Simplify your Sage Reporting Process

Excel® Tips and Tricks Booklet | Volume 1

sage

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Toolbars

Microsoft® Excel® toolbars offer convenient one-click access to the tools you use most often. Try these shortcuts to customize them to your preferences.

1. **Add Macros into your toolbar.**

   a. From the **Menu** bar select Tools, Customize.

   b. Select the **Commands** tab.

   c. In the list of **Categories**, select **Macros**.

   d. The macro should then appear in the **Commands** list.

   e. In the Commands list, select **Custom Button** and drag the button onto the toolbar.

   f. To assign the macro, select **Modify Selection** and select **Assign Macro**.

   g. Select the desired **Macro** from the list and select **OK**.

2. **Return your Toolbar to the default Microsoft Excel layout.**

   a. From the **Menu** bar select **Tools, Customize**.

   b. Select the **Toolbars** tab.

   c. Select the Toolbar you would like to reset.
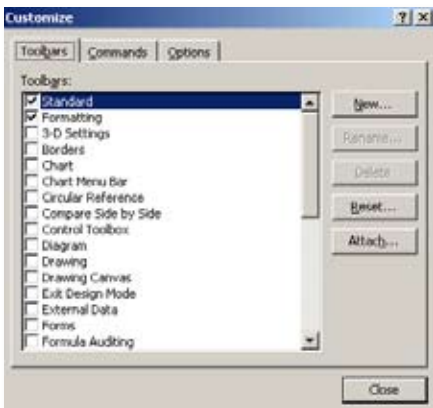
   d. Select **Reset**.

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Navigating

You may navigate through your spreadsheets without much thought. These shortcuts offer you new, faster ways to access the data you need.

1. **Navigate to different sheets in a workbook with many sheets.**

   a. Right-click on the sheet arrows at the bottom left of your screen.

Sheet Arrows
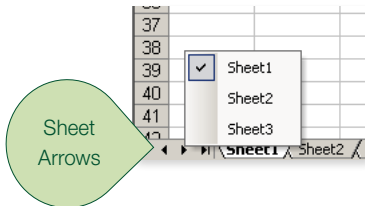
   b. A list of the sheets in the file will be displayed.

   c. Left click on the sheet name you would like to navigate to.

2. **Learn two ways to select a row quickly.**

   a. Select the row number.

   OR

   b. Select any cell in that row and press Shift+Space bar.

PivotTable®

You can use a PivotTable report to summarize and analyze vital company data, you can use the following tips to learn a more efficient process for formatting these convenient summaries.

1. **Maintain formatting when refreshing PivotTables.**

   a. Format the PivotTable in whatever way you want.

   b. On the **PivotTable** toolbar, select **Table Options** from the menu.

   c. The PivotTable Options dialog box is displayed.

Preserve Formatting
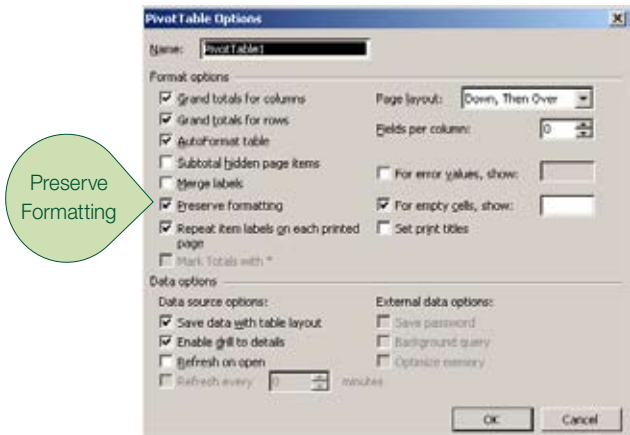
   d. Make sure the **Preserve formatting** check box is selected.

   e. Select **OK**.

2. **The size of a file using Microsoft Excel software increases when a PivotTable®**
   feature is included. Learn to reduce the file size.

   PivotTables by default always save the actual data with the layout of the table, and this
   causes the increase in the size of the file. You can, however, change this on the table
   options of the PivotTable. Once you have changed this, you will always have to refresh
   the table before you can use it.

   a. Right-click anywhere on the **PivotTable**.

   b. Select **Table Options** from the shortcut menu.

   c. Clear the checkbox toward the bottom of the options window "save data
      with table layout."

Save data with
table layout

   d. Select **OK**, and then save the file. The file should have reduced in size.

3. **Group your dates into Months or Quarters in a PivotTable.**

   This can be easily done by using the Grouping feature in the PivotTable.

   a. Select the **field (Date)** you wish to group.

   b. Right-click and select **Group and Show Detail**.

   c. Select **Group**.

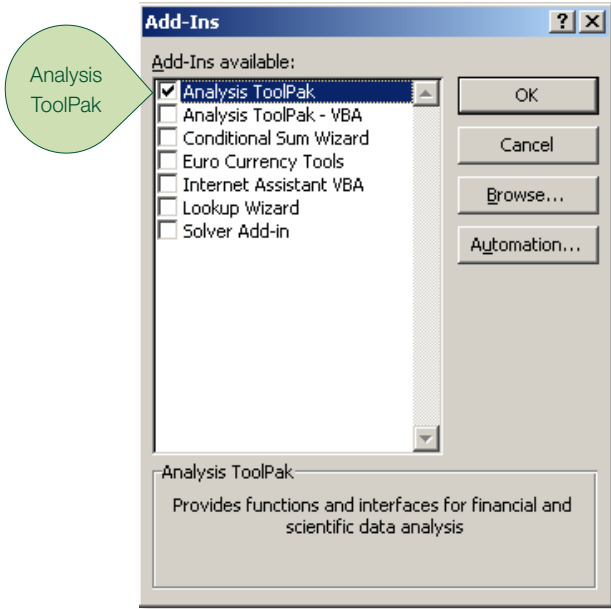   d. The grouping dialog box appears, displaying dates and times.

   e. Type the starting and ending information in the fields provided.

   f. Select the option you wish to group by in the **By** list.

   g. Select **OK**.

   h. Group dates will only work if you do **NOT** have blank cells selected in the source
      data. If you do have blank cells selected, please reselect the area.

Functions

Excel software functions allow you to create your own formulas, format data in multiple cells, and perform complex calculations of your data. Here are several functions you may not be aware of that can simplify your work processes.

1. **There is a function in Excel called "weeknum" that determines the number of the week within the year. This is not a standard function; it is only available if you use the Excel Add-Ins "Analysis ToolPak."**

    a. Select the **Tools** menu.

    b. Select **Add-Ins**. The add-ins box will display.

    c. Select the check box next to **Analysis ToolPak**.

Analysis ToolPak

Add-Ins

Add-Ins available:

☑ Analysis ToolPak
☐ Analysis ToolPak - VBA
☐ Conditional Sum Wizard
☐ Euro Currency Tools
☐ Internet Assistant VBA
☐ Lookup Wizard
☐ Solver Add-in

OK
Cancel
Browse...
Automation...

Analysis ToolPak

Provides functions and interfaces for financial and scientific data analysis

    d. Select **OK**.

    e. The function Weeknum should now be available in the data and time category of functions.

2. **If you have values in the cells D2 through to D1044, learn how to create a formula in column E and quickly copy the formula from E2 through to E1044.**

    a. Enter your formula into cell E3.

	A	B	C	D	E
1	**Branch**	**SalesPerson**	**Quantity**	**UnitPrice**	**ProductSales**
2	East Coast	Anderson, P	60	7.20	432.00
3	East Coast	Johnson, A	21	13.90	
4	East Coast	Peters, K	40	11.20	
5	East Coast	Bonders, P	2	14.70	
6	East Coast	Newson, L	5	15.20	

    b. Place your mouse on the bottom right corner of cell E1 and double-click on the **Autofill** handle.

    c. The formula will then be copied down to cell E1044.

    d. By double-clicking, it will automatically fill the range down to where there is data on the left in Column A. You can also use this for copying formula down.

3. Count the number of cells containing data.

Use the correct count function:

- **Count:** Counts the number of cells containing numbers, as well as numbers within the list of arguments.
- **Count A:** Counts the number of cells that are not empty, as well as the values within the list of arguments.
- **CountBlank:** Counts empty cells in a specified range of cells
- **CountIF:** Counts using criteria

See screenshot below:

Text /Number	Result	Criteria	Formulas Syntax
2	9		=COUNT(A:A)
4	13		=COUNTA(A:A)
6	65523		=COUNTBLANK(A:A)
3	8	>2	=COUNTIF(A:A,C6)
5	4	*	=COUNTIF(A:A,C7)
7	3	11	=COUNTIF(A:A,C8)
11	3	A*	=COUNTIF(A:A,C9)
11	1	*ch*	=COUNTIF(A:A,C10)
11	1	???	=COUNTIF(A:A,C11)
AAA			
AAA			
Alchemex			

4. Calculate the number of months' service for an employee.

Use the **"DATEDIF"** function:

a. The date employed is in cell A2, and the current date is in cell B2.

	A	B	C
1	Date Employed	Current Date	Months
2	11/20/2008	12/15/2010	

b. Select cell C2 and enter = (DATEDIF(A2,B2,"Y")*12)+DATEDIF(A2,B2,"YM").

c. Format to number.

	A	B	C
1	Date Employed	Current Date	Months
2	11/20/2008	12/15/2010	24

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5. **Separate a column of mixed positive and negative figures into two different columns using the "IF" formula.**

   a. In this example your data is in A2:A6.

	A	B	C
1		Positive	Negative
2	-23		
3	67		
4	-90		
5	88		
6	78		

   b. In B2 enter the formula: =IF(A2>=0,A2,'''').

   c. In C2 enter the formula: =IF(B2="",A2,"").

   d. Copy the formula down.

	A	B	C
1		Positive	Negative
2	-23		-23
3	67	67	
4	-90		-90
5	88	88	
6	78	78	

6. **Format telephone numbers to look a certain way [such as 8668592378 to (866) 869-2378] by using a combination of Text functions.**

	A	B
1	Original Telephone Number	Formatted Telephone Number
2	8668592378	(866) 869-2378

   ="("&"0"&LEFT(A14,2)&")"&" "&MID(A14,3,3)&"-"&MID(A14,6,15)

   Explanation:

   a. In between the " is the additional text such as - ( ).

   b. The **&** symbol joins the items together.

   c. **LEFT** extracts the first two digits (area code): 21.

   d. The first **MID** is to extract from the third digit and three digits after that: 864.

   e. The second **MID** is to extract from the sixth digit and 15 digits after that: 2603.

   f. **A14** is the cell with the original telephone number; if necessary, change that cell reference of your first telephone number and copy the formula.

   g. Simply copy and paste this formula to the relevant cell, ensuring you change the cell reference A14 to the cell your telephone number is in.

7. **Format a number without decimal places, with a thousands separator, and combine it with text, using custom formatting and joining cells.**

   For example, Cell A1 contains "You owe" and cell B1 contains the value 87777.

   In cell C1 enter the following formula =A1&" "&TEXT(B1,"R#,##0").

C1	▼	*fx* =A1&" "&TEXT(B1,"R#,##0")	
	A	B	C	D
1	You Owe		87777	You Owe R87,777	
2				

8. **Use a formula to calculate somebody's age.**

   Because a person's age is the amount of time since birth, you can calculate age by putting today's date in one cell, the person's date of birth in another cell, then taking the date of birth away from today. Because you took a date serial from another date serial, you actually get the number of days in between.

   In this example the formula in cell **A3** is: **=A1-A2**

	A	B
1	4/5/2010	*Today*
2	9/27/1950	*Date of Birth*
3	21740	*Age*

   We need to convert this number of days into a number of years. Most years have 365 days but every fourth year has 366 days. So the average number of years is 365.25.

   In this example the formula in cell **A3** is: **=(A1-A2)/365.25**

	A	B
1	4/5/2010	*Today*
2	9/27/1950	*Date of Birth*
3	59.520876	*Age*

   Note the parentheses around the first part of the formula. Parentheses mean "Work out this bit first." They are used to stop Microsoft Excel from trying to divide A2 by 365.25 before taking it away from A1. The number is now in years, but it's still not quite right. The result is accurate, but you don't really want to see the fraction. As a last refinement we'll wrap the whole thing inside an **INT()** function to give us a whole number (an integer). This is better than changing the number of decimal places displayed, which would risk some numbers' being rounded up and giving an incorrect result.

   In this example the formula in cell **A3** is: **=INT((A1-A2)/365.25)**

	A	B
1	4/5/2010	*Today*
2	9/27/1950	*Date of Birth*
3	59	*Age*

9. Create your own Average IF function using a CSE.

An array formula (CSE) can perform multiple calculations and then return either a single result or multiple results. Array formulas act on two or more sets of values known as array arguments. Each array argument must have the same number of rows and columns. You create array formulas in the same way that you create other formulas, except you press CTRL+SHIFT+ENTER to enter the formula. You will notice that by using CTRL+SHIFT+ENTER, it adds curvy brackets around the formula. This is what makes it a CSE formula.

Process: See the example below:

	B18	▼	*fx* {=AVERAGE(IF(A2:A14=A18,C2:C14))}	
	A	B	C	D	E
1	Region	Date	Value		
2	Central	1/1/2010	12000		
3	Central	3/12/2010	23500		
4	East Coast	3/23/2010	14500		
5	Central	4/15/2010	14500		
6	West Coast	5/10/2010	16700		
7	East Coast	5/21/2010	14000		
8	West Coast	6/6/2010	23000		
9	East Coast	6/26/2010	10000		
10	West Coast	5/7/2010	22000		
11	East Coast	4/12/2010	17000		
12	East Coast	3/8/2010	23890		
13	East Coast	5/9/2010	35000		
14	West Coast	2/10/2010	18400		
15					
16					
17	Average of Values:				
18	East Coast	19065			
19	Central	16667			
20	West Coast	20025			
21					

Charts

If you use charts to bring your data to life, these tips can help to simplify their creation and maintenance.

1. **Going through the ChartWizard can take a while. Learn to put a chart into your workbook quickly.**

   a. Select the table on which the chart is to be based.

   b. Press **F11**.

   That's It! Excel inserts a new Chart worksheet before the current worksheet and bases the chart on the data in your table and the default chart type you have set up. At this point you can perform whatever customization you like on the chart and work with it as normal.

2. **Create a Chart that has both a line series and a column series plotted on the same Chart.**

   If the Chart is already created:

   a. **Right**-click on the chart you have created (on the chart area).

   b. Select **Chart Types**.

   c. Select **Custom Types**.

   d. Select **Line-column**.

   e. Select **OK**.

   If you are creating a new Chart:

   a. Select the **area** you would like to **Chart**.

   b. Select the **Chart Wizard** button on the **Standard** toolbar.

   c. Select the **Heading** tab, **Custom Types**.

   d. Select **Line-column**.

   e. Complete the rest of the Chart Wizard.

3. **Using a Chart Title that is linked to your worksheet enables you to simply update your worksheet, and your Chart Title will automatically update.**
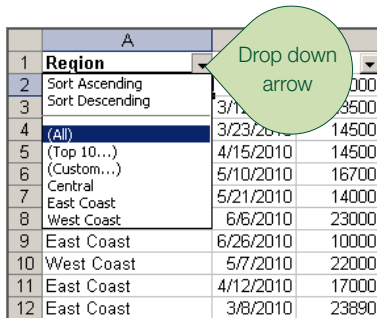
   a. Create the chart as you would normally do.

   b. Select the title you want to modify. Small handles should appear around the title.

   c. In the formula bar enter the address of the cell you want to use for the title. For instance, if the title is in cell A5 of the Data worksheet, you would enter the following in the formula bar:

   =Data!A6

Filtering

Excel software offers the option of filtering your lists in order to access only the information you need. The following can help you create filters and extract data quickly.

1. **Use filtering in Excel to filter a list quickly in order to summarize information.**

   a. **Select** anywhere in the list.

   b. On the **Menu** bar, select **Data, Filter, Auto filter**.

   c. Use the drop-down arrows to filter your list.

2. **If the same list of items is continually used, the easy way to insert the list without having to retype it is using an AUTOFILL LIST.**

   a. Select **Tools**, **Options** then select the **Custom Lists tab**.

   b. Type the first item in the **List Entries box** and enter.

   c. Type the rest of your items pressing enter after each one except the last one.

   d. Select **OK**.

   e. To use the list, enter any of the items in a cell then drag the cell's Autofill handle (bottom right-hand corner) down or across.

3. **Extract a list of unique items from a list by using the Advanced Filter.**

   a. Select the worksheet where you would like the extracted list to appear.

   b. On the Menu bar select **Data, Filter Autofilter**.
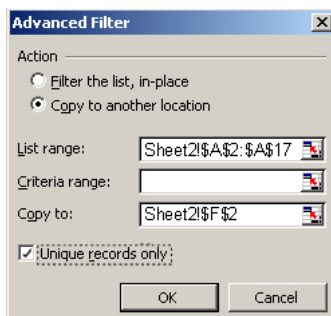
   c. Select **Copy to another location**.

   d. In the **List range**, select the list of items you are extracting unique records from.

   e. In the **Copy to** field, select the first cell in the range where you would like to have your results show.

   f. Select the check box for **Unique records only**. Select **OK**.

Formatting

Do you ever need to remove all of the spaces within a cell? Display numbers in a different format, or change a font type? You can do all of this and more simply by formatting your cells using the following steps.

1. **Remove ALL spaces from a cell (as the TRIM function leaves one space in the middle) using Find and Replace.**
   a. Select the range of cells you would like to remove the space from.
   b. Press **Ctrl + H**.
   c. Click on the **Find What** box and press the space bar once.
   d. Ensure the **Replace with** box has nothing in it.
   e. Select **Replace all**.

2. **If you receive data in one column and need to extract the data into different columns, you can do this by using the "Text to Columns" wizard.**
   a. Select the cells that contain the text or values.

	A	B
1	**Account**	**Sub Account**
2	100/300	
3	1001/4001	
4	10/200	
5	200/300	
6		

   b. On the **Menu** bar, select, **Data, Text to Columns, Next**.
   c. Select the **Delimiter** that separates the items.
   d. Select **Finish**.

	A	B
1	**Account**	**Subaccount**
2	100	300
3	1001	4001
4	10	200
5	200	300
6		

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3. Change a font type to Sentence case by inserting VB code into the worksheet.

    a. Open the required **workbook**.

    b. **Right-click** on any worksheet.

    c. Select **View Code**.

    d. On the left, select **This workbook**.

    On the **right** side paste the below coding:

```
Sub TextIt_Click()
'Modified Text converter
' Option to select range of cells or correct entire worksheet.
Dim TextCaseAlch As Range
Set TextCaseAlch = Selection.SpecialCells(xlCellTypeConstants, 2)
For Each cell In TextCaseAlch.Cells
s = cell.Value
Start = True
For i = 1 To Len(s)
ch = Mid(s, i, 1)
Select Case ch
Case "."
Start = True
Case "!"
Start = True
Case "?"
Start = True
Case "a" To "z"
If Start Then ch = UCase(ch): Start = False
Case "A" To "Z"
If Start Then Start = False Else ch = LCase(ch)
End Select
Mid(s, i, 1) = ch
Next
cell.Value = s
Next
End Sub
```

4. **Quickly format from one cell to a range of cells using FORMAT PAINTER.**

    a. Select the **cell or range** that contains the formats you wish to copy.

    b. Select the **Format Painter** icon (the yellow paintbrush icon on the Standard toolbar).

    c. Click and drag the mouse over the range you want to paint. Excel then applies the copied formats to the selected cells and automatically deactivates the painter.

    d. If you need to copy formats to a range or multiple cells, double-click the Format Painter to keep it active. Pressing the Esc key deactivates the painter once finished.

5. **Force a new line within a cell.**

    a. Press F2 to edit a cell.

    b. Type the text you need on the first line.

   c. Press Alt-Enter, and then type again.

The contents of your cell are split onto two lines regardless of the width of the column. Some people use wrap text to wrap the text onto two lines, but this is not a permanent format since the text will adjust accordingly when you widen the column; you could easily end up with the text on one line again.

6. **Display numbers as only thousands or millions.**

    a. Select the **cell/cells** to be changed.

	A	E
1	**Amount**	
2	3000000	
3	4588900	
4	7866999	
5	1255590	
6		

    b. Select **Format**, Cells, select the **Number** tab, **choose Custom** as the **category**, then in the **Type** box, type in as follows:
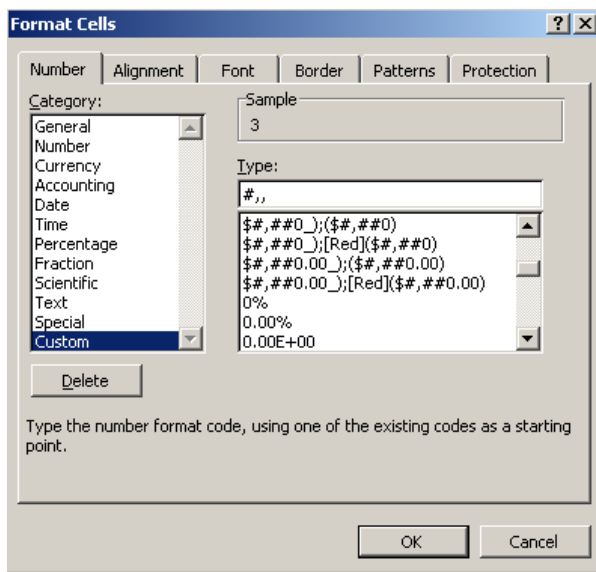
    for thousands enter #,
    for millions enter #,,

    c. Select **OK**.

|	A	E
1	**Amount**	
2	3	
3	5	
4	8	
5	1	

Conditional Formatting

Did you know you can answer specific questions about your data by highlighting cells based on a condition (or criteria)? Try these shortcuts to adding conditional formatting to cells to help you visualize data at a glance.

1. **To apply conditional formatting to an entire row, fix your cell reference for the column.**

   You can apply conditional formatting that checks the value in one cell and applies formatting to other cells based on that value. For example, you could color the entire row in a table if the values in column E are over a set value (2000).

	A	B	C	D	E
1	Category Name	Product Name	Date	Month	Product Sales
2	Dairy Products	Blue Cheese	4/3/2010	April	5568
3	Dairy Products	Blue Cheese	4/4/2010	April	1566
4	Dairy Products	Blue Cheese	4/4/2010	April	3480
5	Dairy Products	Cheese Sticks	4/7/2010	April	4840
6	Dairy Products	Cheese Sticks	4/10/2010	April	1980
7	Dairy Products	Blue Cheese	4/11/2010	April	1392

   a. Select the cells to be formatted (A2:E).

   b. From the **Menu** bar select **Format, Conditional Formatting**.

   c. Enter the below and select **OK**:
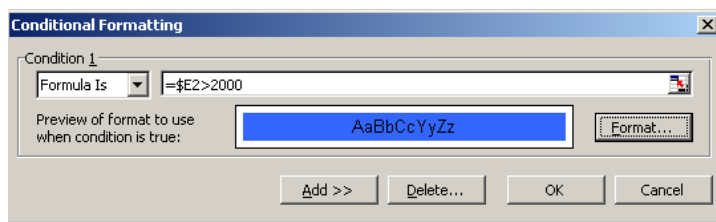
   d. In this example, the formula is =$E2>2000.

2. **Compare two lists and identify the items that are different.**

   This can be done by using a combination of Conditional Formatting and the COUNTIF function. The first list is in A2:A16 and this range is named newacc. The second list is in D2:D16, and the range is named oldacc. The ranges were named using the Insert – Name – Define Command. Naming the ranges is not necessary, but it makes them easier to work with. As you can see, items in newacc that do not appear in oldacc are highlighted with a blue background. Items in oldacc that do not appear in newacc are highlighted with a purple background. These colors are the result of Conditional Formatting. Select the newacc range.

a. On the **Menu** bar, select **Format, Conditional Formatting**.

b. Enter in the below: =COUNTIF(OLDACC,A2)=0.

c. Select the oldacc range.

d. On the **Menu** bar, select **Format, Conditional Formatting**.

e. Enter in the below: =COUNTIF(NEWACC,D2)=0.

f. The COUNTIF function counts the number of times a particular value appears in a range. If the formula returns 0, it means that the item does not appear in the range. Therefore, the conditional formatting kicks in, and the cell's background color is changed.

3. Highlight duplicate items in a column.

a. Select the range of cells.

b. On the **Menu** bar, click on **Format, Conditional Formatting**.

c. Under Condition 1, select **Formula Is**.

d. In the formula =COUNTIF(column range you are in, cell you are in)>1.

e. Select **Format** and select a Pattern of your choice.

f. Click **OK**.

Shortcuts

The handiest tips and tricks are shortcuts that will simplify everyday Excel tasks so you can get started with your spreadsheets quickly.

1. **Use the Shift key to close a number of open workbooks.**
   a. Hold down the **Shift key** as you select **File** on the **Menu** bar.
   b. You will notice that there is a **Close All option**.
   c. Choose this, and all your workbooks are closed.
   d. You will, of course, be prompted to save changes on each open workbook, if necessary.

2. **Quickly enter today's date in a cell without having to type a formula.**
   a. To enter the date press CTRL + ; (Ctrl and semicolon simultaneously).
   b. To enter the time press CTRL+Shift+ ; (Ctrl, shift colon simultaneously).

	A	B
1	Shortcut	Result
2	Ctrl + ;	4/15/2010
3	Ctrl + Shift + ;	10:40 AM

3. **Quickly insert a new worksheet.**
   a. Select the worksheet to the right of where the new worksheet will be inserted.
   b. Press Shift+F11.

Page Setup

Ready to print? Use these shortcuts to create a watermark, apply a header and footer, establish print settings for multiple worksheets at once, and more.

1. **To use the same printing settings for a number of worksheets, without having to manually set up each worksheet, group the worksheets together.**
   a. Select the worksheet whose print settings you want to copy.
   b. **Group** this worksheet together with the worksheets that need to have the same settings.
   c. From the **File** menu, select Page **Setup**, and then select **OK**.
   d. The page settings from the worksheet selected in step a. are copied to all of the selected worksheets.

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2. **When you need to print different ranges for different departments in the same spreadsheet, create Custom Views so the settings don't need to be redone every time.**

   a. Before defining the print area, hide the rows and columns you do not want to print, and set up the spreadsheet as desired.

   b. From the **View** menu, select **Custom Views**. Select **Add**.

   c. In the Add **View** dialog box, type the name of the view in the **Name box**, and then select **OK**.

   d. Repeat until all different reports have been customized.

   e. From any worksheet in the workbook, select the desired **Custom View** from the **Custom View box**.

   f. Press Ctrl+ P. In the **Print dialog box**, click **OK**.

3. **Use the "Remove Page Breaks" Function when the page breaks need to be reset.**

   a. Change your view to **Page Break Preview**.

   b. **View, Page Break Preview.**

   c. Right-click on any cell on the worksheet.

   d. Select Reset **All Page Break**.

4. **Create a watermark to have the word "Confidential" printed on Financial Statements and reports.**

   a. Right-click on a **toolbar** and select the **WordArt toolbar** from the shortcut.

   b. On the **WordArt toolbar**, select the Insert **WordArt** icon.

   c. From the **WordArt Gallery**, select your choice of format, and then **OK**.

   d. In the **WordArt Edit Text dialog box**, type **Confidential**, select the font and size, and then select **OK**.

   e. Right-click the **WordArt**, select **Format WordArt** from the shortcut menu, and then select **the Colors and Lines tab**.

   f. In **Fill**, select **No Fill** from the Color dropdown list.

   g. In the line section adjust the color and line format to black.

   h. Select **OK**.

   i. Right-click the WordArt, select **Order** from the shortcut menu, and then **Send to Back**.

   j. Adjust the WordArt to suit the sheet.

5. **Apply the same Header and Footer to some of the worksheets on a workbook.**

   a. Select the worksheets. If the worksheets are adjacent to one another, select the sheet tab of the first sheet in the range, hold the Shift key, then select the last sheet in the range.

   b. If the sheets are not adjacent to one another then select the first sheet, hold the Ctrl key, select all other sheet tabs of the sheets you wish to apply the header and footer to.

   c. Select **File**, **Page Setup**, **Header and Footer**.

   d. Apply the header and footer.

   e. To ungroup the sheets, hold the shift key then click on the first sheet tab within the group.

6. **When you click on a cell that contains a very long formula, it often takes up more than two lines of text in the formula bar and it hides the first rows of your spreadsheet. To overcome this, insert a blank row at the top of the worksheet and increase the row height.**

   a. To insert a blank row, right-click on Row 1, then select **Insert**, **Rows**.

   b. Increase the row height of the new row by selecting, **Format**, **Row**, **Height**, then type in a high number (such as 50).

7. **Display two worksheets in a workbook on the screen at the same time.**

   a. Open the workbook; activate one of the worksheets you need to display.

   b. Select **Window**, **New Window**.

   c. The workbook will open a second time. In this workbook activate the second sheet you need to display.

   d. Now select **Window**, **Arrange Windows**.

   e. Tick the check box **"Windows of active workbook,"** choose the display you want (tiled, vertical).

   f. Select **OK**.

8. **Print the heading of a report on each page when it prints.**

   a. Select **File**, **Page Setup**.

   b. Select the **heading tab Sheet**.

   c. In the "print titles" section, to have headings repeated; fill in the section **"Rows to repeat at top."**
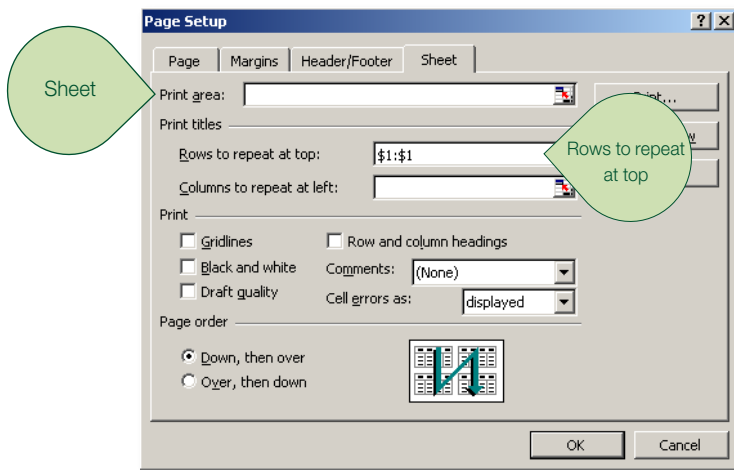
   d. To have a column of information repeated on each page, fill in **"columns to repeat at left."**

   e. Select **OK**.

9. Match the name of a worksheet tab to a cell on the worksheet.

    a. Select, **Tools, Macro, Visual Basic Editor**.

    b. On the left, in the Project window, select **"This Workbook."**

    c. On the right, in the Code window, paste the below code.
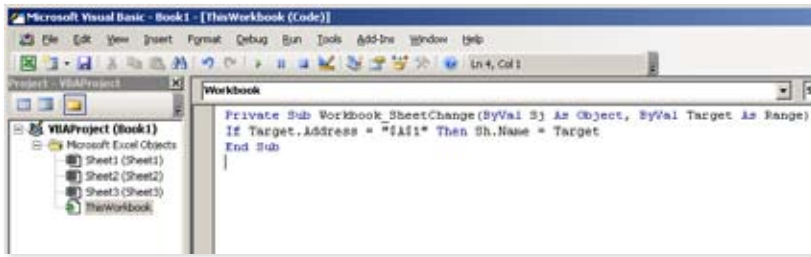
        Private Sub Workshop_SheetChange(ByVal Sh As Object, ByVal Target As Range)
        If Target.Address = "A1" Then Sh.Name = Target
        End Sub

    d. Select, **File, Close and Return to Microsoft Excel**.

Hyperlinks

If you use hyperlinks to jump from one workbook to another, these tips will come in handy.

1. Open another file from inside a workbook using a hyperlink.

    a. Select the cell where you want the link to be activated from.

    b. Right-click and select **Hyperlink**.

    c. Under **Link To**, select **Existing File** or **Web Page**.
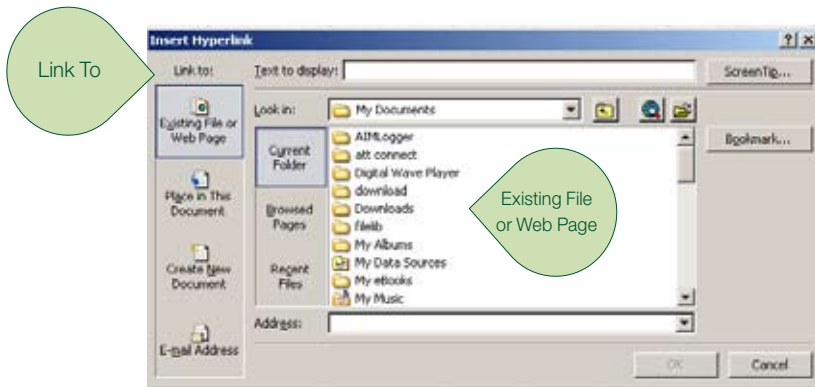
    d. Navigate to the desired file.

    e. Select the desired file and select **OK**.

2. Select a hyperlink without activating it.

    a. Press and hold the mouse button on the cell for a few seconds.

    b. To select a graphic with a hyperlink, CTRL and click the graphic.

Excel Options

Set up your Excel system to work the way you want to. Use these tools to set additional preferences.

1. Show all the menu items, not only the recently used ones.

    a. Select **Tools**, **Customize**.

    b. Select the **Options tab**.

    c. Clear the check box **"Menus show recently used commands first**."

    d. Select **OK**.

2. Prevent Excel from prompting you to update links when you open a workbook that contains links to other workbooks.

    a. Select **Tools**, **Options**.

    b. Select the **Edit tab**.

    c. Clear the check box **Ask to update automatic links**.

    d. Select **OK**.

Sorting

You can use the sorting tool to more than alphabetize. Consider these convenient tips:

1. Use SORT to get rid of empty rows in between data.

    a. Select all columns containing data.

    b. From the **Standard** toolbar, select **Sort Ascending**.

    c. The empty rows will be sorted to the bottom.

2. Sort your month column in month order.

    a. Select any cell in the month column.

    b. From the **Menu** bar, select **Data**, **Sort**.

    c. At the bottom left, select **Options**.
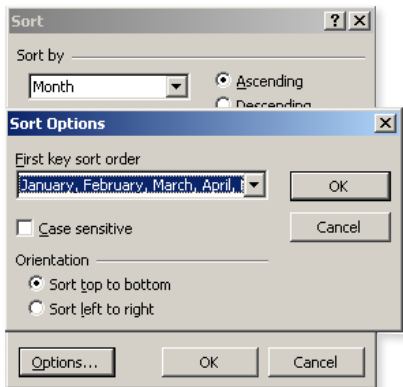
    d. Select the months as your **First key sort order**.

    e. Select **OK**.

Think these tips are useful?

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Subtotals

If you have two columns that need to be subtotaled (such as item quantity and dollar amount), you can perform both of these calculations using a single shortcut.

1. Subtotal under more than one field.

    a. Sort the fields which you need to have subtotaled.

    b. In the example (see screenshot), Customer Name and Area have been sorted.

    c. Select **Data** then **Subtotals**.

    d. Make the selection in the **At each change** in dropdown list (for example Customer Name).

    e. In **Add Subtotal to**, select the **Quantity** and **Total** checkboxes.

    f. Repeat steps c and d, and select **Area**.

    g. **Deselect** the **Replace current subtotals** checkbox, and then select **OK**.

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