UNIT-7 Managing Time with Excel

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Recognize the obstacles that prevent us from effectively managing our time
- ✓ Use a planner
- ✓ Write everything you need to remember in your planner
- ✓ Use a to-do book
- ✓ Understand the basics of an Excel spreadsheet

Unit 7

Managing Time with Excel

It doesn't matter if you love them or hate them; computers are here to stay. When you combine effective time management techniques with the proper use of a computer, you are well on the way to getting things done and keeping yourself organized. In this book, we will combine effective time management strategies and Microsoft Office Excel 2007 together to help you stay focused, organized, and productive.

In the first two Modules, we will provide a quick refresher on using Excel and show you how you can set up Excel the way you like it BEFORE you start to work. Module Three will show you practical ways to use Excel and help you keep track of the things you need to do. Module Four will delve into strategies to help you find the things you need: both electronically in your data but also physically while in your workspace.

The Power of Change

It takes time to make time work for you. If you are truly going to make any difference in your life because of today, you have to be prepared to make some changes.

There is a very expensive weight loss clinic in New York State that won't take people who aren't prepared to make small changes in their life. They arrive at the clinic expecting to get a diet that will make them thinner. Instead, they are asked to go home and fill out a journal of all the changes they can make in their lives in a week. They may want to drive to work a different way or sit at a different place when they sit down to a meal. They may try sleeping on the other side of the bed or making little changes in their early morning routine.

When people go back to the clinic at the end of the week, staff members evaluate the changes the person was able to make. If these changes aren't successful, they are not accepted into the program. They are told, "If you can't change these small things, how will you make the major changes required to learn new ways of thinking about food?"

Are you truly ready to try making a few changes after today? If so, this book will teach you how to develop good time management habits and demonstrate how to apply these skills using Microsoft Excel 2007.

- **What do you believe are your top three priorities/objectives in your position?**

- **What do you believe are the top three obstacles to working on your priorities or meeting your objectives as the moment?**

- **On a scale of one to ten, how organized would you rate yourself?**

1 2 3 4 5 6 7 8 9 10

- **What are the top three things you think you must do in order to be more organized?**

- **What would you do with any additional time if you found a way to give it to yourself?**

From the experts… (http://www.synergyinstituteonline.com/detail_article.php?artid=387, Tristan Loo, 2007)

Most forms of change are tough at the best of times, so keep these five things in mind when tackling a bad habit.

1. Learn to identify your bad habits. Don't be embarrassed to ask for help from others!
2. Understand why those habits exist in the first place. What things do you have the ability to change that will help you beat the habit?
3. Design a new good habit. (We hope the information in this book will help you become more effective at managing your work and personal time.)
4. Create an action plan for that new good habit. In a perfect world, how can you make it happen?
5. Take the top three actions that will help the most with your new habit and do them every day for twenty-one days. Most experts that study behavior recognize that twenty-one days of consistent practice is usually enough time for people to form a new habit.

What do you believe are your typical strategies for managing your work and your time?

Most of us try one of the following techniques when we get snowed under:

- Work harder
- Work faster
- Get organized
- **Have you ever tried these three techniques to get back on track? How successful were they in helping you?**

We all have the power of choice. Your organizational style is a result of the choices you make on a minute by minute basis.

- **Can you give some examples of how choice affects the way you work?**

- **What is the one activity that you know if you did superbly well and consistently would have significant positive results in your personal life?**

- **If you know these things would make such a significant difference, why are you not doing them now?**

Case Study: Another Day at the Office

It was 7:20 a.m. when Myron arrived at the office. He was early because he wanted to clear the backlog of work that had been piling up on his desk. He turned on the lights and started to go through yesterday's e-mail. As he read the first message, he realized he couldn't deal with it until a colleague arrived. He set it aside and went to the next. This item had potential application to a project he was working on, so he walked down the hall to the printer and made a copy for his personal use.

As he continued reading his e-mail he came across a journal article of particular interest and become engrossed in it. As he looked up, he was startled to find that others were arriving and it was nearly 9:00.

He ignored the rest of his e-mail, moved a pile of papers to a corner of his desk and opened a spreadsheet due tomorrow with at least two days of work yet to be completed. As he opened the file, Bill and Claire stopped by and invited him to join them for coffee. Myron decided he could spare ten minutes. Bill and Claire were both anxious to share the details of a play they attended last night. Before Myron realized it, thirty minutes had passed and he hurried back to his office.

As Myron entered his office, the phone rang. It was Mr. Wilson, his manager. There was a meeting scheduled at 10:00. Could Myron sit in for him? There was something to be discussed that the department should know about. Myron looked at his watch. There wasn't enough time to get started on the project so he pushed the file aside and vowed to start it immediately after lunch.

The afternoon wasn't any better. A few visitors, a few phone calls, a couple of letters, and the day was over. Nothing had been accomplished on the project that was due tomorrow. As he stuffed papers into his briefcase, he wondered how Bill and Claire were able to attend plays during the evening.

- **Did he make good use of his best time of day?**
- **Did he work on his high priority items?**
- **Did he have a problem saying no?**
- **Did he complete the tasks he started?**
- **Did he understand his problems?**
- **What would you recommend for Myron?**

Planning Tools

Guidelines for Efficient Planning

- You can save yourself an hour a day by getting organized.
- It is important to identify and operate within two time horizons: short and long term. Anticipating events allows you to get things done in the short term which contribute to achieving long-term objectives.
- An up-to-date master calendar can be your most helpful planning tool. However, detailed project plans should be developed before you make entries on your master calendar.
- When things begin to get hectic, a "Things To Do Today" list helps focus attention on the highest priority items.
- Action planning worksheets, milestone charts, and PERT (Program Evaluation and Review Technique) diagrams are excellent planning aids when properly used.
- Planning contact with colleagues and staff will help minimize disruptions. Keep a file for each person you meet with on a regular basis, with items to be discussed.
- The most effective approaches to planning are those tailored to meet individual needs. Concepts, procedures, and worksheets should be modified to fit individual circumstances.
- Experts say nothing should be attempted without prior planning, but there must be flexibility. Remember Murphy's Law: If something can go wrong, it will.

Five Point Planning Check

For every plan you make, cover all these points:

- What
- Where
- When
- How
- Who

Five Minutes Before the Hour

If you have a desk or other surface that is cluttered, set aside five minutes at the end of each hour to clear off one small part of it. This goes for your electronic files too! At the end of your five minute session, set a timer for fifty-five minutes so you'll remember the next five minute period.

What can you get done in only five minutes? Try it - you'll be surprised. At the end of two weeks you'll see a vast improvement. This example of instant success will bring a feeling of genuine satisfaction.

Using a Planner

A planner can be your best friend if you know what you want the planner to do and you know how to use it effectively. Let's take a look at some aspects and characteristics you should look for when using a planner.

What are your options when choosing a planner?

- A calendar. Like cockroaches, calendars have stood the test of time.
- A to-do list. Someone once said, "Document what you do. Someone is sure to ask."
- A binder, with room for information, information, information.
- A computer-aided planner with time management software, such as Microsoft Office Outlook 2007.
- A spreadsheet like Microsoft Office Excel 2007 with projects and tasks organized by worksheet in a way that makes sense.
- The digital alternative like a handheld organizer, smart phone, or Pocket PC: they can even talk to you!

When choosing your personal planning tool you should ask yourself these questions:

- What do you want it to do?
- How big do you want it to be?
- How much do you want to spend?

- **Do you currently use a planner?**

- **What are the essential things to look for when you purchase a planner?**

- **What are the key strategies for using a planner successfully?**

Many types of planners can work, depending on the needs of the individual. Some people want a calendar, a week at a glance, a space for a to-do list, and room for notes. Others want something so small it fits in a breast pocket. As for strategies, there will be several suggestions about how people use their planner, but the most important thing is to use them.

- How do you remember to call Jim next Wednesday? Note it in your planner.
- How do you remember to follow up with a client in six months? Note it in your planner.
- How do you remember to start a project in six weeks time? Note it in your planner.
- How do you remember not to schedule an out of town meeting for your parent's 50th wedding anniversary? Note it in your planner.

Once we begin using a planner, we sometimes have a tendency to only make note of meetings we must attend or other activities that must be completed, without allotting the time required. For example, if you are attending a meeting that will take up two hours of your time, block out that two hours. Then you have a more realistic sense of how much time has been used and how much time you have remaining to use. Anything over 30 minutes should have time booked.

We will explore how you can transfer information from your paper planner to Excel 2007 (and vice versa) in Module Three. If you learn to effectively use your paper planner in parallel with Excel, then you will be well prepared to tackle the things you need to get done.

The To-Do Book

A to-do book is one of the simplest, most effective time management tools out there. It's easy to use, easy to carry around, and easy to update and customize. To start, decide how you want to record your tasks. We recommend an elementary school style scribbler, but you can also use a designated "inbox" or "new stuff" worksheet in Excel. Don't discount a regular notepad either, just use whatever works for you.

Next, make sure you write down the date on any important piece of paper. If you're using a blank page in your planner or To-Do book, write the date at the top of the page. Then, make a master list of everything you have to do for home or work. (We suggest that you make different lists for each.) Now, take out a highlighter and highlight the top three things that you want to accomplish. During the day, every time you complete an item, cross it off. Nothing feels better than steadily crossing off your list items! This simple action is an excellent way to keep your motivation high throughout the day because you will have visual proof of your progress!

At the end of the day, start a new page. Write the next day's date on it. Then, transfer any uncompleted items to that next page and add all the things you need to do the next day. Highlight the top two items that you want to get done. When you start work the next morning, add any items that have come up, and highlight your third top priority.

Some people find that master list really intimidating because you are seeing ALL of your tasks at once. A modified approach is to lay out your week like this:

Monday	Tuesday	Wednesday	Thursday	Friday

Excel already puts you ahead of the game in this department. Each worksheet is already automatically divided into rows, columns, and cells! List your tasks for each day in each column. (For the sake of simplicity, let's say today's Sunday, and you're planning out your week.) At the end of Monday, you'll transfer any uncompleted items to Tuesday's column and add any new tasks. At the end of the week, you'll transfer any uncompleted items to next week's list.

This approach can also be used for teams. Take a whiteboard and turn it into a chart like the one above. Then write each team member's tasks in a different color using sticky notes or markers. (Sticky notes are useful because they allow you to easily move tasks around, rather than constantly erasing and re-writing them.)

Whichever methods you end up using, make sure that you stick to them! Don't rely 100% on your memory if you need to remember important pieces of information. Write that information down as soon as you have the chance, and make sure you write that information in the correct place! Even if you do remember the information on your own, the worst that can happen is that you'll be reminded again.

Now that you understand some of the basics about time management and staying organized, we'll shift our focus to show you the basics of Excel. You should do your best to understand how to properly use the tools available to you.

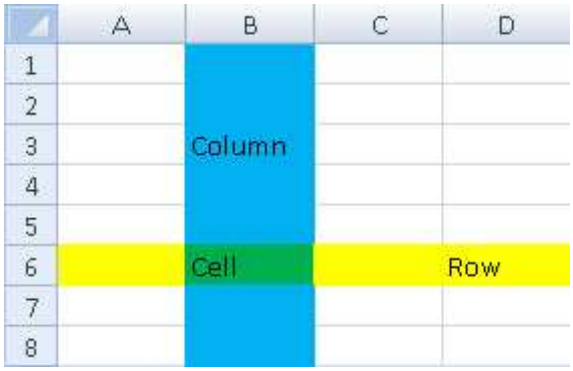
From the experts… (http://www.addresources.org/article_day_planner_nadeau.php, Kathleen Nadeau, Ph.D.)

Any time management resource will tell you to write down EVERYTHING in your planner. However, a huge list of information is not very helpful unless it has some sort of order. Here are some recommended categories for your To-Do items:

- Business To-Do's
- Home maintenance To-Do's
- Family To-Do's
- Long-term goal To-Do's

Excel 101

An Excel file is 'properly' referred to as a **workbook**. Each workbook can contain multiple **worksheets**. Most people generalize and use the term 'spreadsheet' to denote either a workbook or a worksheet.



Each worksheet contains **columns** and **rows**.

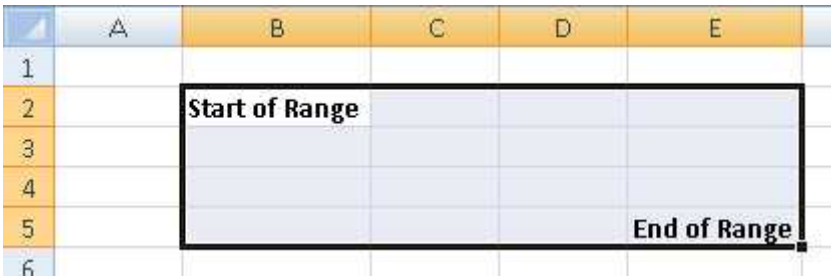
Columns are vertical and are denoted by letters. Since there are only 26 letters in the alphabet, and the capability for far more than 26 columns in a spreadsheet, the next column after column Z is indexed by the letters AA, AB, AC, and so on until the last column (XFD). That's 16,000 columns!

Rows are horizontal and are denoted by numbers. Each worksheet contains a whopping 1,048,576 rows.

A **cell** is the intersection of a row and column.

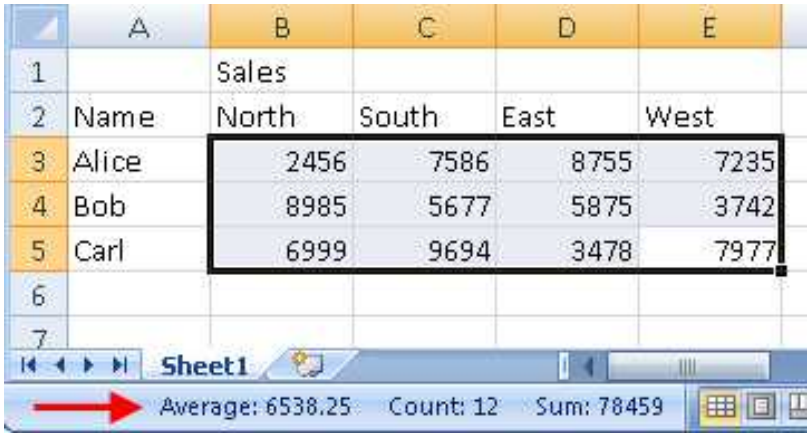
A **range of cells** is a block of adjacent cells. To select a range, let your pointer hover over the center of a cell. When your mouse pointer turns into a thick cross, hold the left mouse button down, and drag your pointer to select a range. (Selected ranges are highlighted in blue.) Excel denotes ranges in the format: **UpperLeftCell : LowerRightCell**

In the image below, the range B2:E5 has been selected. Ranges don't have to be two-dimensional. A1:A5 (a column of adjacent cells) and B3:B4 (two adjacent cells in the same row) are both valid cell ranges.



You can also select a range by clicking on the first cell in a block that you want to select, press and hold Shift, and click on the last cell in the block you want to select.

When you select two or more cells, you should notice some numbers that appear on the Excel status bar. These numbers, and the tell you the average, the count, sum of the data in the selected cells.



Note that this feature was designed for convenience. The numbers generated here may not always 'make sense' according to your data. For example if you have selected three humidity index percentages in a cell range (such as 30%, 50%, and 60%) their 'sum' would be a very balmy140% humidity!

Summary

Technologies come and go, and the nature of your work will likely change a lot over the course of your career. However, one thing will remain the same for all of us: time. There are still sixty minutes every hour and twenty-four hours in a day. Learning to make the most of the time you have is key to getting things done well and on time. You have to be willing to take the time to change in order to drop the bad habits, control procrastination, and get things done. In order to keep on top of the things you need to do in a day, it is important to get and stay organized and make sure you have the tools you need to properly do your job.

Setting Up Excel

In this Module, we will learn how to:

- Use and modify the Quick Access Toolbar
- Change the default workbook settings
- Change the default file format used by Excel
- Control the way Excel calculates formulas
- Change the look of your Excel interface
- Make Excel start when Windows starts

We all know that if you plan to get anywhere with your work, you have to be somewhat organized. Now that we know the popular planning tools and the basics of Excel, it's time to move on and discuss the way you can set up Excel to work for you.

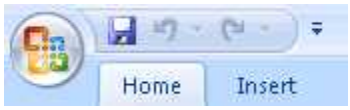
This Module will teach you the ways to make Excel conform to your working standards. Setting up Excel once right now will save you doing a lot of repetitive work later. And should your work require you to use some of Excel's other functionality, you'll be ready for the challenge by already knowing how to control the way Excel calculates data.

The Quick Access Toolbar

Chances are you've used a previous version of Excel in the past. One of the major differences between Excel 2007 and its predecessors is the new graphical user interface. The new user interface does not rely on multiple tool bars and menus; instead it offers a cleaner and more intuitive tab-based layout.

An important component of the new interface (and a great time-saver) is the Quick Access Toolbar. The Quick Access Toolbar was designed to be an 'always on' toolbar that you can load up with your most frequently-used commands. When features are added to the Quick Access Toolbar, they can be brought into play with a single click, even when the associated tab is unavailable.

The Quick Access Toolbar is located in the upper left of the Excel 2007 screen, just to the right of the Office button.



By default, the Quick Access Toolbar holds three buttons. These buttons are (from left to right) **Save**, **Undo**, and **Repeat**. Let's go over the basics of these commands:

Save button

Clicking this button will save your current workbook. If the workbook has not been previously saved, the Save As dialog will open and prompt you to give the workbook a name.

Undo button

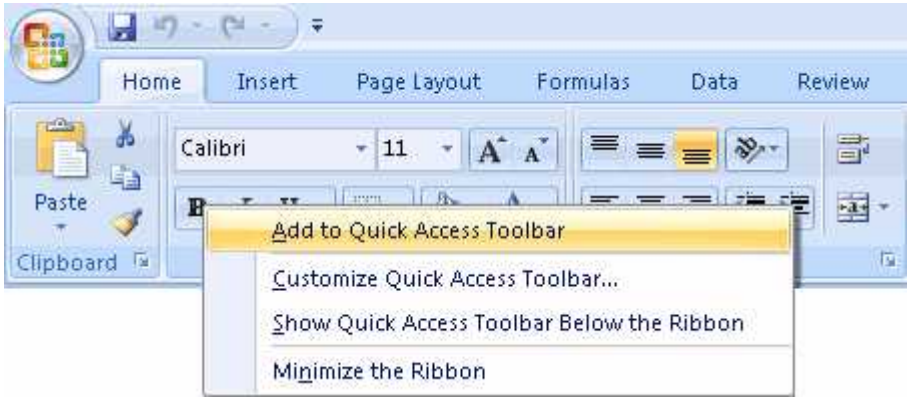
This will undo the very last action you performed. If you continue to click the Undo button, the next most recent action will be undone, and so on. You can also click the pull-down arrow to show a list of recent actions. Highlight a previous action in this list and then click to undo all operations up to and including the highlighted action.

Repeat/Redo button

If you want to redo an action (perform an action that you undid with Undo), you can click the Redo button on the Quick Access Toolbar. If you click redo multiple times, each successive action that was undone will be redone.

You can also repeat an action using the Redo button. If you perform an action on a cell (making it a certain format for example), you can then click on another cell or select a range of cells and use the Redo button to repeat the action on the additional cells.

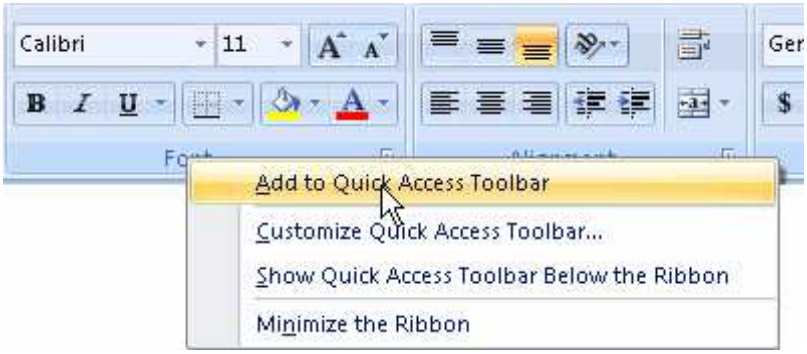
To add a button to the Quick Access Toolbar, simply right-click any command in the Ribbon and click Add to Quick Access Toolbar.



Here, we are adding the **Quick Bold** command. With the Bold command located on the Quick Access Toolbar, you can access it at any time, even if the Home tab is not currently displayed.

If you wish, you can add a group of buttons to the Quick Access Toolbar at once.

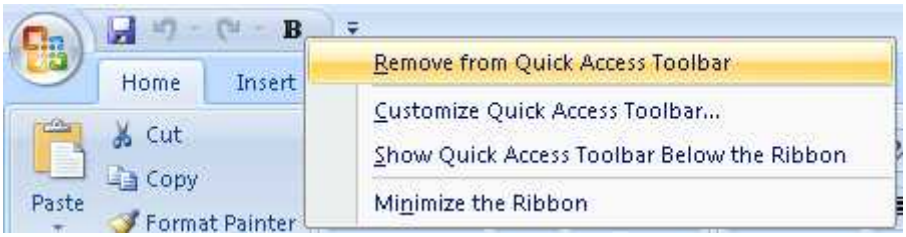
To do this, right-click on the word that defines the command group (such as Clipboard, Font, Alignment, etc.). Then click Add to Quick Access Toolbar.



Removing Buttons

It's easy to remove a button or a group from the Quick Access Toolbar; just right-click the command and click Remove from Quick Access Toolbar.

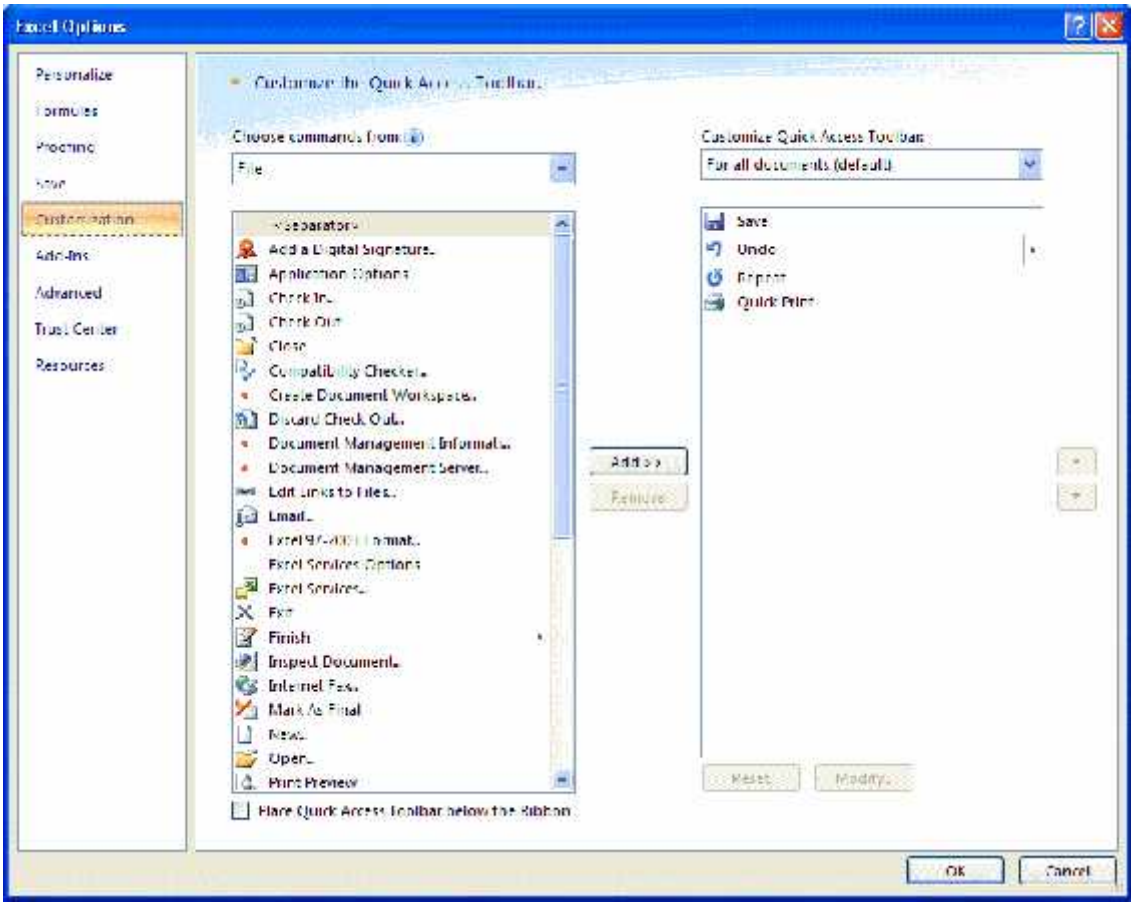
You can remove the default commands if you wish.



Customizing the Quick Access Toolbar

Excel 2007 also allows you to customize the Quick Access Toolbar by using the Excel Options screen.

To do this, click the pull-down arrow at the right of the Quick Access Toolbar, and then click More Commands. This will display the Excel Options dialog, Customization tab.



This window is easy to use: highlight a command from the list on the left, click the Add >> button in the middle, and the command will appear in the list on the right.

You can choose from groups of commands by selecting a command category in the Choose commands from: combo box.

Once you have added commands to the list on the right, you can change icon position in the Quick Access toolbar by highlighting an option and then clicking the up or down arrows on the far right side of the screen. Remove a command from the Quick Access Toolbar by highlighting it in the right-hand list and then clicking Remove (just beneath the Add >> button.)

The Quick Access Toolbar can also be customized for use with a specific file. Open the Excel file you will use, create your custom toolbar as described above, and then use the combo box in the upper-right side of the window to specify that these commands are to be used with the current file. The next time you open the file, the Quick Access Toolbar you specified earlier will appear.

At the bottom of the dialog, you can specify if you want the toolbar above or below the Ribbon.

Click the Reset button near the bottom of the dialog to restore the toolbar to its default (Save, Undo, Repeat).

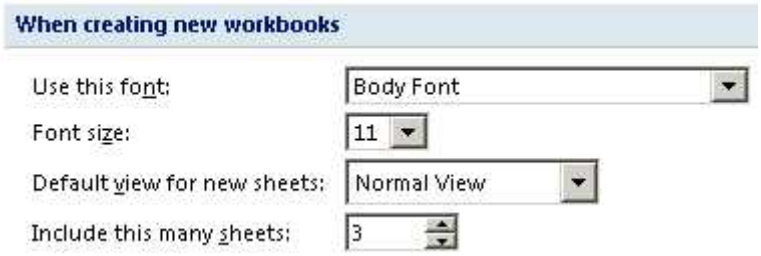
Changing your Worksheet Default Settings

If you always like to work in a particular font or know that every workbook you will create will follow some guidelines determined by your company, it's a lot easier to make Excel conform to your standards once instead of performing the same actions over and over again.

If you prefer to do most of your work with a particular font style and size, but you don't like the inconvenience of selecting a new font and font size every time you start Excel, you should consider changing the default font and font size in the Excel Options window.

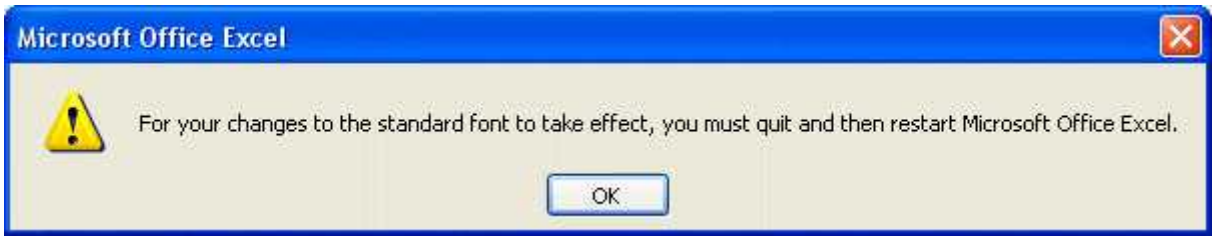
To change the default worksheet settings, click the Office button → Excel Options and then click the Popular tab.

Then look under the When creating new workbooks heading:



From the Use this font drop list, select the font face that you prefer. Next, select the default font size. The Default view option lets you choose between Normal, Page Break Preview, and Page Layout View. And finally, choose how many worksheets you want when creating a new workbook.

If you change the default font face, you will be required to restart Excel in order for the changes to take effect:

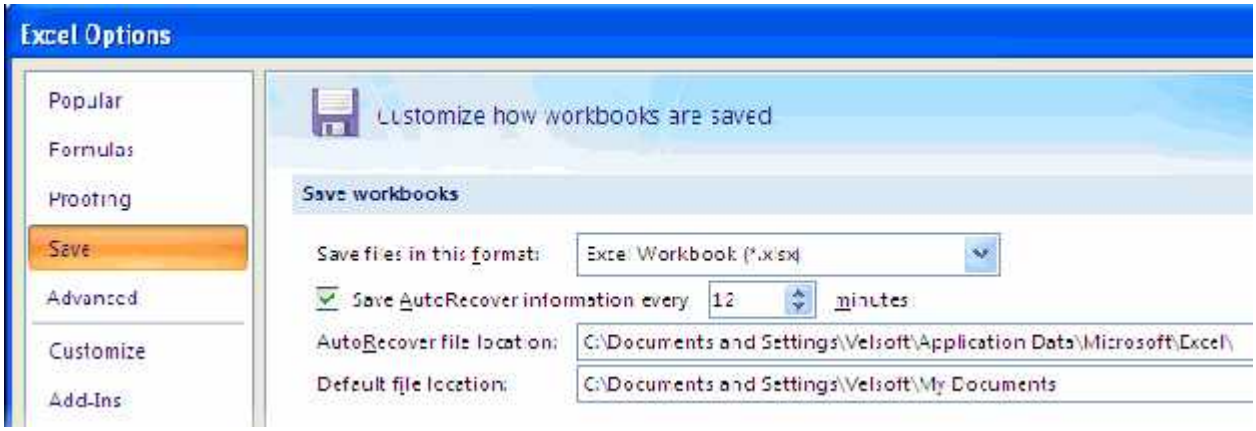


Changing Your Default File Format

If you find yourself constantly saving files as another file format (other than Excel 2007's default format of .xlsx), you can change the default file type from Excel 2007 to another type that is more appropriate to the work you are doing. For example, you may be using Excel 2007 to create several workbooks that must be compatible with Excel 97 or Excel 2003. Rather than specifying this file type in the Save As dialog whenever you save a workbook, you can make this your default file format in the Excel Options window. You can also change the default folder where your workbooks will be saved.

Note that a lot of the new graphical components such as SamrtArt and graph/chart display options are only available when using Excel 2007. If some of these new components are present in a workbook and you try to save the file in a previous Excel format, you will likely encounter several compatibility issues. Use the Compatibility Checker (click Office menu → Prepare →Run Compatibility Checker) to address these before saving the document.

To change your default file format, click Office menu → Excel Options, and then click the Save tab.



Select the file format you want as your default from the "Save files in this format" drop list.

You can choose from many options such as many different Excel versions, a Web page, plain text, XML, CSV, OpenDocument Spreadsheet, and more.

Use the AutoRecover feature to specify how often Excel will automatically save your file. Beneath AutoRecover, you can specify where Excel should save any AutoRecover files.

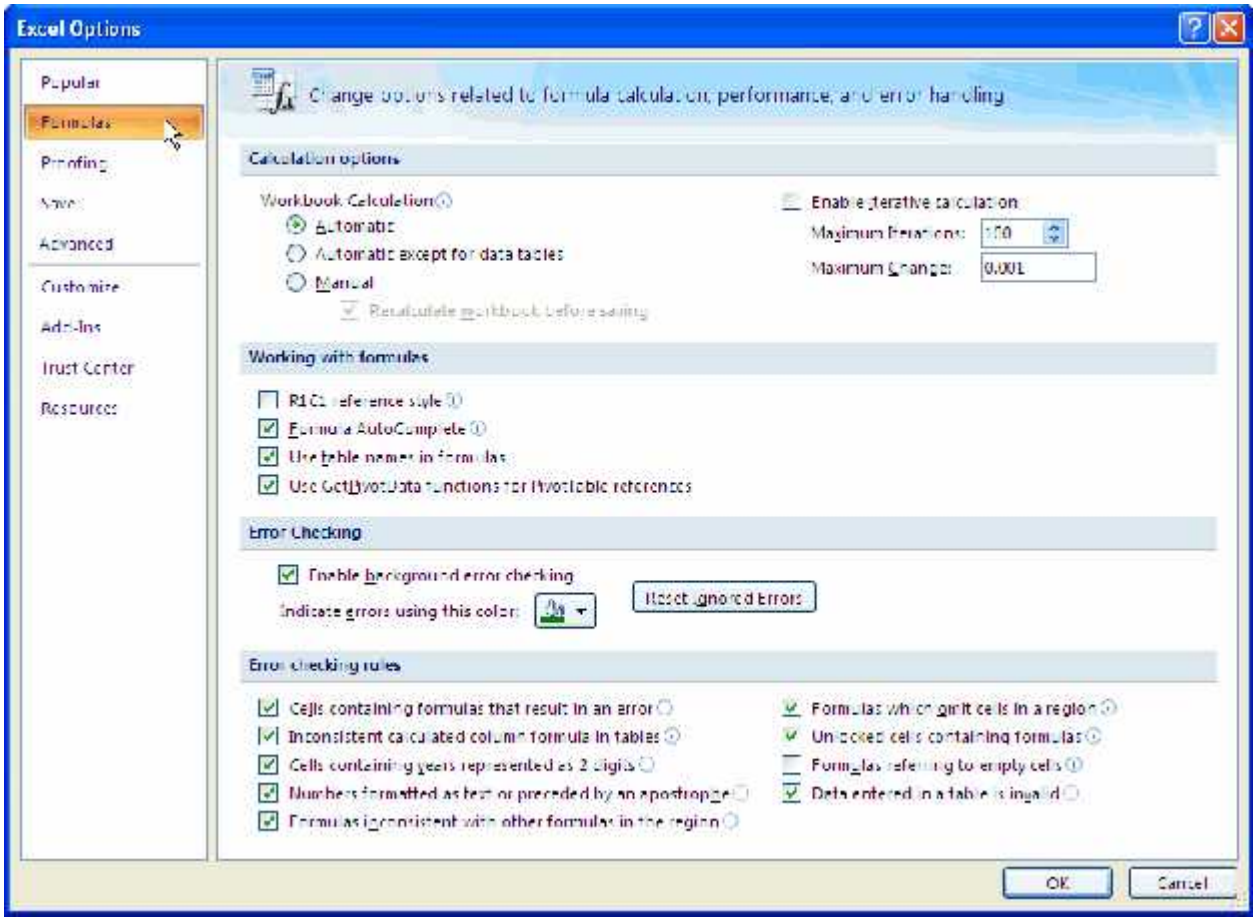
And finally, you can set the default location where any new files should be saved.

Setting Formula Options

If you use Excel to crunch a lot of numerical data, there are quite a few options available to control Excel's calculation fidelity.

To set formula options, click Office menu → Excel Options and then click the Formulas tab.

Take a moment to review the options shown below:



If you let your pointer hover over the information icons (ⓘ) beside some of the options, you will see a brief overview of that particular option.

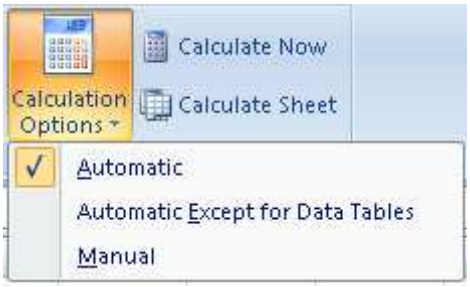
Under the **Calculation options** heading, you will see radio buttons and other controls for specifying how Excel calculates formulas.

By default, Excel formulas are calculated automatically. This means that when you change a value in a cell that is referenced in a formula, Excel recalculates the given workbook automatically, finding a new result for every formula that references the value you changed.

Chances are the Automatic setting will be fine for you, but it can be disabled. For example, you might use a workbook that contains multiple complex formulas or array formulas that reference very large cell ranges. Therefore, automatic calculation may be a problem because of the length of time it takes to perform all of the

calculations required.

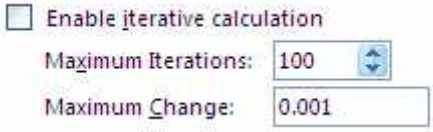
If your computer happens to bogs down in a situation like this, you can specify calculation options manually by using the Calculation Options command on the Formulas tab.



When you calculate your workbook manually, the formulas in your sheets will not recalculate every time you change a referenced value. This can help Excel perform better when you are dealing with a very large workbook with a lot of formulas to be evaluated.

If you select the "Automatically except for data tables" option, the workbook will be recalculated automatically when you change cell values, except for the dependent cells that are in Excel data tables.

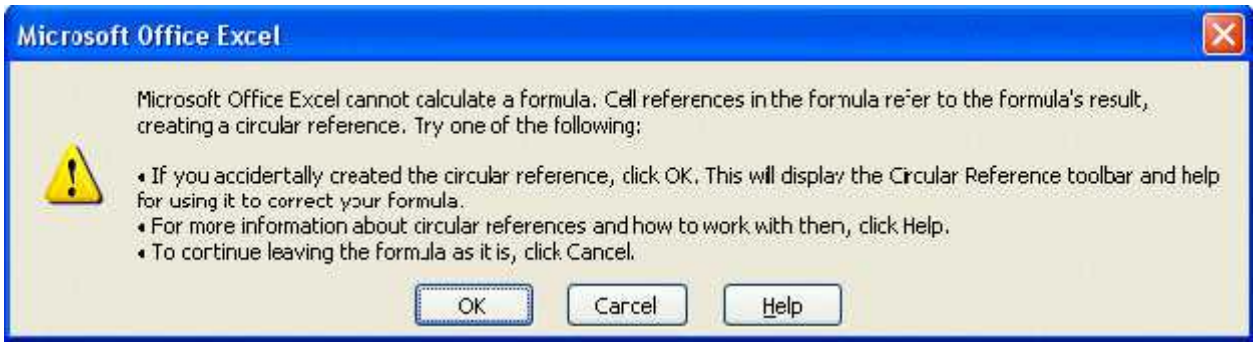
Let's return to the Excel Options dialog → Formulas tab. On the right side of the Calculation options area, you will see a check box labeled "Enable iterative calculation."



The maximum number of iterations is 32,767.

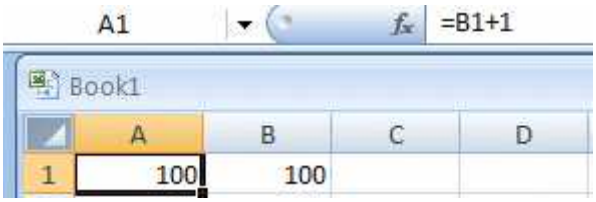
Iteration deals with circular cell references. A circular reference occurs when one cell contains a formula that references another cell, which in turn contains a formula or references a cell with a formula that goes back to the first cell. To make this a little more clear, look at the following example.

Imagine A1 has the formula B1 + 1, and cell B1 has the value 0. In this case Excel will have no trouble calculating the results of the formula. However, if cell B1 contains the formula =A1, you will be faced with a circular reference (B1+1 and B1=A1 so we have A1= A1 +1). Now a situation occurs where the value of cell A1 depends (indirectly) on the value of A1. That is, cell A1 is dependent on itself for its formula result. When this occurs in Excel, you will get the following message.



Most often, Excel users enter circular references by mistake, but sometimes, advanced users create circular references on purpose. If a circular reference is intentional, putting a check in the Limit iterations checkbox will permit circular references in your workbooks so you will not see the alert shown here.

A single iteration refers to one step through the circular formula. In the case of the circular reference described above (A1=A1 +1), after one iteration the value in A1 should be 1. In the Excel Options window, you can specify a maximum number of iterations, if you allow circular references by checking the Limit Iterations checkbox. The default maximum is 100, so for the formula described above 100 iterations should result in a value of 100 in cell A1.



You will also see a Maximum Change field below the iterations field. The value in this field (.001 by default) can be a limit to the amount of iterations that occur. The iterations will stop when the values in any of the cells in the circular reference change less than .001 (the maximum change). You can alter the Maximum Change value by entering a new value directly into the field.

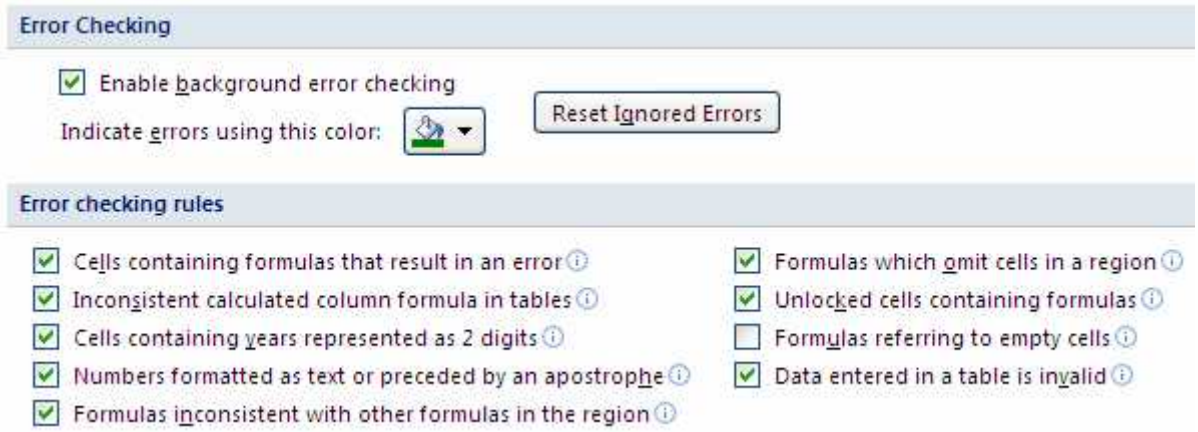
Keep in mind that when you allow circular references in a workbook Excel will not detect a circular reference that you may enter by mistake. If Excel (or your computer) seems to freeze while calculating a worksheet, you might have stumbled across a circular reference.

Further down in the Excel Options window, you will see the **Working with formulas** heading.

You can use these check boxes to specify how cells are referenced, if AutoComplete should be turned on for formulas, and if formulas should accept table names. By default, all of these options are active in Excel, except for the R1C1 reference style option.

R1C1 referencing reverses the way Excel refers to cells. Be default, cells are referenced by column/row (B5). The R1C1 style reverses this convention, referencing cells by row/column (5B).

The final two Formulas option groups deal with **Error Checking**. Take a moment to look over the options below:



Under the **Error Checking** heading, you can enable or disable background checking and you can change the color of the small triangle that appears in a cell to indicate an error.

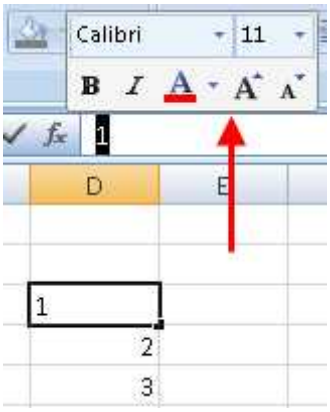
Under the **Error checking rules** heading, you can configure what rules Excel will follow when determining errors. Unless you have a thorough understanding of Excel errors, it is probably wise to leave the default settings unchanged.

When you have finished making changes, click OK to apply the settings. Note that in order for some settings to take effect, you might have to close and restart Excel.

Changing the Appearance of Your Excel Interface

If you open the Excel Options window and click the Popular tab, you will see a section of controls labeled "Top options for working with Excel."

The Mini Toolbar appears after you have selected a cell or range of cells and then selected the text in the Formula bar. The Mini Toolbar offers some basic formatting options for the cell(s):

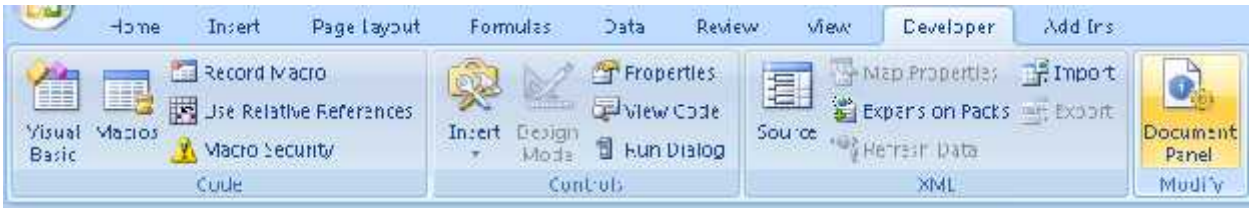


Live Preview will show you the effect that a visual or formatting command will have on some selected information. For example, consider this chart:

A purple style is currently being pointed to; thus Excel has changed the style of the chart to show you what the chart would look like if you were to click this particular style.

The style of the chart will not actually change unless you click a particular style from the list.

The Developer tab contains commands that allow you to record and edit macros using VBA (Visual Basic for Applications).



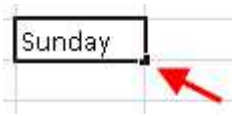
The ClearType option will smooth out the look of fonts and objects in the toolbar to make the commands easier to see when using an LCD monitor with your computer.

Excel also lets you choose between the standard Blue, Glossy Black, or Silver color schemes.

The ScreenTip style lets you choose the level of detail shown in ScreenTips. ScreenTips are small descriptions that appear while you hover your cursor over a command. Here, you also have the option to disable ScreenTips.

Finally, we have the Edit Custom Lists button. A list in Excel is a repeating collection of terms such as the days of the week, the months of the year, a list of employee names, etc. If you need to enter these values over and over again, lists can help to save you a pile of time. Let's go over an example first, and then we'll show you how to create your own lists.

Using lists is easy. Imagine you wanted to list the days of the week in a column (or row) of a spreadsheet, starting with Sunday.

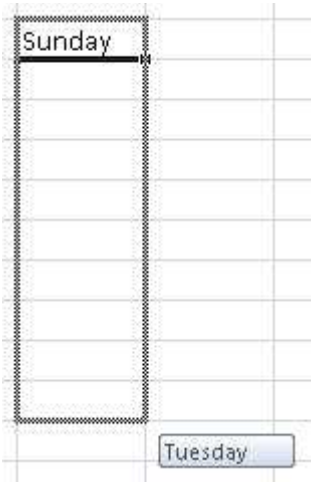


Type "Sunday" into a cell, then point to the black square in the bottom-right corner of that cell:

Now click and drag the black square down the column (or across the row).

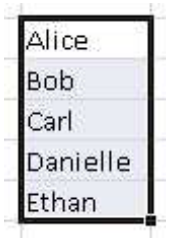
Excel will fill in the other days of the week till Saturday, then loop back to Sunday and repeat (shown below on the left).

Release the mouse button and the values will automatically be filled in (shown below on the right).



Excel comes with four of these lists as standard. They are: the days of the week (like those shown above), the days of the week in abbreviated form (Sun, Mon, …), months of the year (January, February, …) and abbreviated months of the year (Jan, Feb, …).

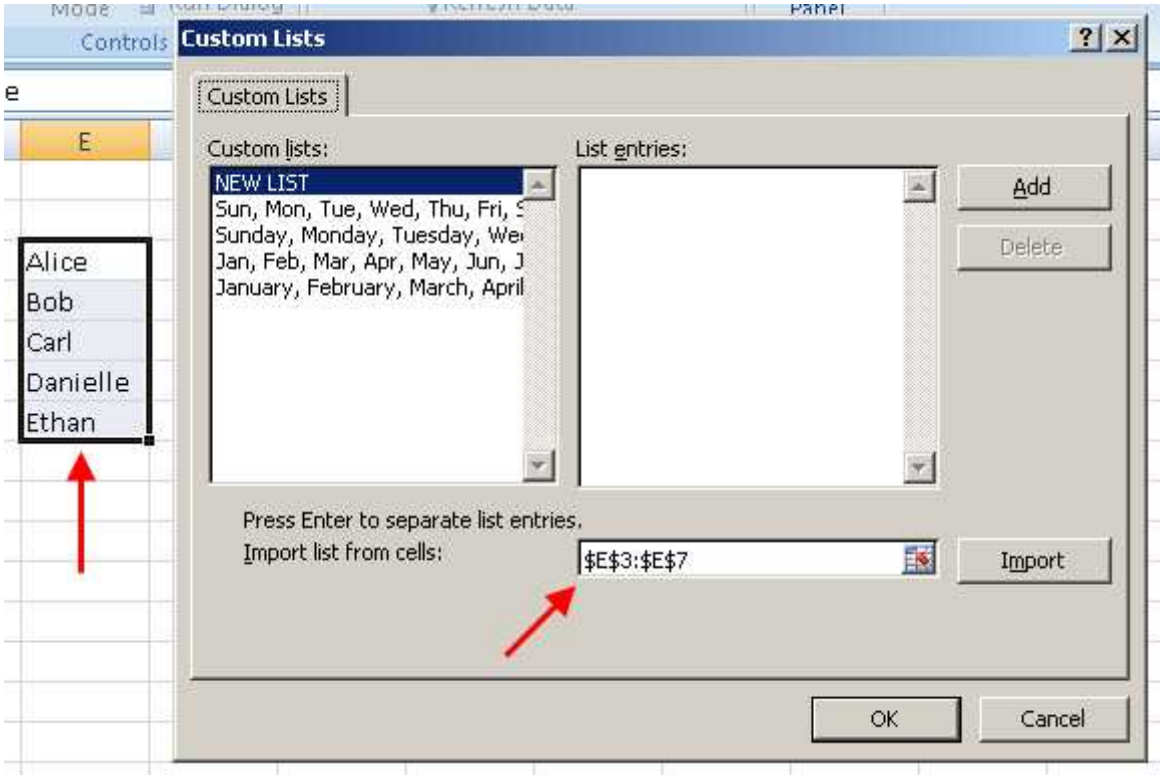
You can create your own custom lists in one of two ways. The first method is to type the list of items in Excel. Let's assume you have five employees you want to add to a list.



Type their names into Excel, and then select the range of names, like this:

Then open Excel Options to the Popular tab and click the Edit Custom Lists button.

This will open the Custom Lists dialog. The selected cells will already be entered in the Import list from cells field:



Click OK to define the selected names as a list.

The second way to create a list is to do it manually from inside the Custom Lists dialog. By default, NEW LIST will be highlighted in the Custom lists field on the left.

Simply click inside the List entries field on the right, type one entry in the list, and then press Enter.

Add one entry per line. When you have completed your list, click the Add button to add the list to Excel's library of lists.

Starting Excel Automatically when Windows Boots

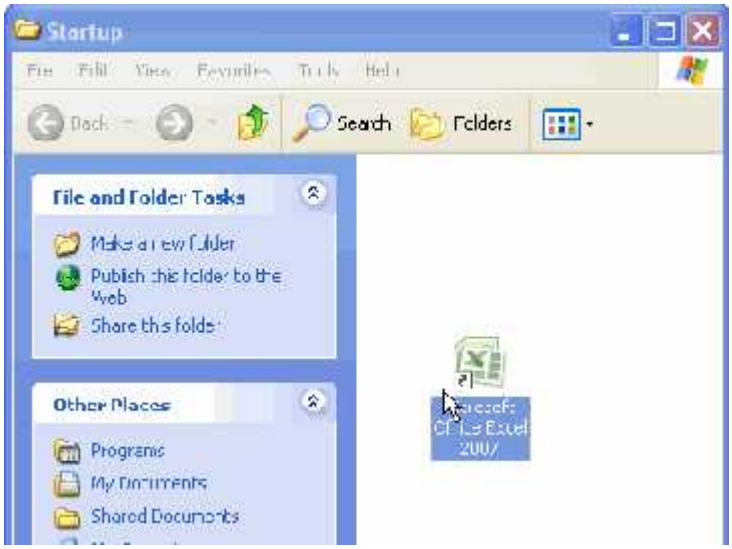
If you wish, you can have Excel start up automatically when you first turn on your computer. To do this, you must first locate your Windows Startup folder. The Startup folder contains shortcuts to programs and services that will start automatically when Windows loads.

Once a shortcut to Excel 2007 is added to the Startup folder, Excel 2007 will open automatically when you start your computer.

Normally this folder has the path **C:\Documents and Settings\All Users\Start Menu\Programs\Startup** or **C:\Windows\Start Menu\Programs\Startup**

You can navigate through the file system on your computer to get to these locations or you can enter the path in the Run dialog under the Start menu.

When you see the startup folder open, hold the Ctrl key and drag and drop the Excel 2007 icon on your desktop into the startup folder.



Holding the Ctrl key will allow you to drag a copy of the Excel icon (shortcut) into the Startup folder. This ensures that an icon for Excel will remain on your desktop.

(If there is no Excel icon on your desktop, you can press the Ctrl button and drag the Excel 2007 menu item from the Windows Start menu into the Startup folder.)

To prevent Excel from opening automatically, just remove or delete the Excel shortcut from the Startup folder.

Note that you can do this action for any program, but don't do it for too many at once! Even a modern computer will become noticeably slower if it tries to open many things at the same time. If you do have to open several programs, open them one at a time. This will actually be faster than letting your computer start many things at the same time.

You can also put individual files into your Startup folder. If the file is recognized by Windows (that is, Windows knows the program used to open it) the file will open when Windows starts.

If you want to have one-click access to Excel (or any other program) without cluttering up your desktop, you can simply drag and drop a program icon to the Quick Launch toolbar*, located right beside the Start button.

The Quick Launch bar functions just like the Quick Access Toolbar we looked at earlier, but instead of one-click commands you have one-click access to a program.

*If you cannot see your Quick Launch Bar, right-click some empty space on the Start bar, point to Toolbars, and click Quick Launch to add it to your screen.

Summary

Excel 2007 is a powerful program and has the ability to calculate a ton of data. It can create complex graphs, import and export data to other programs, be incorporated into web pages, and a lot more. But setting up Excel to work the way you want to every time you want to use it is not an effective use of your time. It's like taking the tires off of your car when you're not driving it, only to have to put them back on again when you need to go somewhere.

Therefore, if you know you are going to always use *this* font or calculate formulas using *that* method, spend a little time now setting up Excel to save yourself a lot of time using Excel later!

The Quick Access Toolbar can be customized to include any command you need, and it can even be customized to be different for each workbook you use. You should also take the time to explore the other features in the Excel Options dialog to make the most of your working day.

Module Three: The Four D's

In this Module, we will learn how to:

- Use the Do, Dump, Delay, and Delegate techniques to help manage our time
- Use the Urgent/Important Matrix and decide which projects are the most important
- Interact with Excel
- Delete data
- Automatically or manually hide data from view
- Create table subtotals
- Use hyperlinks
- Create a special workbook to organize your daily tasks/projects
- Drag, drop, and move cells
- Use Cut, Copy, and Paste
- Use the Paste Special option
- Insert and delete rows and columns
- Use STING to help avoid procrastination

By now, you should have a good understanding of how to set up Excel to allow for maximum productivity. In Module Three, we're going to switch our focus to the practical application of time management techniques while using Excel

2007.

Do, Dump, Delay, and Delegate

Do, Dump, Delay, Delegate: these four D's can help us manage our time better.

Do it Now

Do you spend a lot of time looking for things? Research tells us that the average person spends about 10% of the day looking for documents. If that were so, you could gain **5 weeks a year** just by getting your retrieval methods under control! If you do have a filing system, make sure you stick to it. At the end of this Module, we will introduce the STING technique to help avoid procrastination.

Handle the little things that reduce concentration and cause anxiety, like the clutter on your desk and the smaller incomplete jobs. This is actually the **opposite** of prioritizing. Do the quick and dirty tasks NOW! Most of the crises in our lives are often the result of not handling the little things or not reacting to a niggling feeling that something is wrong. Ignore the little toothache and you wind up with a root canal.

Another technique is to handle the worst things first. We create more stress and anxiety, and waste more time and energy, over the things we least like to do. Why not just do them?

Try the salami technique: break things down into small steps and get started. That is how we eat an elephant, one bite at a time.

Dump

Get rid of things you don't need. This will take some practice and a hard-nosed approach if you have a tendency to hang on to stuff. If throwing it out is too difficult, give it away, or ask someone else to throw it out for you. We will discuss how you can effectively get rid of things later in this book. This concept can also be extended to incorporate an "out of sight, out of mind" way of thinking. We will show you how you can "get rid" of information not by deleting it, but by hiding it.

Delay

Occasionally we have legitimate delays, for example, if we are waiting for somebody else to get us information or complete a task. However, if you have deadlines, pass on deadlines to others as well. Don't let someone else's lack of planning short-circuit your deadlines.

Delegate

Don't waste your time doing things that somebody else can do, especially if they can do them better than you. Save your time for those things which you are uniquely qualified to do.
In The Creative Edge, author William C. Miller defines five levels of delegation:

- Tell: "Based on my decision, here's what I want you to do."
- Sell: "Based on my decision, here's what I want you to do, because…"
- Consult: "Before I make a decision, I want your input."
- Participate: "We need to make a decision together."
- Delegate: "You make a decision."

You must find ways to delegate, no matter what your position is. Learn to clearly define who is to do what, then let go and give the delegate a chance to work on their own.

There are five steps to the delegation process:

1) Explain why the job is important.
2) Describe what is needed in terms of results (not how, but what).
3) Give the person the authority they need to do the job.
4) Indicate when the job needs to be completed and get agreement.
5) Ask for feedback to ensure a common understanding.

Keep in mind that delegation is not always the superior order the subordinate. We will explore different types of delegation near the end of this Module.

The Story about Everybody, Somebody, Anybody, and Nobody

There was an important job to be done and **Everybody** was asked to do it. Everybody was sure that **Somebody** would do it. **Anybody** could have done it, but **Nobody** did it. **Somebody** got mad about it because it was **Everybody's** job. **Everybody** thought that **Anybody** could do it, and **Nobody** realized that **Everybody** wouldn't do it. It ended up that **Everybody** blamed **Somebody** when actually **Nobody** blamed **Anybody**.

- **Why do we resist delegating?**

- **Why do we resist having others delegate to us?**

- **What are some important things to remember when we delegate?**

Do: The Nuts and Bolts of Using Excel

Chances are you are very familiar with the basics of using Excel. However, a refresher never hurts, and hopefully we can uncover a new trick you didn't know about before!

But before we get into practical application, we will discuss a simple yet powerful decision tool, the Urgent vs. Important Matrix. This tool lets you categorize the things you need to do based on their urgency and their importance.

The Urgent/Important Matrix

Items are added to this matrix based on these four categories:

- Things that are urgent and important
- Things that are urgent and not important
- Things that are not urgent but important
- Things that are not urgent and not important

	Important	Not Important
Urgent	1	2
Not Urgent	3	4

Urgent tasks are almost always the ones with a deadline and are assigned by others to you.
Important tasks are defined by the amount of time you want to spend on it. The quality of the finished product is almost always dependant on the amount of time you can devote to it.

Use the following guide to help you sort your tasks:

In a perfect world, the number of tasks in the **Urgent and Important (1)** box should be small. By applying effective time management techniques, you should have a reasonable amount of time available to all of your projects. However, should outside factors like travel delay or a sudden illness get in the way, use the Urgent and Important box to prioritize the most critical things that need doing.

Tasks in box 1 can include preparing for a presentation the next day or completing an important contract for a client.

The **Urgent and Not Important (2)** box will contain most of your day-to-day work. These are the tasks assigned to you or the tasks that are necessary for the daily operation of your workplace. The tasks listed here should be straightforward but would have serious consequences if they weren't completed. The most important thing to remember when sorting items for this category is to not spend a lot of time doing it. Developing a good daily routine will make sorting for this category easy.

Tasks in box 2 can include filling out daily report sheets, maintenance work, or dealing with customer issues.

The **Not Urgent and Important (3)** box contains tasks that are more long-term, and may or may not have deadlines. These tasks should be well-defined so that once you have taken care of boxes 1 and 2, you can pick up something in box 3 and work on it until something more urgent comes along.

Tasks in box 3 can include things like product development or tasks relevant to a repeating monthly contract.

The **Not Urgent and Not Important (4)** box contains everything else. These are tasks that can sometimes be automated or may be discarded if they remain stagnant for a long period of time.

Tasks in box 4 can include things like backing up data or a virus scan.

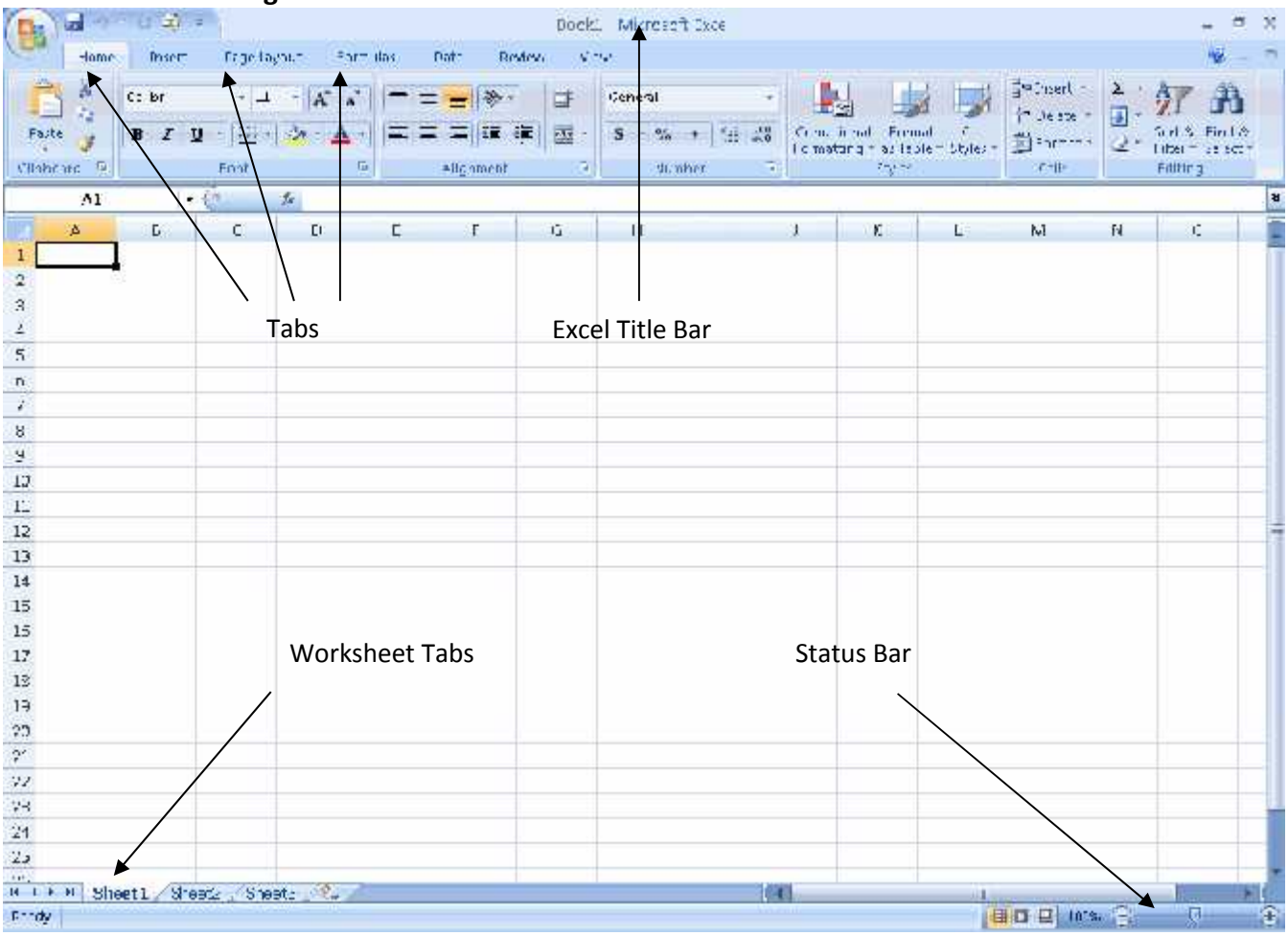
From the experts…
(http://www.time-management-basics.com/time-management-urgent-v-important2.shtml , March Ltd 2006)

Anything can end up in box 1 if you leave it long enough. One characteristic of a good manager is to ask 'why?'If you find too many items ending up in box 1, take a step back and ask 'why?' Learn from the experience so that it will not happen again.

We will make use of the Urgent/Important Matrix later in the Delay section of this Module. You will learn how to create a workbook to help you record information relevant to your tasks and projects.

In Module Four, we will discuss different ways you can sort and filter you data, both textual and numeric. These commands will become very useful when you need to sort or prioritize the tasks that you categorized with the Urgent/Important Matrix.

Interacting with Excel



The largest part of the Excel 2007 screen consists of a grid pattern of cells. These cells are indexed by letters along the top and by numbers down the left side. An individual cell formed from the intersection of a column and a row.

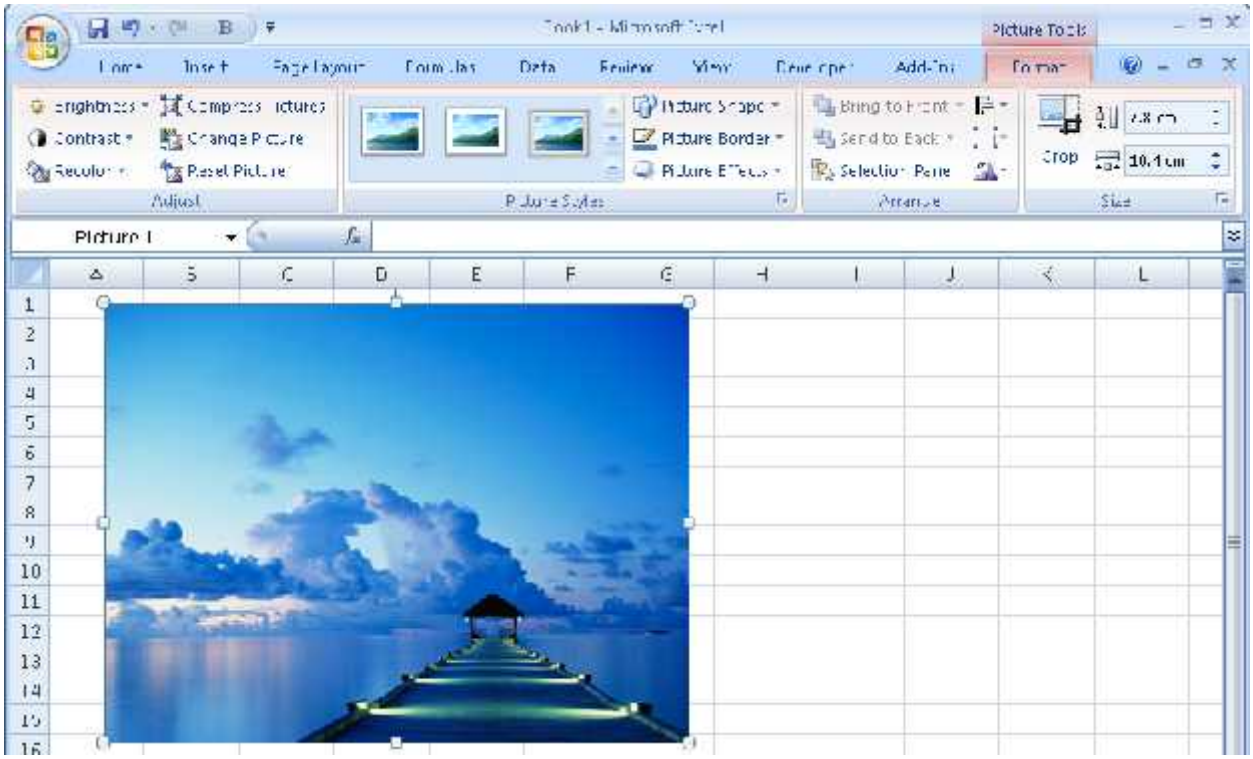
The cell with a heavy black border around the outside is called the active cell (cell A1 in the image above.) If you press the arrow keys on your keyboard, you will move the index of the active cell.

If you hold the Ctrl key and press an arrow key, the active cell border move to the extreme end of the row or column of cells you are in, according to what arrow you press. If you press and hold Shift while pressing the arrow keys, you will select a range of cells. For example, the image at right started with A1 as the active cell. The range that is currently selected was done so selected by holding Shift, pressing the right arrow three times, and the down arrow four times:

One of the major improvements in Excel 2007 over previous versions is an increased number of cells in your spreadsheet. An Excel 2007 spreadsheet contains 16,000 columns and more than 1,000,000 rows. This means that there are more than 16,000 X 1,000000 = 16,000,000,000 individual cells in a spreadsheet!

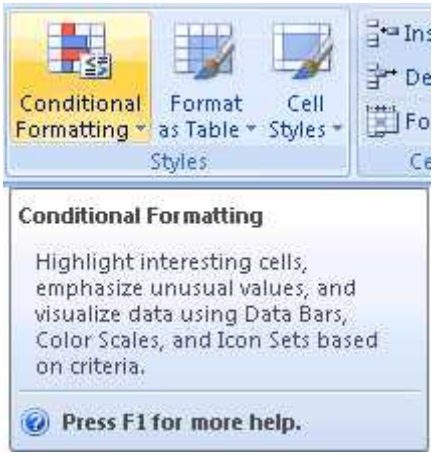
The panel of buttons and controls across the top of the Excel window is collectively called the Ribbon. If you click one of the labeled tabs (Home, Insert, Page Layout, Formulas, Data, Review, View), you will see the buttons and controls in the tab change according to the word you click on.

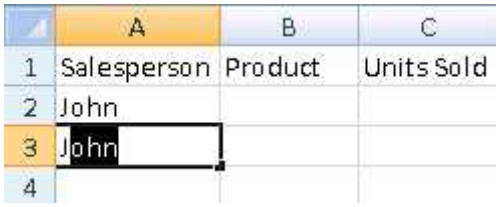
The Ribbon will grow in commands if you select a special object in your spreadsheet, such as a picture or a graph. These contextual tabs only appear when a special object is highlighted. In the image below, the Picture Tools – Format tab is visible and contains commands relevant to tasks you might perform on a picture:



If you let your mouse pointer hover over most controls in the Ribbon, you will see a ScreenTip appear. This box will show you the command name and a brief description of the button or control in question. In the image on the right, you can see the ScreenTip for Conditional Formatting.

Try viewing the different controls available by clicking on each word. Let your mouse pointer hover over the individual controls and buttons in a tab to see information about them.



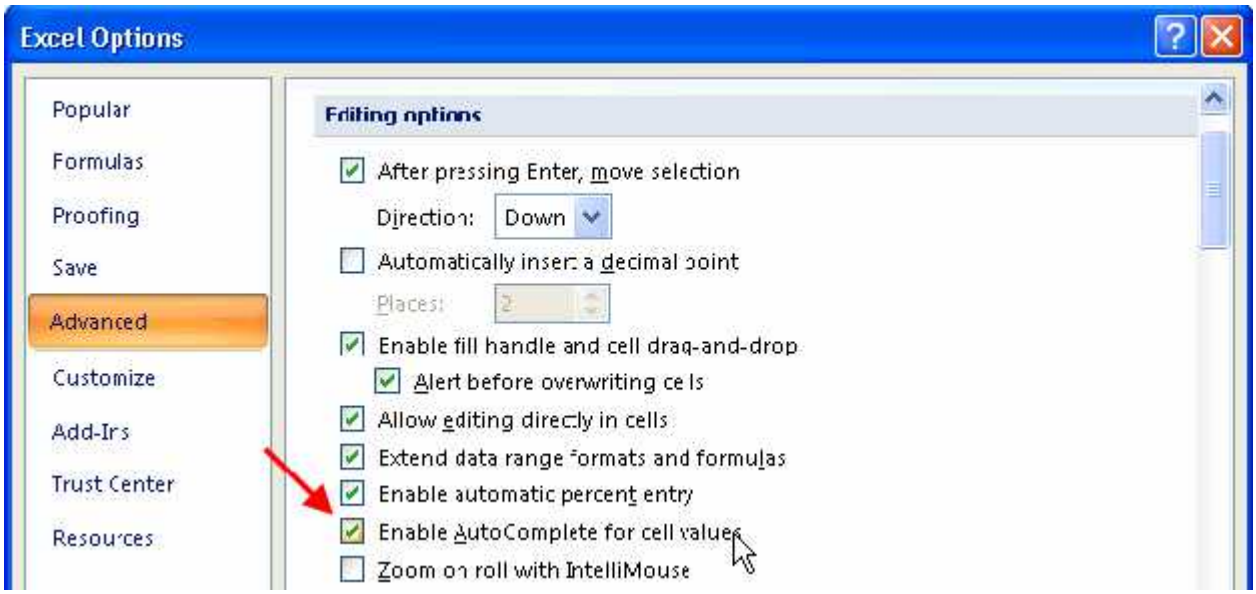


About AutoComplete

AutoComplete will help you enter information faster by completing what you type, based on similar information already entered in the same column. If you enter the name John in a cell, press Enter, and then type the letter J in the cell immediately below it, AutoComplete will fill in the letters “ohn” to complete the word. Just press Enter to accept the substitution.

If you have two words with the same first letter in a column of adjacent cells, John and Jack for example, and you type a J, AutoComplete will wait until you type a second letter to discern the most likely match to complete the entry.

We think you will find AutoComplete very useful. If you find it gets in the way, you can disable this feature. If you want to turn the AutoComplete feature off, open the Excel Options dialog and click the Advanced tab. Remove the Enable AutoComplete checkmark:



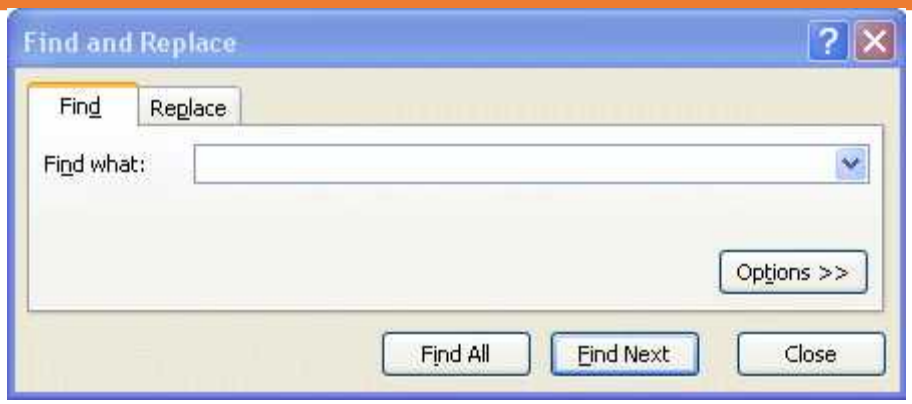
Find and Replace

You might recall that the average person can spend around 10% of their day just looking for stuff, both in their workplace and in their files. You can search a selection or a worksheet for a particular word or number by using Excel's Find and Replace feature.

The Find and Replace command is an excellent way to quickly apply the "Do" mentality. If you need to correct the spelling of someone's name or fix a formula, you may as well do it now and stop worrying about it!

To use Find and Replace, press Ctrl + F or click the Find and Select button on the far right of the Home tab.

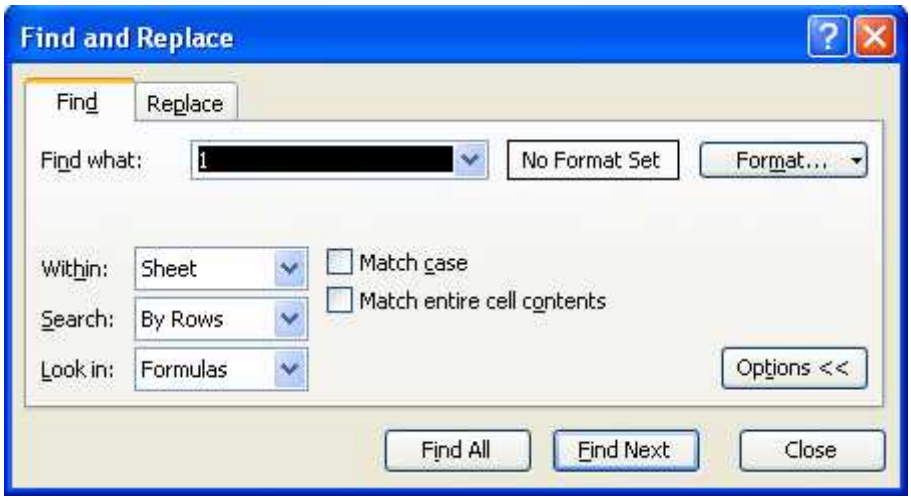
Either action will display the Find and Replace dialog box, which works well to look for a single item. The Find tab is automatically selected:



Type your search term in the Find what text box. Note that the drop down list contains recently used search terms that you can search for again. Then click the Find All or the Find Next button to search the current worksheet.

If you click the Find All button, Excel will provide a list of cell references that contain what you are looking for. Clicking Find Next will take you to the next cell that contains what you are looking for.

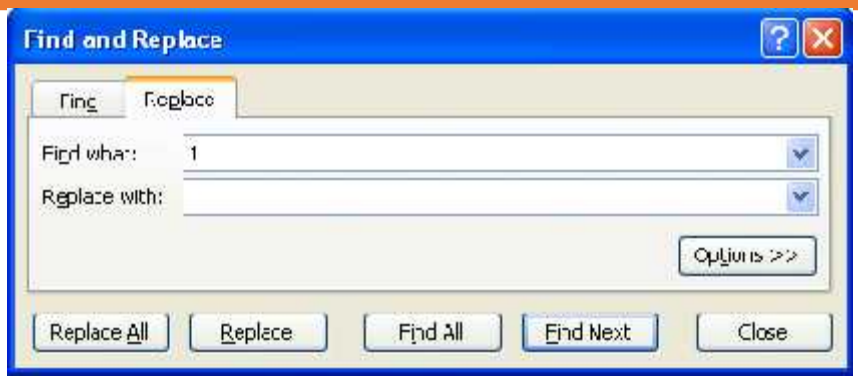
If you click the Options button, the dialog box will present a number of options for refining your search.



You can now choose to search within a certain formatting style, within a worksheet or workbook, by rows or columns, and more.

The Replace command is an extension of the Find command, and a very useful time-saver. If you click the Replace tab, you will be presented with the option to enter a replacement term for the one you are searching for.

You can also jump directly to the Replace tab by pressing Ctrl + H. The Replace command works in the same way as the Find command.



Enter a search term in the Find what field and then enter a replacement value in the Replace with field. Any matches can be replaced with the Replace button.

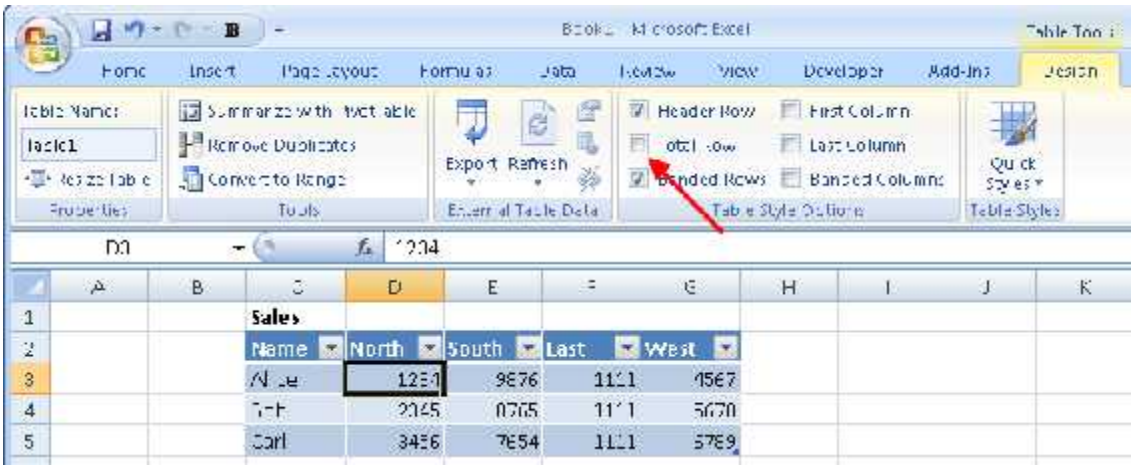
If you click the Replace All button, Excel will replace every instance of the word or number it finds with the replacement term, without waiting for you to click Replace for each one. The Options button reveals the same advanced options as discussed with the Find command.

You can use Find or Find and Replace on a selection of cells as well. Just select the block of cells you want to search through, then press Ctrl + F or Ctrl + H. Finally, you can use wildcard characters (* and ?) as well if you're not 100% sure of what you're searching for.

Total Row

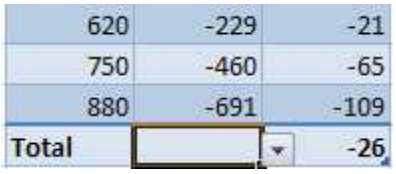
You can create and use tables in Excel, even though it might seem a little odd because a worksheet is already divided up like a table. Nonetheless, you can enter alphanumeric data in a worksheet, insert a table based on the data you have entered, and then use the table as a single entity rather than a range of cells.

You may recall that if you select two or more cells with numerical data, some numbers appear in Excel's status bar that state the average, count, and sum of the data. When working with a table of numeric data in Excel, you can use a formal Total Row that provides totals or other information about your table data. If you are working with a table in Excel 2007 and you click on a table cell, a Table Tools – Design contextual tab will appear:



In the Table Style Options group, check the box labeled Total Row. Clicking on this checkbox will add a new row to the bottom of the table, with the word Total in the first cell. You can also display this Totals Row by right-clicking a cell in the table and choosing the Totals Row option from the Table sub menu.

If you click on a cell in the totals row, you will see an arrow appear indicating a drop list.



If you display the drop list from a cell in the total row you will see a number of options. You can select each cell in the total row in turn and choose an option from the drop list to apply to the particular column of numeric data.

None	Shows nothing in the total row for this particular column.
Average	Shows the average of numerical values for the column.
Count	Shows the number of items in the column.
Max	Shows the maximum value of all items in the column.
Min	Shows the minimum value of all items in the column.
Sum	Shows the sum of numerical data in the column.
StdDev	Shows the standard deviation for numerical column data.
Var	Shows the variance of numerical data in the column.

In the following example, the total row shows the "maximum" (most recent) invoice date, the average invoice total, and a count of the invoice numbers.

	A	B	C	D
1	Company name	Invoice#	Invoice total	Invoice date
2	The Firm	1234	$ 2,000.00	12/12/2006
3	fiction Inc.	1235	$ 2,300.00	12/13/2006
4	Shoes R us	1236	$ 546.00	12/14/2006
5	Sport store	1237	$ 2,654.00	12/15/2006
6	**Total**	**4**	**$ 1,875.00**	**12/15/2006**

- If you resize a table, the Total Row will always stay at the bottom.
- If you enter any new data into the table, the values in the total row cells will be recalculated accordingly.
- If you want to change what is displayed in the total row, you can click on any cell in the row and choose another option from the drop list.
- You can hide the total row by clearing the Total Row checkbox on the Design tab.

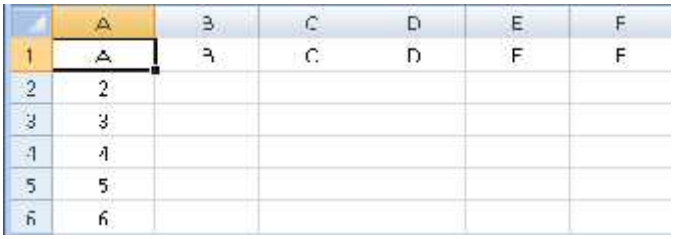
Dump: Getting Rid of Things You Don't Need

Earlier in this Module we discussed that if you really don't need something, you should give it away or get rid of it. In Module Four we will help expand on this concept when we explain how to effectively organize your workspace. But how about 'getting rid' of information when using Excel? In this "Dump" section of Module Three, we will show you how to not only delete information but actually hide it from view as well.

Deleting Information

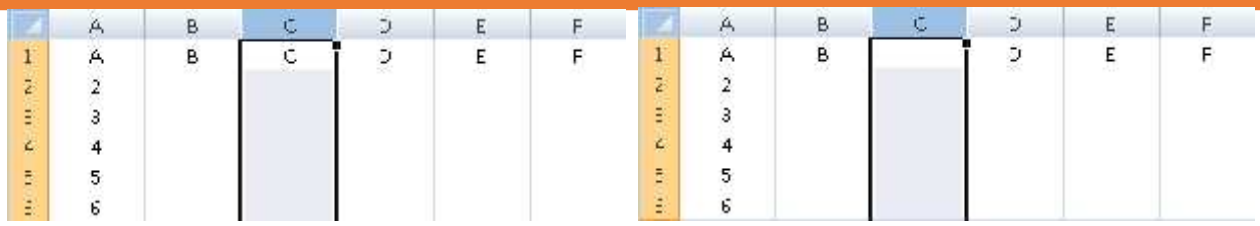
You can easily clear the contents of a cell or range of cells. To clear a cell, simply click the cell and press Delete or Backspace. To clear a range of cells, select the cells and then press Delete or Backspace.

Consider this simple spreadsheet:

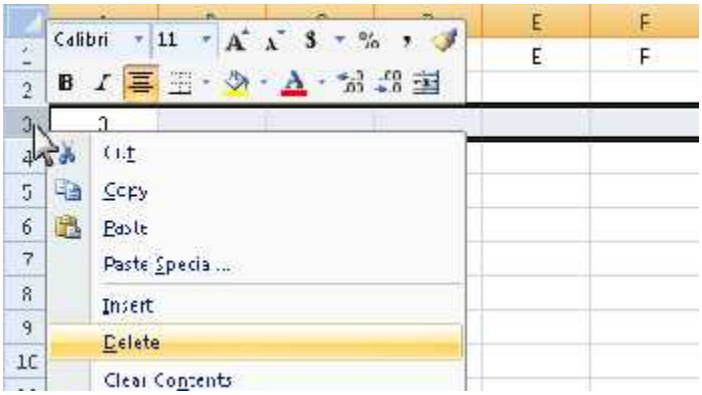


You can clear or delete a row or column from the worksheet. If you clear a row or column, you are removing all information in that row or column. If you delete a row or column, you are "physically" removing it, forcing the data around the deleted area to move and fill the gap.

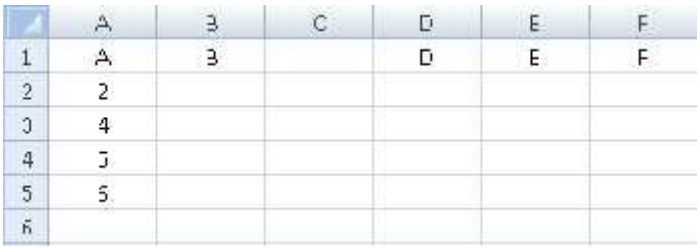
Clearing a row or column is easy. For example, let's clear column C. To do this, click the C column header (which selects the column), and then press Delete:



To delete a row or column, click the column or row header to select that column or row. Then you can either right-click the header and click Delete or click the Delete command in the Cells group of the Home tab. For example, let's delete the third row with the right-click method:



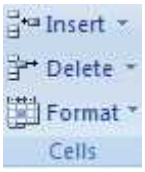
This will automatically move all data under the deleted row up one level:



Sometimes when you use the Delete command, you'll need to select what Excel should do with the surrounding information:

If you click OK both the cell contents and formatting will be removed, and the data from the cell to the immediate right will be shifted left into the now vacant cell. If the Shift Cells Up radio button had been selected, the data in the cell immediately below would be shifted up into the vacant cell.

You can also delete rows and columns by clicking the Delete button on the Home tab.



Clicking the small arrow at the right of the delete button will display a menu with options to delete cells, delete rows, or delete columns. To delete rows, first select a row or rows. Then, click the Delete Button Arrow to display the delete menu, and then click the Delete Sheet Rows option. This will delete the row, and shift the below cells up.

To delete columns, select the column or columns you want removed, and then choose the Delete Sheet Columns option. The columns to the right of the deletion will be shifted left.

Remember, **clearing contents only removes the data**, while **deleting removes data and formatting**.

It is important to keep in mind that Excel treats text and numbers differently. A number is seen as a value in Excel, something that can be used in mathematical operations. Text is often used as labels or identifiers. If you want to enter a number as text (use a number as a label), put an apostrophe (‘) in front of it.

Also keep in mind that if you delete numerical data, check for any formula errors related to the information you just removed. If your formula happens to reference a cell that doesn’t exist anymore, you’ll have to replace the data somewhere in the worksheet and update the formula. You can also press Ctrl + Z to Undo the last operation, but then you’ll have to rethink your deletion strategy!

Using Automatic Outlining

Now let’s shift our view and talk about hiding information from view. Imagine you are using a worksheet that relies on very large amounts of data. This workbook also has lots of graphs and formulas and is overall fairly cluttered. The problem is that you need to show this spreadsheet to other people. You always seem to spend a lot of time scrolling through the document to show them relevant information.

You obviously can’t delete the data in the worksheet, but you can hide certain portions of the worksheet.

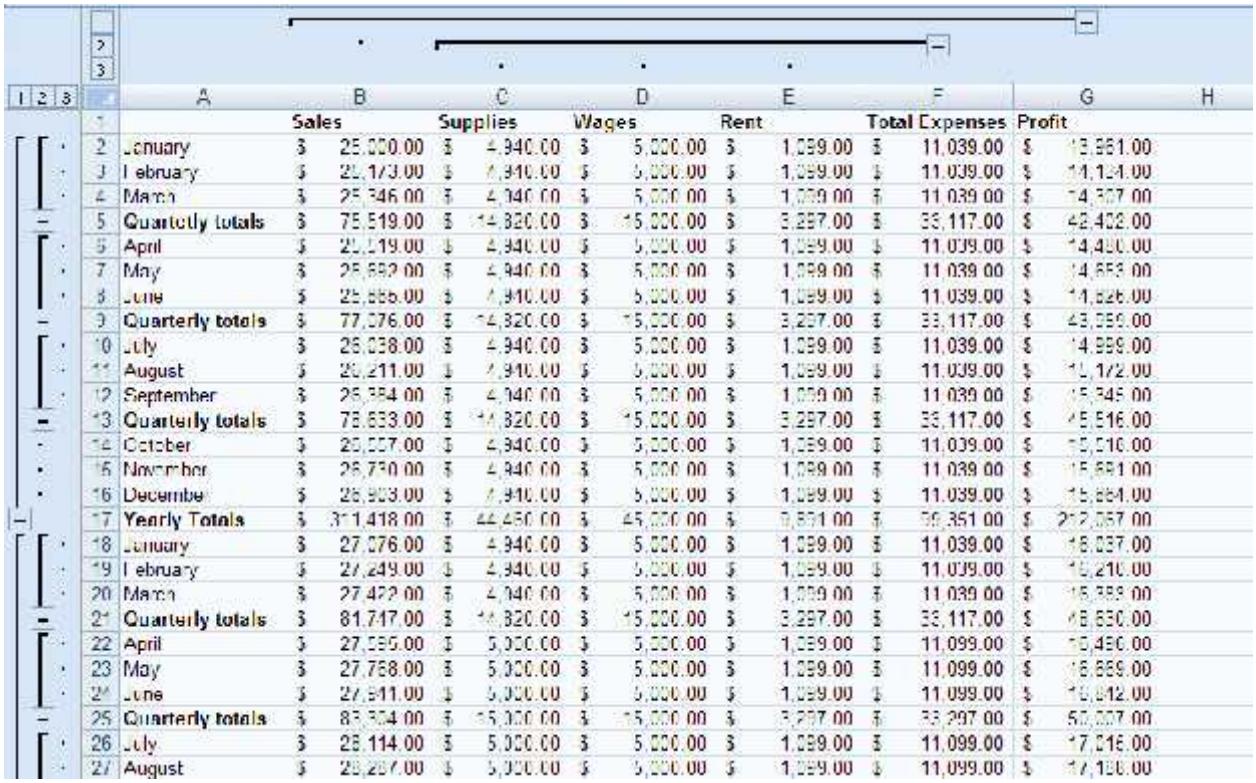
Excel’s automatic outlining feature makes outlining a worksheet fairly straightforward. Automatic outlining works best with numerical data organized into groups and sub groups by formulas or functions. The following worksheet, for example, contains monthly financial data for a business, organized into quarterly and yearly totals using formulas and the SUM function.

	A	B	C	D	E	F	G
1		Sales	Supplies	Wages	Rent	Total Expenses	Profit
2	January	$ 25,000.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 13,961.00
3	February	$ 25,173.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,134.00
4	March	$ 25,346.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,307.00
5	**Quarterly totals**	$ 75,519.00	$ 14,820.00	$ 15,000.00	$ 3,297.00	$ 33,117.00	$ 42,402.00
6	April	$ 25,519.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,480.00
7	May	$ 25,692.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,653.00
8	June	$ 25,865.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,826.00
9	**Quarterly totals**	$ 77,076.00	$ 14,820.00	$ 15,000.00	$ 3,297.00	$ 33,117.00	$ 43,959.00
10	July	$ 25,838.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,999.00
11	August	$ 26,211.00	$ 4,940.00	$ 6,000.00	$ 1,099.00	$ 11,039.00	$ 15,172.00
12	September	$ 26,384.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 15,345.00
13	**Quarterly totals**	$ 78,633.00	$ 14,820.00	$ 15,000.00	$ 3,297.00	$ 33,117.00	$ 45,516.00
14	October	$ 26,557.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 15,518.00
15	November	$ 26,730.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 15,691.00
16	December	$ 26,903.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 15,864.00
17	**Yearly Totals**	$ 311,418.00	$ 44,460.00	$ 45,000.00	$ 9,891.00	$ 99,351.00	$ 212,067.00
18	January	$ 27,076.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 16,037.00
19	February	$ 27,249.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 16,210.00
20	March	$ 27,422.00	$ 4,940.00	$ 6,000.00	$ 1,099.00	$ 11,039.00	$ 16,383.00
21	**Quarterly totals**	$ 81,747.00	$ 14,820.00	$ 15,000.00	$ 3,297.00	$ 33,117.00	$ 48,630.00
22	April	$ 27,595.00	$ 5,000.00	$ 5,000.00	$ 1,099.00	$ 11,099.00	$ 16,496.00
23	May	$ 27,768.00	$ 5,000.00	$ 5,000.00	$ 1,099.00	$ 11,099.00	$ 16,669.00
24	June	$ 27,941.00	$ 5,000.00	$ 5,000.00	$ 1,099.00	$ 11,099.00	$ 16,842.00
25	**Quarterly totals**	$ 83,304.00	$ 15,000.00	$ 15,000.00	$ 3,297.00	$ 33,297.00	$ 50,007.00
26	July	$ 28,114.00	$ 6,000.00	$ 6,000.00	$ 1,099.00	$ 11,099.00	$ 17,015.00

If you look carefully at column A, it's a little tricky to pick out the Quarterly and Yearly rows. This is a good example where you might want to hide all the monthly information.

To automatically outline this worksheet, click the small arrow next to the Group button in the Outline button group on the Data tab.

This action will display a menu with two options: Group and Auto Outline. If you click the Auto Outline button, the spreadsheet will be outlined automatically:



	A	B	C	D	E	F	G	H
1		Sales	Supplies	Wages	Rent	Total Expenses	Profit	
2	January	$ 25,000.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 13,961.00	
3	February	$ 25,173.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,134.00	
4	March	$ 25,346.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,307.00	
5	Quarterly totals	$ 75,519.00	$ 14,820.00	$ 15,000.00	$ 3,297.00	$ 33,117.00	$ 42,402.00	
6	April	$ 25,119.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,080.00	
7	May	$ 25,892.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,853.00	
8	June	$ 25,665.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 14,626.00	
9	Quarterly totals	$ 77,676.00	$ 14,820.00	$ 15,000.00	$ 3,297.00	$ 33,117.00	$ 43,559.00	
10	July	$ 25,038.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 13,999.00	
11	August	$ 20,211.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 9,172.00	
12	September	$ 28,384.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 17,345.00	
13	Quarterly totals	$ 78,633.00	$ 14,820.00	$ 15,000.00	$ 3,297.00	$ 33,117.00	$ 45,516.00	
14	October	$ 20,557.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 9,518.00	
15	November	$ 26,730.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 15,691.00	
16	December	$ 26,903.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 15,864.00	
17	Yearly Totals	$ 311,418.00	$ 44,460.00	$ 45,000.00	$ 9,891.00	$ 99,351.00	$ 212,067.00	
18	January	$ 27,076.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 16,037.00	
19	February	$ 27,249.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 16,210.00	
20	March	$ 27,422.00	$ 4,940.00	$ 5,000.00	$ 1,099.00	$ 11,039.00	$ 16,383.00	
21	Quarterly totals	$ 81,747.00	$ 14,820.00	$ 15,000.00	$ 3,297.00	$ 33,117.00	$ 48,630.00	
22	April	$ 27,295.00	$ 5,000.00	$ 5,000.00	$ 1,099.00	$ 11,099.00	$ 16,196.00	
23	May	$ 27,768.00	$ 5,000.00	$ 5,000.00	$ 1,099.00	$ 11,099.00	$ 16,669.00	
24	June	$ 27,841.00	$ 5,000.00	$ 5,000.00	$ 1,099.00	$ 11,099.00	$ 16,742.00	
25	Quarterly totals	$ 83,304.00	$ 15,000.00	$ 15,000.00	$ 3,297.00	$ 33,297.00	$ 50,007.00	
26	July	$ 28,114.00	$ 5,000.00	$ 5,000.00	$ 1,099.00	$ 11,099.00	$ 17,015.00	
27	August	$ 28,287.00	$ 5,000.00	$ 5,000.00	$ 1,099.00	$ 11,099.00	$ 17,188.00	

You can see the results of Excel's automatic outline above. All of the original data is shown, as well as outline grouping indicators and collapse buttons marked with a (-). Also take note of the numbers 1, 2, and 3 in the upper-left corner. These numbered buttons let you expand or collapse all information in that outline at once. You can see that the quarters are grouped together to be summarized by Quarterly Totals, and each year has been grouped to be summarized by Yearly Totals.

Notice also that the columns Supplies, Wages, and Rent have been grouped under Total Expenses, and that there is an overarching group of all columns under Profit.

	A	G	H
1		Profit	
17	Yearly Totals	$ 212,067.00	
33	Yearly Totals	$ 203,322.00	
49	Yearly Totals	$ 226,030.00	
65	Yearly Totals	$ 231,658.00	
66			
67			

Now that the data is outlined, click the (-) button to collapse the rows/columns within the subgroups. If you collapse everything, you end up with this tidy list of data:

The original information is still available in all of its detail, but it is now presented in a summary view, showing only the yearly profit totals. Of course, automatic outlines will differ from worksheet to worksheet depending on the way the data is organized.

Click (+) to expand a group of data or click one of the numbered buttons to expand the entire group.

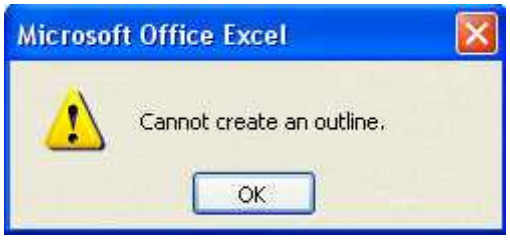
None of the data is missing, it's just hidden. Did you notice the column and row headings in the image above? Columns B-F are hidden, as well as most of the rows.
To remove the outlining from your worksheet, choose the Clear Outline option from the submenu under the Ungroup button.

Grouping Data Manually

Automatic outlining may not be adequate for worksheets with non numerical values or with no distinctive totals (from formulas or functions).

If automatic outlining does not or cannot organize your data in the way you want, you can manually group your data as required. Take the following worksheet as an example.

	A	B	C	D	E	F	G
1			Wins	Losses	Ties	Points	Rank
2		**1st Division**					Second
3		**Rockets**	2	2	1		
4		Joe				20	
5		Jake				23	
6		Linda				22	
7		**Jets**	1	3	1		
8		Tim				12	
9		Frank				11	
10		Walter				13	
11		**2nd Division**					First
12		**Tigers**	3	2	0		
13		Nancy				23	
14		Lisa				23	
15		Jessica				14	
16		**Pirates**	1	4	0		
17		Bob				33	
18		Sandra				35	
19		Ellen				25	
20							

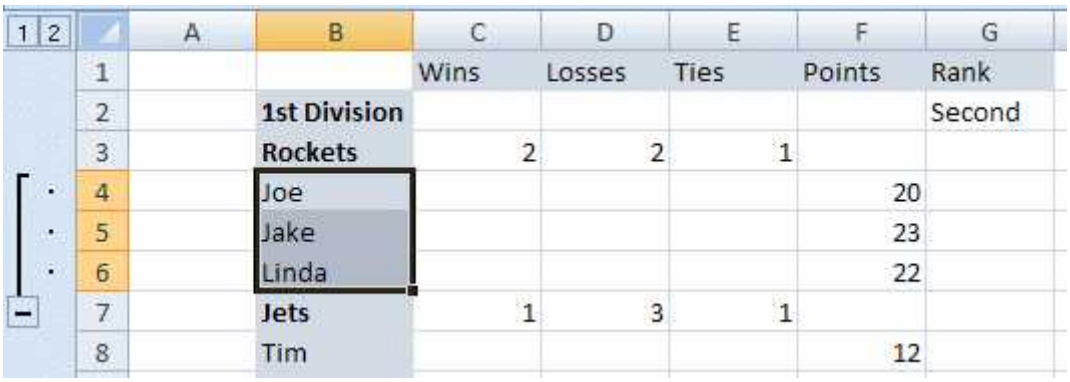


We would like to group this information according to teams and divisions, but if you use the Auto Outline option under the Group button, Excel displays the following alert:

Because the data contains no formulas or functions providing numeric totals, Excel cannot implement automatic outlining for the worksheet. You can, however, create your own groupings by selecting the rows or columns that you want to group, and then clicking the Group button.

For example, if you select the members of Team 1 (cells B4:B6) and click the Group button on the Data tab, Excel will display the following box asking if you want to group by rows or columns.

If you select the Rows radio button and click OK, Excel will provide an outline indicator and a collapse/expand button for the new grouping.

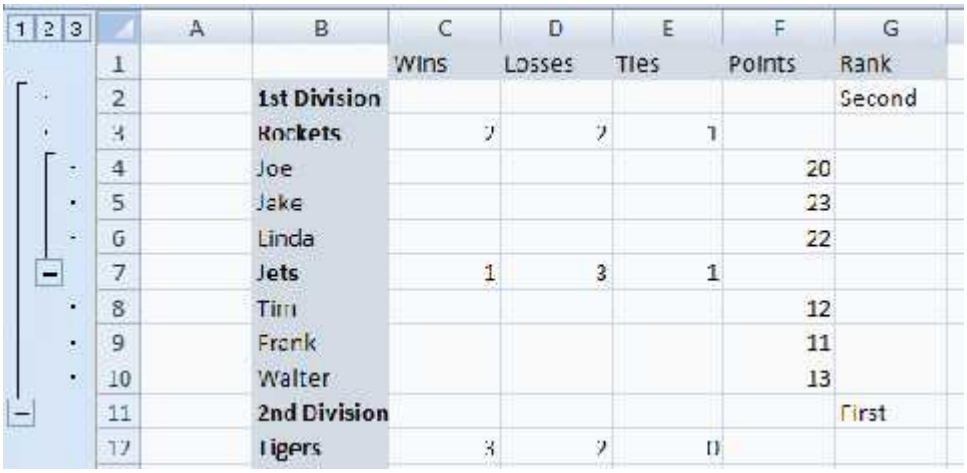


	A	B	C	D	E	F	G
1			Wins	Losses	Ties	Points	Rank
2		**1st Division**					Second
3		**Rockets**	2	2	1		
4		Joe				20	
5		Jake				23	
6		Linda				22	
7		**Jets**	1	3	1		
8		Tim				12	

Look at the numbered buttons in the top left corner.

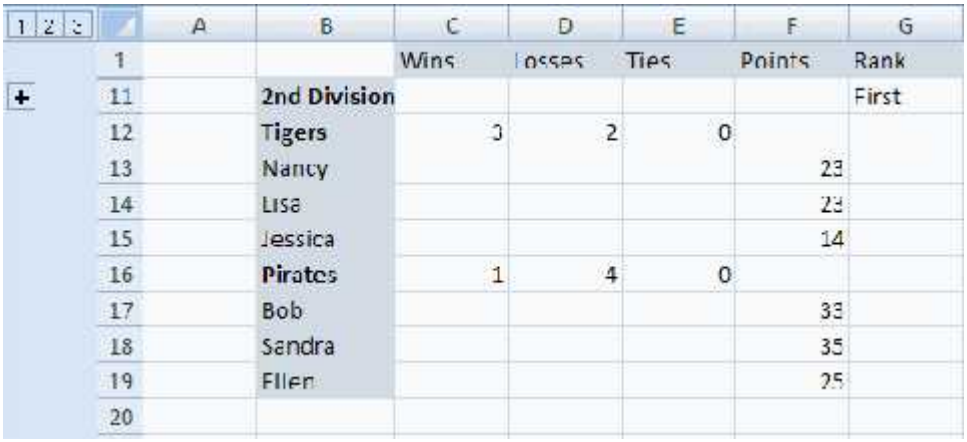
Clicking 1 will show the first level of detail, and clicking 2 will show the second, more detailed level.

If you follow the same procedure for cells B8:B10, and then select cells B2:B10 and group them, you will end up with a worksheet like this.



	A	B	C	D	E	F	G
1			Wins	Losses	Ties	Points	Rank
2		1st Division					Second
3		Rockets	2	2	1		
4		Joe				20	
5		Jake				23	
6		Linda				22	
7		Jets	1	3	1		
8		Tim				12	
9		Frank				11	
10		Walter				13	
11		2nd Division					First
12		Tigers	3	2	0		

This image shown above is of the fully detailed view. If you click 2, you will see the team names, not the player names. Clicking 1 will display the highest level view (lowest detail) of the manual groupings.



	A	B	C	D	E	F	G
1			Wins	Losses	Ties	Points	Rank
11		2nd Division					First
12		Tigers	3	2	0		
13		Nancy				23	
14		Lisa				23	
15		Jessica				14	
16		Pirates	1	4	0		
17		Bob				33	
18		Sandra				35	
19		Ellen				25	
20							

In this image you can see that the entire first division grouping has been collapsed from view.

You can also select rows or columns for grouping by dragging your mouse over the column letters or row numbers accordingly. If you select the rows or columns this way, you will not be asked whether to group by rows or columns, as the selection you choose will clearly indicate this to Excel.

To remove manual groupings, select the rows or columns corresponding to the grouping you wish to remove and click the Ungroup button. Select the appropriate radio button and click OK.

Creating Subtotals

Another kind of outlining or grouping technique available in Excel is the subtotals feature. If you have numeric data organized with clear column and row headings, you can use Excel to create automatic subtotals and grand totals. This is similar to the Total Row we discussed earlier.

Consider this worksheet that contains sales information for different products across geographical regions:

	A	B	C	D	E
1	Region	Product	Units sold	Price per unit	Profit
2	East	TypeA	23	$ 2,000.00	$46,000.00
3	East	TypeB	7	$ 1,500.00	$10,500.00
4	East	TypeC	13	$ 2,350.00	$30,550.00
5	West	TypeD	12	$ 4,000.00	$48,000.00
6	West	TypeC	12	$ 2,350.00	$28,200.00
7	West	TypeA	12	$ 2,000.00	$24,000.00
8	South	TypeE	12	$ 5,450.00	$65,400.00
9	South	TypeC	10	$ 2,350.00	$23,500.00
10	South	TypeB	8	$ 1,500.00	$12,000.00
11					

To use Excel's subtotal feature, select the range of data you want to apply subtotals to and click the Subtotal button on the Data tab.

Be sure to include the column labels in your selection so Excel will be able to discern what numbers to total. For this example, you could select A1:E10 and click the Subtotal button on the Data tab to show the following Subtotal dialog.

The "At each change in" combo box gives you options as to the number of rows that will be totaled. Remember that totals are recalculated every time the values in the chosen column label change.

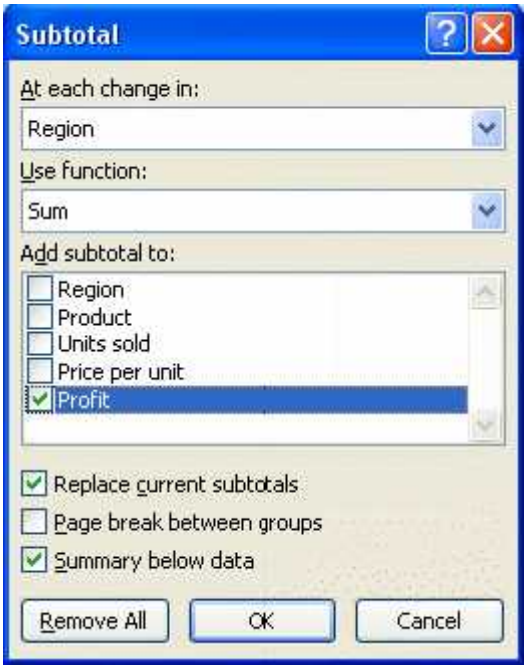
The "Use function" drop list lets you choose from a list of functions including Sum, Average, Count, Product, and StDev to apply to your data. The function you choose will be used to calculate the totals.

Under the "Add subtotals to" option list, you can select which columns to apply the totals to. You can apply totals to a single column or to multiple columns in the selected range.

Finally, there are three check boxes at the bottom of the dialog box that will allow you to:

- Replace any pre existing subtotals

- Put page breaks between totaled groups so they will be printed on separate pages
- Place the subtotals and grand totals above or below the corresponding data

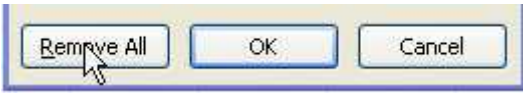


If you choose to apply totals to each change in the region column while using the Sum function for the profit column, and with no page breaks, the resulting worksheet will look like this.

	A	B	C	D	E
1	Region	Product	Units sold	Price per unit	Profit
2	East	TypeA	23	$ 2,000.00	$ 46,000.00
3	East	TypeB	7	$ 1,500.00	$ 10,500.00
4	East	TypeC	13	$ 2,350.00	$ 30,550.00
5	East Total				$ 87,050.00
6	West	TypeD	12	$ 4,000.00	$ 48,000.00
7	West	TypeC	12	$ 2,350.00	$ 28,200.00
8	West	TypeA	12	$ 2,000.00	$ 24,000.00
9	West Total				$100,200.00
10	South	TypeE	12	$ 5,450.00	$ 65,400.00
11	South	TypeC	10	$ 2,350.00	$ 23,500.00
12	South	TypeB	8	$ 1,500.00	$ 12,000.00
13	South Total				$100,900.00
14	Grand Total				$288,150.00
15					

Notice that there is a subtotal for the profit figures at every change in the region value (East, West, South) and a grand total for the Profit column at the end of the data. You can also see that Excel has provided outlined levels, collapse/expand buttons, and numbered outline level buttons associated with the totals. These buttons and outlines work exactly as previously explained. The lower the number on the button, the less detailed information will be shown.

To remove these subtotals, select the range of data in question (A1:E14), click the Subtotal button to show the Subtotal dialog box again, and then click the Remove All button.



As you can see, all it takes is a couple of clicks to make well-designed data that much easier to work with.

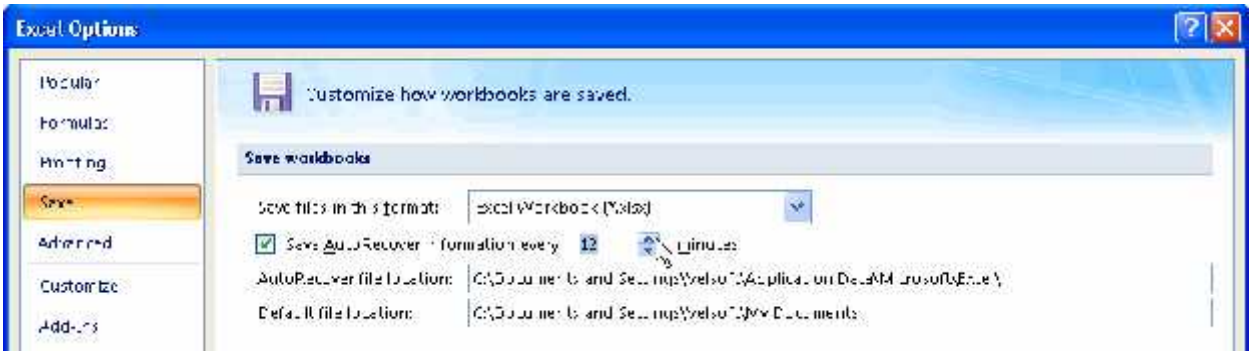
AutoRecover

Now that you know how to delete information and use groupings, you should be in good shape to control your data. Unfortunately, there are some things you can't control, like power outages or your operating system deciding it wants to crash. These are the kinds of "Dump" we can do without!

Excel's AutoRecover feature repeatedly saves a copy of the workbook that you are currently using based on a specified time period. The default period 10 minutes, but you can increase or decrease this time as you see fit. The shorter the time period, the more frequently Excel will save the current file. This means that if something unexpected happens, you should have a fairly recent copy of the file.

To change your AutoRecover settings, open the Excel Options window and click the Save tab.

Under the Save workbooks heading, click on the up and down arrows next to the "minutes" field to specify more or less time between AutoRecover saves.



When you have finished making changes, click OK to close the Excel Options dialog.

Delay: Make Excel Remember For You

Excel is used for a lot more than just crunching numbers. Thanks to the sheer size of worksheets, the power of the average desktop computer, and cheap data storage, it's easy to use Excel as a basic database. If you primarily use Excel in your day-to-day work, you can also use Excel to help you keep track of the things you need to do.

The third D stands for Delay. In conventional thinking, Delay teaches us to make sure that others are aware of our deadlines. If you were creating an important workbook based on data from your accounting department, you would make sure that the accounting department is aware of your needs and delivered the data to you on time. However, there's nothing wrong with making sure that we don't forget the things we need to do as well!

By now, you may have already given some thought to how you might use Excel to help keep you on track. In fact, Excel is perfect to use for a lot of the organizational tools we have already talked about in Module One: a To-Do book, a basic planner, an Urgent/Important Matrix, etc.

Is this section on Delay, we'll focus on building your own task/project organizer into Excel. But before we start to build this workbook, we need to talk a bit about hyperlinks. Without these, our new organizer won't be much more than a jumble of empty worksheets!

What is a Hyperlink?

A hyperlink is a property that can be applied to text or an image. It creates a one-way connection between the current text/image and another location. This other location can be somewhere in the same file, in a different file, on a file across the network, on different computers, or anywhere around the world.

When you click a hyperlink, the file or location that is associated with the link will appear on your screen. The Entire Internet makes extensive use of hyperlinks to link Web pages.

Traditionally, hyperlinks come in the form of an underlined word or phrase in a bright blue font (Like This). This does not always have to be the case as hyperlinks can be a word, a phrase, a symbol, or a picture. Each hyperlink has a statement called a URL (uniform resource locator) associated with it. The URL lists the location of the destination file or object and what protocol should be used to retrieve it. A typical URL that you see in the address bar of your Web browser could look something like: http://www.something.org. When you click a hyperlink, the information in the URL associated with it is used to locate and retrieve the linked file or object.

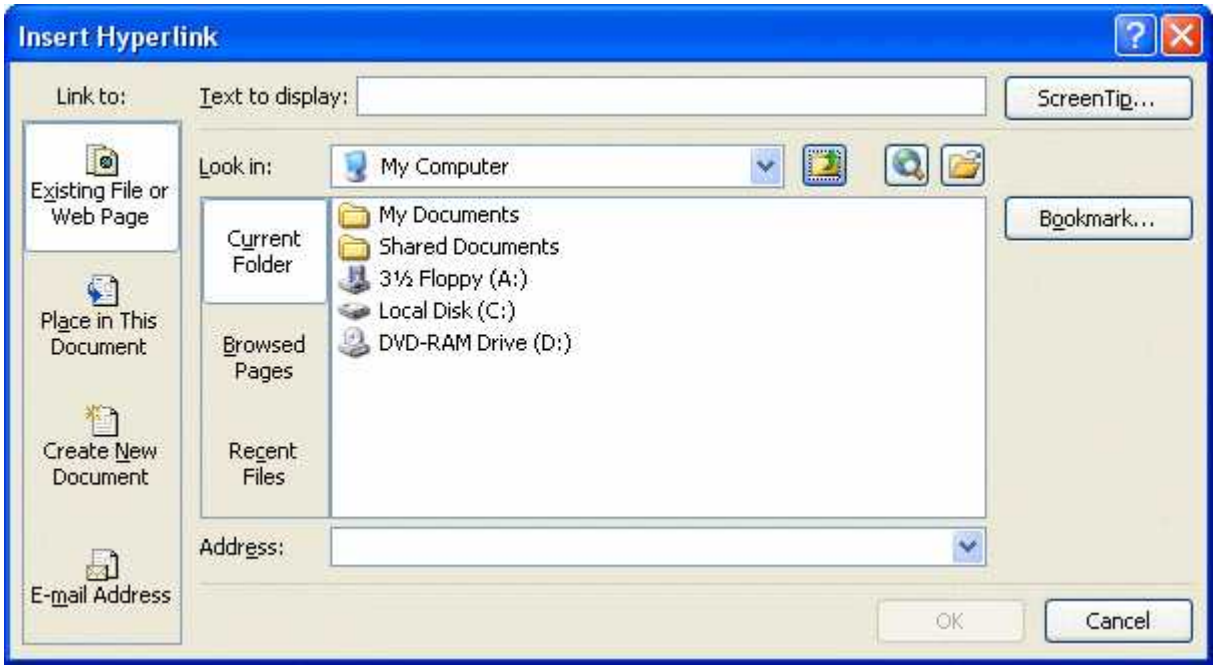
You can create a hyperlink in a workbook that links to an object located in the same directory or on the same computer as the workbook. You can also create a hyperlink that points to a Web page, a file on a remote server, or to a specific e-mail recipient.

Inserting and Modifying Hyperlinks

In Excel 2007, you can insert hyperlinks directly into your worksheets. You might want to insert a link to another location in the same workbook or to another Excel workbook located on the same computer. You might also want to insert a link to a Word document or to a Web page.

To add a hyperlink, select the cell that will contain your hyperlink and then click the Hyperlink button on the Insert tab.

This will open the Insert Hyperlink dialog.



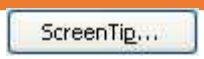
You can see four buttons running down the left side of the dialog box under the Link to: heading. You can use these buttons to create a link to an Existing File or Web Page, a Place in This Document, Create New Document, or to an E-mail Address. Enter the text for your hyperlink in the Text to display field at the top of the dialog box. This text will appear as a blue underlined hyperlink in the cell that you have selected.

If you choose the Existing File or Web Page button, you will see a drop list labeled Look in. Use this list to browse through the various folders on your computer to find the file that you want to create a link to. When you select a folder or drive from the drop list, the available files or folders corresponding to the selection will appear in the large center area of the dialog box.

You will also notice three buttons just to the left of the large center area labeled Current Folder, Browsed Pages, and Recent Files. If you click Current Folder, the files and subfolders of the current folder in the drop list will be displayed. If you click the Browsed Pages button, a list of the URL's for Web pages you recently visited will be displayed. If you click on the Recent Files button, you will see a list of recently accessed files.

If you make a selection from any of these lists the URL (or address) of the file will be entered into the Address field at the bottom of the dialog box. You can also type a URL for a Web page or remote file, or the path to a local file directly into the Address field. In any case, the file or object referred to in the Address field will be the target of the hyperlink.

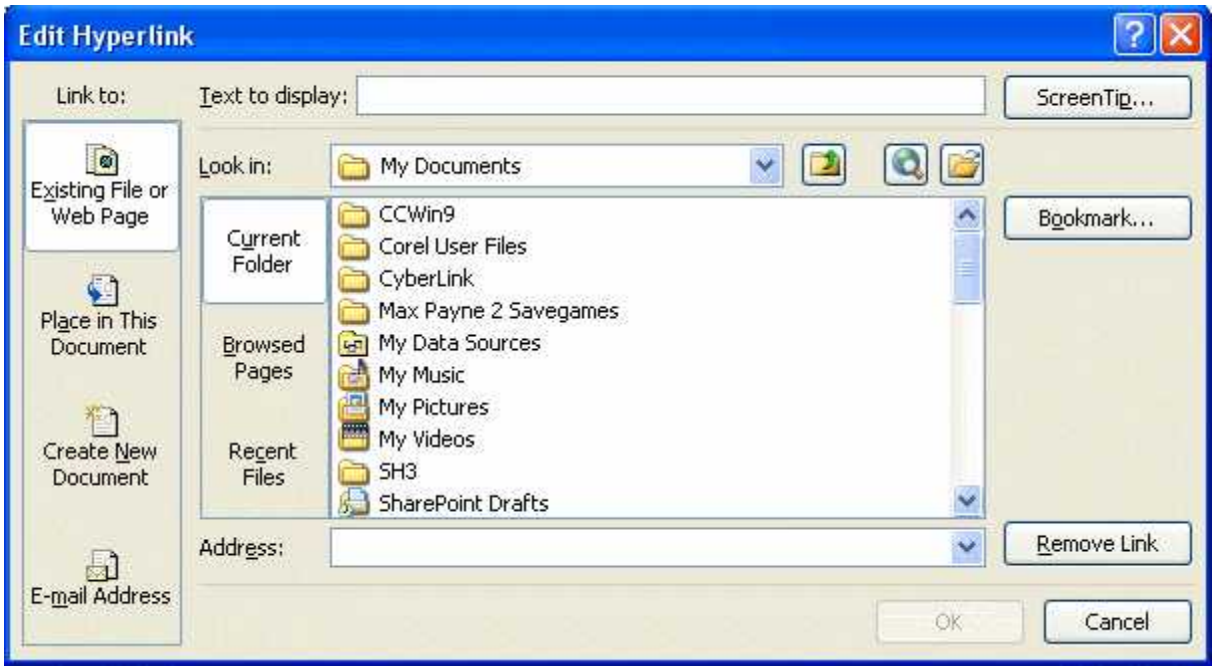
You can click the screen tip button in the upper right of the dialog box to add a brief comment that will appear when the mouse pointer hovers over the hyperlink.



You can use the Bookmark button to link to a specific location (like a cell range) in another Excel workbook. First, select the Excel file from the list, and then click the Bookmark button to specify the exact location within the selected workbook.

When you have finished making the necessary entries in the Insert Hyperlink dialog box, you can click OK to create the hyperlink

To change the text of an existing hyperlink, you can right-click it and edit the text in the Formula bar (because left-clicking would take you to the hyperlink location) You can also right-click the hyperlink and select Edit Hyperlink from the drop down menu. This will display the Edit Hyperlink dialog which is very similar to the Insert Hyperlink dialog.

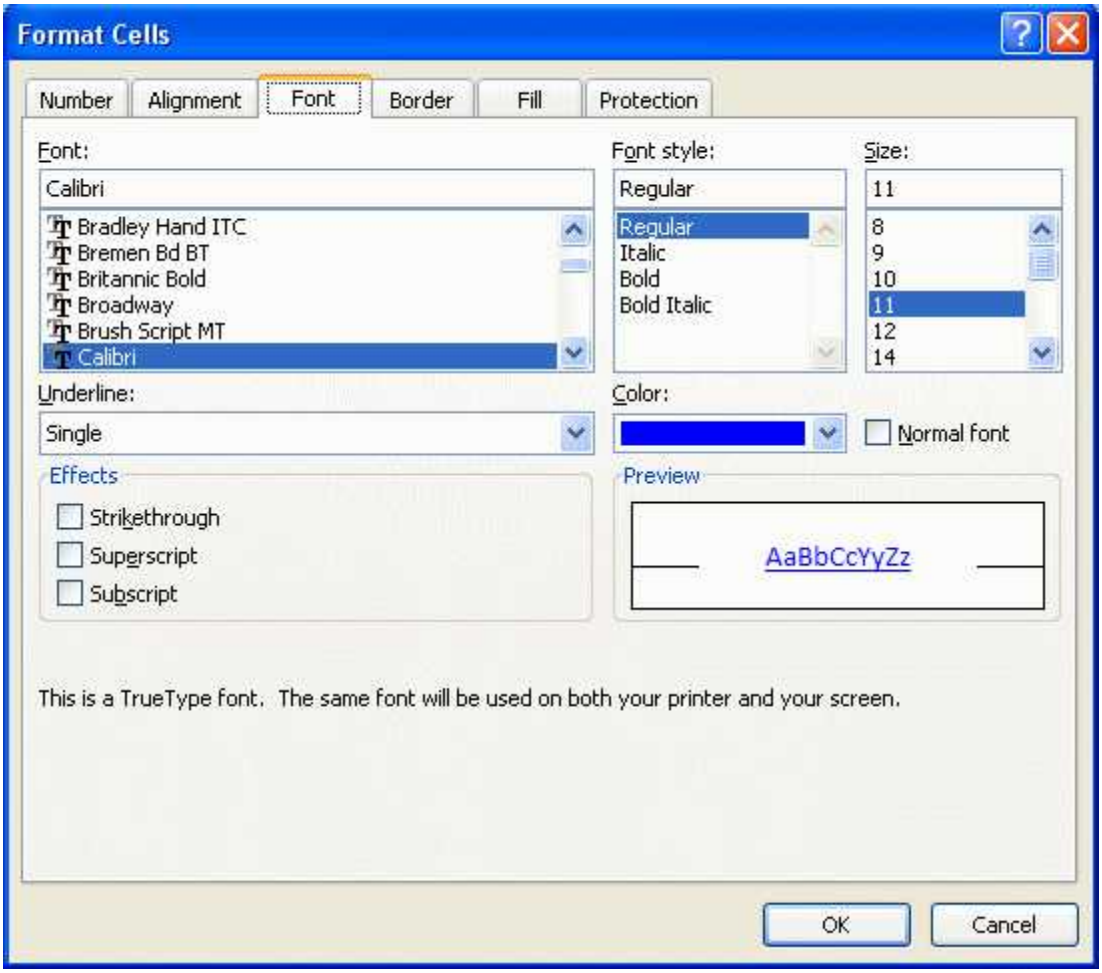


You can now change the target for the hyperlink, the ScreenTip, or the text to display. You can also remove the hyperlink from the worksheet by clicking the Remove Link button. When you are finished with your modifications, click OK to implement them.

(Note that Remove Hyperlink and Open Hyperlink are also options on the drop down menu, available when you right-click on a hyperlink.)

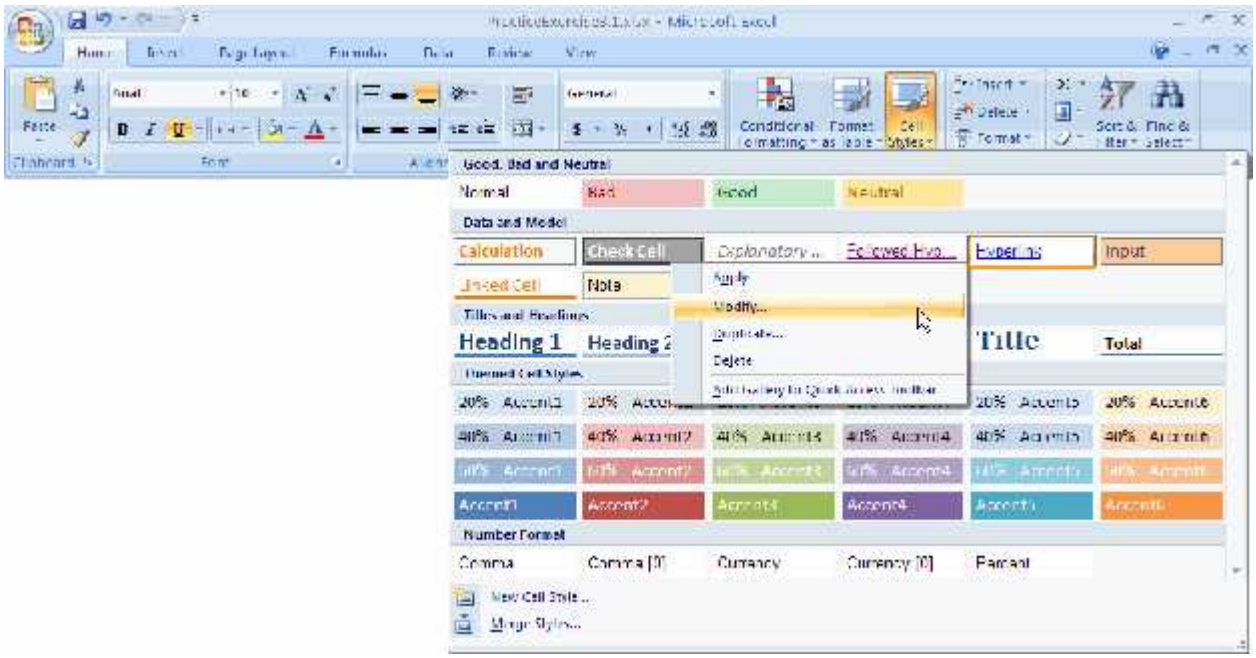
Hyperlinks will generally appear in one color (bright blue by default) before they have been clicked, and in another color (purple by default), after they have been clicked. You can change the font color and size for an individual hyperlink by right-clicking on it, and choosing Format Cells from the drop down menu.

This will display the Format Cells dialog box, which you can use to modify the font color, size, border, shading, and alignment of the link.



The method just described will allow you to modify individual hyperlinks To modify the default color and font size for all hyperlinks, click the Cell Styles button in the Style group on the Home tab to display the pre-set cell styles.

Find the Hyperlink style, right-click on it, and choose Modify from the menu that appears.

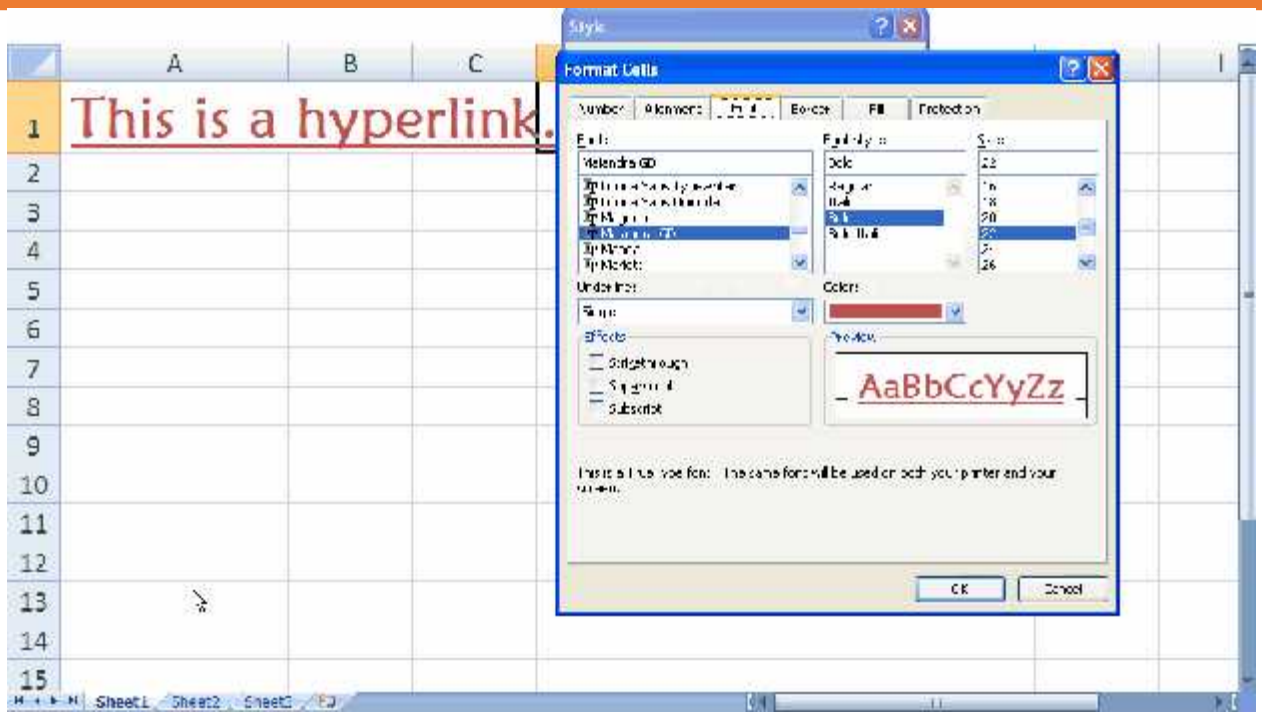


This will display the Style dialog.

Make sure that the word Hyperlink is selected at the top of the Style box. You should be able to see a checkmark next to the word Font in the column of check boxes on the left. This means that the style for hyperlinks currently includes only font settings. Click the Format button to display the Format Cells dialog box where you can make changes to the borders, shading, font size, font color, and alignment for all hyperlinks.

When you are finished modifying the hyperlink style, click the OK button in the format cells dialog.

You will now see the Style dialog, with checkmarks corresponding to the style changes you have made. Click the OK button in the style box to implement the style changes. Now every new hyperlink you create will have this new style by default.

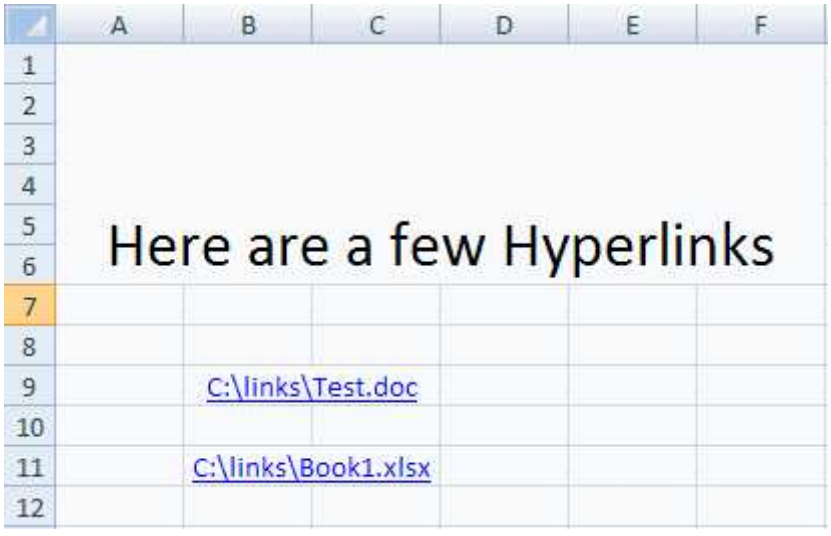


Using Hyperlinks in Excel

To follow a hyperlink in Excel 2007, click on it and hold it until the mouse pointer turns into a pointing hand. When you see the hand, release the mouse button and the target for the link will be opened with the most appropriate program for it.

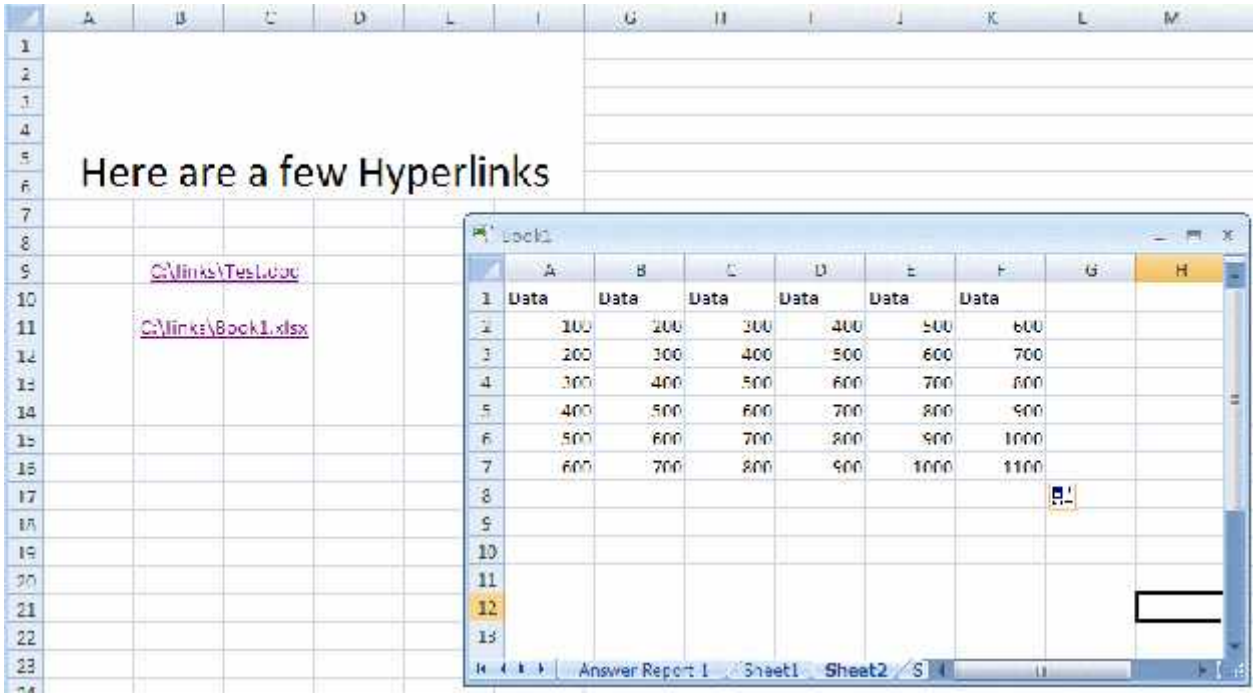
For example, if you click, hold, and release a link to a Word document, the document will open in Microsoft Word. If you click, hold, and release a link to an Access database, the database will open with Microsoft Access. If you click, hold, and release a link to a Web page, the page will open with your default Internet browser.

The following worksheet contains two hyperlinks.



The first link is to a Word document and the second is to another Excel spread sheet. The two linked documents as well as the current workbook are all in the same file folder, though this does not have to be the case.

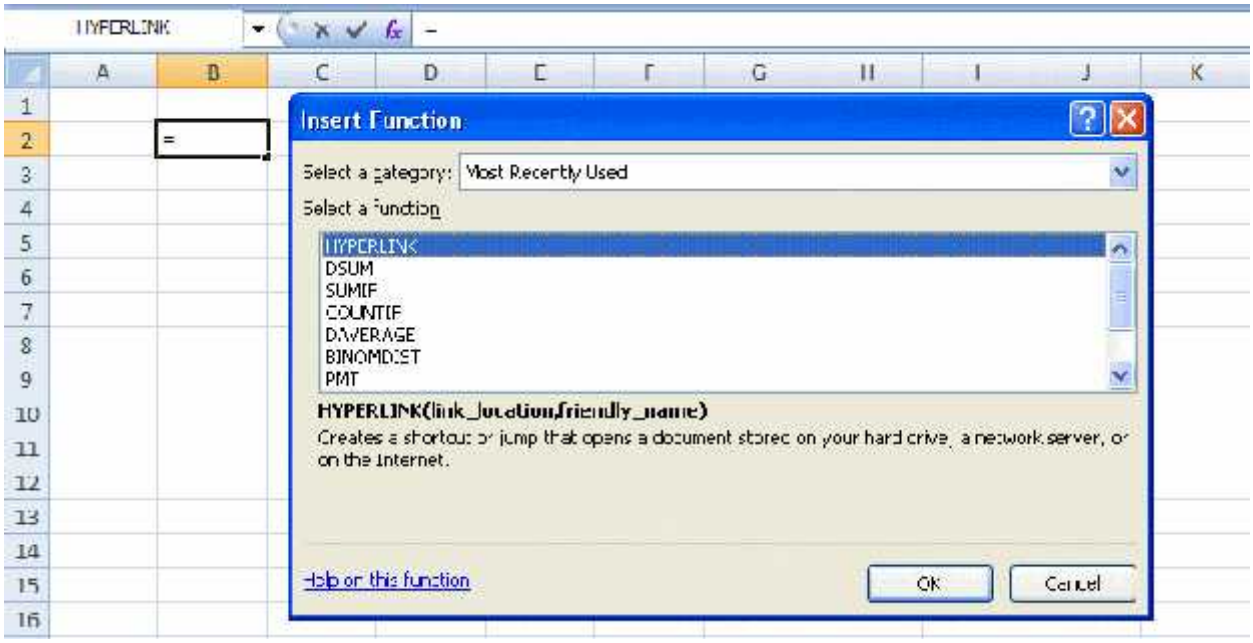
If you click, hold, and release the first link (Test.doc), the target document will open in Microsoft Word. If we click, hold, and release the second link (in cell B11) another worksheet (the link target) will open in Excel.



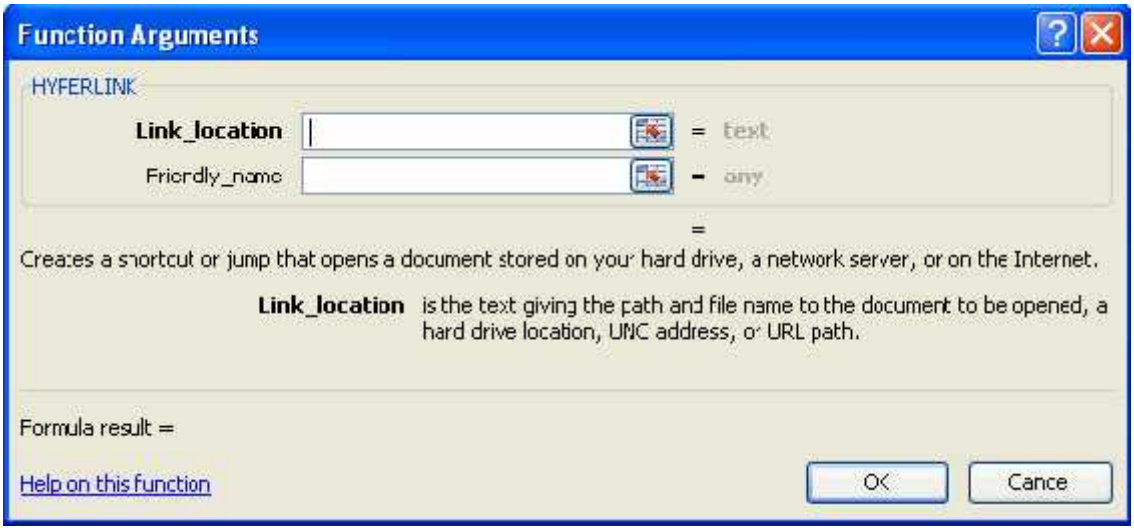
You can see that the hyperlinks are now purple, meaning that they have been followed.

To remove a hyperlink from your spreadsheet, right-click on the cell containing it and select Delete from the pop-up menu. This will remove the target information from the hyperlink, as well as the hyperlink text itself. The cell in question will be left empty. You can also right-click on a cell with a hyperlink, and select Remove Hyperlink from the pop-up menu. This will remove the target information from the link (the link will not function), but the text of the link will remain in the cell.

You can also insert a hyperlink function by clicking the f_x button by the formula bar. This will display the Insert Function dialog, from which you can select the Hyperlink function.



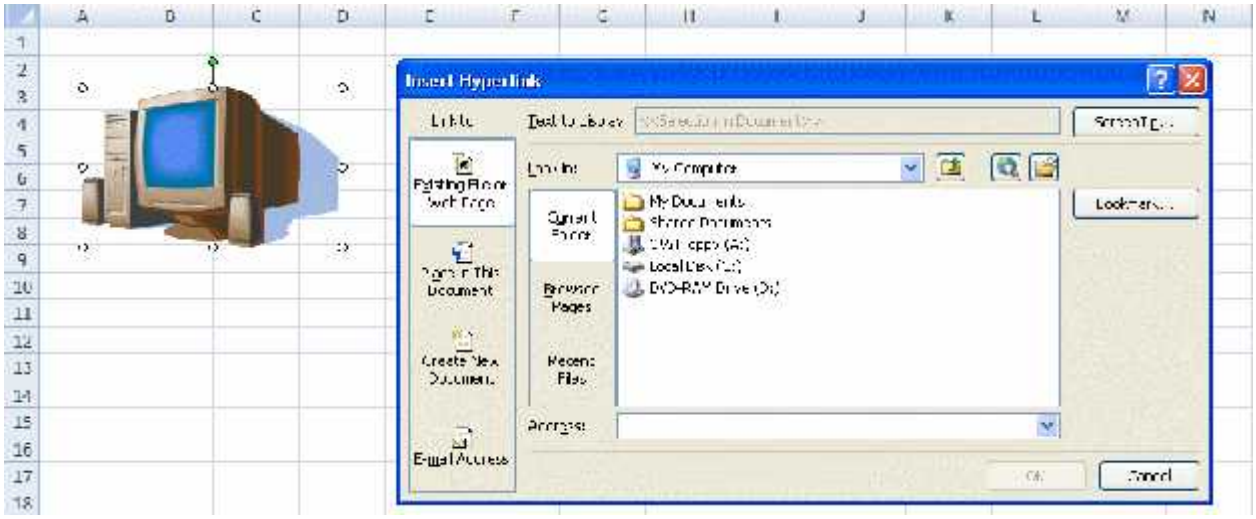
If you click the OK button in the dialog, the Function Arguments box will appear.



In the Link_location field, specify the target of the link. This can be a Web page URL, a local file, a file on a network server, or simple another cell in the same worksheet. In the Friendly_name field, you can specify the particular text or number that will appear as a link in the spreadsheet.

When you click OK, the link will be inserted into the spreadsheet.

You can also specify an image or other graphic as a hyperlink in your spreadsheet. To do this, select the image or graphic by clicking on it and then click the Hyperlink button on the Insert tab.



When you see the Insert Hyperlink dialog, specify a URL or file location as the target of the hyperlink, and then click the OK button to associate the linked location to the image or graphic. When you click, hold, and release the image, the link will be followed to its target just like a regular hyperlink.

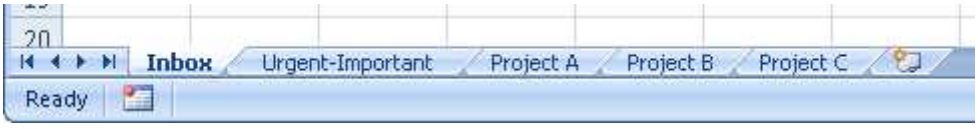
Creating a Simple Project/Task Organizer in Excel

Now it's time to put our knowledge of hyperlinks to work. We will show you how to create a workbook containing several worksheets that are organized and relevant to the tasks at hand. In the final D, Delegate, we will show you how to effectively use this workbook.

Do you remember the most important thing about using a planner or organizer? Write down everything, even the small details. This workbook will let you take advantage of that important rule. The core of this workbook will be a worksheet labeled "Inbox." Everything you can think of that might be important to a project should get written down here. Don't worry about formatting or neatness here; use this worksheet as a place to clear your head of details. We will also add a worksheet dedicated solely to creating a big Urgent/Important Matrix.

The Inbox worksheet will contain hyperlinks to the other worksheets. These worksheets (and the hyperlinks in the Inbox to them) will change as you start and complete projects. However, they will all contain two common elements: a hyperlink back to the Inbox and a hyperlink to the Urgent/Important Matrix

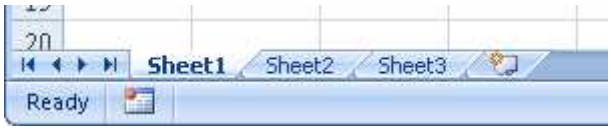
If you are experienced with Excel, you might be wondering why we are bothering to create hyperlinks when Excel already provides a list of tabs at the bottom of the Excel window:



If you are dealing with a small number of projects, then using the tabs at the bottom of the screen is fine. However, remember the title of this section, Delay: Make Excel Remember for You. Most of us are usually involved in a lot more than we think, sometimes having many projects and tasks on the go at once. You probably won't work on more than a couple of projects at a time, but it's important to remember the difference between "inactive" and

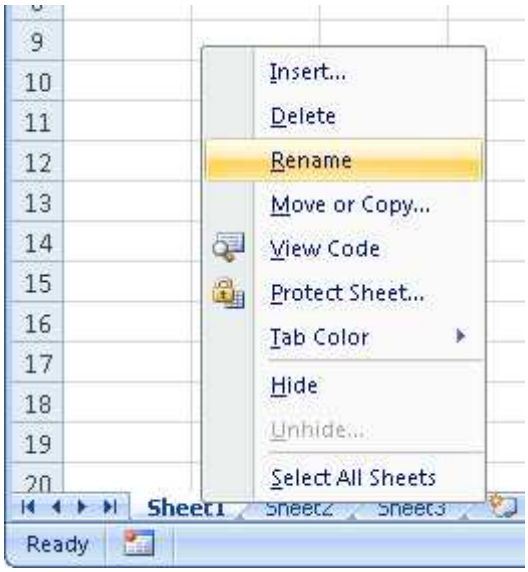
"dead" tasks! That's a lot for one person to remember, so it makes sense to take advantage of extra help.
As stated earlier, the name and number of tasks will vary from person to person. However, everyone's Inbox and Urgent/Important Matrix can be designed in a similar way, so let's take care of the easy parts first.

When you open a new workbook, there are, by default, three new worksheets:



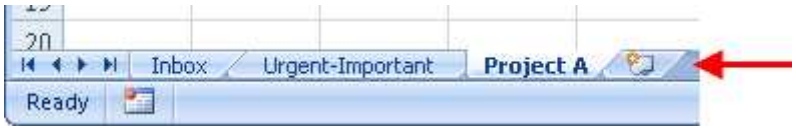
The first two can be renamed "Inbox" and "Urgent-Important," respectively. The third can be named whatever you need to name your first project. (Note that you cannot use forward or back slashes in a worksheet name.)

To rename a worksheet, right-click a sheet tab and click Rename, as shown on the left. Then type the new name and press Enter, as shown on the right.

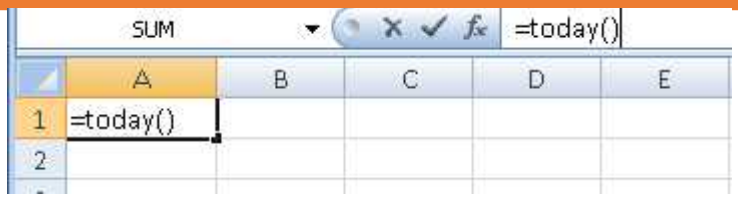


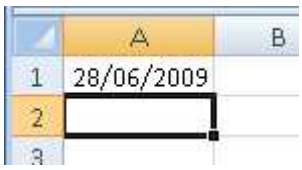
To create new worksheets, click the Insert Worksheet button, found to the right of the existing tabs.

You can click this button to create as many worksheets as you need, and we suggest you name each new worksheet as you create them.

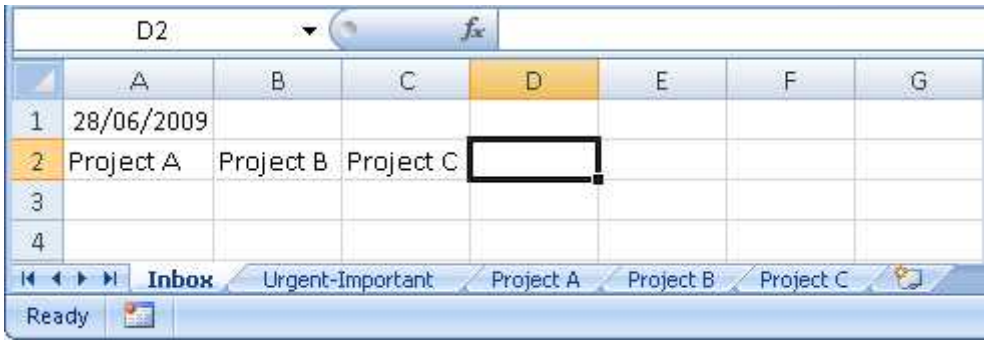


Now return to the Inbox by clicking the Inbox tab. At the top of the sheet, you can enter the formula =today() and then press Enter. This formula automatically displays the current date.

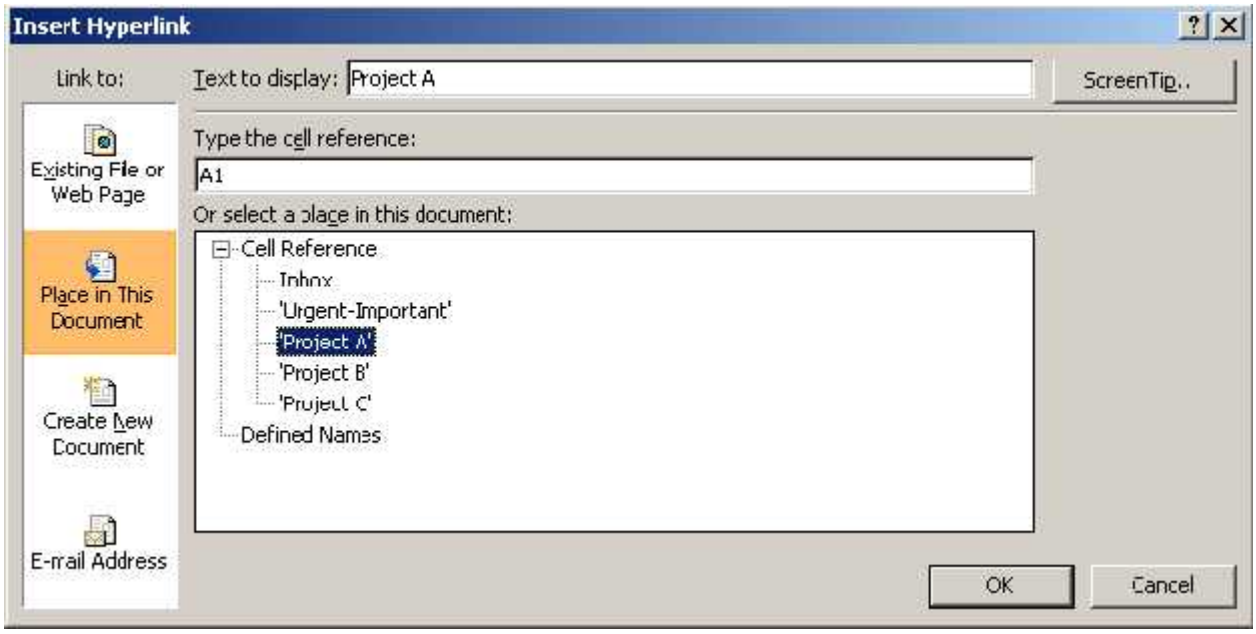




Once you have added a few project worksheets, it's time to create the hyperlinks in the Inbox sheet. We suggest you add these links at the top of the page, underneath the date command. First, type the name of each project or task worksheet into a cell:

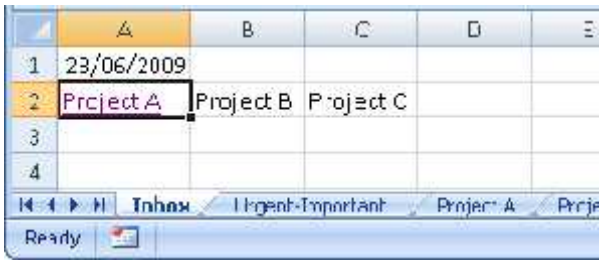


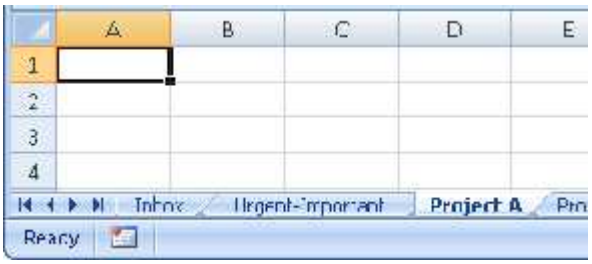
Next, highlight a cell with the first project name, click the Insert tab, and then click the Hyperlink command. Click the "Place in This Document" Link to: option and then select the appropriate worksheet:



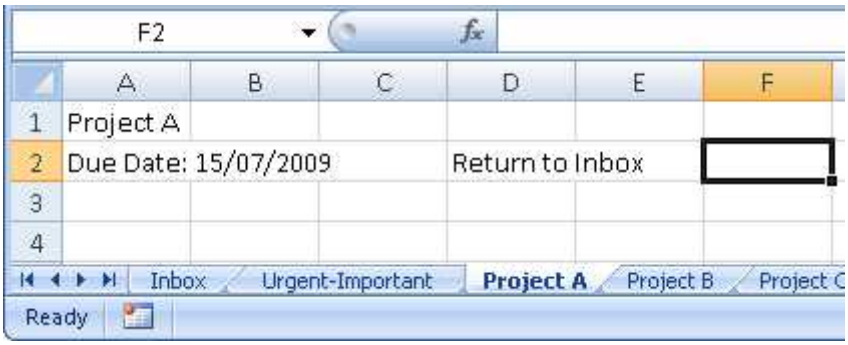
Note the text box that asks for a cell reference. By default, A1 is will become the active cell in the worksheet once you click the hyperlink. You can change this vale to reference any cell or range of cells in the target worksheet. When you click the hyperlink, the referenced cell or cells will be highlighted.

Click OK to complete the hyperlink. In the Inbox worksheet, you should see the new hyperlink. Test it out by clicking it.

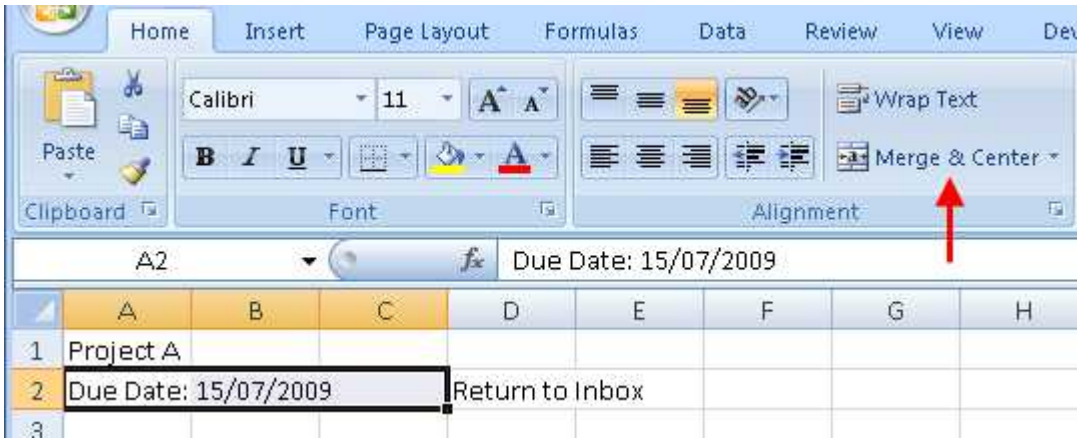




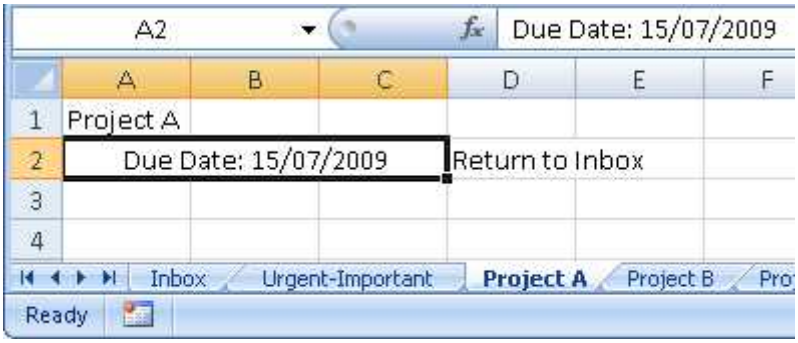
In the Project worksheet, you might want to identify the project by typing a title, the due date (or estimated timeframe), and the text “Return to Inbox” at the top of the page.



Note that the due date was entered in A2, but has spread into B2 and C2. Return to Inbox also takes up more than one slide. In order to take care of possible text overlap, you can merge cells together. To do this, select A2:C2 and then click Merge & Center in the Home tab:



This will combine A2:C2 together into a single cell and center the information (though you can still left or right-align the data if you wish.) The merged cell becomes the leftmost cell, A2. Cells B2 and C2 do not exist anymore:



Now you can Merge and Center the Return to Inbox text if you wish, make the hyperlink back to the Inbox, add a hyperlink for the Urgent/Important Matrix, and repeat the naming process for the rest of your task or project worksheets.

There are lots of other pieces of information you might want to add to a task/project worksheet such as supervisor (with a hyperlink to their e-mail address), other team members if applicable, or anything else relevant to this particular task/project. Just don't overload the top of your worksheet with too much!

Now that the workbook contains all of its necessary parts, it's time to put it to use. Brainstorm the details of current or upcoming projects in your Inbox worksheet or, if the details of a task are well known to you, follow your hyperlinks to the appropriate worksheet and enter them there.

In the final D, Delegate, we'll use our new tasks and projects workbook and demonstrate how to copy things from the Inbox to the appropriate task/project worksheet.

We have added a sample task and project workbook to the Activity Files folder accompanying this book. The file is available in Excel 97-2003 and Excel 2007 format.

From the experts… (http://www.wikihow.com/Manage-Priorities-with-Excel, wikiHow & contributing authors)

Writing your priorities down on paper works if you're able to knock them off in an afternoon. With a torrent of incoming tasks at home or work, many get carried over to the next day (or week or month). This article describes the steps to create a workbook that can mathematically calculate approaching deadlines and shifts task priorities accordingly.

This article uses Excel 2003 to create the workbook, but can be created easily using Excel 2007.

Delegate: Get Things Done

The ability to manipulate your information is crucial to building worksheets and workbooks. To work with your tasks and projects efficiently, you should know how to cut, copy, and paste single and multiple items. You should also know how to insert and delete cells, rows, and columns, understand how to use the Paste Special command, how to drag and drop cells, and be familiar with Excel's Undo, Redo, and Repeat features.

As we explore the last of the Four D's, Delegation, we'll try and put together all of the skills to help you make the most of using Excel as an organizational tool.

To most people, delegation usually means a superior ordering their subordinate. But actually, delegation can take many forms:

- Delegation to a peer, such as a request to tech support to replace the toner in the printer
- Delegation to a superior, such as a request for approval before moving forward with a project
- Delegation to yourself, such as committing to complete a task first thing next week

When you delegate tasks to another person, you should try and set up a time to meet well before the completion date of the task (if applicable). This gives both of you time to consider alternate approaches if either of you anticipate any problems.

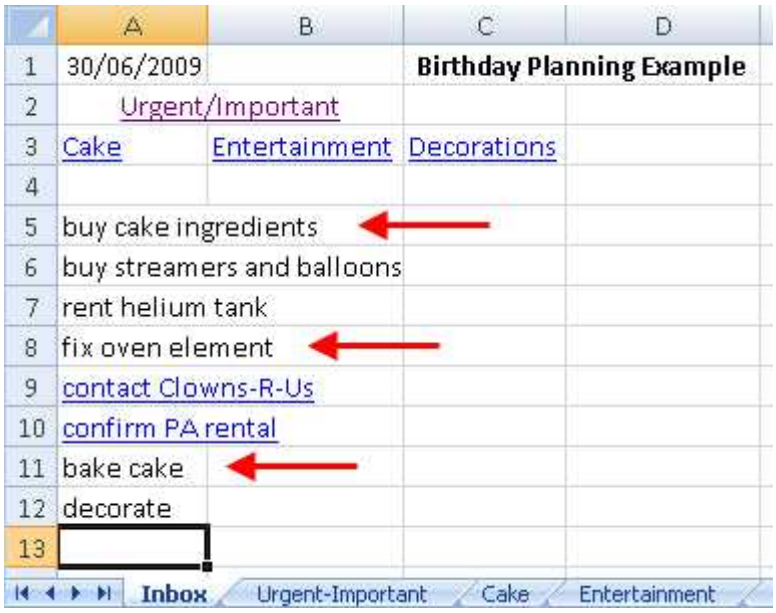
The delegation we're going to talk about here involves switching roles within yourself, becoming the manager, and delegating work to yourself from your pool of open projects. This section will show you the mechanics of using the tasks/projects workbook we created in the last section. We're going to use the example of planning a birthday party.

Our birthday party will consist of three different tasks: baking the cake, hiring some entertainment, and decorating. We've created the structure for this workbook, including all hyperlinks, and are now ready to start listing our tasks.

	A	B	C	D
1	30/06/2009		**Birthday Planning Example**	
2	Urgent/Important			
3	Cake	Entertainment	Decorations	

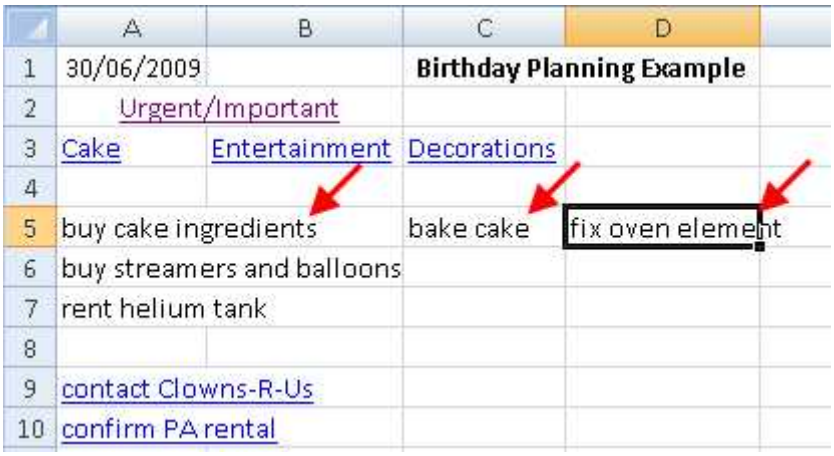
Dragging and Dropping Cells

We've done some early brainstorming for our birthday party in the Inbox worksheet. To make sorting items a little easier, we can drag and drop information around the Inbox to sort like items together. It is a simple matter to drag and drop cells, so let's put the three cake-related items together:



First, select a cell by clicking on it, making it the active cell. When you see the thick black border around the cell, move your mouse pointer over one edge of the border. You will see your pointer turn into a four-headed arrow.

Now, hold your left mouse button down and drag the cell contents to a new location.



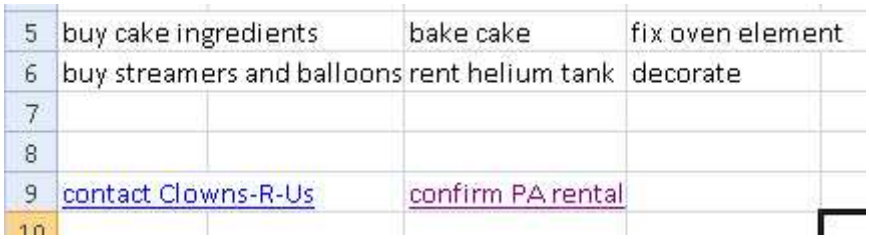
Note that you can't drag and drop a cell in between two cells. Excel will prompt you if you want to overwrite the destination cell's content. If you wanted to keep all the information in one column, you would have to insert a new row into the worksheet. We will cover inserting rows and columns later.

For now, we can drag and drop items around the Inbox worksheet wherever we like, because eventually the Inbox will be empty once all items are categorized.

If you drag a cell that is referenced in a formula (a single cell, or a selection of cells) all formulas that reference the cell will be adjusted to reference the new location.

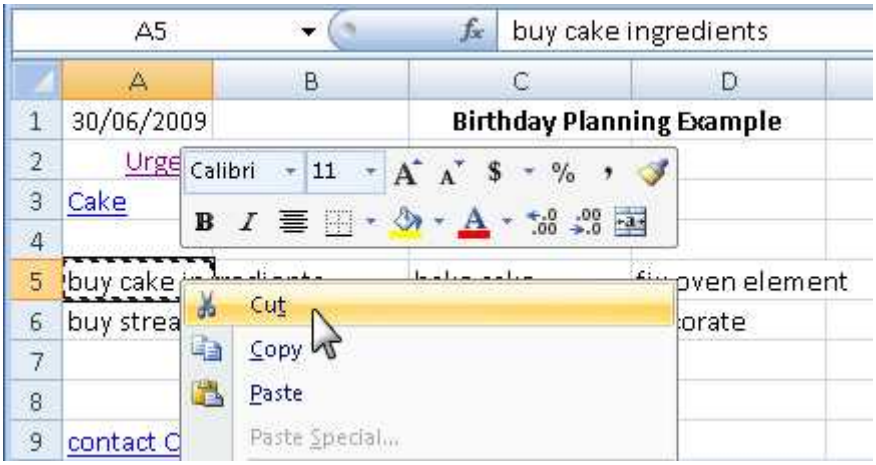
However, this is not the case when a formula references a cell absolutely (using $ in front of the row and/or column index.) Be careful when dragging and dropping in a worksheet. It is easy to drag and drop cells by mistake when trying to perform other operations.

We have done the preliminary sorting here:



All About Cut, Copy, and Paste

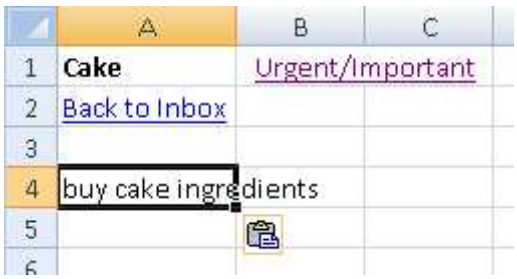
To be able to move your tasks effectively from one worksheet to another, you must know how cut, copy, and paste cells. To cut and paste a cell, right-click on the cell and select Cut from the drop down menu.



You can also right-click on a cell, select the Cut option, and then point and click or use the arrow keys to move to your destination. When you select a destination cell, right-click it and select Paste from the drop down menu. The data will be relocated in the destination cell and removed from its original location.

Often, data needs to be duplicated in another area of the worksheet without disturbing the original cells. To do this, use the Copy feature. To use Copy, once again right-click on a data cell, but this time select Copy from the drop down menu. The cell will once again have a dark and light flashing border. Now move to a new location as before, by dragging, pointing, and clicking, or by using the arrow buttons.

The data will be pasted to its new location, and the original cell and data will remain unchanged.

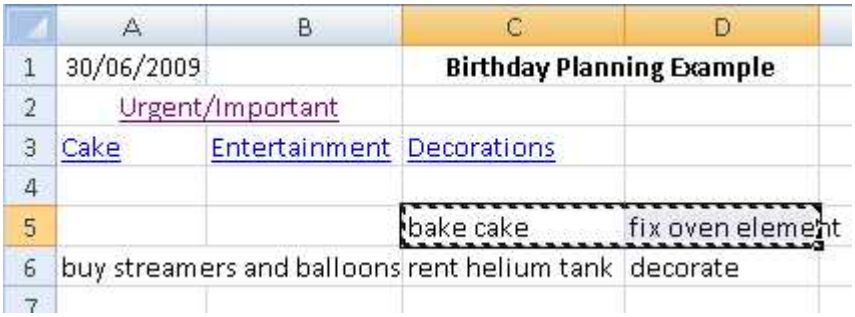


How to Cut, Copy, and Paste Multiple Cells and Items

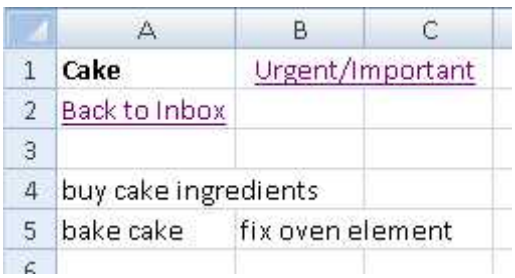
Cutting copying and pasting multiple cells is just like cutting copying and pasting single cells. The important difference is that you must select a range of cells first.

To begin, select a range of cells by dragging the thick cross  pointer.

When you have made your selection, right-click on any cell in the selected range, and choose Cut or Copy from the drop-down menu. The selected range will have a light and dark flashing border.



If you cut a selection of data, it is just like cutting a single cell in the sense that the cell information in the original selected area will be removed (cut) from the worksheet. Paste the copied data into its new location:



Note that the “fix oven element” item is in the same row as “bake cake”.” You might want to move “fix oven element” to a new line and avoid some confusion.

When you cut or copy items, they are saved to the clipboard. You can view the items on your clipboard at any time by accessing the Clipboard task pane. You can do this by clicking the Home tab, and then clicking the small arrow at the bottom right of the Clipboard group.

Any items copied (up to 24 items) from other Microsoft Office applications like PowerPoint, Word, or Access, will be saved on this clipboard. You can paste items to your Excel worksheet (at the location of the active cell). You can also copy items to the clipboard from Excel, and paste them to another program like Word.

You can clear all the items from the Office clipboard by clicking the Clear All button, or you can paste all of the items on the clipboard by using the Paste All button.

The Cut, Copy, and Paste operations are almost universal across programs that operate in Microsoft Windows and various Linux distributions. Use Ctrl + C for Copy, Ctrl + V for Paste, and Ctrl + X for Cut.

How to Use Paste Special

Paste Special is a very interesting and useful Excel feature. You can use Paste Special to perform a lot of operations that might be awkward and tedious to perform using other Excel tools. Paste Special does more than just paste data. It allows you to use the values you will paste to perform operations on the destination cells.

In this worksheet we have the prices for our party entertainment.

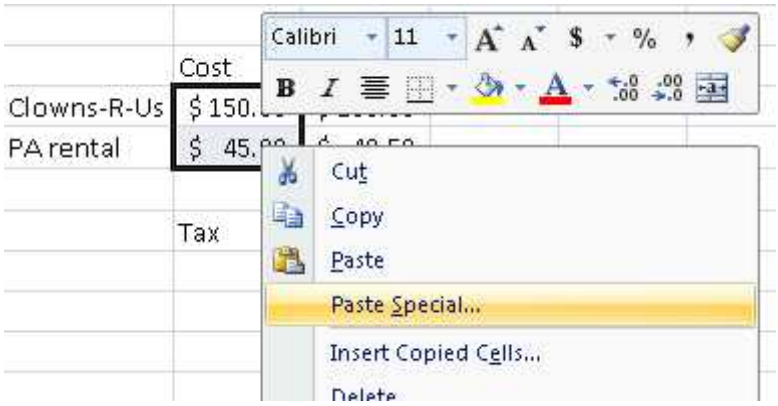
	A	B	C	D	E	F
1	**Entertainment**	Urgent/Important				
2	Back to Inbox					
3					Cost	Total
4	contact Clowns-R-Us			Clowns-R-Us	$ 150.00	$ 165.00
5	confirm PA rental			PA rental	$ 45.00	$ 49.50
6						$ 214.50
7					Tax	1.1

As it turns out, a friend of yours owns both of these companies and is giving you a 15% discount off of both services. Therefore, we can apply a 15% discount to the Cost column of data by using paste special.

To use paste special for this situation, we would enter the value 0.85 in an empty cell, then copy the information in that cell. The copied value will have a flashing border:

	Cost	Total		0.85
Clowns-R-Us	$ 150.00	$ 165.00		
PA rental	$ 45.00	$ 49.50		
		$ 214.50		
	Tax	1.1		

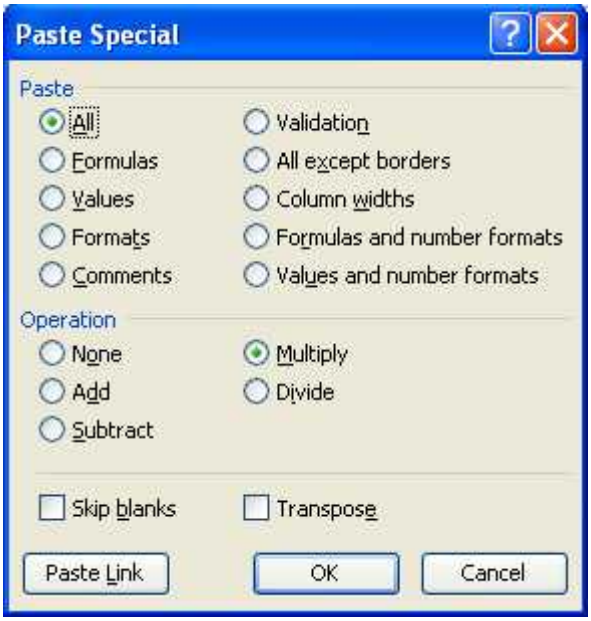
Next, select the column of prices by dragging the thick cross pointer. When the selection is highlighted, right-click on the selected area and choose Paste Special from the drop down menu.



This will display the Paste Special dialog box.

There are a number of options In the Paste Special dialog box that you can choose from. Since we want to decrease the prices in the selected range by 15%, we want to multiply each price in the selected range by 0.85 (the value that was copied).

Select the Multiply radio



button and then click OK.

	Cost	Total
Clowns-R-Us	$ 127.50	$ 140.25
PA rental	$ 38.25	$ 42.08
		$ 182.33
	Tax	1.1

The prices have been decreased by 15%, the rest of the worksheet has been recalculated.

Remember, you must copy the value or values that you want to paste and then select the cell or range that you want to paste to, before invoking the Paste Special dialog.

Like the regular copy and paste operation, you can use single or multiple items with Paste Special. You can copy and Paste Special a single item to a single cell, a single item to multiple cells, and multiple items to multiple cells.

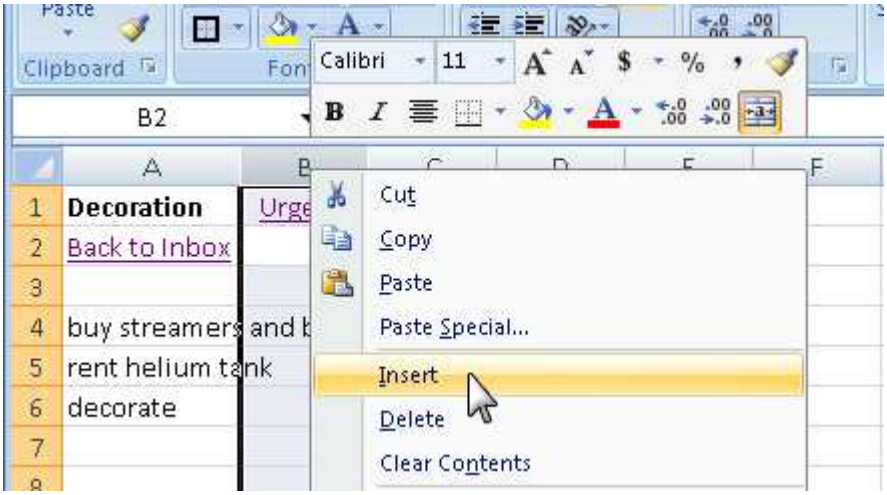
With Paste Special you can choose to add the copied value, subtract it, multiply it, or divide by selecting the appropriate radio button. You can also choose to paste only values, so a formula will not be copied but its result will.

Take a look at the options available to you in the dialog box, and remember, the default setting under the Paste heading is All.

How to Insert and Delete Cells, Rows, and Columns

Earlier, we briefly talked about removing rows and columns from a worksheet. Now we will go over the concept of removing and inserting cells, rows, and columns.

To insert a column in a worksheet, first right-click on the letter at the top of the column. Click the Insert option from the menu.



Now, all of the data to the right of, and including the highlighted column, will be shifted one column to the right. In this example, the data in column B will now be shifted to column C, the data in column C to column D, and so on.

	A	B	C	D
1	**Decoration**		Urgent/Important	
2	Back to Inbox			
3				
4	buy streamers and balloons			
5	rent helium tank			
6	decorate			
7				

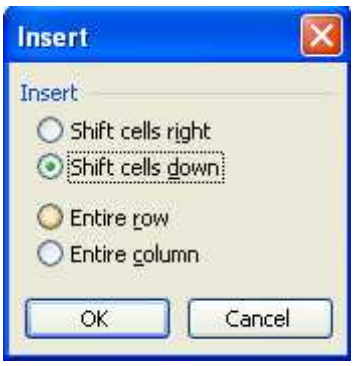
Now there is an empty column where you can enter a new label and data.

This procedure is essentially the same for inserting rows. To insert a row, just right-click on the row number and choose Insert from the menu. All of the data in the row you selected as your insertion point, and the data in the rows beneath it, will be shifted down one row. This will leave an empty row where you can enter new data.

It is also easy to delete rows and columns. To delete a column, right-click on the letter at the top of the column and choose Delete from the drop down menu. All of the data to the right of the column will be shifted one row to the left, and the old information will be replaced with the data that was in the column to the immediate right.

To delete a row, right-click on the row number and choose Delete from the drop down menu. All of the data below the column will be shifted up one row, and the old information will be replaced with the data that was in the row directly beneath.

To insert a cell, right-click on it and click Insert. The Insert dialog box will appear.

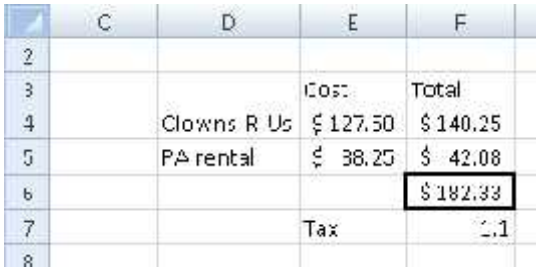


When you insert a cell, the existing data must be relocated. You can click the radio buttons in the dialog box to specify how the data will be moved. Selecting Shift Cells Right and clicking OK will move the item in the active cell, and all the items to the right of it, one cell further to the right, leaving a blank cell at the original location. For example, the data in cell A1 would move to B1, and the data in B1 would move to C1 and so on, leaving cell A1 empty.

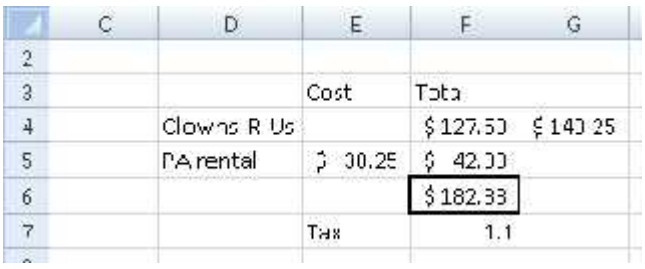
Selecting Shift Cells Down will perform a similar operation, but in the direction of the bottom of the worksheet. For example, if you inserted a cell at location B1, the data in B1 would shift to B2 and the Data in B2 would shift to B3, and so on, leaving B1 empty.

The Entire Row or Entire Column options allow you to insert a row or a column as previously discussed.

Let's look at an example. We will insert a new cell at E4 and shift the other cells to the right:



	C	D	E	F
2				
3			Cost	Total
4		Clowns R Us	$ 127.50	$ 140.25
5		PA rental	$ 38.25	$ 42.08
6				$ 182.33
7			Tax	1.1
8				



	C	D	E	F	G
2					
3			Cost	Tota	
4		Clowns R Us		$ 127.50	$ 140.25
5		PA rental	$ 38.25	$ 42.00	
6				$ 182.33	
7			Tax	1.1	

STING

Most people battle the habit of procrastination (putting off something you really want or need to do) more than they would like to admit. And in spite of how good you are at setting goals, procrastination can sabotage your personal and professional life.

Here are five steps to take the STING out of feeling overwhelmed and how you might use Excel 2007 to help.

- **S: Select one thing to do.**
  If you are using Excel to record your to-do list items, it really pays to keep that list as up-to-date as possible. As the old saying goes, an inch of planning is worth a mile of progress. If you have taken the time to organize and prioritize your tasks, you'll always know what you should do next. Keep that list open on your computer throughout the day or save the file somewhere easily accessible, like your desktop or a handy USB flash drive. A current Urgent/Important Matrix should make this step easy.

- **T: Time yourself. Check the clock, give yourself an hour, and go for it.**
  You can purchase a simple kitchen timer and have it on your desk to provide a warning when your time is up. Remember our discussion of the first D – Do it now so it's done!

- **I: Ignore everything else while the clock is ticking.**
  Don't check your e-mail, let others know you're focused on your task, put away your organizer or smart phone. Just focus on the task at hand. In the next Module, we will go over many techniques to organize your workspace and help minimize distraction.

- **N: No breaks until your hour is up.**
  This step is really up to you. Sit up straight, make sure you are in a well-lit environment, and take things one step at a time.

- **G: Give yourself a reward when the hour is up.**
  How you choose to reward yourself is up to you, but we recommend a healthy snack or at least a few minutes to stand up and stretch.

Summary

There are lots of different factors that might hinder the way you work. We recommend you keep these Four D's in mind: Do, Dump, Delay, and Delegate.

- Do take the time to set up Excel the way you want it to work instead of struggling later on.
- Dump the data you don't need and try to keep your formatting neat. For information you can't remove, you might try instead to group and hide the data.
- Make Excel remember the important things for you by recording important pieces of information about your tasks and projects. (Just remember to back up your data occasionally!)
- Once you have recorded the important details and are getting down to work, remember that you can very easily move your data around to make room or cut the information you don't need.

And when the going gets tough, no matter what you are working on, use STING to stay focused and avoid procrastination.

Module Four: Finding What You Need

In this Module, we will learn how to:

- Organize your physical workspace
- Recycle what you don't need to keep
- Sort physical and electronic files based on file type
- Deal with e-mail
- Organize your briefcase
- Sort and filter the data in a worksheet
- Use conditional formatting

Organizing Your Workspace

Getting rid of clutter is one of the best things we can do to make a more efficient work environment. Remember that electronic clutter still counts as clutter!

In this Module, we will go over the basics of organizing your physical workspace. Keep in mind that we're not suggesting you use ALL of these sorting and categorization techniques. You can spend too much time doing a good thing! We recommend you read through the concepts in this Module first and then decide which method or combination of methods would work the best for you.

Let's start with your desk. The object of this exercise is to purge both the work surface and the contents of the desk. If the surface is already clear, good for you! However, if there are items on the desk, ask yourself if they are necessary and/or in an effective location.

Check position of the desk:

- **Is it facing the door and making interruptions more likely?**
- **Is the lighting adequate?**
- **Is the phone where it can be reached easily?**
- **Is there a better arrangement possible?**

- **Is the seating/chair adequate?**

Your first step should be to get rid of things that should NOT be on the desk. Check everywhere. Look under the blotter, on the walls surrounding the desk, in trays and drawers, etc. Collect all bits and pieces and de-clutter by throwing out or noting information in an appropriate spot and discarding it, or filing it for the moment.

Then move to the contents of the desk. Focus first on the tools you use, such as pens, pencils, and erasers.

Check to make sure of the following:

- **Do you have all tools you need, and they are in good working order?**
- **Tools should be organized so like tools are together and easily accessible. Do you need to move any useless tools? Do any of these tools need fixing or can they be discarded?**
- **Group like items together (for example: stationery, envelopes, and stamps all in one drawer).**
- **Store any oversupply is in a supply area. Would anyone else need some of the extra supplies?**
- **Tools should be stored in a shallow desk drawer, not on the desk.**

We recommend you make four piles of all the papers they have strewn around, including those on the bulletin board, under your ink blotter or desk calendar, and on chairs.

- Take home/get out of office
- Help yourself/giveaways to colleagues
- Cool stuff you want to keep and display
- Things to be filed or written into your planner

Set up a system where vital information is saved where it can be accessed easily, and then bits of paper can be discarded. Clutter often prevents us from using our time efficiently.

From the experts… (http://www.ehow.com/how_3813_organize-work-space.html, eHow Careers & Work Editor)

Workspace Tips and Warnings

- Give computer documents logical names for faster recall.
- Try buying an organizer to keep your pens, rulers, scissors, tape, stapler, etc organized.
- Regularly review your filing cabinet, desk, and computer files to discard old materials. If you don't already have access to one, invest in a paper shredder.
- Replace things in the same place, every single time.
- Beware of sticky notes – they often fall off or get lost.
- Avoid stacking papers on your desk; you will inevitably misplace important documents.

Guidelines for Keeping a Piece of Paper

Am I going to need to refer to this later?
YES: File it
NO: Recycle it

Do I have a digital copy that will suffice?
YES: Recycle it
NO: File it

Is it directly related to me or will someone else have a copy that I can refer to?
YES: Recycle it
NO: File it

Do I need to keep this for legal reasons?
YES: File it
NO: Recycle it

Does it fit in my filing system?
YES: File it
NO: Recycle it

If I file it, will I be able to find it?
YES: File it
NO: Recycle it

Sorting Based on File Type

The key principles of file retrieval are to:

- Group similar things together
- Place them in their own space or container
- Label them clearly

Four Categories

There are also some additional steps we can take depending on what kind of files you are trying to organize. We can usually divide our files into four categories: Working, Reference, Archive, and Disaster.

Working Files

These include your current projects, routine functions, and quick references. These are the files where you have 80% of your work. These should be within arm's reach. They usually contain the following:

- **The projects you are currently working on.** This file should be cleaned occasionally, to move projects to a reference file or to eliminate duplication.
- **Fingertip information** you need on a routine or daily basis, such as phone lists, client addresses, and computer codes.
- **A follow-up file for each person with whom you come in contact on a regular basis**, where you keep track of all correspondence with that person.
- **A file for routine functions** such as sales reports or other functions performed daily/weekly/monthly.

Since these files should be within reach, they might be in a large desk drawer. Make certain they are in file folders, labeled in large letters, and then placed in hanging file folders that are also labeled.

Usually it is more efficient to label hanging folders by category, rather than by a letter of the alphabet. Then categories can be alphabetized or color-coded.

Reference Files

These are files you must refer to frequently as you work on current projects. This is where the bulk of your files will be located. Since you use these files regularly, they need to be kept handy, but not necessarily within arm's length. The most important thing is to arrange all information in such a way that you can pull information out of the file easily.

Key questions for you to consider as this file is set up:

- **What do I want to keep?**
- **What do I need to keep?**
- **If I wanted this information, could I find it elsewhere?**

Information that should be in the reference file includes:

- Research for future projects
- Past projects to which the client refers

It can be helpful to consider key functions or components of your job, and make these the major categories for reference files. Other files might include:

- Sponsor files
- Administrative information

Cull all duplicates or useless paper. Have a recycling bin at the ready.

Establish subject categories, and label both file folders and hanging files. Put the file structure on paper prior to starting the filing.

Label file drawers and create a master list of files if the amount of information is large. Remember to use large, clear print with a fine tip felt marker.

Archive Files
These are the files nobody looks at. You keep them because the law says you must, or because you are afraid you'll need them if they are thrown out, or because nobody wants to take the time to do anything about them. They should be kept in a designated location far from your work area.

Disaster Files
This is one file that contains all vital information, including identification and financial references, in case you have to vacate the office unexpectedly. You can also have a file like this at home so you have things organized in the event of a disaster.

Electronic Files
The key rule is that the file structure used in paper files and electronic files should parallel each other. This is all for the sake of retrieval. Make use of keywords and search programs to help you find your files even faster.

In this information age, we have to know what we need to keep and what we don't need to keep. Don't keep what you don't need. Don't ask, "Will I ever need this?" The answer is almost sure to be "Maybe." Ask instead, "Where could I get this if I needed it?"

E-mail
We recommend you check your mail twice a day.

- Checking your e-mail frequently is one of the big time-wasters of the modern office. Avoid it if you can.
- Set aside two periods when you know it will be quiet and check your mail then.
- Use separate accounts for personal and business mail.

Filter the spam.
With all of the junk e-mail circulating today, it's vital to use an e-mail program that can filter it by dumping junk in the trash before it gets to you.

Most junk mail filters good job of filtering junk e-mail messages, but you should never be 100% reliant on any junk e-mail filter. Sometimes legitimate e-mail will be filtered as junk and vice versa.

Filters can also help you manage your e-mail better. For example, you can filter mailing list updates, news, and promotions, into separate folders and read them when you're ready.

Organize your addresses.
Most modern e-mail programs and clients remember the addresses of people that you have contacted in the past. They are likely stored within the program itself and can't be directly accessed unless you create a special contact file. Alphabetization is the way to go here.

File your messages.
Organize your messages into folders or delete them as soon as you're done reading them or acted on them. It's a good idea to ensure your Inbox contains only messages you haven't read or that require further action.

Keep messages simple.

Remember:

- A short e-mail is a good e-mail.
- Use a specific or descriptive subject heading.
- Keep messages, especially replies, short.
- If a simple "yes" or "no" will do, that's all you need to say.

Briefcase

Your briefcase should be organized with:

- Tools that are needed frequently when away from the office
- Reference files that are frequently referred to such as telephone lists
- Working files that are needed
- A system for expenses

Look at your briefcase or whatever you use to carry important information around with you.

- **Are you prepared with extra paper and pens?**

- **Is your briefcase organized?**

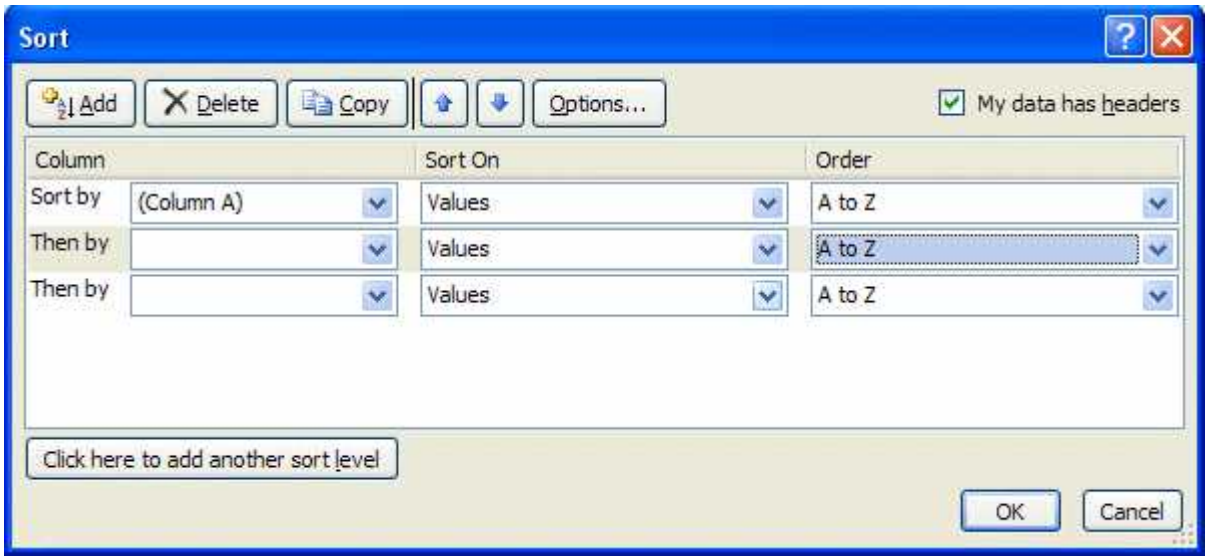
- **What if someone looked in your vehicle: what does your vehicle say about you?**

Sorting and Filtering Data

The Sort and Filter group (in the Data tab) gives you finer control over how your spreadsheet data is sorted or filtered. **Sorting** is the process of ordering data based on some criteria. **Filtering** is the process of extracting data from a larger group based on some criteria.

The two buttons to the left of the main Sort button will allow you to perform simple ascending or descending sorts.

Clicking the Sort button displays a dialog box that will let you apply multiple sort levels and other criteria to be used when sorting your data.



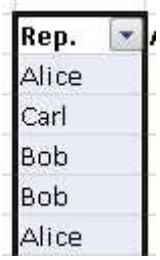
The Filter buttons can help you extract certain data from a much larger list or group of data based on criteria that you can choose or create. The sorting and filtering tools are especially useful for those who may use Excel as a simple database.

Consider the list of sales data shown on the right. We can apply a filter to the Rep. column and show only the sales made by a one or two of the reps.

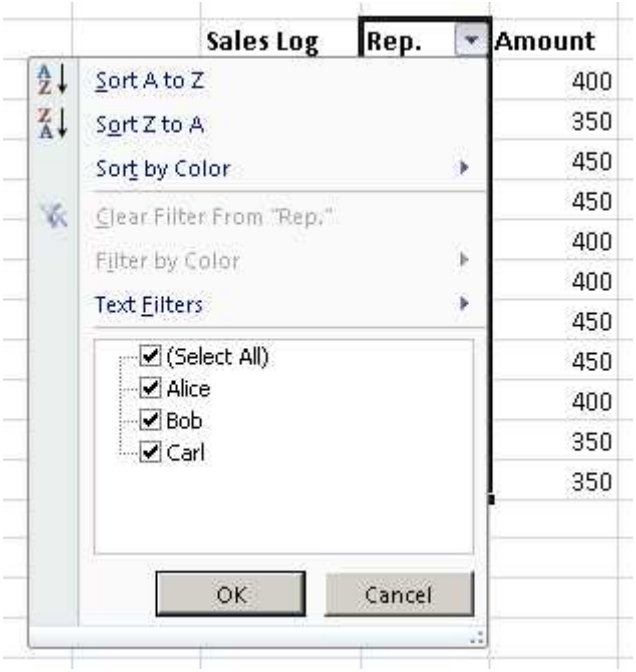
To do this, select the range of Sales representatives (including the column header) and then click the Filter command.

Sales Log	Rep.	Amount
01-Apr-08	Alice	400
02-Apr-08	Carl	350
03-Apr-08	Bob	450
04-Apr-08	Bob	450
05-Apr-08	Alice	400
06-Apr-08	Alice	400
07-Apr-08	Bob	450
08-Apr-08	Bob	450
09-Apr-08	Alice	400
10-Apr-08	Carl	350
11-Apr-08	Carl	350

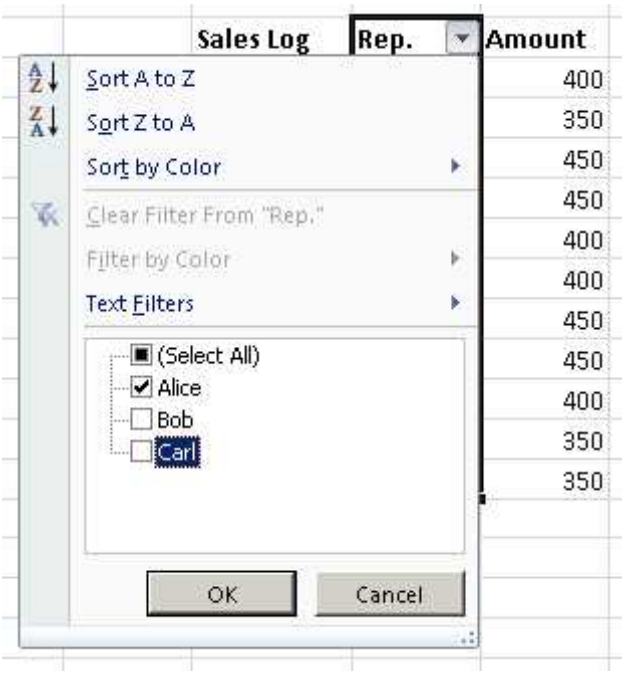
This will add a pull-down arrow at the top of the selected cell range, like this:

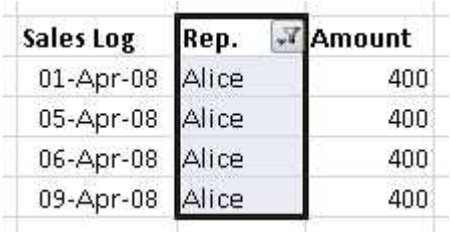


Click the pull-down arrow and then use the checkboxes to only show certain data:



For example, if we wanted to only see the sales made by Alice, we would clear the checkboxes beside Bob and Carl and then click OK. This will only show Alice's sales, shown on the right:



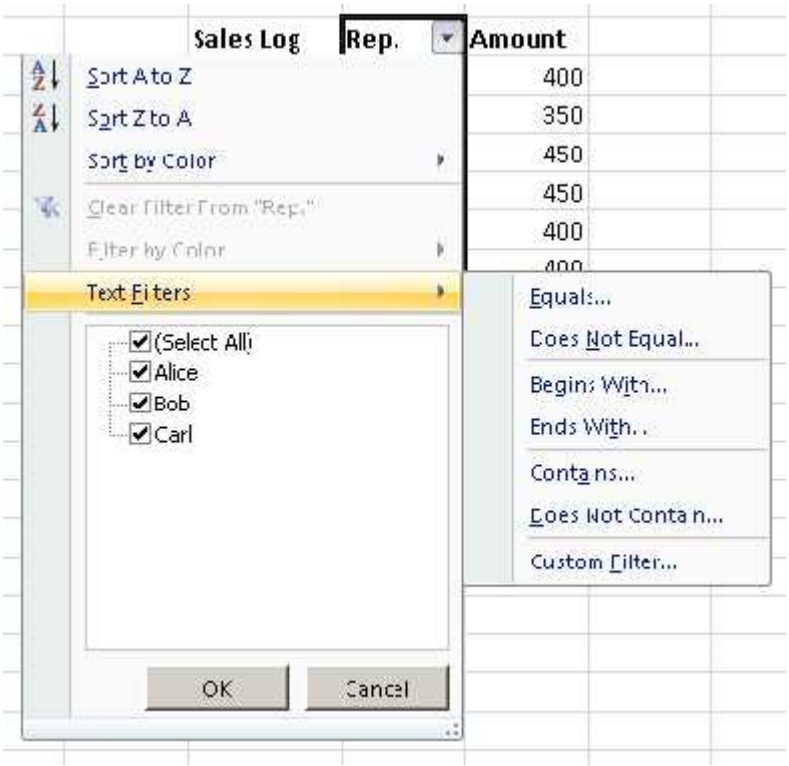


Sales Log	Rep.	Amount
01-Apr-08	Alice	400
05-Apr-08	Alice	400
06-Apr-08	Alice	400
09-Apr-08	Alice	400

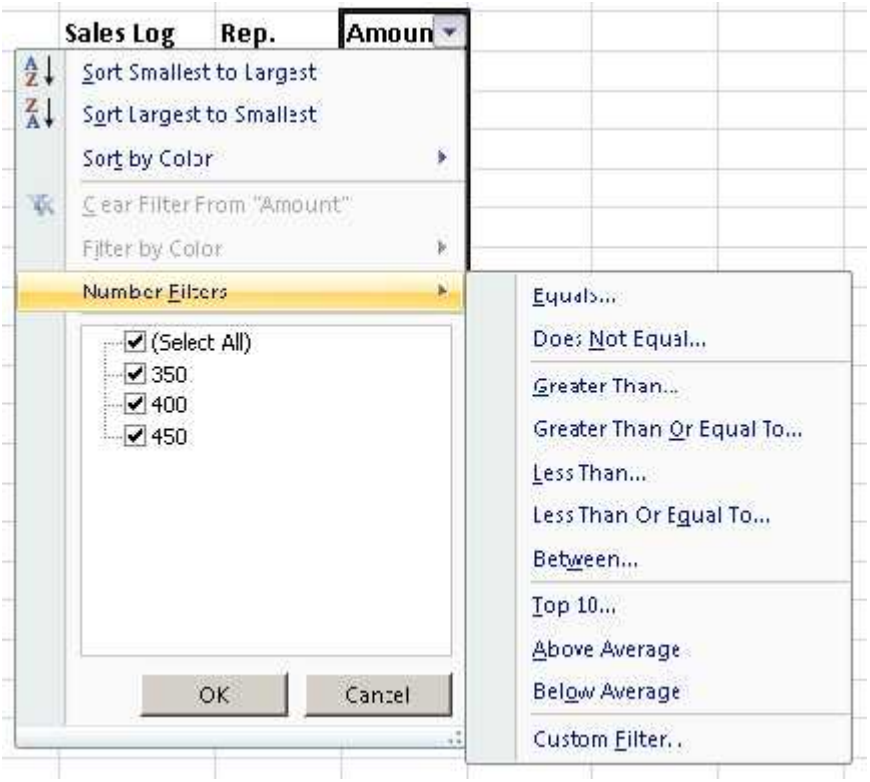
Excel is capable of detecting the type of data that has been filtered. In this case, Excel has detected text data because it is filtering a list of names. Therefore, this Filter menu also offers a Text Filters submenu.

If you have used your tasks/projects spreadsheet and assigned yourself items using the Urgent/Important Matrix, you could use a text flag indicating the priority. If you then use a filter on your list of text flags, you'll be able to choose a project and know exactly what should be done next.

The Text Filters submenu offers more filtering options:



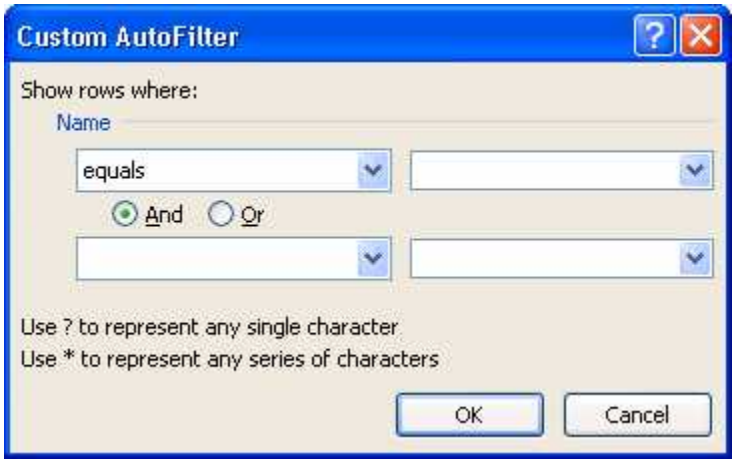
If you are filtering numerical data, Excel offers a numerical filter as well:



Custom AutoFilters

With the custom AutoFilter options, you will be able to set up a customized filter for your data table.

To create a custom AutoFilter, select a field heading that you want to filter with and choose Custom Filter from either the Text Filters or Number Filters submenu.



In this dialog, you can use the drop down arrows and radio buttons to set up filtering criteria for your records. (This particular Custom AutoFilter is based on a Name field, a field that contains the names of tools. The word 'Name' is displayed in blue in the upper left of the dialog box.)

The first drop list, with the default value equals, will display the following expressions that you can choose to create a filter:

- Equals (=)
- Does not equal (!=)
- Is greater than (>)
- Is greater than or equal to (>=)
- Is less than (<)
- Is less than or equal to (<=)
- Begins with
- Does not begin with
- Ends with
- Does not end with
- Contains
- Does not contain

The next drop list (on the immediate right) will contain values from your data table belonging to the current field. You can see a list of unique tool names at right:

If you use the And or Or radio buttons, the other two combo boxes contain the same options as those described here.

When you use the And/Or radio buttons to build custom filters, remember:

- For the And option, both conditions must be satisfied for the record to be shown.
  *I need my towel **and** my sunscreen before heading to the beach*.
- With the Or option, records that satisfy either condition (or both) will be shown.
  *I will go to the movie with Alice **or** Bob*.

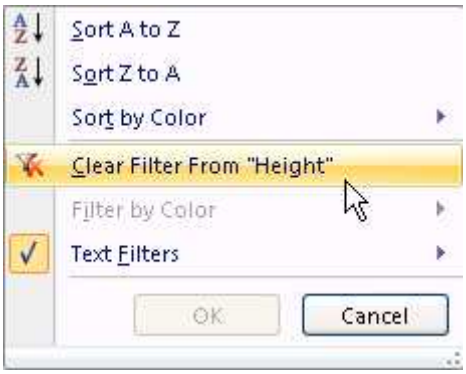
You can use the radio buttons to combine filtering conditions, or create a filter based on a single condition. To understand how to create a custom filter with these option lists, look at the following example.

This And condition states that the value for Height must be less than 70 and greater than 63 for a record to be shown.

	A	B	C	D
1	Name	Height	Weight	Age
4	Cindy	65	105	48
5	John	68	186	34
8	Bert	68	150	30
10	Bert	69	175	48
12				

You can tell which field has a filter applied to it by the funnel icon that appears on the AutoFilter drop list button.

To remove the filter, just display the drop list, and click the Clear Filter option on the menu.



Advanced Filters

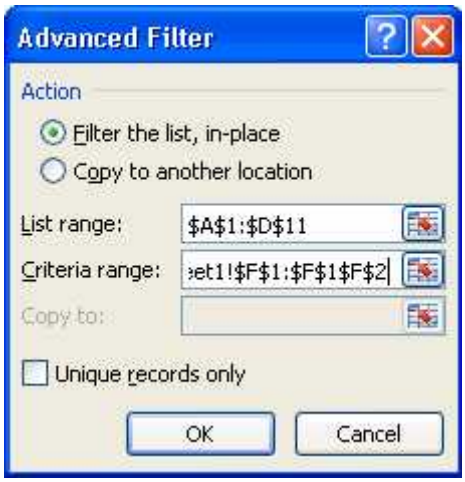
If you can't get the results you want from a custom filter, you can construct your own advanced filters to get the most control over your data tables.

To make an advanced filter, you have to set up a range of criteria to filter your table. Let's look at an example based on the Height, Weight, and Age of ten people. We want to show only the records where the Age field is less than 40. To do this, type a column heading in cell F1 that is the same as the corresponding heading in the data. (The headings must be identical, as noted by the red arrows.)

	A	B	C	D	E	F
1	Name	Height	Weight	Age		Age
2	Bob	70	180	50		<40
3	Bob	70	181	50		
4	Cindy	65	105	48		
5	John	68	186	34		
6	Kevin	72	140	25		
7	Vera	59	110	22		
8	Bert	68	150	30		
9	Bert	70	165	38		
10	Bert	69	175	48		
11	Sandy	63	130	55		

Cell F2 contains the criteria <40. To apply the filter, click on any cell in the data table and then click the Advanced button on the Data tab.

You will now see the data table outlined with a flashing dashed border, and the Advanced Filter dialog box will be displayed.



When you see the box, make sure the table range is indeed the range you want to filter. You can then click in the data area labeled Criteria (cells F1:F2 Range and select the cells that contain your filtering criteria in this case).

The Filter the List in-Place radio button is selected, so the filtered records will appear in the same location as the original table. Click OK to filter the List range using the Criteria range as specified in the Advanced Filter dialog.

The table has been filtered to show only those records that have an age field value that is less than 40.

	A	B	C	D	E
1	Name	Height	Weight	Age	
5	John	68	186	34	
6	Kevin	72	140	25	
7	Vera	59	110	22	
8	Bert	68	150	30	
9	Bert	70	165	38	

To display the full table again, click the Clear button in the Sort and Filter group in the Data tab.

You can set up more complex filters by adding to your criteria range. For example, the following criteria range will filter the records so that only those with an age less than 40, a height greater than 63, and a weight less than 180 will be shown. Notice that the column headings in the criteria range are identical to those in the original table.

F	G	H
Age	Height	Weight
<40	>63	<180

Filtering with Wildcard Characters

Sometimes when you are using a custom filter, or even an advanced filter, it can be difficult to get precisely the kind of records you want. You can therefore add wildcard characters and fine-tune your filters to retrieve all the data that you are after.

In Excel, you can use the question mark (?) or the asterisk (*) as wildcard characters. A question mark will substitute a single character in a string, while an asterisk can substitute multiple characters in a string. For example, the string “ca?” could be car, cat, can, cap, etc. The string “tele*” could be television, teleportation, telemarketing, and so on.

To see how to use these wildcard characters in a filter, take a look at the following Excel data table.

	A	B
1	Animal	Habitat
2	Camel	Desert
3	Lion	Savanah
4	Zebra	Savanah
5	Deer	Forest
6	Polar Bear	Arctic
7	Black Bear	Forest
8	Dolphin	Ocean
9	Duck	Marsh

If you wanted a list of records pertaining to bears, you could use a wildcard character in your custom filter in the following way. Remember, you can display the custom filter box by selecting the Custom Filter command from the AutoFilter drop menus in the Animal column.

To filter our records for bears, we would select equals and type "* Bear" as filtering criteria.

This is the resulting list for the custom AutoFilter. It contains every record from the table with the word Bear in the Animal field.

	A	B
1	Animal	Habitat
6	Polar Bear	Arctic
7	Black Bear	Forest

Here is another table and custom AutoFilter using the ? and * wildcards.

The first condition tests if Animal equals L?on. The first condition is combined with a logical Or to the second condition, which tests if Animal equals D*.

The Or condition will return the records that meet either criterion.

The records that have a word starting with the letter D and the records that have a four letter word of the form L?on (where ? can be any letter) will be shown.

It should be noted that the wildcards do not have to appear at the beginning or end of a word. They can be used anywhere in a word to substitute the characters you want.

For example, "ma*atics" could represent the word "mathematics" with the * substituting for the letters t, h, e, and m.

Similarly, "Ro?e" could represent Rope or Role or Rose or any other word of this form.

	A	B	C	D	E
1	Animal	Habitat			
2	Camel	Desert			
3	Lion	Savanah			
4	Zebra	Savanah			
5	Deer	Forest			
6	Polar Bear	Arctic			
7	Black Bear	Forest			
8	Dolphin	Ocean			
9	Duck	Marsh			

Here are the results of the above wildcard filter:

	A	B
1	Animal	Habitat
3	Lion	Savanah
5	Deer	Forest
8	Dolphin	Ocean
9	Duck	Marsh

When using wildcard characters you should be clear on the distinction between the asterisk and the question mark. “H??se” is not the same as “H*se,” because “H??se” could be Horse or House but not Hose, while “H*se” could be Horse, House, or Hose.

You can combine both wildcard characters into one term (as in “S*e?), but the resulting records may be surprising because of the generality of the wildcards. (The example wildcard term S*e? could be Sewer, Softer, Soften, or Salamander, to mention only a few of the possibilities).

The best way to find out what you can do with wildcard characters is to experiment with them.

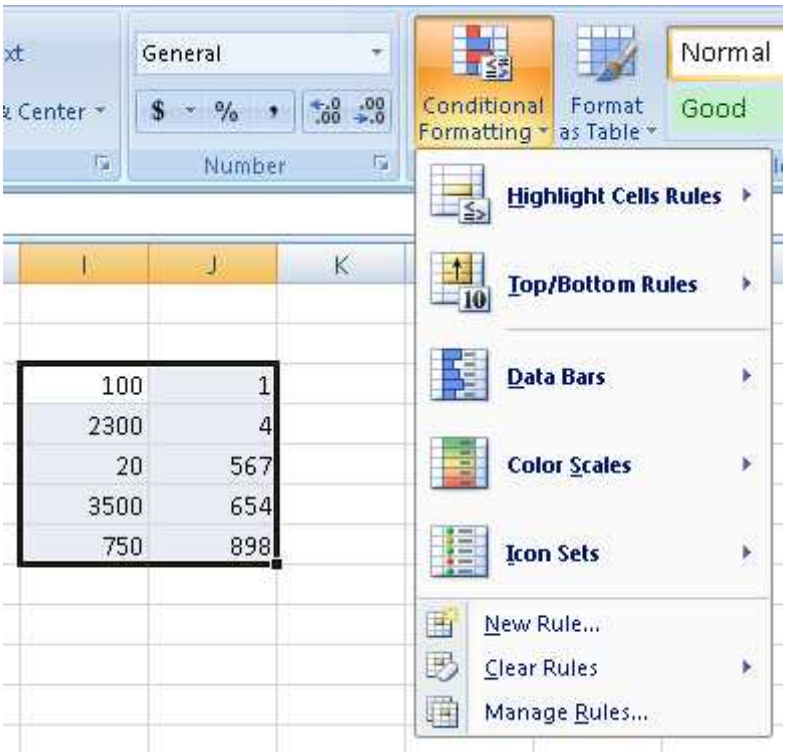
You can combine wildcards with an advanced filter to create quite complex and powerful filtering rules. Remember, wildcards are used to substitute text, not numerical values.

Conditional Formatting

You have likely heard the financial expressions "in the black" or "in the red." In Excel 2007 you can design a worksheet in such a way that data is formatted based on the values the data assumes, such as **black and bold** for a profit or *red and italicized* for a loss. This is called conditional formatting.

To use conditional formatting, first select a range of data that you want to follow your formatting guidelines, and then click the Conditional Formatting button on the Home tab.

This will display a menu of conditional formatting options. From this menu, you can choose one of the following options:



Highlight Cells Rules	This will highlight cells that are greater than, less than, between or equal to values that you specify.
Top/Bottom Rules	This option will allow you to highlight the top or bottom numbers or percent in the selected cells, such as the top 10% according to value or the ones below average.
Data Bars	Will display colored bars that are indicative of the value in the cell.
Color Scales	Will use different shades of color to represent different values, from low to high.
Icon Sets	Will use sets of similar icons that will visually indicate a cell's value.

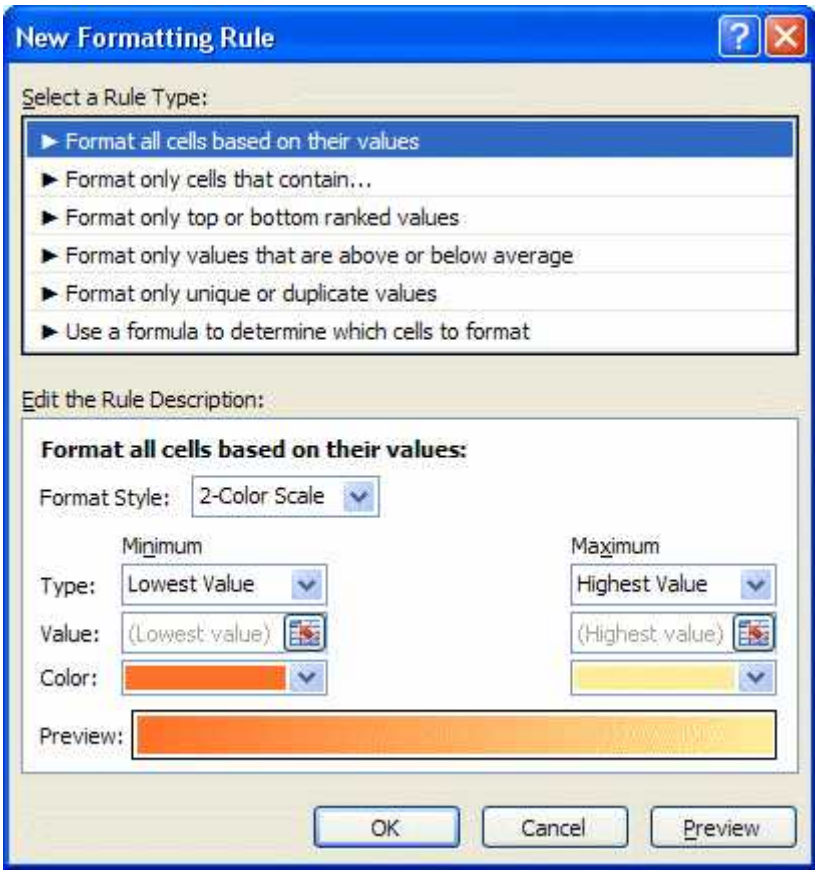
There are also options at the bottom of the menu for creating a new rule to your specifications, for clearing existing formatting rules, and for managing rules.

Each one of the conditional formatting menu options will display either a sub menu or a dialog box. As you let your mouse pointer hover over an option in the sub menu, you will see a preview of the type of conditional formatting that your pointer is on applied to the cells that you selected. To apply the conditional formatting, just click the submenu option of your choice.

You can apply multiple conditional formatting rules to a group of cells by simply re-selecting the group, and then adding another variety of conditional formatting. The image at right shows a group of cells with a data bar conditional format and an icon set conditional format.

The black and red circle icons represent low values, while the yellow and green icons represent higher values. You can also see that the size of the data bar in each cell corresponds to the cell's value.

If you click the New Rule option near the bottom of the Conditional Formatting menu, you will display the following New Formatting Rule dialog box:

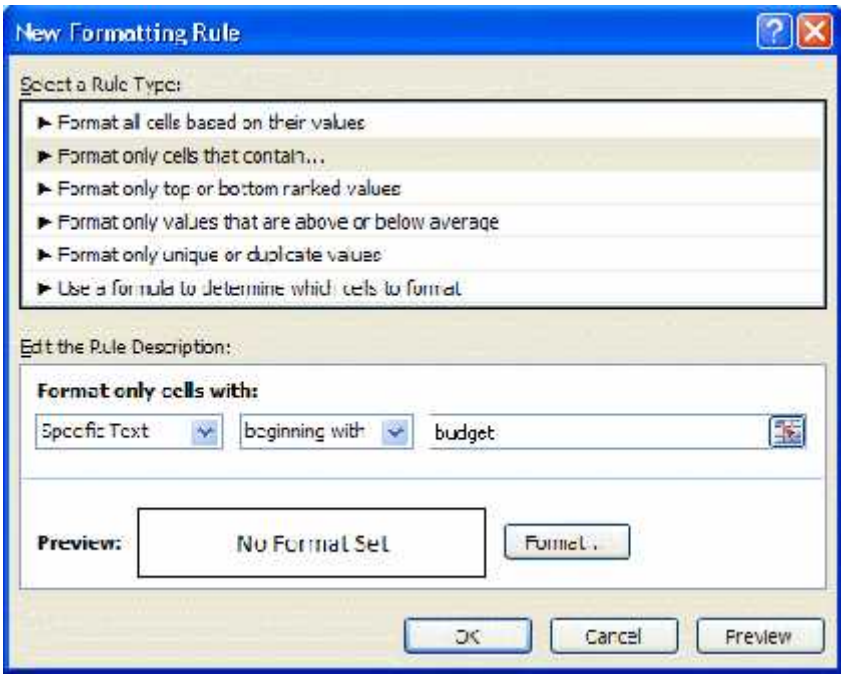


This dialog lets you pick from one of six base rules. The first five rules are all common rules to use with spreadsheet data, both textual and numerical. But if none of the first five rules work to suit your needs, you can create your own custom rule based on a formula by choosing the sixth rule.

Don't forget about the Preview button! Make sure the rule does what you want it to do before you apply it to your worksheet.

If you do apply conditional formatting that doesn't look as good as you thought it would, use the Undo command on the Quick Access Toolbar (described in the next module) or press Ctrl + Z to undo the last action applied to your spreadsheet.

For example, here is a rule set up for cells that contain text starting with "budget." Look closely at the Rule Description half of the dialog:



Once you define the rule criteria, you can click the Format button to specify what Excel should do to any data that satisfy this rule. This will display the Format Cells dialog.

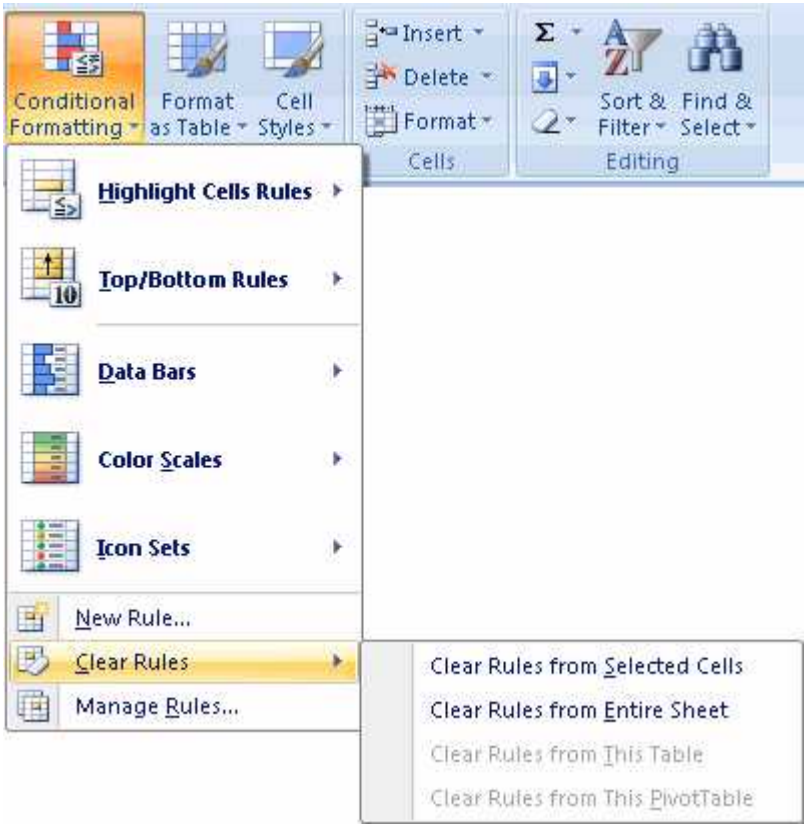
This dialog contains four tabs: Number, Font, Border, and Fill.

Number	Format numerical data to account for different currencies, follow accounting standards, time formats, as fractions, or apply special formatting like scientific and exponential notation.
Font	The Font tab lets you choose the font face, style, size, underline characteristics, color and other special effects.
Border	Use the Border tab to apply colorful/patterned borders to highlight cells that satisfy your defined rule.
Fill	Here you can specify cell color, shade, pattern, and gradient to highlight cells that satisfy your defined rule.

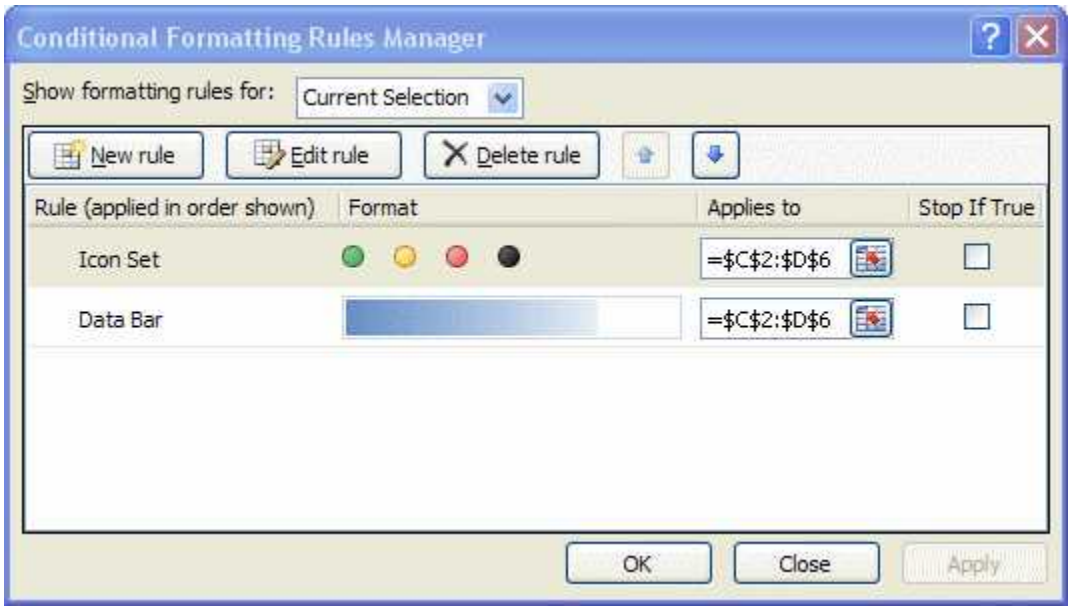
Click OK when you are finished specifying your format.

If you want to remove conditional formatting rules, use the Clear Rules option from the Conditional Formatting menu.

This option will let you clear rules for selected cells or for the entire worksheet.



The Manage Rules option will allow you to delete, edit, or add new conditional formatting rules for the selected range of cells.



Summary

In order to be effective at work, it is important to keep your work area and your electronic files organized. Remember that file retrieval systems work best when like items are grouped together, there's a place for everything and everything is in its place, and everything is labeled clearly.