Business Process Procedures

14.40 MICROSOFT EXCEL TIPS

Overview
These procedures document some helpful hints and tricks while using Microsoft Excel.

Key Points
This document will explore the following:

1. Formatting columns for EmplIDs with leading zeros
2. Formatting column width
3. Sorting
4. Filtering data
5. Filtering data to unique records only
6. Importing text files
7. Inserting additional worksheets within the original spreadsheet
8. Transposing values within a spreadsheet
9. Add additional lines of text to a specific cell
10. Combining values from multiple columns
11. Separating values into multiple columns

Tip 1 – Formatting Columns for EmplIDs with Leading Zeros

Detailed Directions
Sometimes when you are working with imported data, the leading zeros on EmplIDs are truncated like in the example below.

To reformat rows or columns to display leading zeros in EmplIDs or other numerical data, follow these steps.
Step 1.1 Click the column heading for the column to be reformatted.

HINT: Use CTRL and click additional column headings if you need to reformat more than one column to the same specifications – two columns both need to view all seven digits of an EmplID, as in the example above.

Step 1.2 Click **Format**

Step 1.3 Click **Cells**

Step 1.4 Click on the **Number tab**

Step 1.5 The default format should be **General**

Step 1.6 Click **Custom**

Step 1.7 On the right-hand size of the dialog box, in the **Type field** highlight and delete **General**

Step 1.8 Enter seven zeros in the **Type box** 0000000

Step 1.9 Click **OK**

Step 1.10 Review the results
Tip 2 – Formatting the Widths of Multiple Columns

Detailed Directions
To format the width of multiple columns at one time, follow these steps.

**Step 2.1**
Highlight all columns you wish to format or click the upper left-hand corner of the spreadsheet to choose all columns in the spreadsheet.

**Step 2.2**
Place your cursor on one of the column divider lines as shown below and double-click
Step 2.3  The column widths will automatically reformat to accommodate the longest piece of data in the column as shown below.

Tip 3 – Sorting Data

Detailed Directions  To sort data in a spreadsheet, follow these steps.

Step 3.1  Highlight and delete any blank or unneeded rows at the top of the document and between the column headings and the data, as shown on the screen shot below. (Edit→Delete)
When the additional rows are deleted, click **Data**

- Click **Sort**

**Step 3.2**

A dialog box appears

```
Sort

Sort by

AUDIT_STA  

Then by

EMPID

My list has

- Header row
- No header row

Options...  OK  Cancel
```

**Step 3.3**

If you have a header row, click on the **Header Row** radio button so the sort skips that row.

**Step 3.4**

Choose your sort criteria, starting with the **Sort by** field, and moving to the **Then by** fields if you choose to use sub-sorting. In the example above, the sort will be on the audit date first, and then within the audit date, by EmplID.

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**Tip 4 – Filtering Data**

**Detailed Directions**

To filter data in a spreadsheet, follow these steps.

**Step 4.1**

Highlight and delete any blank or unneeded rows at the top of the document and between the column headings and the data, as shown on the screen shot below. (Edit→Delete)
Step 4.2  When the additional rows are deleted, click Data

Step 4.3  Click Filter

Step 4.4  Click Autofilter

Step 4.5  Notice the arrows that appear on each column

Step 4.6  Click on the arrow for the first column and review the list of values. In this example, the first column represents employees’ EmplIDs.
Step 4.7  Highlight one of the values and you will see that Excel hides all rows that don’t meet the criteria you’ve chosen.

Step 4.8  To further filter the data, click on the arrow on the second column. In this example, the second column represents the audit date.

Step 4.9  Highlight one of the values and you will see that Excel further hides all rows that don’t meet the criteria you’ve chosen.
Tip 5 – Filtering Data to Unique Records Only

Detailed Directions: To filter data to unique records in a spreadsheet, follow these steps.

**Step 5.1** Highlight and delete any blank or unneeded rows at the top of the document and between the column headings and the data, as shown on the screen shot below. (Edit -> Delete)

![Screen Shot of Data](image)

**Step 5.2** When the additional rows are deleted, highlight the column that you would like to filter to unique records.

**Step 5.3** Click **Data**

**Step 5.4** Click **Filter**

**Step 5.5** Click **AutoFilter**
Step 5.6  Notice the arrows that appear on each column

Step 5.7  Click Filter

Step 5.8  Click Advanced Filter

Step 5.9  A dialog box appears

Step 5.10  Click the Copy to another location radio button

Step 5.11  Check the Unique records only checkbox

Step 5.12  Click the at the end of the Copy to field

Step 5.13  A small dialog box appears on the screen
Step 5.14  With the little dialog box shown above still open, highlight the column where you would like to save the unique records. In the example below, Column O is highlighted and the Column O values have been entered in the Copy to field.

Step 5.15  Click OK

Step 5.16  The unique records will be written to the Copy to area
**Tip 6 – Importing Text Files**

**Detailed Directions**
To import text files into a spreadsheet, follow these steps.

**Step 6.1** Click **Data**

**Step 6.2** Click **Get External Data**

**Step 6.3** Click **Import Text File**

**Step 6.4** Browse and choose the text file you wish to import

**Step 6.5** The following dialog box appears

![Image of the Text Import Wizard dialog box]

**Step 6.6** If the file has commas or tabs separating the fields, click the **Delimited** radio button. If not, accept the default choice of **Fixed Width**.

**Step 6.7** Click **Next**
Step 6.8  The following dialog box appears

Step 6.9  Using the scroll bar at the bottom of the screen; verify that the column breaks are correct.  
If necessary, correct them using the directions on the screen.

Step 6.10  Click **Next**

Step 6.11  The following dialog box appears

Step 6.12  Click **Finish**
Step 6.13 The following dialog box appears

Step 6.14 Highlight the cell where you want to have the data saved (usually A1)

Step 6.15 Click OK

Step 6.16 The data appears starting in the cell you highlighted above
Tip 7 – Inserting Additional Worksheets within the Original Spreadsheet

Detailed Directions

To insert additional worksheets within the original spreadsheet, follow these steps.

Step 7.1

There are two ways you can insert additional worksheets within a spreadsheet. You may either right-click on the worksheet name, and then click **Insert**.

Then choose **Worksheet** from the options given, and click **OK**.
**Step 7.2**  
Or you may choose **Insert → Worksheet** from the toolbar.

**Step 7.3**  
You may also rename the original and new worksheets by either right-clicking on the worksheet name (as shown in Step 7.1) and choosing **Rename**, or by double-clicking on the worksheet name. When the current name is highlighted, you may type a new name.

**Step 7.4**  
Save your changes.
Tip 8 – Transposing Values within a Spreadsheet

Detailed Directions  To switch the column and row values within a spreadsheet, follow these steps.

**Step 8.1**  Highlight all of the values you would like to switch.

**Step 8.2**  On the taskbar, click **Edit**.

**Step 8.3**  Click **Copy**.

**Step 8.4**  Place your cursor on in the cell where you would like the results to start (A10 was used in this example).

**Step 8.5**  On the taskbar, click **Edit**.
Step 8.6  Click **Paste Special**. A dialog box appears.

![Paste Special dialog box](image)

Step 8.7  Make these choices:

- **Paste**: All
- **Operation**: None
- **Check Transpose**

Step 8.8  Click **OK**.

Step 8.9  The results appear starting in the cell you chose in Step 8.4. See example below:

![Excel transpose example](image)

The transpose functionality switched the alpha values in each column and the numeric values in each row.
Step 8.10  Save your changes.

Tip 9 – Add Additional Lines of Text to a Cell

Detailed Directions  To add additional lines of text to a specific cell, follow these steps.

Step 9.1  Type the first line of text in the cell.

Step 9.2  Hold down the Alt key and click Enter. Type the second line of text. Repeat this step for each line of text added.
Step 9.3 When all lines have been added, click Enter. View results.
Tip 10 – Combining Values from Multiple Columns

Detailed Directions   To combine the values from multiple columns into one column, follow these steps.

Step 10.1    Place your cursor in the cell where the results will start.

Step 10.2    In the formula field enter =A1&B1 (where A1 represents the first value to be combined and B1 represents the second value) and click Enter ↵.
Step 10.3

The results will show the two values were combined in the destination cell.

Note

If you wish to combine the two values with a separator (like Last Name, First Name), then the formula should read =B1","&A1 (where B1 represents the first value to be combined, the ",", " represents the comma and space separator, and A1 represents the second value).

The results are as follows:
Tip 11 – Separating Values into Multiple Columns

Detailed Directions  To separate values stored together in one column into multiple columns, follow these steps.

Step 11.1  Prior to separating the values, you may choose to remove extraneous data, and insert delimiting values. The example below shows “>” between each navigation level.

Since Excel can only handle one delimiter, these values were replaced with commas in the steps below using Excel's Find/Replace feature.
Step 11.2  Highlight the source column.

Step 11.3  On the toolbar, click Data, Text to Columns. The Convert Text to Columns Wizard dialog box appears.

Click the for Delimited data type, then click Next >.
Step 11.4
The next dialog page appears.

Using the scroll bar at the bottom of the screen; verify that the column breaks are correct. If necessary, correct them using the directions on the screen. When the breaks are correct, click Next >.

Step 11.5
The following dialog box appears.

Click Finish.
Step 11.6  
The results will show the values in the source column have been separated into individual columns.