

Excel 2003: So THAT'S How They Do That!

Learn five great Microsoft Excel features that will help you to work faster and easier.

After completing this course you will be able to:

- Freeze the upper and left panes to keep column or row titles in view while you scroll through data.
- Compare two workbooks at the same time by using the new **Compare Side by Side** feature in Microsoft Office Excel 2003.
- Add up numbers just by selecting them.
- Use the fill handle instead of typing to complete repetitive series of numbers, dates, or text.
- Make formatting changes automatically when values are at a certain point by using conditional formatting.

Divide and Conquer

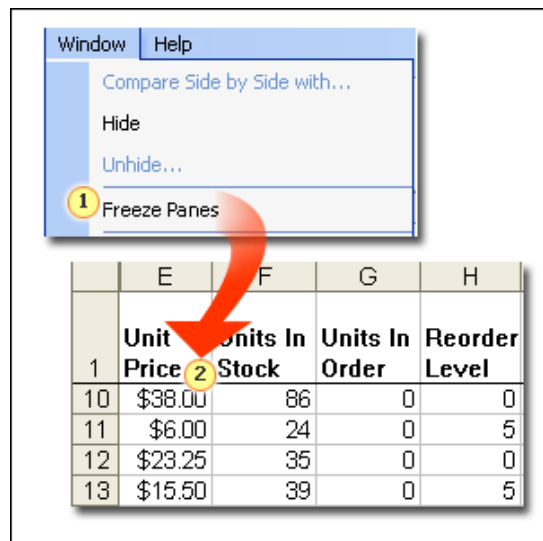
To keep titles in sight, divide or split the worksheet by freezing the titles in their own pane. The title pane is then locked in place as you scroll through the rest of the worksheet.

You freeze panes by making a selection in the worksheet, which you'll learn how to do in the next section, and then clicking **Freeze Panes** on the **Window** menu.

You can see the result in the picture. The titles, separated from the worksheet data by a horizontal line, are still visible over the top of row 10.

1 Click **Freeze Panes** on the **Window** menu.

2 Column titles are divided from the rest of the worksheet by a horizontal line.



Freeze Here

It's not just column titles that you can freeze in place. You can also freeze row titles, or you can freeze both at the same time to keep both column and row titles.

But there's a secret to success: To freeze titles, *do not* select the titles themselves. To freeze:

- **Column titles** Select the first row *below* the titles.
- **Row titles** Select the first column to the *right* (for example, to keep supplier names in sight as you scroll across the worksheet).
- **Both column and row titles** Click the cell that is both just *below* the column titles and just to the *right* of the row titles.

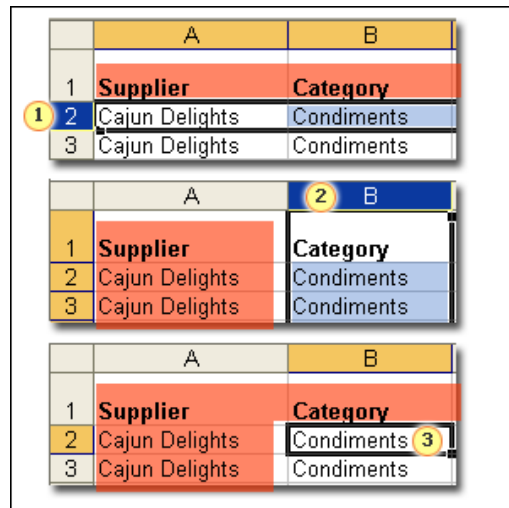
If you don't get it right the first time, it's easy to unfreeze and try again. Just click **Unfreeze Panes** on the **Window** menu.

Tip You can freeze panes anywhere, not just below the first row or to the right of the first column. For example, if you wanted the information in the first three rows to stay in sight as you scroll, you would select the fourth row and freeze.

1 Freeze column titles by selecting the row below.

2 Freeze row titles by selecting the column to the right.

3 Freeze both column and row titles by selecting the cell that is just below the column titles and to the right of the row titles.



Compare side by side

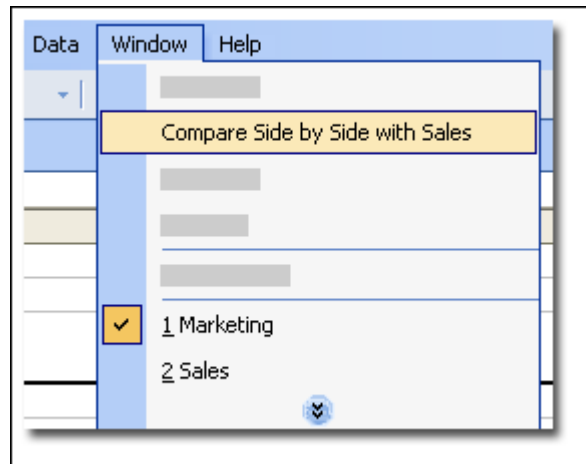
Have you ever wanted to compare the content in two different workbooks at the same time? In this lesson you'll see how to use the new **Compare Side by Side** feature to compare budgets for two departments in two workbooks. Both workbooks open in the same window.

As you scroll in one worksheet, Excel automatically scrolls the same amount of cells in the second worksheet. Because you can see the same locations in both worksheets at the same time, it's no trouble at all to compare the differences between the two.

Imagine that you have two workbooks. One is the budget for the Sales department and the other is the budget for the Marketing department. You'd like to compare both workbooks to see the differences in projected expenses between the two departments.

As you can see in the picture, the **Window** menu shows that both workbooks are already open. Because **Marketing** is in view, the name of the second worksheet, **Sales**, is listed after the Side by Side command. To see both workbooks at the same time, you click **Compare Side by Side with Sales**.

Use the **Compare Side by Side** command to compare two workbooks at the same time.



Scroll through both workbooks at the same time

Worksheets from both workbooks will open, with one at the top of the window and the other in the bottom of the window. That's right, in Excel side by side means one on top of the other, but you can change the orientation from one on top of the other to one next to the other if you want.

As you scroll through the first worksheet, the second worksheet scrolls right along, keeping pace with you, making it easy to compare the differences between the two department budgets.

Tips

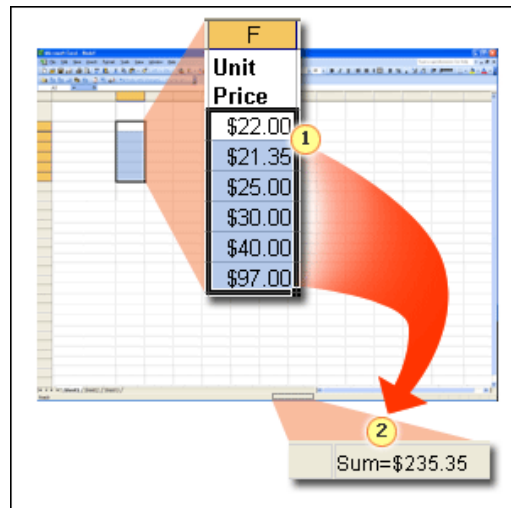
- The worksheet at the top of the window is the one that's in view when you click the Side by Side command.
- You can navigate from either the top or bottom worksheet. Just click in the worksheet you want to navigate in to activate the scroll bars in that sheet.
- You can see data up close by zooming in on both worksheets at the same time by clicking **Zoom** on the **View** window.

Sum it up, and more

	E	F	G
1	Quantity	Per Unit	Units In
2	48 - 6 oz jars	\$22.00	53
3	36 boxes	\$21.35	0
4	12 - 8 oz jars	\$25.00	120
5	12 - 1 lb pkgs.	\$30.00	15
6	12 - 12 oz jars	\$40.00	6
7	18 - 500 g pkgs.	\$97.00	29
8	12 - 200 ml jars	\$31.00	31
9	1 kg pkg.	\$21.00	22

Quick: What's the sum of the selected numbers in the picture? Even if you're very fast at doing math in your head, Excel can probably get the answer before you do. In this lesson you'll learn where to find Excel's super-fast automatic sums and more, such as calculating the average, minimum, or maximum value in a range of numbers.

And the total is



1 Selected numbers.

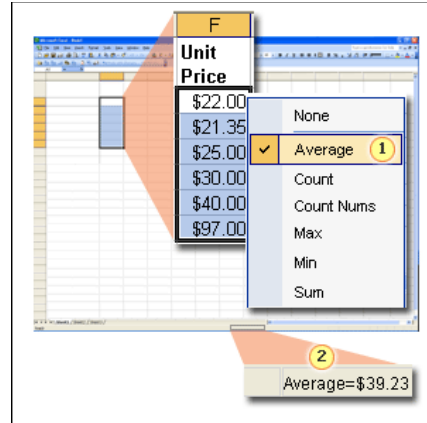
2 Total in the status bar at the bottom of the window.

All you have to do is... wait, the total is already in the status bar at the bottom of the window: **Sum=\$235.35**.

As you select the numbers, Excel automatically adds them up and displays the total in the status bar.

Tip The numbers you select don't have to be lined up together or in the same row or column. Add up numbers anywhere on the worksheet by pressing CTRL and then selecting each number.

Want more?



- 1 Click **Average** on the shortcut menu.
- 2 Sum changes to Average on the status bar.

Need an average? Select the numbers, right-click the status bar, and then click **Average** on the shortcut menu, which gives you the arithmetic mean. The answer in the status bar changes from a sum to **Average=\$39.23**.

If you want to do even more, just click one of the other options on the shortcut menu, such as **Max** or **Min** to find the maximum or minimum in a range.

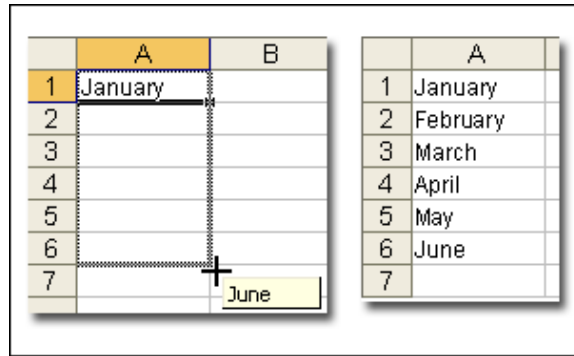
Type less, get more with Fills

Don't type the same lists over and over again.




Tired of typing the same lists over and over again, or copying and pasting lists from one place to another? Then stop. Instead, let Excel fill in the months of the year, days of the week, and even your company's sales regions or employee names. In this lesson you'll learn how to use the fill handle to complete lists after you type one or two entries.

Fill it up



To add the first six months of the year, drag the fill handle until the ScreenTip says June and then release the mouse button to fill the list.

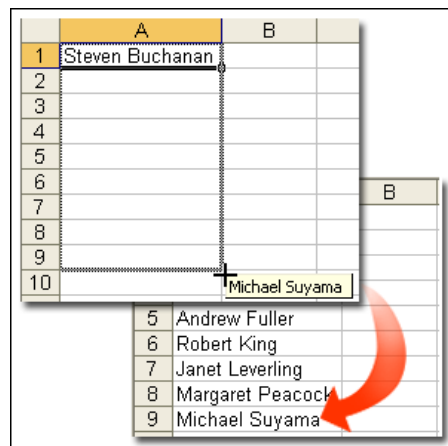
Pretend that you're typing the first six months of the year for the umpteenth time. Only this time you'll do it the easy way.

- Type "January" so that Excel knows what you want.
- Select the January cell, and then position the mouse pointer over the lower-right corner of the cell until the black cross (+) appears.
- Drag the fill handle  over the range you want to fill. As you drag, the ScreenTip tells you what will be filled in.
- Release the mouse button to fill the series in.

Tips

- For some lists you need to type two entries to establish a pattern. For example, to fill in a series of numbers such as 3, 6, 9, type two numbers, select both cells, and then drag the fill handle.
- You can also drag up or to the left as well as drag down or to the right.
- Ever need to type the same word many times, such as **Complete** in 10 consecutive rows? Just type the word once, and then drag the fill handle down rows or across columns to enter the same text without typing.

Make your own list for Excel to complete



Fill in a list of employees instead of typing the list.

Excel has all sorts of lists you can complete with the fill handle: 1, 2, 3; Mon, Tues; 9:00, 10:00; Quarter 1, Quarter 2; or 15-Jan, 15-Feb.

But Excel can also fill in custom lists that you create, such as a list of employees at your company.

Enter the employee names once, select them, open **Custom Lists** in the **Options** dialog box (**Tools/Options**), and then click **Import**.

The next time you need to enter the list, type the first name, and then use the fill handle to complete the list.

Tip If a list isn't already available to import, you can type it directly in the **Custom Lists** dialog box. If you do, remember to press ENTER after each entry, or type them all in one line, but separate each entry with a comma.

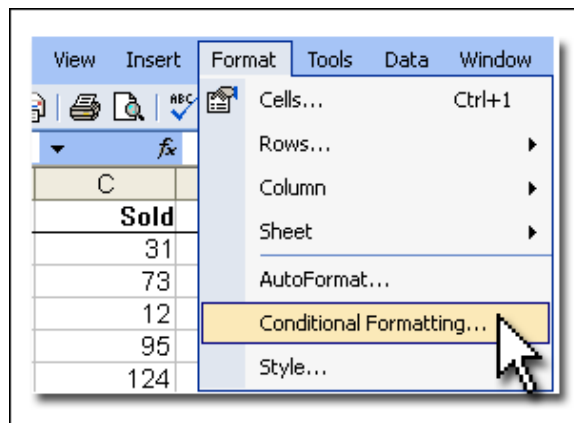
Call attention to the good or the bad

Conditional formatting can make it easier to see what you're looking for.

	A	B
1	Spruce	Sumac
2	Elm	Cherry
3	Oak	Douglas
4	Pine	Fir
5	Alder	Balsa
6	Hemlock	Birch
7	Willow	Forest
8		

Have you ever found it hard to spot the data you're looking for because you couldn't see the forest from the trees? In this lesson you'll learn how to use conditional formatting to make certain values jump right out at you when the conditions are right. Then you can quickly see what you're looking for.

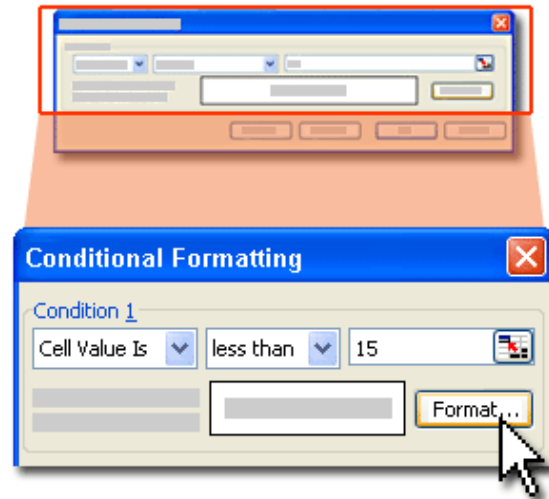
Get ready



Say that you want book sales under 15 copies to be formatted in bold red to really make underachieving sales stand out. It's probably easy for you to spot the sale under 15 in the picture, but imagine that there are lots of other rows, in which case other under-15 entries could get lost in the rest of the data.

You'd start by selecting column C (which contains the book sales numbers), and then clicking **Conditional Formatting** on the **Format** menu.

State your conditions



Conditional Formatting dialog box.

The **Conditional Formatting** dialog box is big, with enough boxes and buttons to be intimidating, because it's built to take in a lot of possible conditions. But once you know which boxes and buttons to pay attention to, it's a snap.

- First you choose the cell value conditions to trigger the conditional formatting by selecting **less than** and typing **15**.
- Then you click the **Format** button to pick bold red format for any values less than 15.
- Now Excel knows that the condition that triggers bold red formatting is any value that is less than 15 in column C. See? It's a snap.

Note You can add up to three conditions to a cell or a given range of cells.

See the results

	A	B	C
1	City	Date	Books Sold
2	Philadelphia	31-Jan	31
3	Providence	2-Feb	73
4	Detroit	14-Feb	58
5	Atlanta	8-Feb	95
6	Charleston	29-Jan	124
7	Topeka	20-Feb	12
8	Vancouver, B.C.	13-Mar	59

Bold, red formatting stands out.

There you have it, the bold red stands out, highlighting every number that is less than 15.

Whether it's good or bad, rising or falling sales figures, or anything else you want to be sure to notice, call attention to cell values by using conditional formatting. Then you can quickly tell when to hand out congratulations for good news or take steps to stop the damage when the news is bad.

Quick Reference - So that's how! Great Excel features

Freeze panes

Keep titles in sight as you scroll through worksheets. To freeze titles, make a selection in the worksheet, and then click **Freeze Panes** on the **Windows** menu.

To freeze titles, *do not* select the titles themselves. To freeze:



- ↳ **Column titles only** Select the first **row** below the titles.
- ↳ **Row titles only** Select the first **column** to the right.
- ↳ **Both column and row titles** Select the **cell** that is both directly below the column titles and to the right of the row titles.

To unfreeze panes, on the **Window** menu, click **Unfreeze Panes**.

Tip You can freeze panes anywhere, not just below the first row or to the right of the first column. Click the row below, or the column to the right, or the cell that is both below and just to the right of whatever information you want to freeze.

Compare worksheets side by side

- ↳ If more than two workbooks are open, select the workbook you want to compare with in the **Compare Side by Side** box after you click the **Compare Side by Side with** command.
- ↳ To change sheets in both workbooks, you must click the sheet tabs in both workbooks. Clicking in one will not change the sheets in the other.
- ↳ You can see data up close by zooming in on both worksheets at the same time. Just click **Zoom** on the **View** menu.
- ↳ You can change the side by side orientation from horizontal to vertical by clicking **Arrange** on the **Window** menu, and then selecting **Vertical**. Be sure that you only have two workbooks open when you do this. If you have more than two, they'll all open up next to each other.

You only have to change orientation once. Excel will remember how you arrange your windows to compare them side by side. Clicking the **Reset Window Position** button  on the **Compare Side by Side** toolbar will return the orientation to one on top of the other.
- ↳ If workbooks are differently sized or positioned—for example, if one is larger or smaller than the other—clicking the **Reset Window Position**  button on the **Compare Side by Side** toolbar will return both workbooks to equal sizes and positions. Keep in mind, however, that this will also return orientation to one on top of the other if you previously set the orientation to one next to the other.

Use automatic sums

Excel automatically adds up numbers that you select, displaying the total in the status bar at the bottom of the window.

If you do not see the total in the status bar, click **Options** on the **Tools** menu. On the **View** tab, select the **Status bar** check box.

Tips


Right-clicking the status bar displays the shortcut menu, on which you can select other options such as **Average**, **Min**, or **Max**.

You can select numbers that are not all together in a row or a column by pressing CTRL and then selecting each individual number.

Learn more about doing math in Excel by taking another online course: [Audio course: Get to know Excel: Enter formulas.](#)

Use the fill handle to complete lists

Excel can fill in all sorts of lists: 1, 2, 3; Mon, Tues; 9:00, 10:00; Quarter 1, Quarter 2; 15-Jan, 15-Feb; January, February.

1. Type one or two entries in the list.
2. Select the cells and position the mouse pointer over the lower-right corner of the cell until the black cross (+) appears.
3. Drag the fill handle  down the column, and then release the mouse button.

You can drag up or to the left as well as down or to the right.

You can also make your own custom list, such as a list of employees or sales regions.

1. Select the list.
2. On the **Tools** menu, click **Options**, and then click **Custom Lists**.
3. Click the **Import** button, and then click **OK**.

If you don't have a list ready to import, you can type the list directly in the **Custom Lists** dialog box. Click inside the **List entries** box and enter each item in the list, pressing ENTER after each item. Then click **Add** and click **OK**.

Use conditional formatting

Use conditional formatting to make certain values jump right out at you when conditions are right, making it easy to see what you're looking for. For example, you might want numbers less than 15 to be formatted in bold red text.

1. Select the area of the worksheet that contains the information you want to highlight.
2. On the **Format** menu, click **Conditional Formatting**.
3. In the box to the right of **Cell Value Is**, click the arrow, and in the drop-down list, click **less than**.
4. In the next box to the right, type **15**.
5. Click **Format**.
6. Under **Font style**, click **Bold**. Then in the **Color** list, click the arrow and select the **Red** box.
7. Click **OK** twice.

Tips

To enter more than one condition, for example, to also highlight numbers greater than 125, click the **Add** button in the **Conditional Formatting** dialog box. Then fill in the boxes under **Condition 2**.

To delete conditional formatting, click **Delete** in the **Conditional Formatting** dialog box. Select the check boxes for the conditions you've set up, and then click **OK** twice.