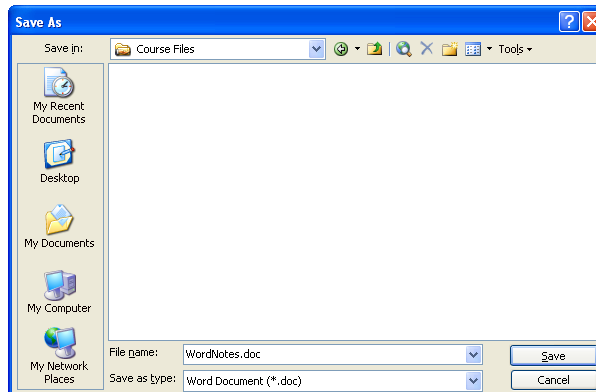
Number Format

Ctrl 1 Format Cells
Ctrl Shift ~ General Format
Ctrl Shift 1 Decimal Format: 0,000.00
Ctrl Shift 4 Currency Format: \$0,000.00
Ctrl Shift 5 Percentage Format

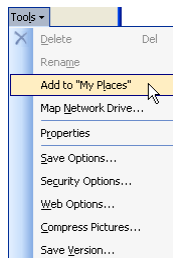
Shortcut to your Directory

You can either use the Save As... or Open... dialog for this.

File.Save As... (File.Open...)



Tools.Add to "My Places"



The icons in the left are still large, so you might select small icons:

Right-click.Small Icons

