Excel Expert

Session 2 – Customizing Everything

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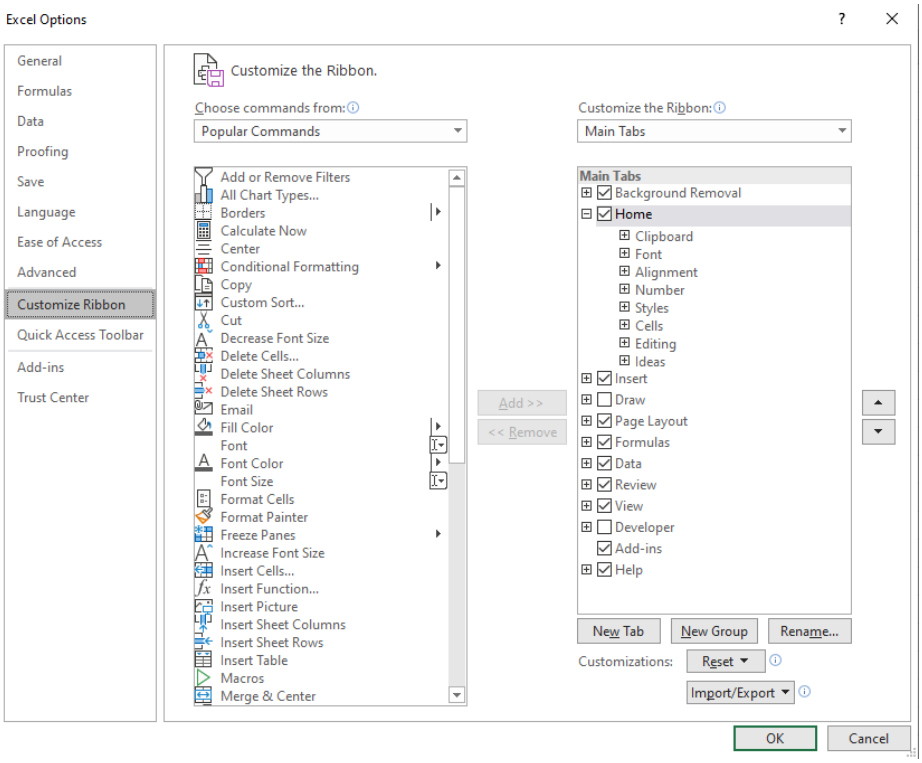
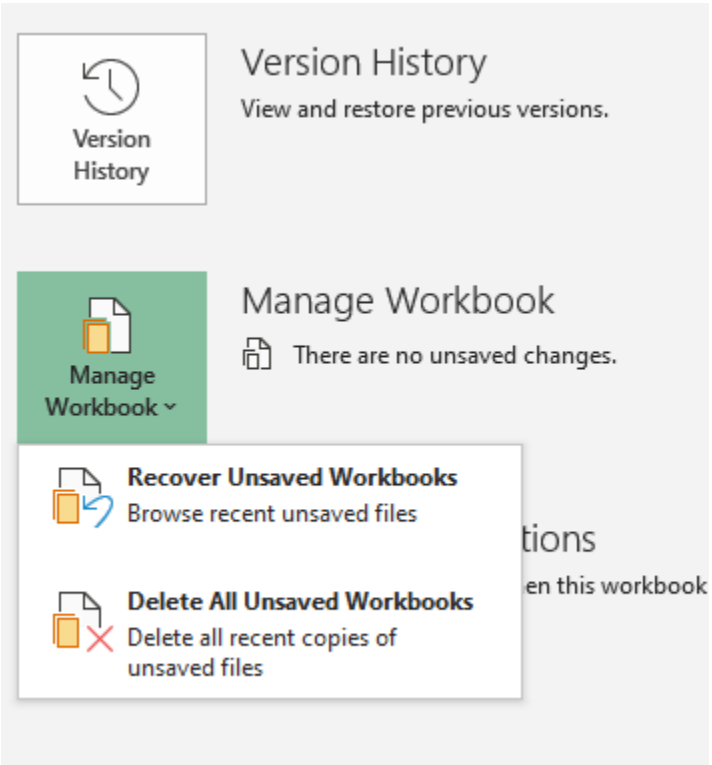
Change Tabs

Under Options, there is a way to customize the ribbon. This includes adding and hiding tabs.

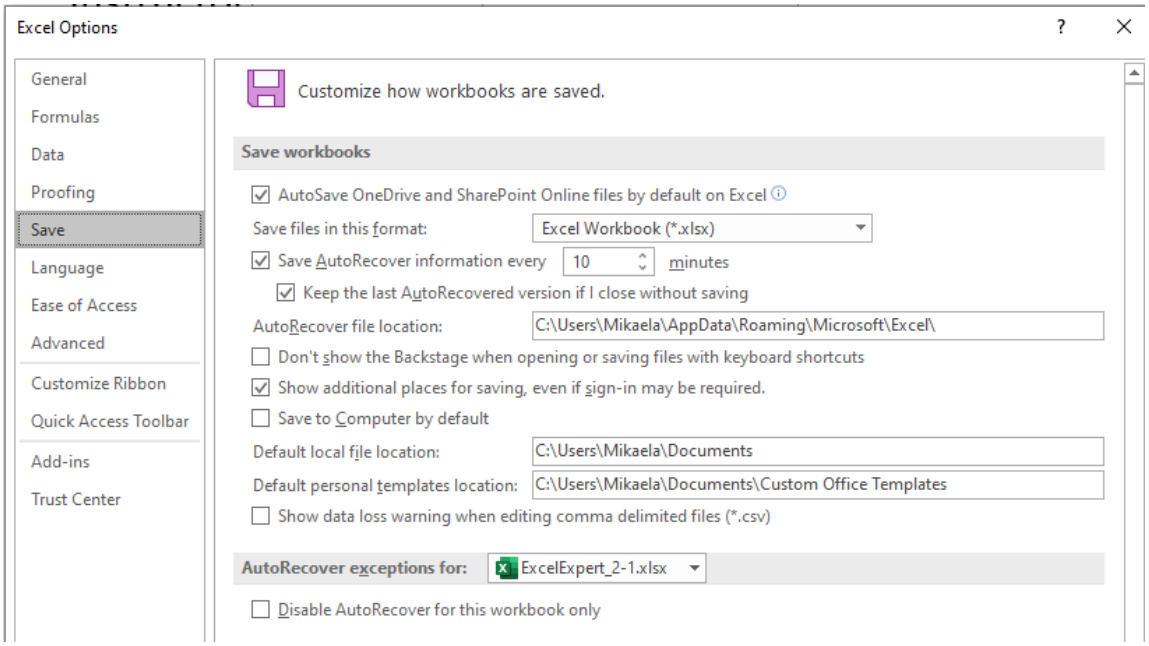


Manage Workbook Versions

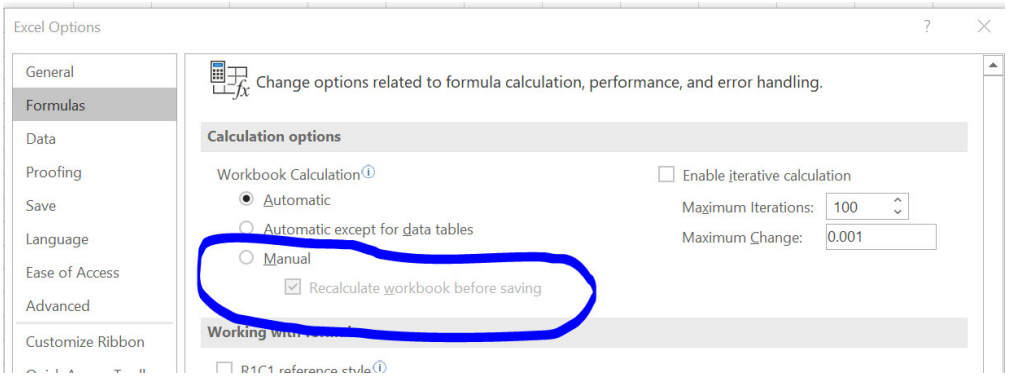
If you want to go “Back in Time” to another version, or if the computer died without saving your changes – the computer does that for you. This is found when you open the workbook and go to File->Info



Configure Auto Recover



And While we are here… the test really wants you to know how to set the calculations to manual.



To manually recalculate formulas in only the active worksheet

- On the Formulas tab, click Calculate Sheet.
- Press Shift+F9.

To manually recalculate formulas in every open worksheet

- On the Formulas tab, in the Calculation group, click Calculate Now.
- Press F9.

To manually recalculate every formula in every open worksheet

- Press Ctrl+Alt+Shift+F9.

Custom Formats

Excel custom number formats have a specific structure. Each number format can have up to four sections, separated with semi-colons as follows:

This structure can make custom number formats look overwhelmingly complex. To read a custom number format, learn to spot the semi-colons and mentally parse the code into these sections:

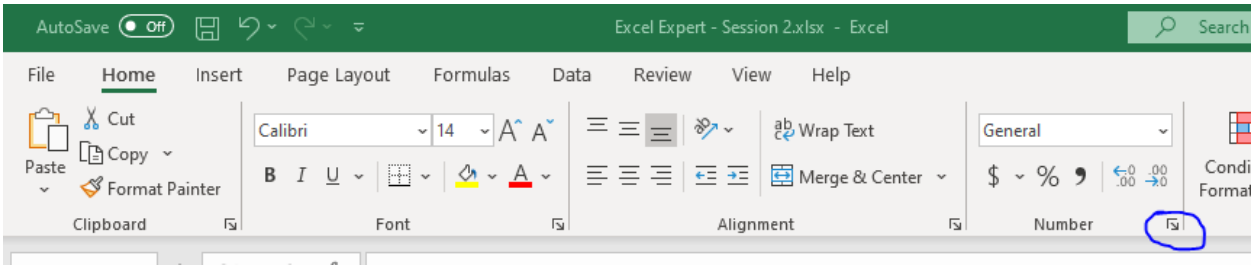
- Positive values
- Negative values
- Zero values
- Text values

Symbol	Description
#	Holds a place for a digit and displays the digit exactly as typed. Displays nothing if no number is entered. For example, if a cell’s custom format is ### and you enter 25 into the cell, Excel displays 25
0	Holds a place for a digit and displays the digit exactly as typed. Displays zero if no number is entered. For example, if a cell’s cus
?	Holds a place for a digit and displays the digit exactly as typed. Displays a space if no number is entered. For example, if a cell’s custom format is 0??? and you enter 25 into the cell, Excel displays 0 25.
. (period)	Sets the location of the decimal point. For example, if a cell’s custom format is #.#0 and you enter 34.5 into the cell, Excel displays 34.50.
, (comma)	Sets the location of the thousands separator. Marks only the location of the first thousand. For example, if a cell’s custom format is #,### and you enter 12345 into the cell, Excel displays 12,345.
%	Multiplies the number by 100 (for display only) and adds the percent (%) character. For example, if a cell’s custom format is #% and you enter .75 into the cell, Excel displays 75%.
“text”	Inserts the text that appears within the quotation marks. For example, if a cell’s custom format is “Part “\#00-0000 and you enter 123456 into the cell, Excel displays Part #12-3456.
@	Displays the cell’s text. For example, if a cell’s custom format is @” entry” and you enter credit into the cell, Excel displays credit entry.

[color]	Displays the cell contents in the specified color. For example, if the cell's custom format is 0.00[green];0.00[red], Excel displays positive cell values in green and negative cell values in red. The predefined color values you can use are black, white, red, green, blue, yellow, magenta, and cyan, and the color codes color8 through color55.

Open the Workbook **Excel Expert – Session 2 -> Custom Data Formatting**

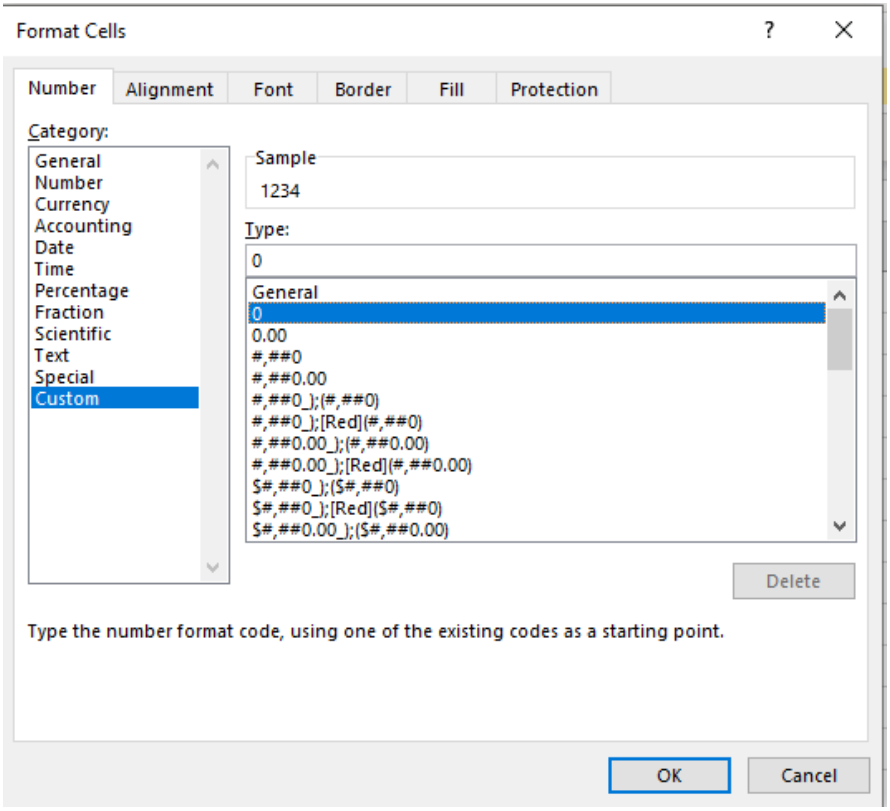
Open the customization window:



Examples:
SS

Phone

Menards SKU



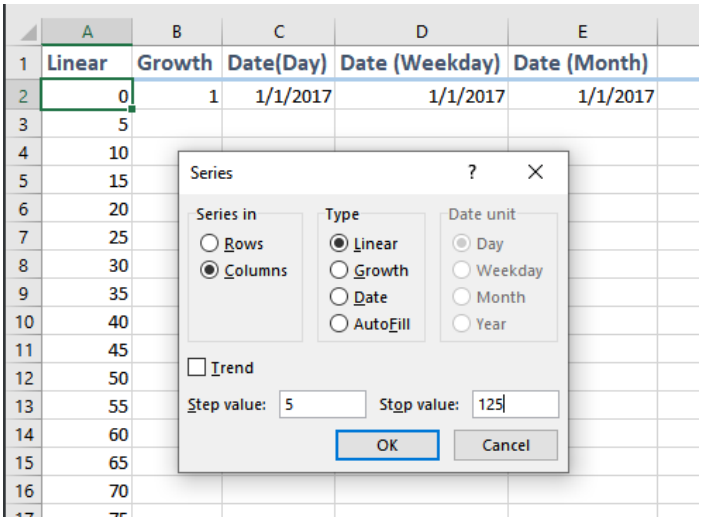
When using time, we can use an entirely new set of tools!

To display	Use this code
Months as 1–12	m
Months as 01–12	mm
Months as Jan–Dec	mmm
Months as January–December	mmmm
Months as the first letter of the month	mmmmm
Days as 1–31	d
Days as 01–31	dd
Days as Sun–Sat	ddd
Days as Sunday–Saturday	dddd
Years as 00–99	yy
Years as 1900–9999	yyyy
To display	Use this code
Hours as 0–23	h
Hours as 00–23	hh
Minutes as 0–59	m
Minutes as 00–59	mm
Seconds as 0–59	s
Seconds as 00–59	ss
Hours as 4 AM	h AM/PM
Time as 4:36 PM	h:mm AM/PM
Time as 4:36:03 P	h:mm:ss A/P
Elapsed time in hours; for example, 25.02	[h]:mm
Elapsed time in minutes; for example, 63:46	[mm]:ss
Elapsed time in seconds	[ss]
Fractions of a second	h:mm:ss.00

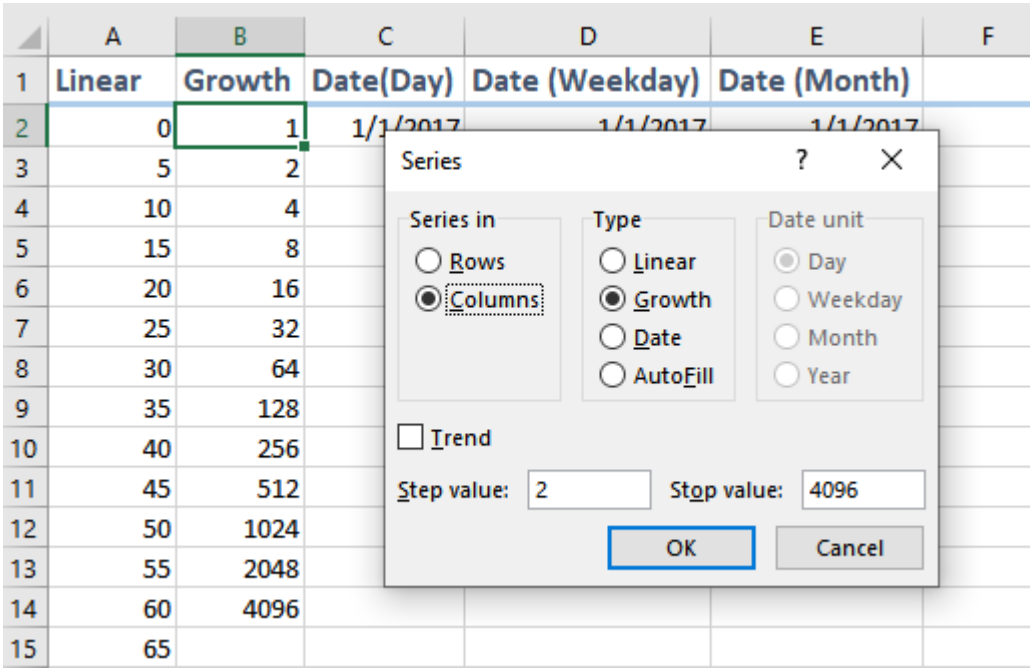
Fill Series

Go to the Fill Series Tab.

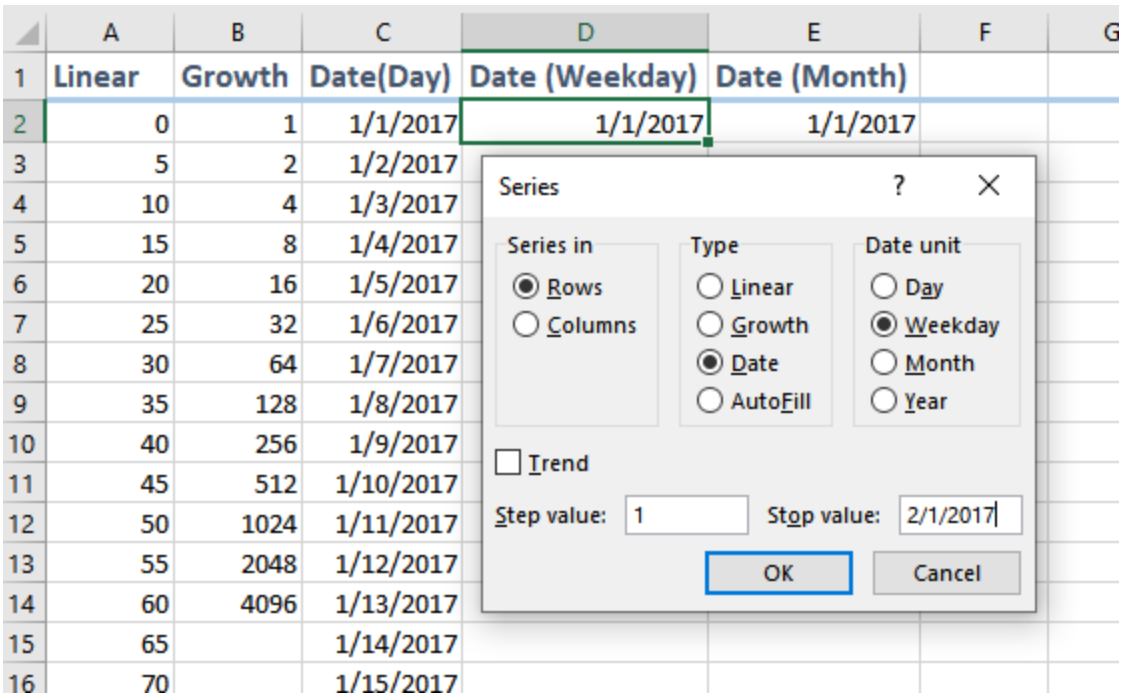
For a linear series, it just goes up by +{step}



For a Growth Series, it goes up by *{step}



Then, we can also use that for days and weekdays:

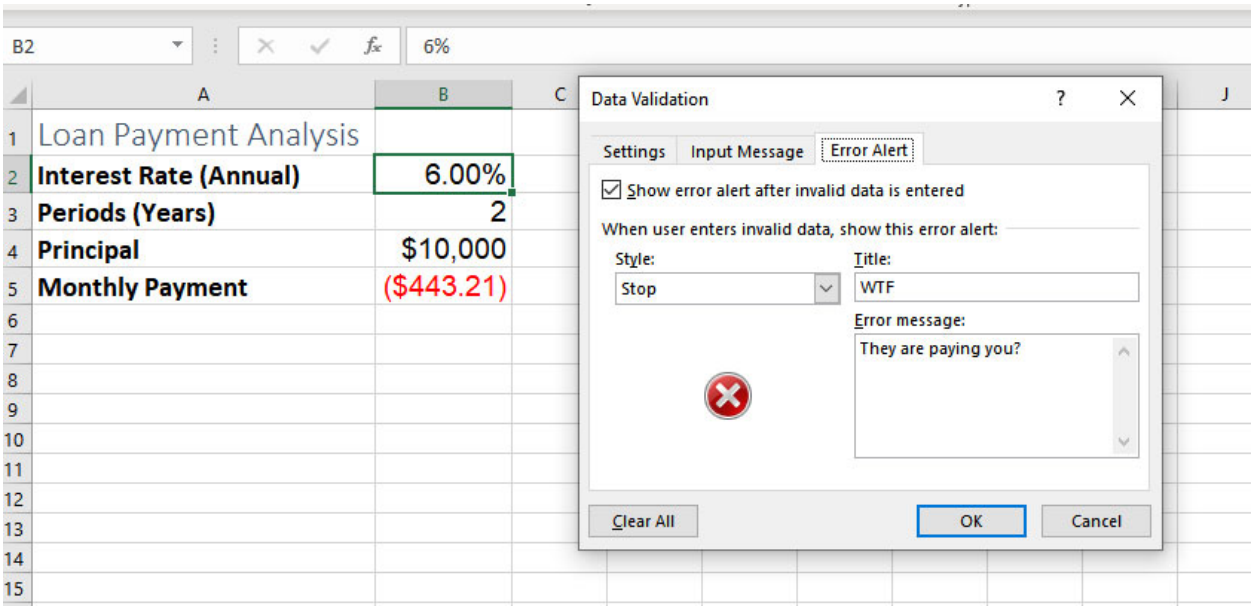

A
B
C
D
E
F
G
1 Linear Growth Date(Day) Date (Weekday) Date (Month)
2 0 1 1/1/2017 1/1/2017 1/1/2017
3 5 2 1/2/2017
4 10 4 1/3/2017
5 15 8 1/4/2017
6 20 16 1/5/2017
7 25 32 1/6/2017
8 30 64 1/7/2017
9 35 128 1/8/2017
10 40 256 1/9/2017
11 45 512 1/10/2017
12 50 1024 1/11/2017
13 55 2048 1/12/2017
14 60 4096 1/13/2017
15 65 1/14/2017
16 70 1/15/2017
Series
Series in
Rows
Columns
Type
Linear
Growth
Date
AutoFill
Date unit
Day
Weekday
Month
Year
Trend
Step value: 1
Stop value: 2/1/2017
OK
Cancel

Data Validation

The best solution for preventing data entry errors is to use the data-validation feature of Excel.

- Select the range to which you want to apply rules
- Data -> Data Tools -> Data Validation

For example, let's make sure a loan amortization only allows positive years and positive %!



Custom Conditional Formatting

Student Grades Tab

Custom conditional formatting can help you answer the following:

- Which cell values are less than 0?
- What are the top 10 values?
- Which cell values are above average, and which are below average?

Rules

- Highlight cell rules
- Top/Bottom rules
- Data bars
- Color scales
- Icon sets

Create conditional formatting rules that use formulas

Excel comes with another conditional formatting component that makes this feature even more powerful: you can apply conditional formatting based on the results of a formula. In particular, you can set up a logical formula as the conditional formatting criterion. If that formula returns TRUE, Excel applies the formatting to the cells; if the formula returns FALSE, instead, Excel doesn't apply the formatting.

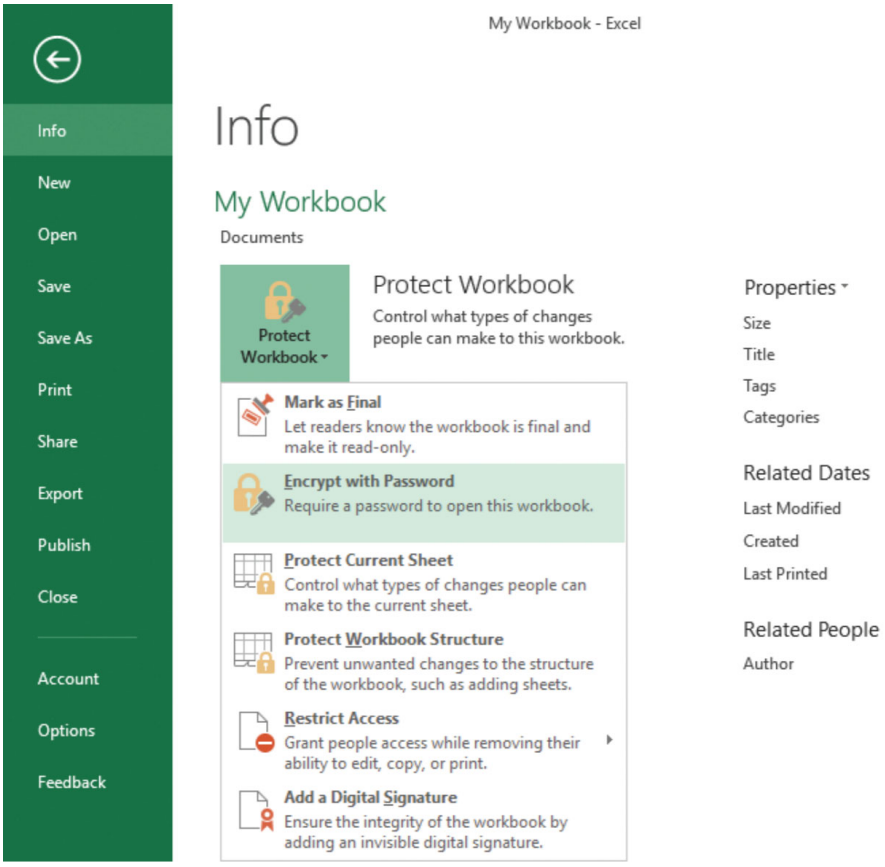
Encrypt a workbook with a password

For a workbook with confidential data, merely protecting cells or sheets might not be enough. For a higher level of security, you can encrypt the workbook with a password. This prevents anyone who doesn't know the password from opening the workbook.

To encrypt a workbook with a password

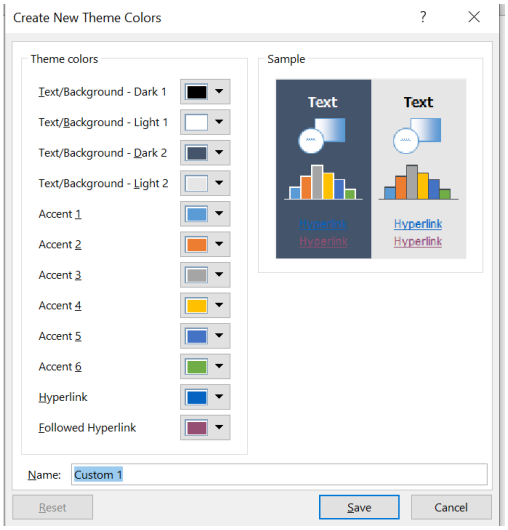
1. In the workbook you want to protect, display the Info page of the Backstage view.

2. Click Protect Workbook, and then click Encrypt with Password.



Custom color/font schemes

If you want to have your spreadsheets to have a common look throughout your company, you can create a custom color scheme.



And you can get precise colors: