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FILE TRIAGE MKII

Working Smarter, Not Harder in Microsoft Word, Excel, and PowerPoint



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MICROSOFT WORD

In Microsoft Word, the most common problem is 'on the fly' formatting. If you and your team haven't planned ahead, we can replace poor formatting with Styles. In addition, building replacement tools for content can revamp a document very quickly.

FIND AND REPLACE

GENERAL CONTENT

The most common use of Find and Replace is to replace words or phrases. If you company changes name, for example, you can use the keyboard shortcut **[CTRL] + [H]** to open the dialog box:

Find and Replace	? ×
Find Replace Go To	
Find what: ACME Corp.	~
Replace with: XYZ, Inc.	~
More >> Replace Repla	ce <u>A</u> ll <u>F</u> ind Next Cancel

SPECIAL CHARACTERS

Interestingly, if you use **[CTRL] + [H]** and press **More >>**, you'll find a number of other options. For example, you can use **Special** to replace a double return with a single return:

	<u>P</u> aragraph Mark		
	<u>T</u> ab Character	63	
	Any <u>C</u> haracter		
	Any Digit	i	sioned multimedia based expertise and cro
Find and Replace	An <u>y</u> Letter		? ×
Fin <u>d</u> Replace	Caret Character		
Find what:	§ Section Chara	cter	
TI <u>n</u> u what.	1 P <u>a</u> ragraph Ch	aracter	·
	Col <u>u</u> mn Break		
Replace with:	E <u>m</u> Dash		~
	E <u>n</u> Dash		
	<u>E</u> ndnote Mark		
<< <u>L</u> ess	Fiel <u>d</u>		Replace <u>All</u> <u>F</u> ind Next Cancel
Search Options	<u>F</u> ootnote Mark	_	
Search: All	Graph <u>i</u> c		
Match case	Manual <u>L</u> ine Bre	ak	Match prefix
Use wildcard	Manual Page Br	ea <u>k</u>	
Sounds li <u>k</u> e (Nonbreaking <u>H</u>	/phen	Ignore punctuation characters
Find all word	Nonbreaking Sp	ace	Ignore <u>w</u> hite-space characters
	Optional Hyphe	n	
	Section <u>B</u> reak		
Replace	<u>W</u> hite Space		
F <u>o</u> rmat ▼	Sp <u>e</u> cial ▼ No F	ormatting	

FORMATTING

Additionally, you can use **Formatting** to replace **18pt** font with **Heading 2**:

Find and Replace		7 × ration an
Find Replace Go To	Find Font	? ×
Find what:	Fo <u>n</u> t Ad <u>v</u> anced	
Replace with: << Less Search Options	Eont: +Headings Adobe Devanagari Agency FB Algerian Amasis MT Std	Font style: Size: Regular A Bold talic Not Bold V
Search: All Y Matc <u>h</u> case Find whole words only Use wildcards Sounds li <u>k</u> e (English) Find all <u>w</u> ord forms (English)	Font <u>color:</u> Underline s No Color V Effects Double strikethrough Superscript Superscript	tyle: Underline color: No Color V Small caps All caps Hidden
Replace Format • Special • N	Preview AaBbCo	eYyZz
	Set As Default	OK Cancel

FORMATTING

FORMAT PAINTING

Any formatting you'd like to copy to a new piece of content, simply select the content that's already formatted:

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other. For example, you can add a matching cover page, header, and sidebar. Click Insert and then choose the elements you want from the different galleries. **Themes and styles also help keep your document convidinated.** When you click <u>Design</u> and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme. When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that show up where you need them. To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign. Beading is easier, too, in the new

Then, to use it once, single click the Format Painter on the Home Ribbon:



..or, to use it multiple times in a row, **double-click** the **Format Painter**. Press **[ESC]** on the keyboard to stop format painting.

Also, remember the keyboard shortcuts for copying and pasting formatting: **[CTRL] + [SHIFT] + [C]** to copy, followed by **[CTRL] + [SHIFT] + [V]** to paste.

CLEAR FORMATTING

To remove unique formatting from a section of your content, first select that content (**[CTRL] + [A]** to select all the content in the document):

চি-৫ -															Docur	nent1 - Wo	d					(_			~	Neil Malek	B –	٥	/×/
File Home	Insert	Desig	in La	yout	Reference		1ailings	Revi	w Vi	ew l	Develope	r Add-ir	ns ACR	OBAT 🖓 1															₽. Share	Ģ
Paste Format Pair	inter	Calibri (Bo B I <u>U</u>	dy) * 11 * abc 1	• A*	A Aa	a - 🇞 - <u>A</u> -	:= • =	i≣ • 'iī : = = 	• €≣ ‡≣ •	≖ 2↓ _2 - 8	L ¶ B•	AaBbCcDc 1 Normal	AaBbCcE 11 No Space	AaBbC	(AaBbCcE Heading 2	AaB	A a B b C c f	Subtle Em	AaBbCcDe Emphasis	AaBbCcDa Intense E	AaBbCcD Strong	AaBbCc Quote	De <u>AaBbC</u> Intense	CDr Al	ABBCCDE	ABBCCDE	AaBbCcDe Book Title		e	
Cipboard									rugrupri										Styles									Luning		-
Page 1 of 9 620 of	6363 wa	rds []12	Video p paste ir the vide you can you clie you rou voant fir you clie voant fir you can click in stop rei video p paste ir the vide you can click in stop rei video p paste ir the vide you can click in stop rei video p point. V change, then, T next to stop focus ou can alss documor click in stop focus ou can alss documor Click in help kee chants, change them. T o chants is change, change, then that con Click in help kee chants, change on the 1 help kee chants, change you left When y also typ	rovides is the emit of the the emit of the the emit of the the emit of the emit of the emit of the emit of the emit of the the	a powerf bed code set fits y fiferent and cho buttons . When buttons . When buttons . When buttons . When buttons to add i . 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Wh the pluid is where is next the the click it in the pluid is where is next the pluid is the pluid is where is next the pluid is the pluid is the pluid is the pluid is next the is next the pluid is shat cc is next the pluid is next the pluid	hen you i also typ look pro- ser and omplem sert and complem sert and to match change <i>eep you</i> left or the to it. Wh sign. A sign of the service is on the te you left on the you also typ is look pro- took	click Online e a keywor feesionally document that he ach ot document that graph and the ach of document that graph and the ach of the even you wor eading is e work you wo off - even en you wor eading is e work you wo off - even en you work off - even	video, you want to add to a	u can n online for , Word ample, ments you ted. When to match at meath at mean to match at time in in your ted. When in your ted. vice. in the new need to r device. u can h online for , Word sample, styles also olctures, headings n click the lent and, mbers your tyles also olctures, headings your tyles also olctures, headings your so add. You your so add. You your so add. You olctures, headings and focus where oint. You can to add. You olctures, headings wineed were so add. You olctures, headings wineed ters next k the plus and focus where oint. You can to document			locities in the second	k profession mplement ea ert and then sp your docu 3 SmartArt g match the ne your docu 3 SmartArt ge match the ne wideo that to video that to u can do <u>ne</u> ading view. Y p reading be to provides radade u can add a n thore the to video that to video that to othet to to ti. When you left o int. When you a laso type a 1 complement to new the read to p to a laso type a 1 complement to new the to match to the video that to video that to to the video that to to the video that to b video that to video that to video that to to to video that to b video that to video that to	ally produced ch other. For choose the e- ment coordia aphics chang we theme. Sa- a picture fits ork on a table easier, too, i want. If you en on anothe a powerful w bed code for set fits your r, footer, cow buttons that and choose e. When you buttons that it and a button buttons that to add a ron ou can collag fore you reas a powerful w bed code for you can collag fore you reas document cc then choose document cc rtrArt graphin then envoise a seiser, r, ty ou work o u click Online keyword to s professional nt each other then choose	d, Word proof pro- example, y, we time in N and the set of the set	vides headed use an add use and from your clearly your lick for your clearly your lick for your clearly the text box defe, and sis and shyle your clearly your clearly the document of the docum	Ir, footer, c a matching the differ seging and herme. Why we button is a seging and herme. Why we button is a seging that refore you r and very our point. V very and very our point. V add. Vou c ur docume segins that debar. Click the segins that debar. Click the pears new then a differ that the is and for the segins that debar. If you want to a want to the mement, click the pears new then into pears new then into pears new then into pears new then the segins that disk the pears of the segins that disk the segund the segund	over page, cover page to galeric that show or a colo that show or a colo collapse page and that show or a colo complement insert and to change to compleme insert and to change to compleme insert and to change to compleme to match the show of a complement to complement to complement	and tee e, head s. Then every the system of the system of the system of the system of	xt box designed to the set of the	Ins that bar. Click less also he lings chang. It was changed and and the search of the plus and the search of the plus and	ip fts ge o o s s for for s s o ars te e is s o o o o o o o o o o o o o o o o o			1006
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Next, click the **Clear Formatting** button on the **Home Ribbon**:

Home	Inser	t	Desig	n	Layo	out	Refe	rences	М	aili
Cut		Cal	ibri (Bo	dv)	- 11	Ŧ	A A	Aa +	P	
Сору		_				,	0	ahe	6	
Format Pa	inter	в	<u>1</u> <u>U</u>	*	abe X ₂	X.	A -	*	A -	Ξ
board	E.				Fo	nt			Fai	

APPLYING STYLES

To use any of the standard styles, select the content to be formatted, then either use the **Styles Pane** on the **Home Ribbon:**

A	aBbCcDc	AaBbCcDc	AaBbCo	AaBbCcE	АаВ	AaBbCcD	AaBbCcDu	AaBbCcDu	AaBbCcDu	AaBbCcDc	AaBbCcDı	AaBbCcDu	AABBCCDE	AABBCCDE	AaBbCcDı
1	Normal	1 No Spac	Heading 1	Heading 2	Title	Subtitle	Subtle Em	Emphasis	Intense E	Strong	Quote	Intense Q	Subtle Ref	Intense R	Book Title
Aa 11 L	aBbCcDc .ist Para		He	eading 1											
*34	Create	a <u>S</u> tyle													
Ą	Clear F	ormatting													
4	, <u>A</u> pply S	Styles													.:

.. or use the keyboard shortcuts:

[CTRL] + [SHIFT] + [N]	Normal Style
[CTRL] + [ALT] + [#]	Heading # (1 for Heading 1, etc.)

NEW STYLES

If there's a bit of formatted text that you like, and you'd like to apply it many times throughout your document, select the content, then click the **drop-down arrow** on the **Styles Pane** on the **Home Ribbon**:

AaBbCcDc	AaBbCcDc	AaBbCo	AaBbCcE	АаВ	AaBbCcD	AaBbCcDı	AaBbCcDı	AaBbCcDı	AaBbCcDc	AaBbCcDı	AaBbCcDu	AABBCCDE	AABBCCDE	AaBbCcD a
1 Normal	¶ No Spac	Heading 1	Heading 2	Title	Subtitle	Subtle Em	Emphasis	Intense E	Strong	Quote	Intense Q	Subtle Ref	Intense R	Book Title
AaBbCcDc 11 List Para		He	eading 1											
≫ <u>4</u> Create	a <u>S</u> tyle													
<u>C</u> lear F	ormatting													
A Apply	Styles													

Then, click Create a Style. Finally, Name and Modify your style as necessary.

Create New Style from Formatting	?	×
Name:		
Style 1		
Paragraph style preview:		
Style1		
OK Modify	(Cancel

TEMPLATES

AUTOREPLACE TOOLS

To adjust what Microsoft Word will automatically replace or adjust, click **File Tab > Options > Proofing > AutoCorrect Options**:

Word Options		?	×
General	ABC Change how Word corrects and formats your text		
Display			
Proofing	AutoCorrect options		
Save	Change how Word corrects and formats text as you type: <u>AutoCorrect Options</u>		
Language			
Ease of Access	when correcting spelling in Microsoft Office programs		
Advanced	☑ Ignore words in <u>U</u> PPERCASE		
Customiza Pikhon	✓ Ignore words that contain numbers		
Customize Ribbon	✓ Ignore Internet and <u>f</u> ile addresses		
Quick Access Toolbar	✓ Flag repeated words		
Add-ins	Enforc <u>e</u> accented uppercase in French		
Trust Center	Suggest from main dictionary only		
	<u>C</u> ustom Dictionaries		
	French modes: Traditional and new spellings 🔻		
	Spanis <u>h</u> modes: Tuteo verb forms only		
	When correcting spelling and grammar in Word		
	Check spelling as you type		
	✓ Mark grammar errors as you type		
	✓ Frequently confused words		
	Check grammar with spelling		
	Show readability statistics		
	Writing Style: Grammar & more 🔻 Settings		
	Rechec <u>k</u> Document		
	Exceptions for:		-
	ОК	Ca	ncel

QUICK PARTS

If you've typed a chunk of content that will be repeated across many documents, you can save that for reuse as a Quick Part. Select the content:

you can add a matching cover page, header, and sidebar.

Click Insert and then choose the elements you want from the different galleries. Themes and styles also help keep your document coordinated. When you click <u>Pesign</u> and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme. When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that show up where you need them.

To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus

Then click Insert Tab > Quick Parts > AutoText > Save Selection to AutoText Gallery.

Quie	K WordArt Drop Cap • Cap • Object •	πΩ Ω Equation Symbol Embed Flash
<u>L</u> j	<u>A</u> utoText ►	General
	Document Property	Neil Malek
[=]	<u>F</u> ield	Neil Malek
8	Building Blocks Organizer	
6	Save Selection to Quick Part Gallery	
ew b ck it to a ou ca re y	uttons that show up where and a button for layout op dd a row or a column, and an collapse parts of the doo ou reach the end, Word re	NM NM E E ∑ Save Selection to AutoText Gallery

Finally, give it a name, and you'll be able to reuse it whenever you want.

TEMPLATES AND STYLES

You can save your style changes to the standard *normal template*, or to a custom template. To save the style to a custom template, make all your style changes, then make the file into a template by choosing **File Tab > Save As > Word Template (.dotx)**.

🕎 Save As						×
← → • ↑ 🗖	> This PC > Desktop >			✓ ³	earch Desktop	م
Organize 🔻 Ne	w folder					
Quick access Desktop Downloads Documents Pictures HDD (D:) 170906 WEBA' ANDERSONW CRAFTSOFT Graphics Microsoft Word Word CRAFTSOFT Graphics Microsoft Word COMPACE Dropbox	Name Name	Date modified 9/7/2017 11:52 AM 8/23/2017 11:17 AM	Type File folder Shortcut	Size		
🙈 OneDrive - Kna	ck ¥					
File name:	Sample Template					~
Save as type: Authors:	Word Document Word Document Word Macro-Enabled Document Word 97-2003 Document Word Template					~
	Word Macro-Enabled Template Word 97-2003 Template PDF XPS Document Single File Web Page Web Page, Web Page, Filtered Rich Text Format Plain Text Word XML Document Word 2003 XML Document Strict Open XML Document OpenDocument Text	8				

To make those changes within the Normal template, when you change a style, click the radio button at the bottom of the dialog - *New documents based on this template*.

Add to the <u>Styles gallery</u> Automatically update		
Only in this document New documents based on this temp	ate	
F <u>o</u> rmat ▼	ОК	Cancel

MICROSOFT EXCEL

In Excel, much of what's happening is hidden - cells display number values instead of calculations, and the source of a calculation might be on an entirely different sheet. We need to expose what's happening in our workbooks so we can control it more carefully.

NAMED RANGES

CREATING NAMED RANGES

First, select the cells to be named. Then, click in the Name Box in the top-left corner.

Products		Q1					
TTOULOUS	January	February	March	Α			
Product 1							
Product 2							
Product 3							
Product 4							
Product 5							
Product 6			A				

Type the name you want. Named Ranges cannot contain spaces, so I often use capitalization to mark the beginnings of new words. Press **[ENTER]** when you've typed the name to set it.



DYNAMIC NAMED RANGES

Select a set of cells to be turned into a *table*. Click **Insert Tab > Table**, or use the keyboard shortcut **[CTRL] + [T]**.

F	ile Home	e Ins	ert F	age Layo	ut F	ormulas	Da	ata	Review	View
Pive	otTable Recom Pivot Tabl	? mended Tables es	Table	Pictures	Online Pictures	Shapes •	G Icons	₽ <mark>,</mark> S	martArt creenshot •	Recom Cł
Δ) •	1 : [Table ((Ctrl+T)						
	A		Create analyze	a table to e related d	organize ata.	and			D	E
1	First Name	Last Na	Tables	make it e		rt filter		C	ity	State
2	Caroline	Porter	and for	rmat data	within a	sheet.		P	hoenix	AZ
3	Katherine	Fuetscl	0 -					P	hoenix	AZ
4	Neil	Behr	😗 Te	ll me mor	re			P	hoenix	AZ
-	mal		l= = .=	015 5-1		-				A 7

Make sure that Excel recognizes all the cells in your table, and that it has a header row. Click **OK**.

	А	В	С	D	E	F	G	Н	I. I.	J	K
1	First Name	Last Name	Street Address	City	State	ZIP	Phone Number	Department	Group	Yearly Salary	Date of Hire
2	Caroline	Porter	215 Fourth Ave.	Phoenix	AZ	85004	4807752861	Finance	Corporate Finance	88800	40386
3	Katherine	Fuetsch	Create Table ? ×	ioenix	AZ	85004	4807751247	Accounting	Accounts Payable	82800	37296
4	Neil	Behr		ioenix	AZ	85004	4807754188	Human Resources	Policies and Benefits	102600	40603
5	Edwin	MacMahon	Where is the data for your table?	ioenix	AZ	85004	4807753829	Finance	Risk Management	124500	36746
6	Tara	Pearson	=SAS1:SKS292	ioenix	AZ	85004	4807753311	Human Resources	Policies and Benefits	86600	37662
7	Christina	Fox	✓ My table has headers	ster City	CA	94404	5102105815	Information Technology	Hardware and Software	53600	40457
8	Clara	Evans		ioenix	AZ	85004	4807751946	Marketing	Conventional Media	59400	38297
9	Emma	Chen	OK Cancel	inneapolis	MN	55403	6124006547	Production	Production	53000	40014
10	Lily	Pfeffer	3750 S. Hope Ave.	St. Louis	MO	63005	3146705136	Information Technology	Hardware and Software	62100	41779
11	Aiden	Davies	3750 S. Hope Ave.	St. Louis	мо	63005	3146702625	Marketing	Online Marketing	75100	40401
12	Evelyn	Hayes	3750 S. Hope Ave.	St. Louis	мо	63005	3146704842	Human Resources	Policies and Benefits	103600	41679
13	Tommie	Van Houten	1225 NW 1776th Blvd., Ste. 350	Minneapolis	MN	55403	6124002334	Accounting	Accounts Payable	77100	40507
14	lohn	Chapman	3750 S. Hope Ave.	St. Louis	мо	63005	3146703716	Marketing	Online Marketing	62700	37102

Now, name the table by clicking **Design Tab > Name**, and typing a name for the table. Names for tables follow the same rules as those for Named Ranges.

AutoSave 💽	জ 🗄 🔊					Sample	Report - Exc	el			Table Tools			
File Hom	e Insert F	Page Layout I	Formulas	Data	Review	View	Developer	Add-ins /	ACROBAT	Power Pivot	Design	♀ Tell me w	hat you want to do	
Table Name: Employees	Summarize w Remove Dupl	rith PivotTable licates ange S	nsert Exp Slicer	ort Refresh	E Propertie ゆ Open in ダ Unlink	es Browser	 ✓ Header Total Ro ✓ Banded 	Row First Co w Last Co Rows Bandeo	olumn [olumn d Columns	✓ Filter Button				
Properties		Tools		Extern	ial Table Data			Table Style	e Options				Table S	yles
A1 *		<i>f</i> _∞ First	Name											
A	В		С		D	E	F	G		Н		1	J	К
1 First Name	Last Name	Street Addre	ess		City	State	🛛 ZIP 🔽 Pl	none Number	Departm	ent 🔤	Group		🔻 Yearly Salary 💌	Date of Hire 💌
2 Caroline	Porter	215 Fourth A	Ave.		Phoenix	AZ	85004	480775286	1 Finance		Corporate	Finance	88800	40386
3 Katherine	Fuetsch	215 Fourth A	Ave.		Phoenix	Δ7	85004	480775124	7 Accounti	nø	Accounts	Pavable	82800	37296

DATA VALIDATION

RANGE-BASED VALIDATION

Select a set of cells to be validated.

Products	Q1				Q2			Q3			Q4		
Troducts	January	February	March	April	May	June	July	August	September	October	November	December	
Product 1													
Product 2													
Product 3													
Product 4													
Product 5													
Product 6												÷.	

Click **Data Tab > Data Validation**.

		→		→ □		6
Text to	Flash	Remove	Data	Consolidate	Relationships	Manage
Columns	Fill	Duplicates	Validation 👻			Data Model
			Data T	ools		

Choose either **Whole number** or **Decimal** from the initial drop-down menu, then add values for **Greater than**, **Between**, or any other setting that works for your situation.

	Data Valida	tion			?	×		
	Settings	Input Message	Error Alert				E	
	Validation	criteria						
	Decimal	J	✓ ✓ Ignore	<u>b</u> lank				
Salesper	<u>D</u> ata: betwee	n	~					
	Minimur	n:						
Prc	0 Ma <u>x</u> imur	n:		1			il	N
Product	100000)	3	1				
Product	Apply t	hese changes to	all other cells wit	h the same se	ettings			
Product	<u>C</u> lear All			OK	Car	ncel		
Product 4					_			
Product 6	5							

14 | Knack Training: File Triage mk II

DROP-DOWN MENUS

First, type out a set of values to be added to the menu:

Sales Staff:		
H. Rosen		
S. de la Cruz		
E. San Cartier		
N. Malek	¢	
1		'n

Next, click **Data Tab > Data Validation**.



Choose **List** from the drop-down menu, and choose the set of cells you've types values into:

Salesperson:	
Produc	Data Validation ? × Settings Input Message Error Alert
Product 1 Product 2 Product 3 Product 4 Product 5 Product 6	Validation criteria <u>A</u> llow: List Data: <u>between</u> <u>S</u> ource: = \$A\$19:\$A\$22 T
Sales Staff: H. Rosen S. de la Cruz E. San Cartier N. Malek	Apply these changes to all other cells with the same settings Clear All OK Cancel C

DATA CLEANUP

REMOVE DUPLICATES

Select a set of cells to be manipulated. Click **Data Tab > Remove Duplicates**.

	F			→□						
Text to	Flash	Remove	Data	Consolidate	Relationships					
Columns	Fill	Duplicates	Validation	-						
	Data Tools									

For absolute unique values, leave all the checkboxes selected and click **OK**.

FName	LName	2	EMP#	Dept	Shift	VDays	Hourly	Emp	Ret	Med		
Teri	Binga	AW55		Sales	D	10	\$11.38	С	3.0%	Y		
Dean	Krame	r	AC49	Developmen	D	12.5	\$19.50	AW	1.0%	Y		
Jacqueline	Banks		AS03	Staff	N	10	\$11.38	AW	0.0%	N		
Jeri Lynn	MacFa				_		4					
Joanne	Parke	Ren	nove Du	plicates						ſ		×
Peter	Allen	To d	elete du	plicate values, se	elect o	ne or mo	ore colum	ins tha	at cont	ain du	plicates	
Melanie	Bowe		=						My da	ita has	header	rs
Steve	Singe	L	selec	t <u>A</u> ll <u>B≣ U</u> n	select	AII			<u></u> y aa		neader	Ĩ.,
Joshua	Macca	_										
Edward	Trelly	Col	umns									^
Michael	Lewis	M	FName									
Lynne	Simm	M	LName									
Lindsey	Wing		Dent									
Frieda	Binga	G.	Shift									
Esther	Willia		VDavs									¥
Marianne	Calvir						r					
Grace	Sloan							C	ж		Cancel	
Lorrie	Sulliva	n	AW04	Sales	D	10	\$16.38	С	1.0%	Y		
Alice	Owen	s	AW48	Sales	D	10	\$7.15	C	4.0%	N		
Greg	Thoma	as	AC53	Developmen	N	12.5	\$21.78	AW	0.0%	Y		
Erin	Binga		AA70	Research	D	15	\$15.73	С	7.0%	N		
Amy	Tooley	/	AW59	Sales	D	10	\$8.45	AW	2.0%	N		
Michael	Lewis		AW58	Sales	D	10	\$8.45	С	0.0%	Y		
Lindsey	Winge	r	AW77	Research	D	15	\$31.20	AW	5.0%	N		
Melanie	Bower	s	AA35	Research	N	12.5	\$8.45	AW	7.0%	Y		

TEXT-TO-COLUMNS

Select the set of cells to be manipulated. Click **Data Tab > Text to Columns**.

	-	→		→ □
Text to	Flash	Remove	Data	Consolidate
Columns	Fill	Duplicates	Validation -	
45			Data	Tools

Unless your values have the same text length, choose **Delimited**.

Names						Addresses		
Cara Olson						215 Fourth Ave.,	Phoenix,	AZ 850
Anthony Ts	ang					215 Fourth Ave.,	Phoenix,	AZ 850
Nicole Brag	a					215 Fourth Ave	Phoenix	<u> 47 85(</u>
Bradley Ch	Convert	Text to Colur	nns Wizard	- Step 1 of 3			?	×
Annette Si	The Text V	Vizard has d	etermined th	at vour data	is Delimited.			C
Jerry River	If this is c	orrect choos	e Next or ch	noose the da	ta type that k	est describes your (data.	C
Steven Per	Original	data type	e nexų or e	loose the da	in type that i	, con desembles your	aata	C
Natalie So:	Choose	the file type	that hest de	scribes your	data:			c
Elizabeth C		elimited	- Characters	such as com	mas or tabs :	separate each field.)
Frank Balla	OF	ixed <u>w</u> idth	- Fields are	aligned in co	lumns with s	paces between eacl	h field.)
Patrick Ros)
Wallace Ar								c
Britney We)
Victoria Co								C
Lynne Sapp	_ .)
Patricia Ma	Preview	of selected (lata:)
Amy Shern	2 Cara	Olson						<u>^</u> (
Sharon Lin	3 Anth	ony Tsang						
Veronica B	5 Brad	ley Chapm	an					C
Michael Ra	6 Anne	tte Silva						<u>۷</u> (
Kevin Ucke	<						>	c
Evan Wors								C
Paolo Cerv				Cancel	< Back	Next >	<u>F</u> inisl	n)
William Sha	ahkaram					3750 S. Hope Av	e., St. Lou	is, MO

Choose or manually type the delimiter you want to break the text by (you may want to do multiple steps for varied delimiters). Click **Finish**.

TEXT FUNCTIONS

To use the LEFT or RIGHT functions to get part of the content, select the cell you want to get data from, and choose the number of characters you need to retrieve:

L	M
ID No.	
MNI58269	=LEFT(L2,3)
RRY75624	
ALA76721	
ALA54750	
ALA93753	
MNI66235	

To make the number of characters dynamic, use the FIND function to determine where the delimiter is:

A	В	
Names		
Cara Olson	=FIND(" ",	A2)
Anthony Tsang		
Nicole Braga		ഹ
Bradley Chapman		لمح
Annette Silva		
lerry Rivera		

To combine these two factors, next FIND within LEFT or RIGHT. Be aware that you'll probably need to adjust your value from FIND - FIND tells you *where* the delimiter is, but you probably want to stop before or after the delimiter:

А	В	С	[
Names							
Cara Olson	=LEFT(A2,FIND(" ",A2)-1)						
Anthony Tsang							
Nicole Braga							
Bradley Chapman							

PASTE SPECIAL

Once you have *calculated* a value, you'll often want to make that value permanent by copying (**[CTRL] + [C]**) and Paste Special: Values:



The alternate keyboard shortcut is **[ALT] + [E], [S], [V]**.

FLASH FILL

For Flash Fill to work properly, you need to do enough manual work that Excel can pick up the pattern you're interested in:

F	G	н
Addresses		
215 Fourth Ave., Phoenix, AZ 85004	Phoenix	
215 Fourth Ave., Phoenix, AZ 85004		
215 Fourth Ave., Phoenix, AZ 85004		
215 Fourth Ave., Phoenix, AZ 85004		
215 Fourth Ave., Phoenix, AZ 85004		
33 Shoreline Blvd., Foster City, CA 94404		
215 Fourth Ave., Phoenix, AZ 85004		
1225 NW 1733rd Blvd., Minneapolis, MN 55403		
3750 S. Hope Ave., St. Louis, MO 63005		

Now, use Home Tab > F	Fill > Flash Fill,	or the keyboard shortcut	[CTRL] + [E].
---------------------------------	--------------------	--------------------------	---------------



MACROS

To record a macro, turn on the **Developer Tab** by clicking **File Tab > Options > Customize Ribbon > Developer** checkbox marked:

Excel Options					?	×
Excel Options General Formulas Data Proofing Save Language Ease of Access Advanced Quick Access Toolbar Add-ins Trust Center	Customize the Ribbon. Choose commands from: Popular Commands Popular Commands All Chart Types Borders Calculate Now Center Conditional Formatting Copy Custom Sort Cut A Decrease Font Size Delete Sheet Columns Delete Sheet Columns Delete Sheet Columns Delete Sheet Columns Fill Color Font Font Font Color Font Size Format Painter Freeze Panes A Increase Font Size Insert Function T Insert Function Insert Sheet Columns Insert Sheet Columns	+ + +	Add >> << Remove	Customize the Rigbon: ① Main Tabs Main Tabs Main Tabs Decleground Removal Clipboard Font Clipboard Font Alignment Styles Cells Editing Page Layout Formulas Page Layout Page Layout Page Layout Add-ins Power View Power View Power View Power View Decloper Add-ins Power Group Renag Customizations	? * *	×
	Insert Table Macros Merge & Center	¥		Customizations: Reset		ancel
				UK		ancel

If your file is going to hold the macro, **File Tab > Save As > Excel Macro-Enabled Workbook** (.xlsm).



Now, press **Developer Tab > Record Macro**.

Visual Basic	Macros	E Record Macro C Use Relative References A Macro Security
		Code

Perform any steps you want.

Press **Developer Tab > Stop Recording**.



HIGHLIGHTING ISSUES

RANGE-BASED CONDITIONAL FORMATTING

Select your cells to be color-coded.

	А	В	С	D	E	F	G	Н	1	J	К	L	М	
1														
2						Sale	s Report							
3														
4	Salesperson:													
5														
6	Products	Products Q1			Q2			Q3		Q4				
7	7	January	February	March	April	May	June	July	August	September	October	November	December	
8	Product 1	\$ 82,500.00	\$ 80,025.00	\$ 83,226.00	\$ 86,555.04	\$ 82,227.29	\$ 85,516.38	\$ 88,937.03	\$ 90,715.78	\$ 86,179.99	\$ 86,179.99	\$ 85,318.19	\$ 87,877.73	
9	Product 2	\$ 68,500.00	\$ 71,925.00	\$ 70,486.50	\$ 71,191.37	\$ 67,631.80	\$ 66,955.48	\$ 64,946.81	\$ 64,297.35	\$ 62,368.43	\$ 62,368.43	\$ 61,744.74	\$ 64,831.98	
10	Product 3	\$ 68,000.00	\$ 65,280.00	\$ 62,016.00	\$ 59,535.36	\$ 59,535.36	\$ 58,344.65	\$ 58,928.10	\$ 58,928.10	\$ 61,285.22	\$ 58,220.96	\$ 55,892.12	\$ 58,686.73	
11	Product 4	\$139,700.00	\$146,685.00	\$151,085.55	\$157,128.97	\$149,272.52	\$155,243.42	\$161,453.16	\$163,067.69	\$158,175.66	\$155,012.15	\$159,662.51	\$151,679.39	
12	Product 5	\$117,800.00	\$113,088.00	\$115,349.76	\$114,196.26	\$110,770.37	\$106,339.56	\$103,149.37	\$108,306.84	\$105,057.64	\$ 99,804.75	\$101,800.85	\$104,854.87	
13	Product 6	\$141,200.00	\$142,612.00	\$136,907.52	\$141,014.75	\$143,835.04	\$143,835.04	\$138,081.64	\$139,462.46	\$140,857.08	\$138,039.94	\$138,039.94	\$142,181.14	
14														
15														

Click **Home Tab > Conditional Formatting**, and choose one of the **Color Scales**:

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enter 🔹 🤅	\$ ~ % • .0	.00. →.0	Conditional Formatting •	Format as Table •	Comma	[0]	Currency		Currency [(0]	Percent		
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			Color	<u>S</u> cales	×								
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5,555.04	\$ 82,227.29	\$	🔝 Manage	<u>R</u> ules		<u>۳</u> ډ د	JU,/1J./0	γ c	6,179.99	\$	86,179.99	\$	85
1,191.37	\$ 67,631.80	\$	66,955.48	8 \$ 6	4,946.81	L \$	64,297.35	\$ 6	52,368.43	\$	62,368.43	\$	61
9,535.36	\$ 59,535.36	\$	58,344.65	5\$5	8,928.10) \$	58,928.10	\$ 6	51,285.22	\$	58,220.96	\$	55
7,128.97	\$149,272.52	\$	155,243.42	2 \$16	1,453.16	5 \$1	163,067.69	\$15	58,175.66	\$1	155,012.15	\$1	159
4,196.26	\$110,770.37	\$	106,339.56	5 \$10	3,149.37	7 \$1	108,306.84	\$10	05,057.64	\$	99,804.75	\$1	101

FUNCTION-BASED CONDITIONAL FORMATTING

Select the cells to be color-coded.

	А	В	С	D	E	F	G	н	l l	J	K	L	M	N
1	First Name	Last Name	Street Address	City	State	ZIP	Phone Number	Department	Group	Yearly Salary	Date of Hire		State	Department
2	Caroline	Porter	215 Fourth Ave.	Phoenix	AZ	85004	4807752861	Finance	Corporate Finance	88800	40386		AZ	Finance
3	Katherine	Fuetsch	215 Fourth Ave.	Phoenix	AZ	85004	4807751247	Accounting	Accounts Payable	82800	37296			
4	Neil	Behr	215 Fourth Ave.	Phoenix	AZ	85004	4807754188	Human Resources	Policies and Benefits	102600	40603			
5	Edwin	MacMahon	215 Fourth Ave.	Phoenix	AZ	85004	4807753829	Finance	Risk Management	124500	36746		~	
6	Tara	Pearson	215 Fourth Ave.	Phoenix	AZ	85004	4807753311	Human Resources	Policies and Benefits	86600	37662		v	
7	Christina	Fox	33 Shoreline Blvd.	Foster City	CA	94404	5102105815	Information Technology	Hardware and Software	53600	40457			
8	Clara	Evans	215 Fourth Ave.	Phoenix	AZ	85004	4807751946	Marketing	Conventional Media	59400	38297			
9	Emma	Chen	1225 NW 1776th Blvd., Ste. 350	Minneapolis	MN	55403	6124006547	Production	Production	53000	40014			
10	Lily	Pfeffer	3750 S. Hope Ave.	St. Louis	MO	63005	3146705136	Information Technology	Hardware and Software	62100	41779			
11	Aiden	Davies	3750 S. Hope Ave.	St. Louis	MO	63005	3146702625	Marketing	Online Marketing	75100	40401			
12	Evelyn	Hayes	3750 S. Hope Ave.	St. Louis	MO	63005	3146704842	Human Resources	Policies and Benefits	103600	41679			
13	Tommie	Van Houten	1225 NW 1776th Blvd., Ste. 350	Minneapolis	MN	55403	6124002334	Accounting	Accounts Payable	77100	40507			
14	John	Chapman	3750 S. Hope Ave.	St. Louis	MO	63005	3146703716	Marketing	Online Marketing	62700	37102			
15	Kevin	Delgado	33 Shoreline Blvd.	Foster City	CA	94404	5102103262	Production	Production	75000	41408			
16	Lynne	Filkins	3750 S. Hope Ave.	St. Louis	MO	63005	3146705897	Accounting	Accounts Receivable	91400	36890			
17	Robyn	Finlayson	3750 S. Hope Ave.	St. Louis	MO	63005	3146703900	Finance	Corporate Finance	83700	39506			
18	Charie	Tramont	215 Fourth Ave.	Phoenix	AZ	85004	4807751302	Information Technology	Help Desk	45400	41229			
19	Andrea	Boyd	3750 S. Hope Ave.	St. Louis	MO	63005	3146704793	Accounting	Accounts Receivable	95900	41276			

Click Home Tab > Conditional Formatting, and choose New Rule...

≠		Normal						
Conditional	Format as	Neutra						
rormatting *	IdDle*							
Highlight Cells Rules								
Top/Bottom Rules								
<u> </u>								
Color Scales								
lcon	Sets	×						
🔝 New Ru	ıle							
😺 <u>C</u> lear R	ules	×						
Manag	e <u>R</u> ules							

Choose Use a formula to determine which cells to format.

New Forma	ew Formatting Rule									
<u>S</u> elect a Rule	: Type:									
🛏 Format a	II cells based on their values									
Format o	► Format only cells that contain									
Format o	► Format only top or bottom ranked values									
Format o	► Format only values that are above or below average									
🕨 Format o	only unique or duplicate values									
🛏 Use a fo	rmula to determine which cells to format									
Edit the Rule	Edit the Rule Description:									
	<u> </u>									
Preview:	No Format Set	Format.								
	ОК	Cance	el							

Build a logical function that will evaluate to TRUE for items that should be color-coded, and FALSE for items that shouldn't be color-coded. In this example, we're combining the state and department with the AND function:

New Format	tting Rule	?	\times							
<u>S</u> elect a Rule	Type:									
► Format a	Il cells based on their values									
► Format only cells that contain										
 Format only top or bottom ranked values 										
Format o	 Format only values that are above or below average 									
Format o	 Format only unique or duplicate values 									
🛏 Use a for	rmula to determine which cells to format									
Edit the Rule	e Description: lues where this formula is true:									
=AND(\$E2	=AND(\$E2=\$M\$2,\$H2,\$N\$2)									
Preview:	AaBbCcYyZz	<u>F</u> ormat	t							
	ОК	Cano	el							

PINPOINTING DUPLICATES

Click **Home Tab > Conditional Formatting > Highlight Cell Rules > Duplicate Values**.



FIXING CALCULATIONS

FORMULA AUDITING

If you're unsure what's happening with a calculation, try using **Trace Precedents** (Formulas Tab > Trace Precedents) to see what references are feeding into the function. This will demonstrate whether the references are accurate.



To see where a function breaks, click **Formulas Tab > Evaluate Formula**, and evaluate the segments of the function.

😳 Trace Precedents	强 Show Formulas	=					
📲 Trace Dependents	Error Checking 🔹	60	_				
🔀 Remove Arrows 🔹	🕭 Evalurte Formula	Window	C				
For	mula Auditing						
Evaluate Formula							
G les Report	Debug a complex for evaluating each part individually. Stepping formula part by part verify it's calculating	mula, of the form g through th can help yo correctly.	ula ne u				

IFERROR NESTING

If you know that your use of AVERAGE, VLOOKUP, or other function may result in an error, you can handle that by nesting the function within the IFERROR function:

=IFERROR(AVERAGE(C8:C13),0)

Setting the 'if error' value will make the output more user-friendly.

MICROSOFT POWERPOINT

Make your presentations better and more consistent with these tools.

GETTING RID OF BULLET POINTS

SMARTART

Click within a set of bullet points, so the blinking cursor appears within the textbox:



Now, click **Home Tab > Convert to SmartArt**, and choose the diagram type that best illustrates the context of the bullets.



SPEAKER NOTES

Select your bulleted text, and use **[CTRL] + [X]** to cut the content from the slide.



Expand your Speaker Notes area at the bottom of the screen, and use **[CTRL] + [V]** to paste the content into the Speaker Notes area. You can elaborate on your content here, since it doesn't have to be read during the presentation.

5 * Terrar (* 1997) * Terrar (*			¥ \$
6 Idea 7 med	a #1 Subordinate Thought A Subordinate Thought B a #2 Subordinate Thought C S(ICtrl) -	I	

To use these notes for others after the session, click **File Tab > Export > Handouts > Create Handouts**, and the slides and notes will be put into a Word handout format.

Info	Export
New Open	Create Adobe PDF Create Adobe PDF Create Handouts in Microsoft Word Put slides and notes in a Word document Edit and format content in Word
Save Save As	Create PDF/XPS Document Automatically update slides in the handout when the presentation changes
Save as Adobe PDF	Create a Video
Print	Package Presentation for CD
Export	Create Handouts

FORMATTING

THEMES

To create an Office Theme, click **Design Tab > Variants** and choose **Customize** for Fonts and Colors:



Then click **Design Tab > Themes > Save Current Theme** to save the changes you've made.



SLIDE MASTERS

To affect all the slides in the presentation, click **View Tab > Slide Master**.

		# 🗖	5 - 0	<u>-</u>							
File	Home	Inse	rt Design	ı Tra	nsitions	Anim	ations	Slide Show	Revi	ew V	iew
Normal	Outline S View So	ilide No	tes Reading ge View	Slide Mastar	Handout Master	Notes Master	✓ RulerGridlinGuide	nes Notes	Zoom	Fit to Window	
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Find the topmost slide (the *slide master* for the presentation). Any aesthetic changes you make here (font, positioning, color) will then filter to the *slide layouts* and ultimately the actual slides of the presentation.



SLIDE LAYOUTS

To affect the layout of a particular slide type, click **View Tab > Slide Layout**.

The program will automatically choose the layout that's applied to your current slide. If necessary, navigate to the layout you're interested in.

Finally, any aesthetic changes you make to this layout will make the changes *away* from the choices made in the slide master, and affect the slides that use that layout.

TEMPLATES

To save Themes, Masters, Layouts, *and* content for a presentation starting point, click **File Tab > Save As > PowerPoint Template (.potx)**.

