Excel 2007-2010 Topic Summary Notes
AGA Seminar - May 2011
Presented by ExecuTrain of Utah

Update Workbook Properties
Properties are used to help locate the correct workbook and to document the content of the workbook.
Click the File or Office Button to the left of the Ribbon
Click Prepare, Properties
Fill out the Properties

See Workbook Properties when Opening the File
Click the File or Office Button to the left of the Ribbon
Click Open
Click the View button and select Properties OR
Right Click the File and select Properties

Create a Macro
If you are repeating the same tasks over and over again, record a macro and then just play it back when you need the task ran again.
Click View, Macros, Record Macros
Give the Macro a Name, a Shortcut Key if desired and a Location via "Save Macro In"
Location Note: If you select Personal Macro Workbook, the macro can be ran in any Excel file
If you select This Workbook, the Macro is meant to run only in this workbook
Click OK
Do your work and the Macro will record your steps

Stop Recording a Macro
Click View, Macros, Stop Recording

Edit A Macro
Press Alt+F8
Click on the Macro
Click Edit
Make changes in the Visual Basic Editor
Save the changes by clicking the Save Button

Replay a Macro
Press Alt+F8
Double Click the Macro

Apply Conditional Formatting
Conditional Formatting will change the cells appearance when values change in the cell. For example, perhaps you wish the cell to turn Red when you type a number over 100.
Select Cells
Click Home Tab, Conditional Formatting

Types of Conditional Formats
Data Bars show a small graph in the cell based on its number value
Color Scales uses different colors for Low, Medium and High values
Icon Sets show icons to indicate Low, Medium and High values

Another Way To Set a New Conditional Format Rule
Click Home Tab, Conditional Formatting, New Rule

Clear Conditional Format
Select the Conditional Formatted Cells
Click Home Tab, Clear button arrow, Clear Formats
OR
Select the Conditional Formatted Cells
Click Home Tab, Conditional Format button

Data Validation
Data Validation limits what people can or can't type into a cell
Select the cells you want to limit
Click the Data Tab, Data Validation button
Use the Settings Tab to set what can or can't be typed into the cells
Use the Input Message Tab to set what help message comes up when the cell is selected
Use the Error Alert Tab to set what error comes up when the wrong information is typed into the cell

Trace Cells
To trace what cells affect the value in the current cell
Click Formulas Tab, Trace Precedents button
Note that you can click the button more than once to trace back more than one step

To trace what cells are affected by the value in the current cell
Click Formulas Tab, Trace Dependents button
Note that you can click the button more than once to trace back more than one step

To clear the Trace Lines
Formulas Tab, Remove Arrows button

To Go To the cell that is traced to a different sheet
Trace the Dependent or Precedent
Double Click the dashed line
Double Click the address shown in the GoTo window

Find Cells with Errors on the current sheet
Click Formulas Tab, Error Checking arrow, Error Checking button
OR
Press F5, Click Special, Click Formulas and Uncheck everything except for Errors

Watch Window
The Watch Window allows you to see what happens to cells in other sheets or off screen cells when you make changes to a cell that affects them. A good use of this is when I make a change to a cell in Sheet1, I can see the values change to the cells in Sheet2 that are affected by the Sheet1 cell I just changed.

Add a Watch
Select the cells you wish to watch
Click Formulas Tab, Watch Window, Add Watch

Delete a Watch
Click Formulas Tab, Watch Window, Delete Watch

Create Data List Outline
This is an easy way to hide and show rows or columns for lists that need to be viewed or printed in various ways.

Create an Automatic Data List Outline
Click on the list
Select Data Tab, Group (down arrow) and Auto Outline

Remote an Auto Outline
Click on the list
Select Data Tab, Ungroup (down arrow) and Clear Outline

Manually Create an Outline
Select the Row(s) or Column(s) you want to easily show or hide
Select Data Tab, Group button

Hide and Show Rows or Columns that have been Grouped in an Outline
Click the Plus or Minus buttons on the left of the rows or at the top of the columns
OR click the numbers to the left and above cell A1

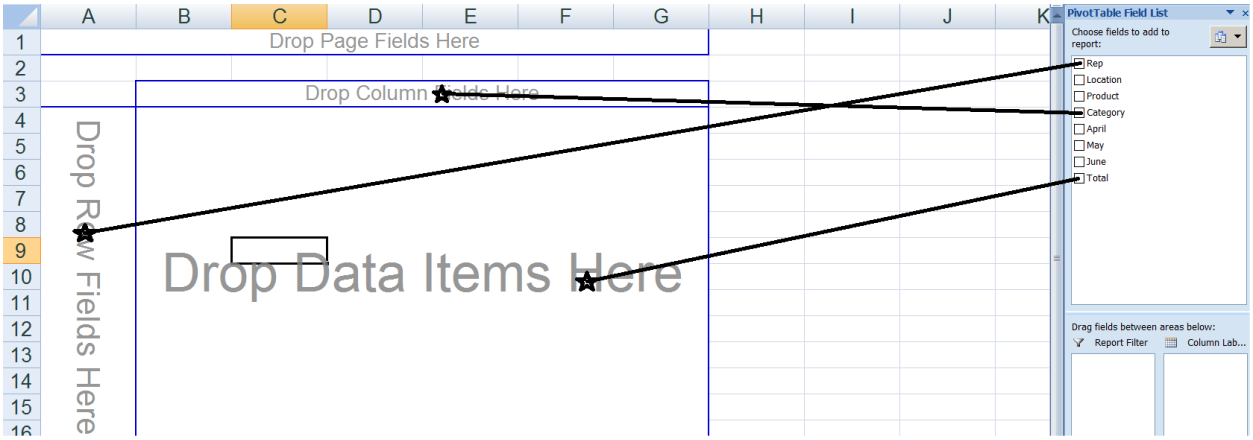
PivotTables
PivotTables summarize large amounts of database data. They eliminate duplication of data and give sub and grand totals for large datasets. The greatest benefit is that large amounts of data can be easily shown many ways, thus giving many different "big" pictures of the data you are measuring.

Create PivotTables (Step 1)
Click on a cell inside the database list
Select Insert Tab, PivotTables button
Confirm that the correct range is selected and the correct location for the PivotTable
Click OK

Create PivotTables (Step 2)
Now you drag the fields on the right to the grid on the left. For example, if you drop the REP (Sales Rep) field in the Drop Row Fields Here area, each Rep will be listed once on each row going down. Then if you drop the Category field in the Drop Columns Field Here area, each Category will be listed once in each

column going across. Then if you drop the Sales Total field in the Drop Data Fields Here area, you we get Totals for each Sales Rep and each Category.

Before:



After:

	A	B	C	D	E	F	G	H	I
1	Product	(All)							
2	Location	(All)							
3									
4	Sum of Total	Category							
5	Rep	Calculators	Computers	Copiers	Modems	Monitors	Printers	Scanners	Grand Total
6	Adler		126995	42193		21252		23754	214194
7	Ainsworth						64285		64285
8	Ansley				21221		51197		72418
9	Barr			21070			14464		35534
10	Becker	1660	60730	31478			17944		111812
11	Bowlby			26578			14464		41042
12	Collins			25989			21020		47009
13	Elems	5612	71423			36838	8449	4422	126744
14	Farrow	2263	82308	40908		11276	16901	1995	155651
15	Hall			34044			20463		54507
16	Harris	2671	107528		8449		24174		142822
17	Harrod			34769	10710				45479
18	James	3540	160357		16260		14676	1556	196389
19	Julia			69292					69292

Note that I also dropped the Product field and the Location field in A1. This allows me to filter down the data by specific Products and Locations.

You can have multiple fields in the Row, Column and Data areas to create some very creative reports that show data in ways that a regular database list simply can't.

Also, you can drag the fields (such as Category, Rep, etc in this example) around and put them in other areas. For example, you could take Category and move it to A5, where Rep is. You could take Product in A1 and move it to B4, where Category was. Doing this has no effect on the original list, so you can play and experiment all you like. If you mess it up, simply Undo or remake the PivotTable and try again.

Slicers

This is a new feature in Excel 2010. Simply click on the Options Tab in the Ribbon, Click the Slicers button and place a Slicer on the worksheet for a particular field. Then you can click each choice in the slicer, and it will narrow down the PivotTable to only the values representing the category you selected.

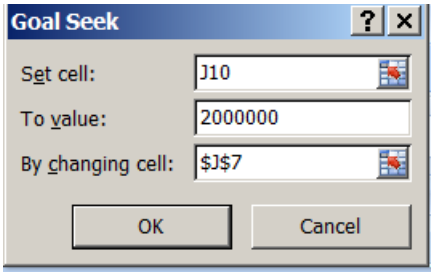
Create Sparklines
Sparklines are new in 2010. They show a graph in one cell or several cells, thus making a Mini-Graph of the data.
Simply click Insert Tab, and select a Slicer in the Charts area
Select the cells that you want to chart
Select the cell(s) where you want the Sparkline

Modify a Sparkline
Click on the Sparkline, then Options Tab in the Ribbon to change colors, locations, etc

Goal Seek
`This feature allows you to set a goal value, tell Excel what cell to change in order to reach the goal, and then Excel tweaks the change cell until it reaches the desired value. For example, you are making deposits in your retirement account every month, but you want to know how much you need to deposit to reach $2,000,000. Goal Seek will change the deposit cell to various amounts until the goal of $2,000,000 is reached.

Select Data Tab, What If Analysis, Goal Seek
Set Cell is the cell that contains the formula which will give the Goal Amount
To Value is the goal you want for the Set Cell
By Changing Cell is the cell that Excel will change to get the answer

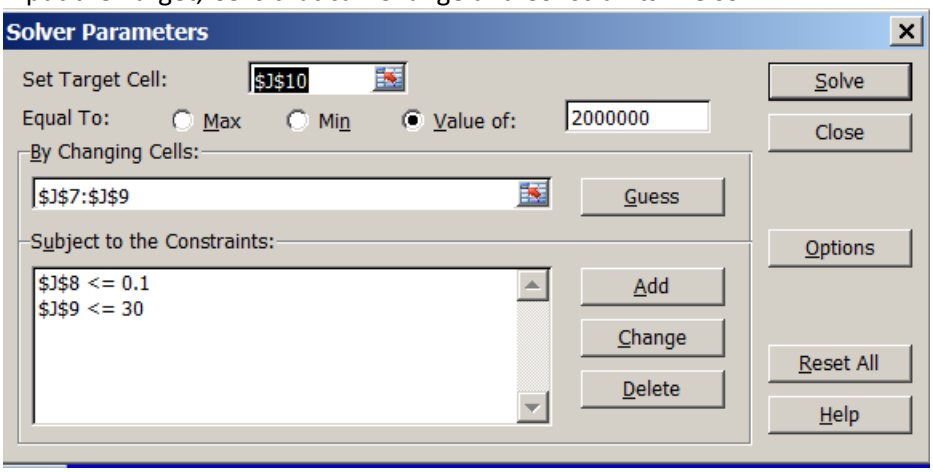
For example:



Solver
Goal Seek only changes one cell to obtain a Goal Answer. Solver allows Excel to change one or more cells to obtain a Goal Answer. Solver is an Add-In program meaning that it is not part of the regular Excel menus and must be installed before use.

Installing Solver
Click the Office Button or File Menu
Select Excel Options button
Select Add-Ins on the left
Click the GO button
Check the Solver Add In
Click OK

Using Solver
Select Data Tab, Solver (on the far right)
Input the Target, Cells that can Change and Constraints like so:

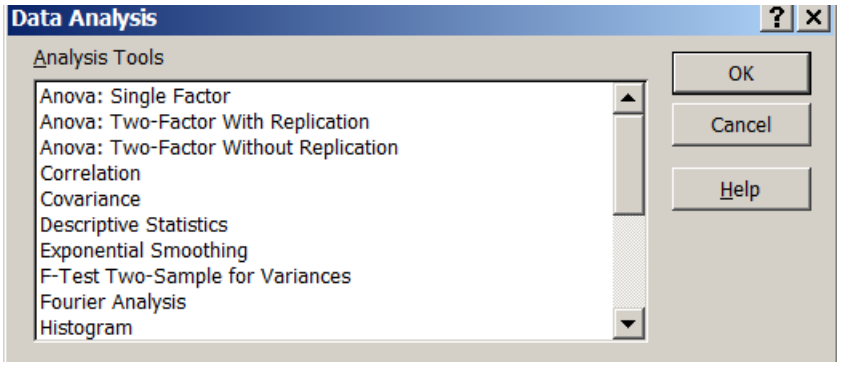


Constraints are limits that you enforce on cells. If you don't want a cell value to be adjusted above or below a certain value, list that in the Constraint box.

Analysis ToolPak
When it comes to hard core statistics such as Descriptive Statistics or Histograms, there is another Add-In called the Analysis ToolPak.

Installing the Analysis ToolPak
Click the Office Button or File Menu
Select Excel Options button
Select Add-Ins on the left
Click the GO button
Check the Analysis ToolPak Add-In
Click OK

Using Analysis ToolPak
Select Data Tab, Data Analysis (on the far right of the Ribbon)



Protecting Files

Set/Unset a Password on an Excel File
Press F12 (Save As)
Click Tools button, General Options

Protect a Worksheet from Data Change
Go to the sheet
Select Review Tab, Protect Sheet
Enter a password if wanted, and check/uncheck the options that you want the user to be able to do

Protect a Worksheet (but allow some cells to be changed)
Select the cells you want the users to be able to change after the sheet is protected
Press Ctrl+1 OR Select Home Tab, Format Button, Format Cells
Select the Protection Tab
Uncheck Locked
Select Review Tab, Protect Sheet
Enter a password if wanted, and check/uncheck the options that you want the user to be able to do

Share Workbooks
An Excel File can be in use by 255 people at one time. Typically, the file is saved on a shared folder in a network and then it is shared. Many people can change the same cell and Excel keeps track of who, what and when for the change. Later, you can review these changes and revert the cell back to a previous entry if desired.

Share a Workbook
Select Review Tab, Share Workbook
Check "Allow Change by more than one user at the same time"
Select the Advanced Tab and input the desired settings

Review Tracked Changes (See who changed what)
Select Review Tab, Track Changes, Highlight Changes

Review Tracked Changes (Select what changes to keep and discard)
Select Review Tab, Track Changes, Accept/Reject Changes

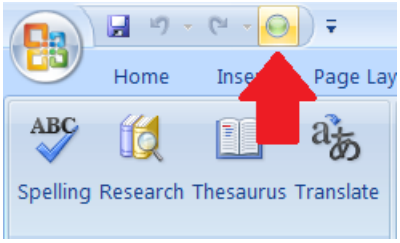
Merge Workbooks
Another method of allowing many people to make changes to a file is to use the Merge Workbooks feature. Instead of sharing one file, you give each person their own "Shared" file via email or place on the network. Each person makes changes to his/her file, and then you combine all the files back into the original Excel File that you started with.

The Merge Workbooks feature has to be added to the Quick Access Toolbar because it is not on the Ribbon.

Add Merge Workbooks to the Quick Access Toolbar
Click File OR Office button
Select Excel Options button
Select Customize
Set "Choose Commands From:" to "Commands not in the Ribbon" instead of Popular Commands
Select "Compare and Merge Workbooks" from the list
Click the ADD button
Click OK

Set Up Workbooks for Each User
Open the Original workbook (make sure it is shared)
Share the workbook using Review Tab, Share Workbook
Save the file for each user on a shared folder on the network OR email it to each user
(Each of their files must be shared in order for this to work properly)
Allow users to make changes over time

Merge Users Workbooks back into the Original
Open the Original Shared File
Click the Compare and Merge Workbooks button



Find and Select Each File you want to combine into the original
Click Open
Once all the files are Merged into the Original File, then you can Accept or Reject Changes

Review Tracked Changes (See who changed what)
Select Review Tab, Track Changes, Highlight Changes

Review Tracked Changes (Select what changes to keep and discard)
Select Review Tab, Track Changes, Accept/Reject Changes