Business Process Procedures

14.40 EXCEL 2007 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** While the column is highlighted, you may do one of two things to access the numeric formatting:

- Right-click on your mouse
- Click **Format Cells**

OR

- Locate the Number formatting section on your tool bar and click the small arrow in the lower right-hand corner of the formatting box.

![Number formatting section](image)

**Step 1.3** The Format Cells dialog box appears.

![Format Cells dialog box](image)

**Step 1.4** If the dialog box does not open to the **Number tab**, click on that 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.

Step 3.2  To sort the remaining data, highlight the entire spreadsheet (see Step 2.1 for details).
Step 3.3  While the spreadsheet is highlighted, click at the right-hand side of your toolbar, then chose one of the first two standard sort options: Smallest to Largest, or Largest to Smallest. Starting with Column A, the data will sort according to the criteria chosen.

Step 3.4  If you need to sort by other criteria, click Custom Sort and continue with the Steps below.

Step 3.5  The Sort dialog box appears.

Step 3.6  If you data has a header row, click the My data has headers checkbox.
Step 3.7  Click the **Sort by** drop down arrow and chose the first column to sort.

Step 3.8  Click the **Sort On** drop down arrow and chose the value criteria for that column.

Step 3.9  Click the **Order** drop down arrow and chose the order in which you would like the results to display.

Step 3.10 If you need to chose more than one criterion, follow the steps above for each subsequent column you need to sort, clicking the Add Level to insert additional rows.

Step 3.11  Click OK to close the dialog box. The data will be sorted upon closing the box.
Tip 4 – Filtering Data

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

**Step 4.1** Click the upper left-hand corner of the spreadsheet to choose all columns in the spreadsheet.
Step 4.2 While the spreadsheet is highlighted, click at the right-hand side of your toolbar, then click.

Step 4.3 Notice the arrows that appear on each column.
Step 4.4 Click on the arrow for the column you wish to filter. A dialog box appears with all the values for that column. In this example the column represents tuition exceptions.

Step 4.5 Check and uncheck the value boxes so as to choose only the values you wish to view.

Step 4.6 Click and you will see that Excel hides all rows that don’t meet the criteria you’ve chosen.
**Step 4.7**

To further filter the data, click an arrow on a second column. In this example, the second column represents the audit action. 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.

![Screen Shot](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 the **Data** tab on your toolbar.

**Step 5.4** Click **Advanced**.

**Step 5.5** A dialog box appears.
Step 5.6  Click the **Copy to another location** radio button

Step 5.7  Check the **Unique records only** checkbox

Step 5.8  Click the **at the end of the Copy to field**

Step 5.9  A small dialog box appears on the screen

**Advanced Filter - Copy to:**

[Image]

Step 5.10  With the small 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.

[Image]

Step 5.11  Click **on the small dialog box, and then **.
**Step 5.12**

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 the **Data** tab on your toolbar.

**Step 6.2**  
Click

**Step 6.3**  
When the **Import Text File** dialog box appears, browse and choose the text file you wish to import.

**Step 6.4**  
Click **Import**. The following dialog box appears

![Import Text File Dialog Box](image)

**Step 6.5**  
If the file has commas or tabs separating the fields, click the **Delimited** data type, then click **Next >**. If not, accept the default choice of **Fixed Width**.

**Step 6.6**  
Click **Next >**.
**Step 6.7** The following dialog box appears

![Image of Text Import Wizard - Step 2 of 3]

**Step 6.8** 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 6.9** Click ➤Next➤.

**Step 6.10** The following dialog box appears

![Image of Text Import Wizard - Step 3 of 3]

**Step 6.11** Click ➤Finish➤.
Step 6.12 The following dialog box appears

Step 6.13 Highlight the cell where you want to have the data saved (usually A1)

Step 6.14 Click OK.

Step 6.15 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**
Right-click on the worksheet name, and then click **Insert**.

**Step 7.2**
Then choose **Worksheet** from the options given, and click **OK**.
**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** You may also choose to color the worksheet tabs to help highlight them for users by right-clicking on the worksheet name (as shown in Step 7.1) and choosing **Tab Color**.

**Step 7.5** 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.

![Spreadsheet Image](image.png)

**Step 8.2**  Click [](./image.png).

**Step 8.3**  Place your cursor on in the cell where you would like the results to start (A10 was used in this example).
**Step 8.4**  On the taskbar, click then **Transpose**.

**Step 8.5**  The results appear starting in the cell you chose in Step 8.4.  See example below:

The transpose functionality switched the alpha values in each column and the numeric values in each row.

**Step 8.6**  Save your changes.
Tip 9 – Add Additional Lines of Text to a Cell

**Detailed Directions**  To add data on separate lines of text, all within a specific cell, follow these steps.

**Step 9.1**  Type the first line of text in the cell.
**Step 9.2** While the cursor is still active in the cell, 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 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. The results will show the two values were combined in the destination cell.

Step 10.3 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 need to insert a delimiting value, or combine multiple values (Excel can only handle one delimiter for this task)

The example below shows -> between each navigation, before those two values were combined into one.
The screen shot below shows the \( \rightarrow \) values were replaced with commas using Excel's Find/Replace feature.

**Step 1.2** Highlight the source column.

**Step 1.3** Click the [Data] tab on your toolbar.
Step 11.4 Click . The Convert Text to Columns Wizard dialog box appears.

Step 11.5 Click the for Delimited data type, then click . The next dialog page appears.
Step 11.6 Verify that the Delimiter is set for Comma, or other appropriate value. 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 11.7 The following dialog box appears.

The following dialog box appears.

Step 11.8 Click [Back].
Step 11.6  The results will show the values in the source column have been separated into individual columns.