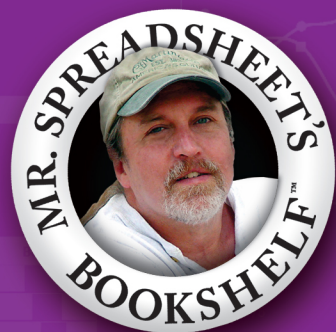


# 101 <sup>Microsoft®</sup> Excel 2013 Tips, Tricks & Timesavers

John Walkenbach



WILEY





# John Walkenbach's **101 Excel® 2013 Tips, Tricks & Timesavers**

by John Walkenbach

**WILEY**

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## Publisher's Acknowledgments

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# INTRODUCTION

Excel is a very popular program. Millions of people throughout the world use it on a regular basis. But it's a safe bet that the vast majority of users have yet to discover some of the amazing things this product can do. If I've done my job, you'll find enough useful information in this book to help you use Excel on a new level.

## What You Should Know

This book isn't a beginner's guide to Excel. Rather, it's a book for those who already use Excel but realize that they have a lot more to learn. This book contains 101 tips and tricks that I've learned over the years, and I'm certain that about 99 percent of all Excel users will find something new and useful in these pages.

If you have absolutely no experience with Excel, this book might not be the best choice for you. To get the most out of this book, you should have some background in using Excel. Specifically, I assume that you know how to accomplish the following tasks with Excel:

- Create workbooks, insert worksheets, save files, and perform other basic tasks.
- Navigate through a workbook.
- Use the Excel Ribbon and dialog boxes.
- Use basic Windows features, such as file management and copy-and-paste techniques.

## What You Should Have

To use this book, you need a copy of Microsoft Excel 2013 for Windows. If you use an older version of Excel, some of the tips won't apply.

As far as hardware goes for the computer you use to run Excel, the faster, the better. And, of course, the more memory in your system, the happier you'll be.

# Conventions in This Book

Take a minute to skim this section and become familiar with some of the typographic conventions used throughout this book.

## Formula listings

Formulas usually appear on a separate line in monospace font. For example, I might list the following formula:

```
=VLOOKUP (StockNumber, PriceList, 2, False)
```

Excel supports a special type of formula known as an *array formula*. When you enter an array formula, press Ctrl+Shift+Enter (not just Enter). Excel encloses an array formula in curly braces to remind you that it's an array formula.



Note

Don't type the curly braces for an array formula. Excel puts them in automatically.

## Key names

Names of keys on the keyboard appear in normal type: for example, Alt, Home, PgDn, and Ctrl. When you need to press two or more keys simultaneously, the keys are connected with a plus sign: Press Ctrl+G to display the Go To dialog box.

## The Ribbon

Excel 2013 features the Ribbon user interface, which was introduced in Excel 2007.

When you need to select a command by using the Ribbon, I describe the command by using the tab name, the group name, and the command name: for example, Choose Home→Alignment→Wrap Text. This command translates to "Click the Home tab, locate the Alignment group, and then click the Wrap Text button."

Some commands use a drop-down Ribbon control. For example: Home→Styles→Conditional Formatting→New Rule. In this case, you need to click the down-pointing arrow on the Conditional Formatting control in order to access the New Rule command.

Many commands begin with the word File. Clicking the File tab takes you to the Backstage View.



## Functions, procedures, and named ranges

The names of the Excel worksheet functions appear in all uppercase letters: for example, “Use the SUM function to add the values in column A.”

Unless you’re dealing with text inside quotation marks, Excel isn’t sensitive to case. In other words, both the following formulas produce the same result:

```
=SUM (A1 : A50)  
=sum (a1 : a50)
```

Excel, however, converts the characters in the second formula to uppercase.

## Mouse conventions

The mouse terminology in this book is all standard fare: pointing, clicking, right-clicking, dragging, and so on. You know the drill.

## What the icons mean

Throughout this book, icons appear in the left margin to call your attention to points that are particularly important.



**Note**

I use Note icons to tell you that something is important — perhaps a concept that can help you master the task at hand or something fundamental for understanding subsequent material.



**Caution**

I use Caution icons when the operation I’m describing can cause problems if you’re not careful.



**Cross-Ref**

I use the Cross-Reference icon to refer you to other tips that have more to say on a particular topic.

# How This Book Is Organized

To provide some semblance of order, I grouped these tips and tricks into six parts:

- Part I: Workbooks and Files
- Part II: Formatting
- Part III: Formulas
- Part IV: Working with Data
- Part V: Tables and Pivot Tables
- Part VI: Charts and Graphics

## How to Use This Book

This book really isn't intended to be read from cover to cover, as you would read a novel — but I'm sure that some people will do so. More likely, you'll want to use it as a reference book and consult it when necessary. If you're faced with a challenging task, you may want to check the index first to see whether the book specifically addresses your problem. The order of the parts and tips is arbitrary. Most readers will probably skip around and pick up useful tidbits here and there.

There are also an additional 30 bonus tips that you'll find at [www.dummies.com/go/101excel2013tips](http://www.dummies.com/go/101excel2013tips).

## About the Power Utility Pak Offer

Toward the back of this book is a coupon that you can redeem for a discounted copy of my award-winning Power Utility Pak — a collection of useful Excel utilities, plus many new worksheet functions.

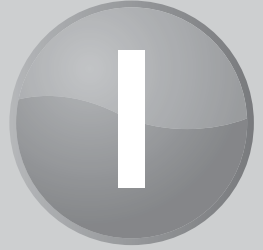
You can also use this coupon to purchase the complete VBA source code for a nominal fee. Studying the code is an excellent way to pick up some useful programming techniques. You can take the product for a test drive by downloading the trial version from my website at <http://spreadsheetpage.com>.



**Note**

**Power Utility Pak version 7 requires the Windows version of Excel 2007 or later.**

PART



# Workbooks and Files

In this part, you'll find tips and tricks covering some of the basics of Excel, including Protected View and AutoRecover, as well as working with the Quick Access toolbar and changing Excel's color scheme.

# Tips and Where to Find Them

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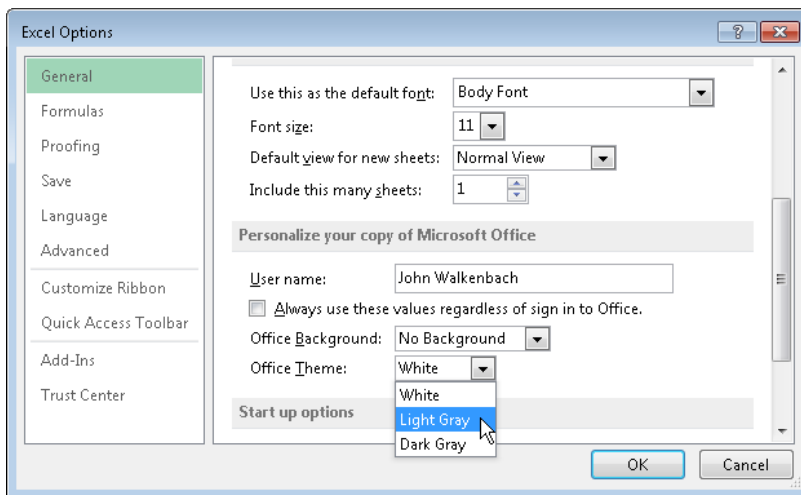
# Changing the Look of Excel

With Excel 2013, what you see isn't necessarily what you have to live with. This tip describes several ways to change the look of Excel. Some changes affect only the appearance. Other options allow you to hide various parts of Excel to make more room for displaying your data — or maybe because you prefer a less-cluttered look.

## Cosmetic changes

When the preview version of Microsoft Office 2013 became available, there was a minor uproar about its appearance. Compared to previous versions, the applications looked “flat” and many complained about the overall white color.

When the final version was released, Microsoft added two alternative Office themes: light gray and dark gray. To switch to a different theme, choose File→Options to display the Excel Options dialog box. Click the General tab and use the Office Theme drop-down list (see Figure 1-1). The theme choice affects the appearance of the title bar, row and column borders, task panes, the taskbar, and a few other items. The theme you choose applies to all other Office 2013 applications.

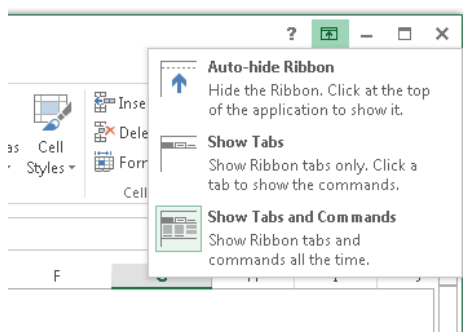


**Figure 1-1:** Selecting a different Office theme.

Figure 1-1 shows another option: Office Background. Use this drop-down list to select a background image that appears in the Excel title bar. Fortunately, one of the options is No Background.

## Hiding the Ribbon

To hide the Ribbon, click the Ribbon Display Options drop-down menu in the Excel title bar. You'll see the choices shown in Figure 1-2.



**Figure 1-2:** Choosing how the Ribbon works.

## Using options on the View tab

The View tab, shown in Figure 1-3, has three groups of commands that determine what you see onscreen.

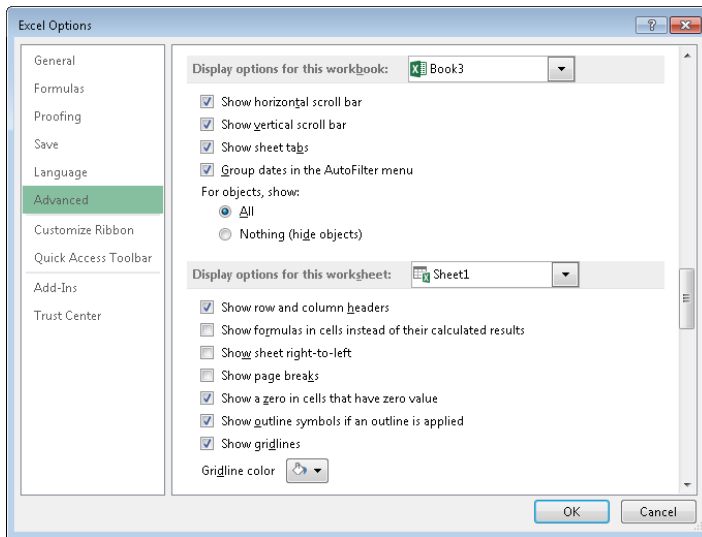
- **Workbook Views group:** These options control the overall view. Most of the time, you'll use Normal view. Page Layout view is useful if you require precise control over how the pages are laid out. Page Break Preview also shows page breaks, but the display isn't nearly as nice. The status bar has icons for each of these views. Custom Views enable you to create named views of worksheet settings (for example, a view in which certain columns are hidden).
- **Show group:** The four checkboxes in this group control the visibility of the Ruler (relevant only in Page Layout view), the Formula bar, worksheet gridlines, and row and column headings.
- **Zoom group:** These commands enable you to zoom the worksheet in or out. Another way to zoom is to use the Zoom slider on the status bar.



**Figure 1-3:** Controls on the View tab.

## Hiding other elements

To hide other elements, you must make a trip to the Advanced tab of the Excel Options dialog box (choose File→Options). Figure 1-4 shows workbook display options and worksheet display options. These options are self-explanatory.



**Figure 1-4:** Display options on the Advanced tab of the Excel Options dialog box.

## Hiding the status bar

You can also hide the status bar, at the bottom of the Excel window. Doing so, however, requires VBA code.

1. Press Alt+F11 to display the Visual Basic Editor.
2. Press Ctrl+G to display the Immediate window.
3. Type this statement and press Enter:

```
Application.DisplayStatusBar = False
```

The status bar will be removed from all open workbook windows. To redisplay the status bar, repeat those instructions, but specify True in the statement.

# Customizing the Quick Access Toolbar

If you find that you continually need to switch Ribbon tabs because a frequently used command never seems to be on the Ribbon that's displayed, this tip is for you. The Quick Access toolbar is always visible, regardless of which Ribbon tab is selected. After you customize the Quick Access toolbar, your frequently used commands will always be one click away.



Note

The only situation in which the Quick Access toolbar is not visible is when the title bar is hidden (by choosing Auto-Hide the Ribbon from the Ribbon Display Options drop-down list in the title bar).

## About the Quick Access toolbar

By default, the Quick Access toolbar is located on the left side of the Excel title bar, and it includes three tools:

- **Save:** Saves the active workbook.
- **Undo:** Reverses the effect of the last action.
- **Redo:** Reverses the effect of the last undo.

Commands on the Quick Access toolbar always appear as small icons, with no text. When you hover your mouse pointer over an icon, you see the name of the command and a brief description.

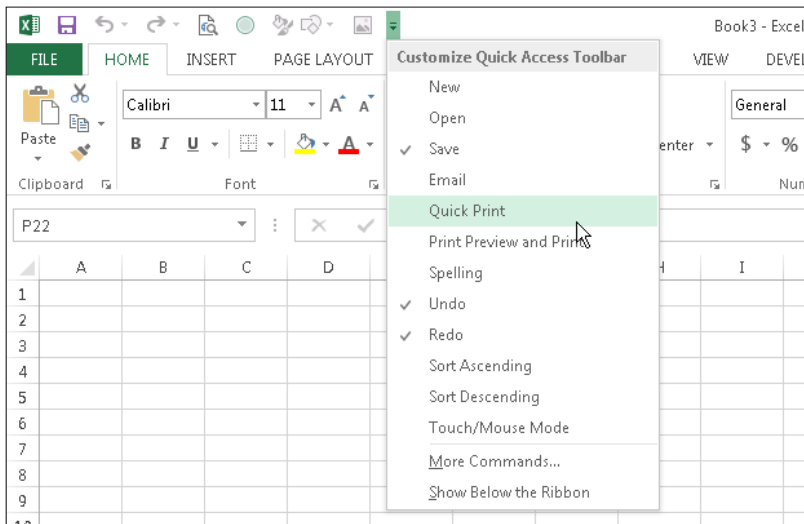
As far as I can tell, the number of icons that you can add to your Quick Access toolbar is limitless. But regardless of the number of icons, the Quick Access toolbar always displays a single line of icons. If the number of icons exceeds the Excel window width, it displays an additional icon at the end: More Controls. Click the More Controls icon, and the hidden Quick Access toolbar icons appear in a pop-up window.

## Adding new commands to the Quick Access toolbar

You can add a new command to the Quick Access toolbar in three ways:

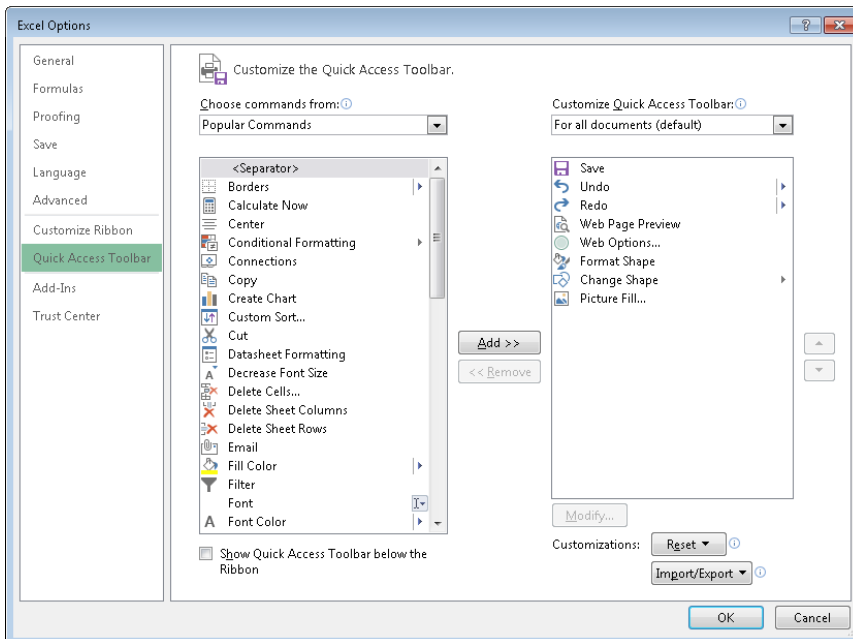
- Click the Quick Access toolbar drop-down control, which displays a down-pointing arrow and is located on the right side of the Quick Access toolbar (see Figure 2-1). The list contains several commonly used commands. Select a command from the list, and Excel adds it to your Quick Access toolbar.
- Right-click any control on the Ribbon and choose Add to Quick Access Toolbar. The control is added to your Quick Access toolbar, positioned after the last control.
- Use the Quick Access Toolbar tab of the Excel Options dialog box. A quick way to access this dialog box is to right-click any Quick Access toolbar or Ribbon control and choose Customize Quick Access Toolbar.





**Figure 2-1:** The Quick Access toolbar drop-down menu is one way to add a new command to the Quick Access toolbar.

Figure 2-2 shows the Quick Access Toolbar tab of the Excel Options dialog box. The left side of the dialog box displays a list of Excel commands, and the right side shows the commands that are now on the Quick Access toolbar. Above the command list on the left is a drop-down control that lets you filter the list. Select an item from the drop-down list, and the list displays only the commands for that item.



**Figure 2-2:** Use the Quick Access Toolbar tab in the Excel Options dialog box to customize the Quick Access toolbar.

Some of the items in the drop-down list are described here:

- **Popular Commands:** Displays commands that Excel users commonly use.
- **Commands Not in the Ribbon:** Displays a list of commands that you cannot access from the Ribbon.
- **All Commands:** Displays a complete list of Excel commands.
- **Macros:** Displays a list of all available macros.
- **File Tab:** Displays the commands available in the back stage window.
- **Home Tab:** Displays all commands that are available when the Home tab is active.

In addition, the drop-down list contains an item for every other tab.

Sometimes, you need to do some guessing to find a particular command. For example, if you want to add the command that displays the Excel Options dialog box, you can find it listed as Options, not Excel Options.



Note

Some commands simply aren't available. For example, I'd like the Quick Access toolbar to display the command to toggle the "dashed line" page break display on a worksheet. The only way to issue that command is to display the Advanced tab of the Excel Options dialog box and then scroll down until you find the Show Page Breaks checkbox. No command for doing so can be added to the Quick Access toolbar.

To add an item to your Quick Access toolbar, select it from the list on the left and click Add. If you add a macro to your Quick Access toolbar, you can click the Modify button to change the text and choose a different icon for the macro.

Notice the drop-down control above the list on the right. This lets you create a Quick Access toolbar that's specific to a particular workbook, which is most useful when you add workbook-specific macro commands to the Quick Access toolbar. Most of the time, you'll use the setting labeled For All Documents (Default).

The only time you ever need to use the Quick Access Toolbar tab of the Excel Options dialog box is when you want to add a command that's not on the Ribbon or add a command that executes a macro. In all other situations, it's much easier to locate the command on the Ribbon, right-click the command, and choose Add to Quick Access Toolbar.

Only you can decide which commands to put on your Quick Access toolbar. In general, if you find that you use a particular command frequently, it should probably be on your Quick Access toolbar.

## Performing other Quick Access toolbar actions

Here are some other things you can do with your Quick Access toolbar:

- **Rearrange the Quick Access toolbar icons.** If you want to change the order of your Quick Access toolbar icons, you can do so on the Customization tab of the Excel Options dialog box. Select the command and then use the up- and down-arrow buttons on the right to move the icon.
- **Display the Quick Access toolbar below the ribbon.** To change the position of the Quick Access toolbar, choose the down-pointing arrow control and select Show below the Ribbon.
- **Remove Quick Access toolbar icons.** The easiest way to remove an icon from your Quick Access toolbar is to right-click the icon and choose Remove from Quick Access Toolbar. You can also use the Quick Access Toolbar tab of the Excel Options dialog box. Just select the command in the list on the right and click the Remove button.
- **Share your Quick Access toolbar.** Use the Import/Export button to save a file that contains your Quick Access toolbar customization. You can then share this file with others. Unfortunately, this file also contains any Ribbon customizations that you might have made (see Tip 3). In other words, you can't share your Quick Access toolbar without also sharing your Ribbon customizations.
- **Reset the Quick Access toolbar.** If you want to return the Quick Access toolbar to its default state, display the Quick Access Toolbar tab in the Excel Options dialog box and click the Reset button and choose Reset Only Quick Access Toolbar. All your customizations disappear, and the Quick Access toolbar then displays its three default commands.

# Customizing the Ribbon

Tip 2 describes how to customize the Quick Access toolbar by adding Ribbon commands, but some users prefer to make some changes to the Ribbon itself.

You can customize the Ribbon in these ways:

- Add a new tab.
- Add a new group to tab.
- Add commands to a group.
- Remove groups from a tab.
- Remove commands from custom groups.
- Change the order of the tabs.
- Change the order of the groups within a tab.
- Change the name of a tab.
- Change the name of a group.
- Reset the Ribbon to remove all customizations.

That's a fairly comprehensive list of customization options, but you *cannot* do some actions:

- You cannot remove built-in tabs — but you *can* hide them.
- You cannot add commands to built-in groups.
- You cannot remove commands from built-in groups.
- You cannot change the order of commands in a built-in group.

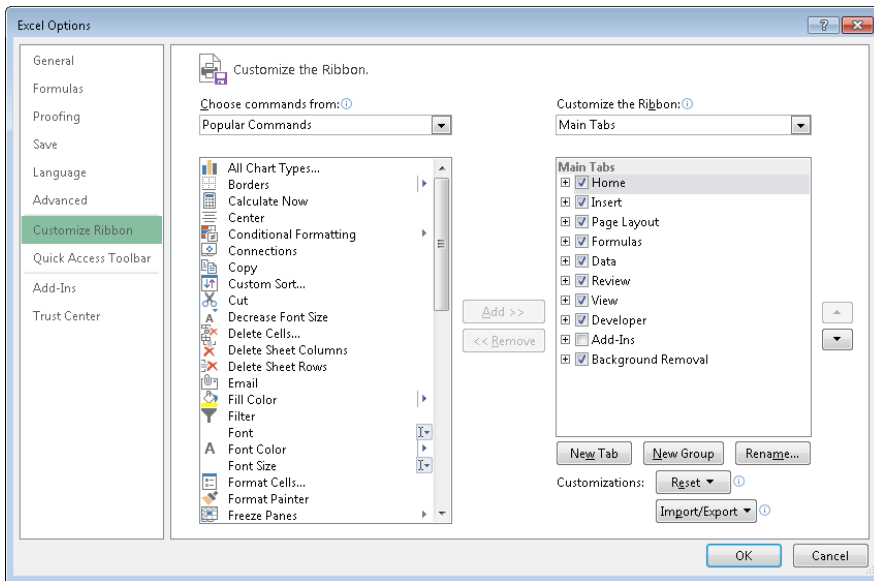


Note

Unfortunately, you can't customize the Ribbon (or Quick Access toolbar) by using VBA macros. However, developers can write RibbonX code and store it in workbook files. When the file is open, the Ribbon is modified to display new commands. Writing RibbonX is relatively complicated and is the subject of several complete books.

## How to customize the Ribbon

You customize the Ribbon in the Customize Ribbon tab of the Excel Options dialog box (see Figure 3-1). The quickest way to display this dialog box is to right-click anywhere in the Ribbon and choose Customize the Ribbon.



**Figure 3-1:** The Customize Ribbon tab of the Excel Options dialog box.

Customizing the Ribbon is very similar to customizing the Quick Access toolbar, which is described in Tip 2. The only difference is that you need to decide where to put the command within the Ribbon. Here's the general procedure:

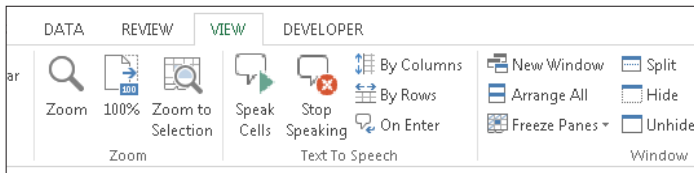
1. Right-click any part of the Ribbon, and choose Customize the Ribbon. Excel displays the Customize Ribbon tab of the Excel Options dialog box.
2. Use the drop-down list on the left (labeled Choose Command From) to display various groups of commands.
3. Locate the command you want in the list box on the left and select it.
4. Use the drop-down list on the right (labeled Customize the Ribbon) to choose a group of tabs.  
Main Tabs refers to the tabs that are always visible; Tool Tabs refers to the context tabs that appear when a particular object is selected.
5. In the list box on the right, select the tab and the group where you want to put the command.  
You must click the "plus sign" controls to expand the hierarchical lists. Remember that you cannot add commands to built-in groups, so you may need to use the New Tab or New Group buttons to add a tab or group.
6. Click the Add button to add the selected command from the left to the group on the right.

When you are finished making your Ribbon changes, click OK to close the Excel Options dialog box.

New tabs and groups are given generic names, so you'll probably want to give them more meaningful names. Use the Rename button to rename the selected tab or group. You can also rename built-in tabs and groups.

Although you cannot remove a built-in tab, you can hide the tab by unchecking the check box next to its name.

Figure 3-2 shows a part of a customized Ribbon. In this case, I added a group to the View tab. The new Text To Speech group has five commands. I inserted this new group between the Zoom and the Window groups.



**Figure 3-2:** The View tab, with a new group added.