

# **EXCEL: IMPROVE YOUR PROFICIENCY**

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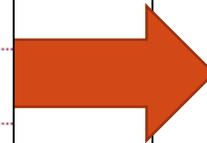
1

# #1 - HIDE GRIDLINES

Sometimes you just want the gridlines on an Excel worksheet to go away....

<u>T-Shirt Sizes</u>	<u>Qty on Hand</u>
Small	5
Medium	2
Large	12
X-Large	6
	<b>25</b>

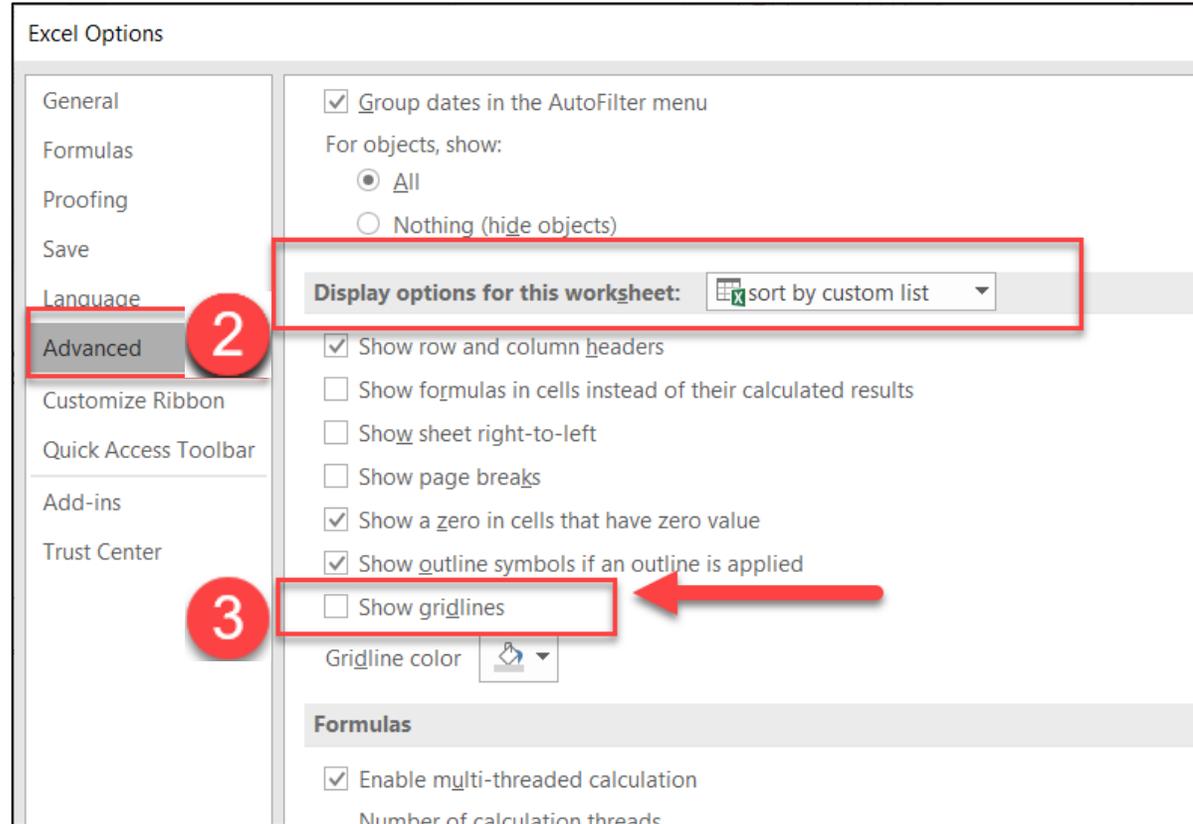
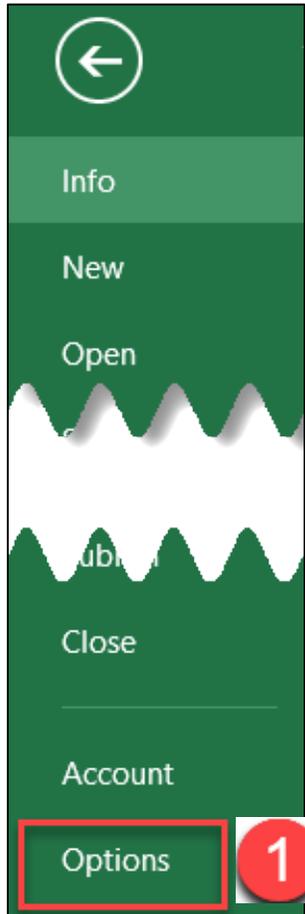
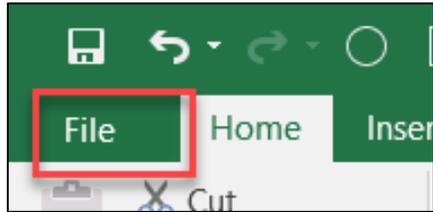
With gridlines



<u>T-Shirt Sizes</u>	<u>Qty on Hand</u>
Small	5
Medium	2
Large	12
X-Large	6
	<b>25</b>

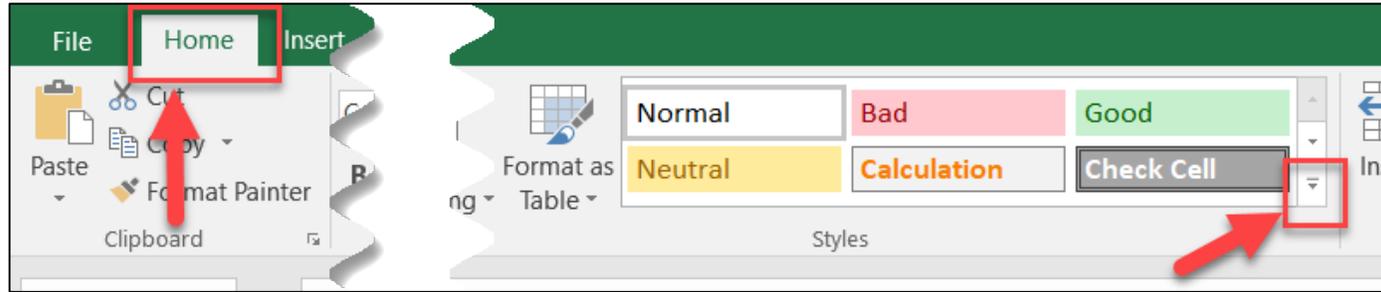
Without gridlines

# #1 - HIDE GRIDLINES



1. Select **Options** from the **File** tab
2. Select the **Advanced** area.
3. Uncheck **Show gridlines** in the **Display options for this worksheet** area

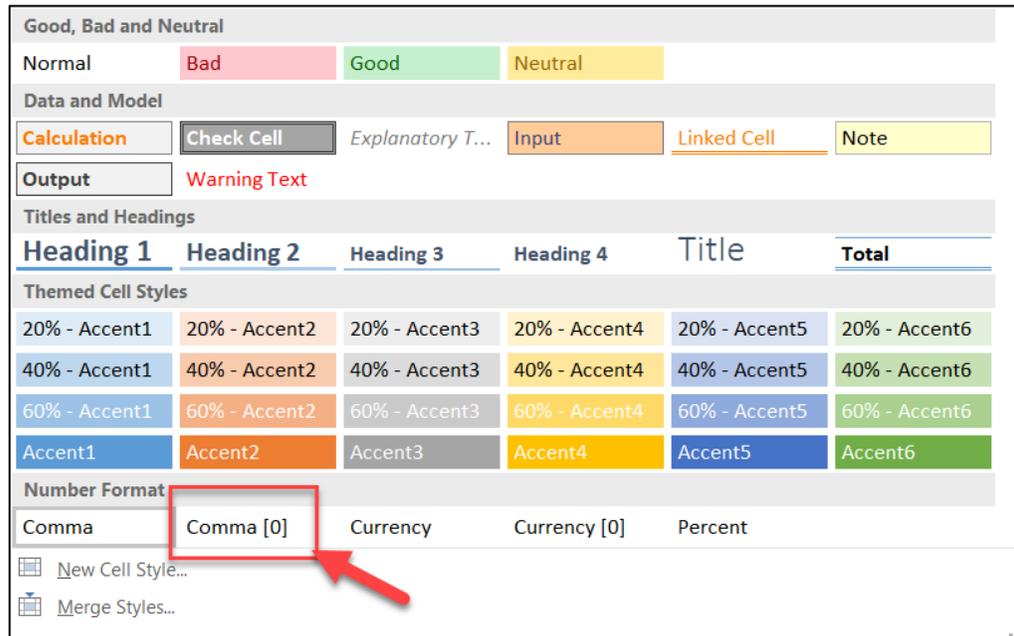
# #2 - COMMA FORMAT WITHOUT DECIMALS



**Description:** Use the preformatted style to format numbers with a comma but no decimals.

1. Expand your **Style** options on the **Home** tab

2. Select **Comma [0]**



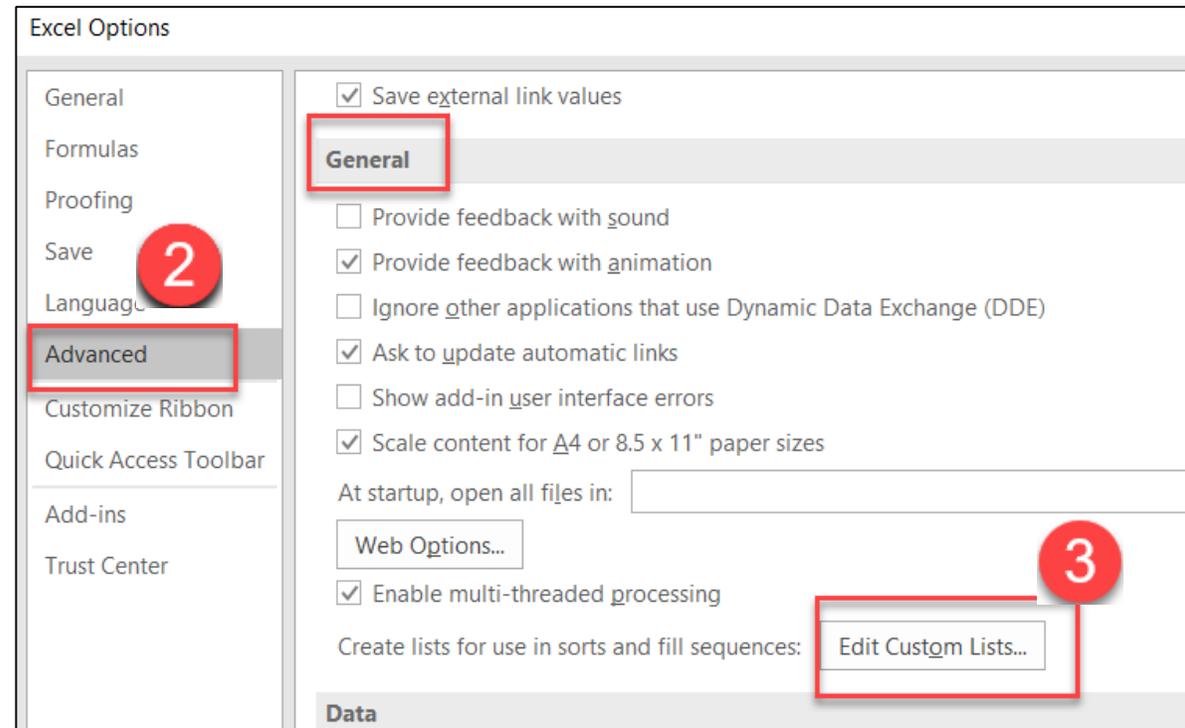
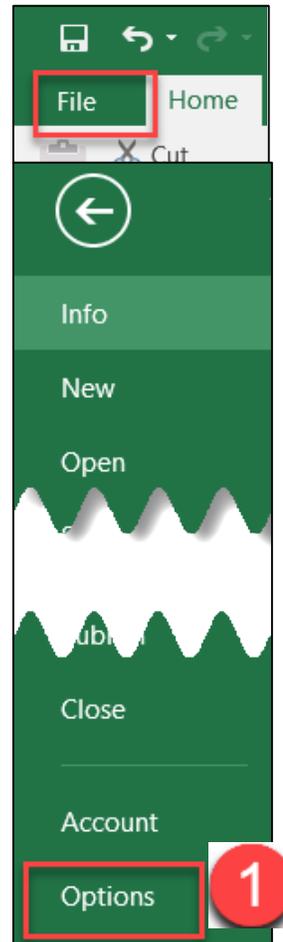
<u>T-Shirt Sizes</u>	<u>Qty on Hand</u>
Small	2,322
Medium	1,253
Large	560
X-Large	1,365
	5,500

# #3 - SORT BY CUSTOM LIST

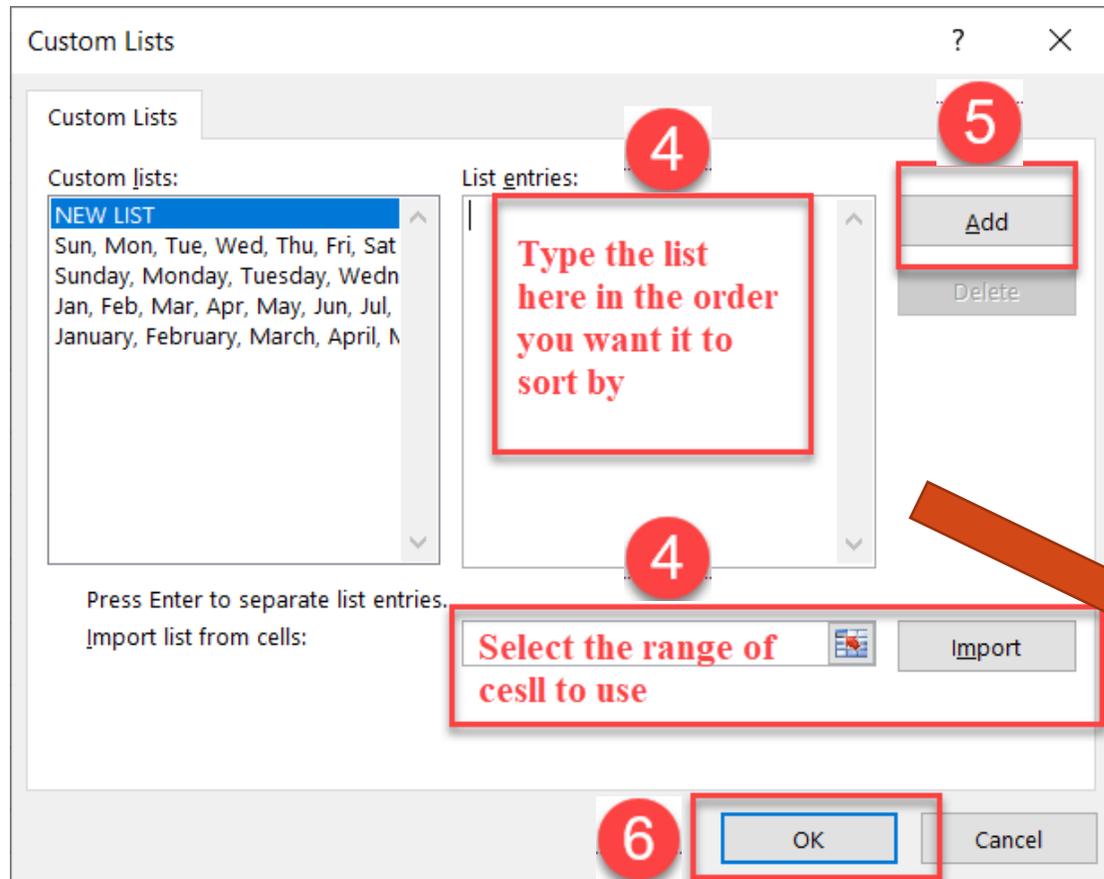
If you have a customized list, sorting the list in the traditional A → Z or Z → A will not always work. You can store the list as a “custom list” in Excel and use that to determine the sort order. This is a two part process: 1) Create the custom list and 2) Use the custom list for sorting.

## Create the Custom List:

1. Select **Options** from the **File** tab
2. Select the **Advanced** area.
3. Select **Edit Custom Lists** in the General area.



# #3 - SORT BY CUSTOM LIST



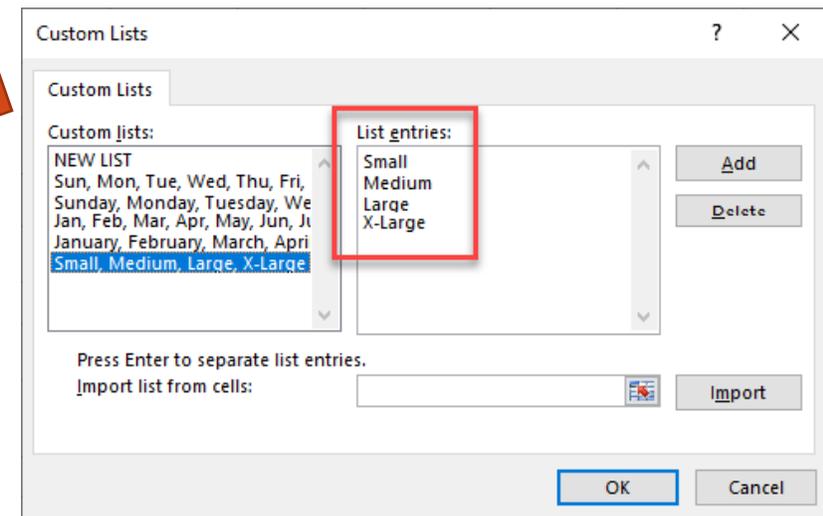
4. Create your custom list by either

- Entering the list in the **list entries** area separating each item by a comma or placing each item on a separate line or by
- **Importing** a list from Excel

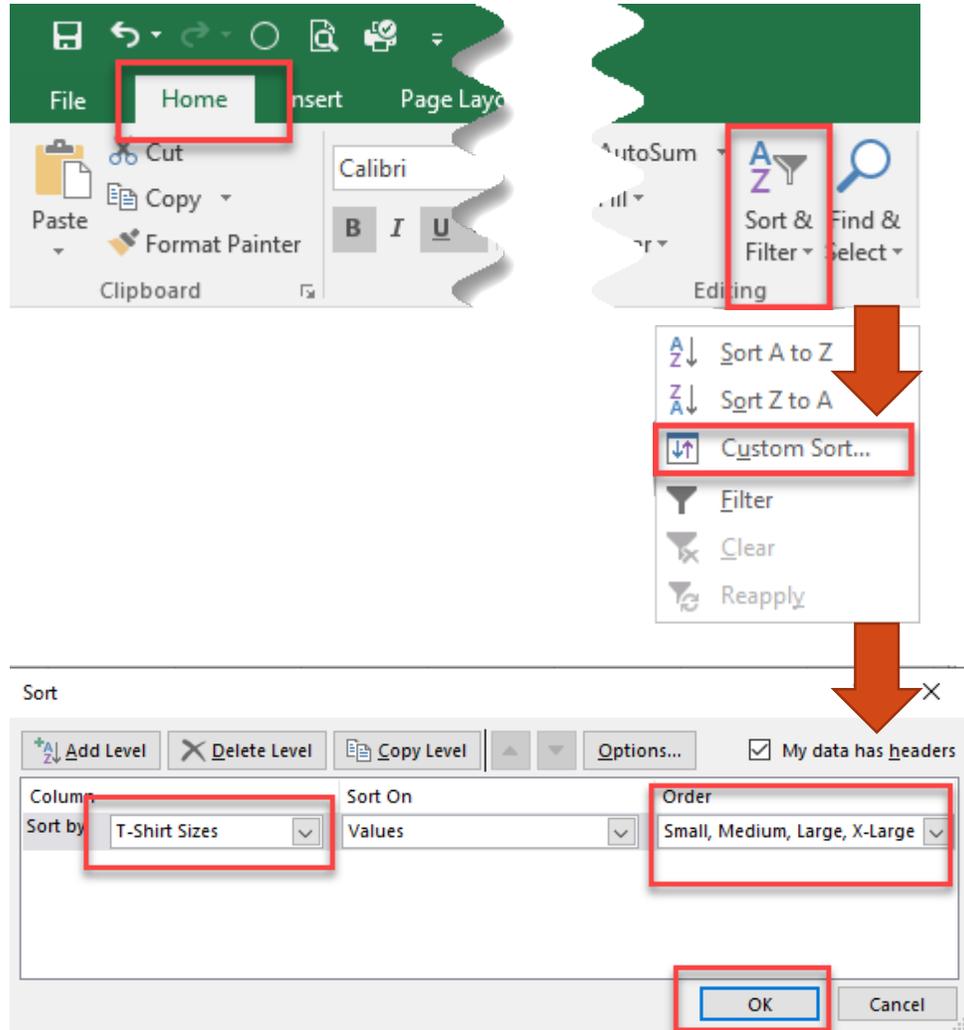
**NOTE:** The order of list with determine the sort order

5. Click **Add**

6. Click **OK**



# #3 - SORT BY CUSTOM LIST



## Sort a list by the customer order

- Select the data you want to sort in Excel
- Select **Sort & Filter** from the **Home** tab
- Select **Custom Sort**
- Select **your custom list** in the **Sort by** field.
- Select the Order
- Click **OK**

<u>T-Shirt Sizes</u>	<u>Qty on Hand</u>
Large	12
X-Large	6
Small	45
Medium	5
	<b>68</b>

Before

<u>T-Shirt Sizes</u>	<u>Qty on Hand</u>
Small	45
Medium	5
Large	12
X-Large	6
	<b>68</b>

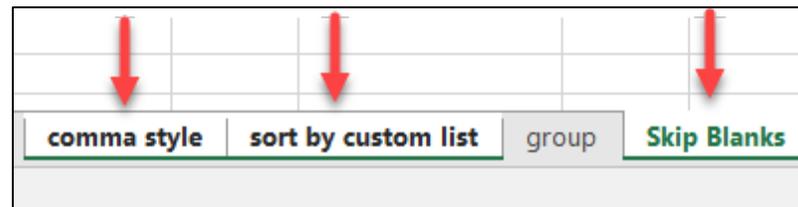
After

# #4 - GROUP SHEETS

- If you would like to apply a change to multiple worksheets at one time you can select all the worksheets as a **Group**. Changes made on one worksheet will transfer to all selected worksheets.
- Select the first worksheet in the group, and while holding down the **Shift** key (if the worksheets are next to each other) or the **Ctrl** key (if the worksheets are not next to each other) select the remaining worksheets you would like grouped together.

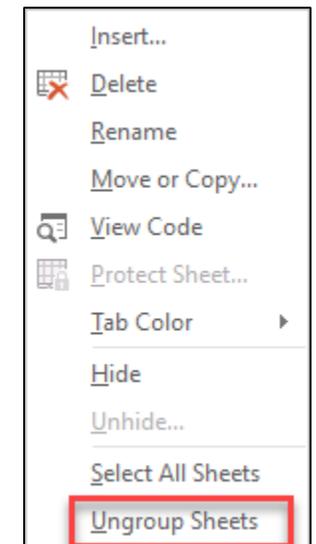


Worksheets selected right next to each other



Worksheets selected that are not right next to each other

- Make your edits or your changes.
- To Ungroup the worksheets after the changes are made, **Right-click** on any of the worksheet names in the group and select **Ungroup Sheets**.



# #5 COPY - SKIP BLANKS

- The Paste Special feature **Skip Blanks** allows you to select a set of data that contains blanks and paste only the fields with data to the destination cells.

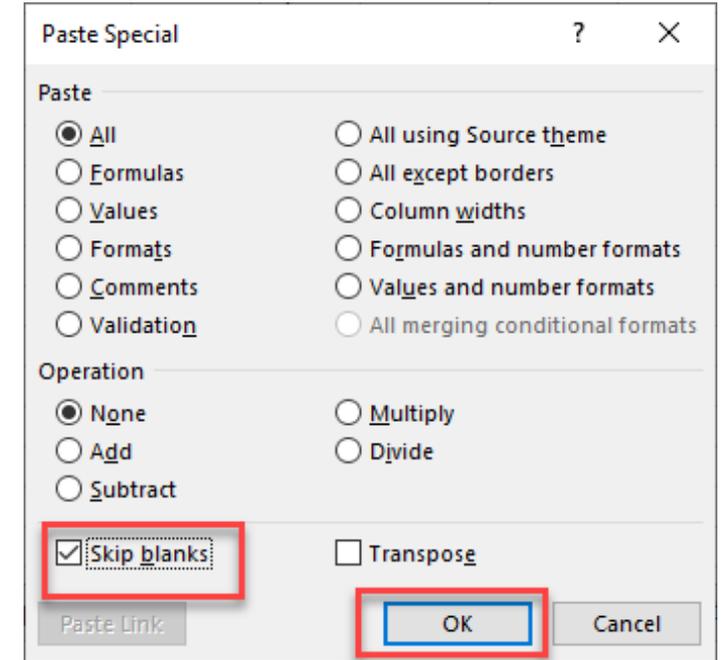
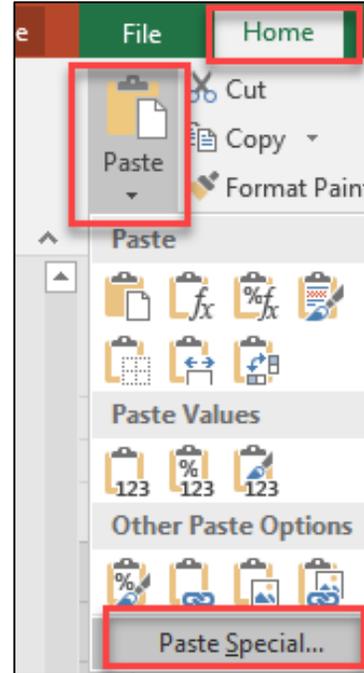
Part Number	Sales Price		Updated Price
INV-101	\$ 2.00	←	\$ 2.50
INV-102	\$ 0.75		
INV-103	\$ 8.50		
INV-104	\$ 5.75	←	\$ 6.25
INV-105	\$ 2.25		
INV-106	\$ 3.00		
INV-107	\$ 7.00		
INV-108	\$ 9.00		
INV-109	\$ 4.57	←	\$ 6.00
INV-110	\$ 44.00		
INV-111	\$ 38.00	←	\$ 47.00
INV-112	\$ 8.99		
INV-113	\$ 6.75		
INV-114	\$ 0.99		
INV-115	\$ 1.25		
INV-116	\$ 53.00		
INV-117	\$ 12.00		

Part Number	Sales Price		Updated Price
INV-101	\$ 2.50	←	\$ 2.50
INV-102	\$ 0.75		
INV-103	\$ 8.50		
INV-104	\$ 6.25	←	\$ 6.25
INV-105	\$ 2.25		
INV-106	\$ 3.00		
INV-107	\$ 7.00		
INV-108	\$ 9.00		
INV-109	\$ 6.00	←	\$ 6.00
INV-110	\$ 44.00		
INV-111	\$ 47.00	←	\$ 47.00
INV-112	\$ 8.99		
INV-113	\$ 6.75		
INV-114	\$ 0.99		
INV-115	\$ 1.25		
INV-116	\$ 53.00		
INV-117	\$ 12.00		

# #5 COPY - SKIP BLANKS

To copy and paste while skipping blanks, follow these steps:

1. Select the cells that you want to copy including the blanks.
2. Select **Ctrl-C** (or Copy)
3. Select the first cell location where the data will be pasted
4. Select the dropdown on **Paste**
5. Select **Paste Special**
6. Select **Skip Blanks**
7. Click **OK**

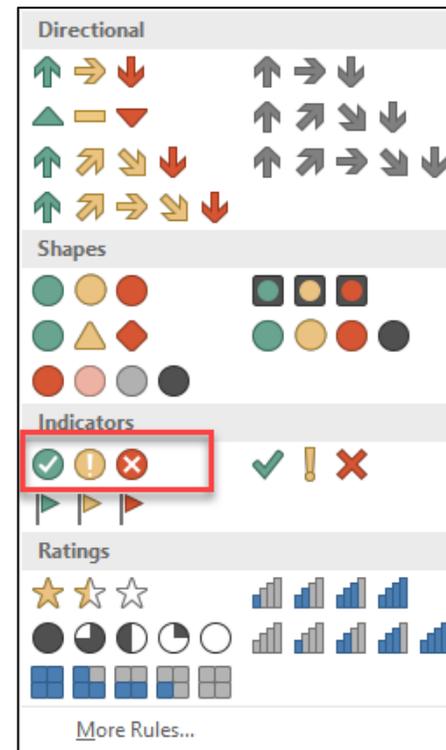
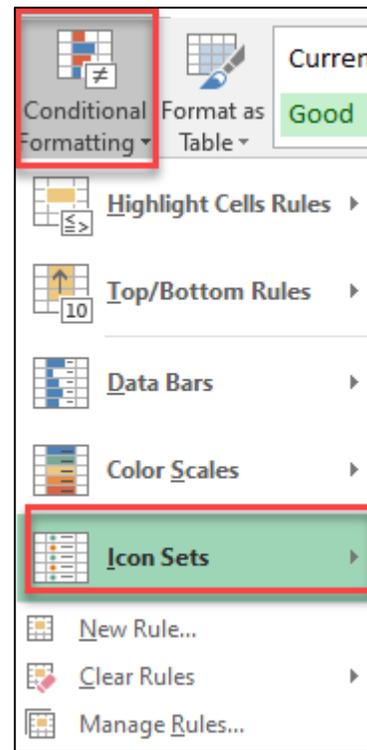


# #6 CONDITIONAL FORMATTING — ICON SET

You can use Icon Sets paired with Conditional Formatting to visualize your data.

- To set-up conditional formatting, select the cells that you would like to apply the format to.
- Select **Conditional Formatting** from the Home tab
- Select **Icon Sets**
- Select your desired icon set

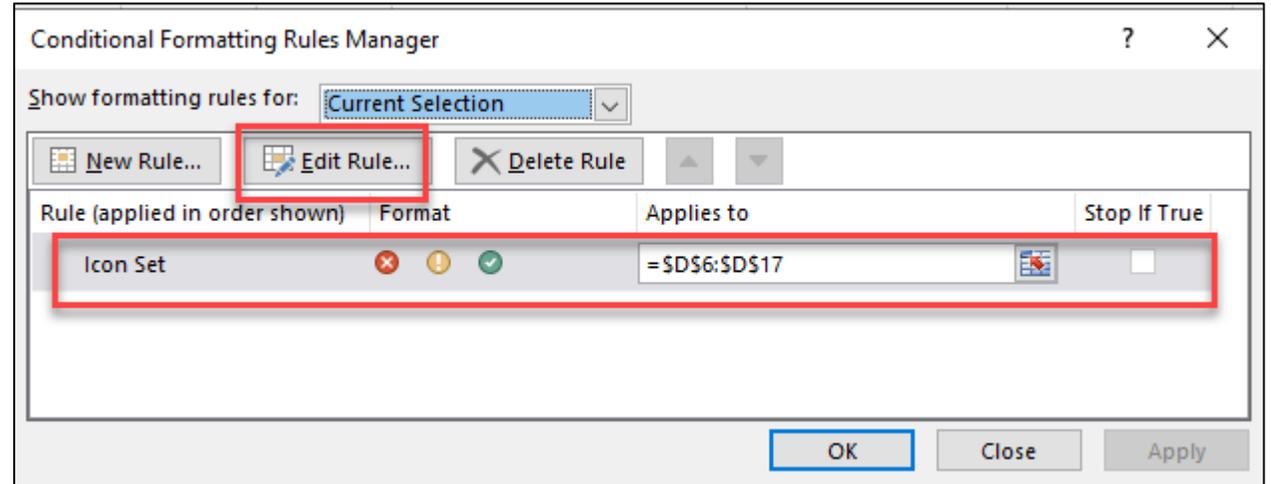
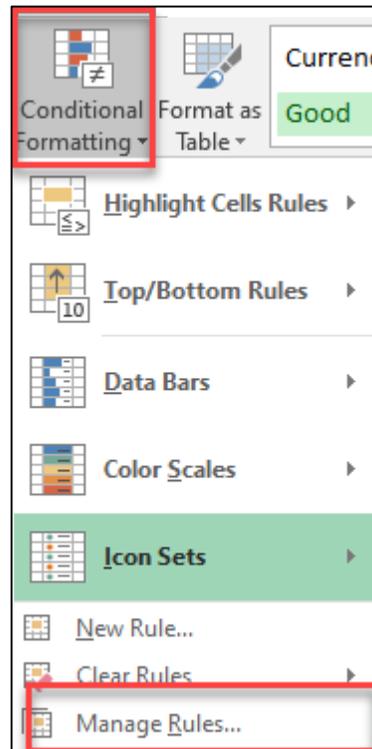
Customers	Invoice Date	Due Date	Days Past Due
Jane Smith	2/28/2020	3/29/2020	33
Bob James	3/15/2020	4/14/2020	17
Fred Johnson	4/15/2020	5/15/2020	(14)
Samantha Cricket	2/8/2020	3/9/2020	53
Cynthia O'Neil	12/15/2019	1/14/2020	108
Maria Sanchez	3/7/2020	4/6/2020	25
Hector Rubio	3/28/2020	4/27/2020	4
Robert Dove	4/7/2020	5/7/2020	(6)
Justin Drake	3/22/2020	4/21/2020	10
Leslie Kim	12/29/2019	1/28/2020	94
Matt Sanchez	4/15/2020	5/15/2020	(14)
Seth Applegate	4/12/2020	5/12/2020	(11)



# #6 CONDITIONAL FORMATTING — ICON SET

To define the rules for how to apply the formatting we need to edit the conditional formatting rule:

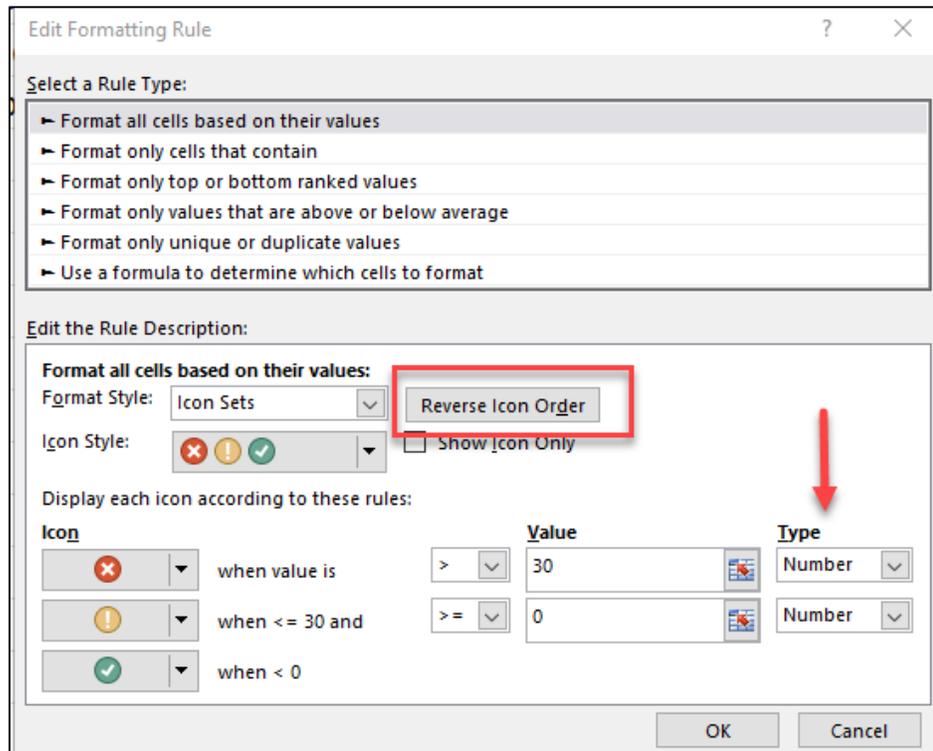
- Select **Manage Rules** from the **Conditional Formatting** selection box.
- Select your **rule**
- Select **Edit Rule**



# #6 CONDITIONAL FORMATTING – ICON SET

For this situation we are applying icons to the number of days past due for an invoice.

- For this situation we display the icons in **Reverse Icon Order** and selected to determine the ranges based on a **Number** type.



Customers	Invoice Date	Due Date	Days Past Due
Jane Smith	2/28/2020	3/29/2020	✖ 33
Bob James	3/15/2020	4/14/2020	! 17
Fred Johnson	4/15/2020	5/15/2020	✔ (14)
Samantha Cricket	2/8/2020	3/9/2020	✖ 53
Cynthia O'Neil	12/15/2019	1/14/2020	✖ 108
Maria Sanchez	3/7/2020	4/6/2020	! 25
Hector Rubio	3/28/2020	4/27/2020	! 4
Robert Dove	4/7/2020	5/7/2020	✔ (6)
Justin Drake	3/22/2020	4/21/2020	! 10
Leslie Kim	12/29/2019	1/28/2020	✖ 94
Matt Sanchez	4/15/2020	5/15/2020	✔ (14)
Seth Applegate	4/12/2020	5/12/2020	✔ (11)

# #7 - #DIV/0! ERROR

In Excel you will get a #DIV/0! error when the denominator of a formula is a zero. How can we hide this, since this error indicator does not look good in a presentation.

<b>Profit and Loss</b>				
<b>March 2020</b>				
	<b>Feb-20</b>	<b>Mar-20</b>	<b>\$ Change</b>	<b>% Change</b>
<b>Income</b>				
<b>400 Tutoring Revenue</b>	2,995.00	2,655.00	\$ (340.00)	-11%
<b>405 Workshops Revenue</b>	3,750.00	4,000.00	\$ 250.00	7%
<b>408 Training</b>	0.00	1,450.00	\$ 1,450.00	#DIV/0!
<b>420 Sales of Product</b>				
<b>Income</b>	1,227.00	4,983.00	\$ 3,756.00	306%
<b>480 Markup Income</b>		34.71	\$ 34.71	#DIV/0!
<b>490 sales discount</b>	-175.00	-220.75	\$ (45.75)	26%
<b>Total Income</b>	<b>\$ 7,797.00</b>	<b>\$12,901.96</b>		

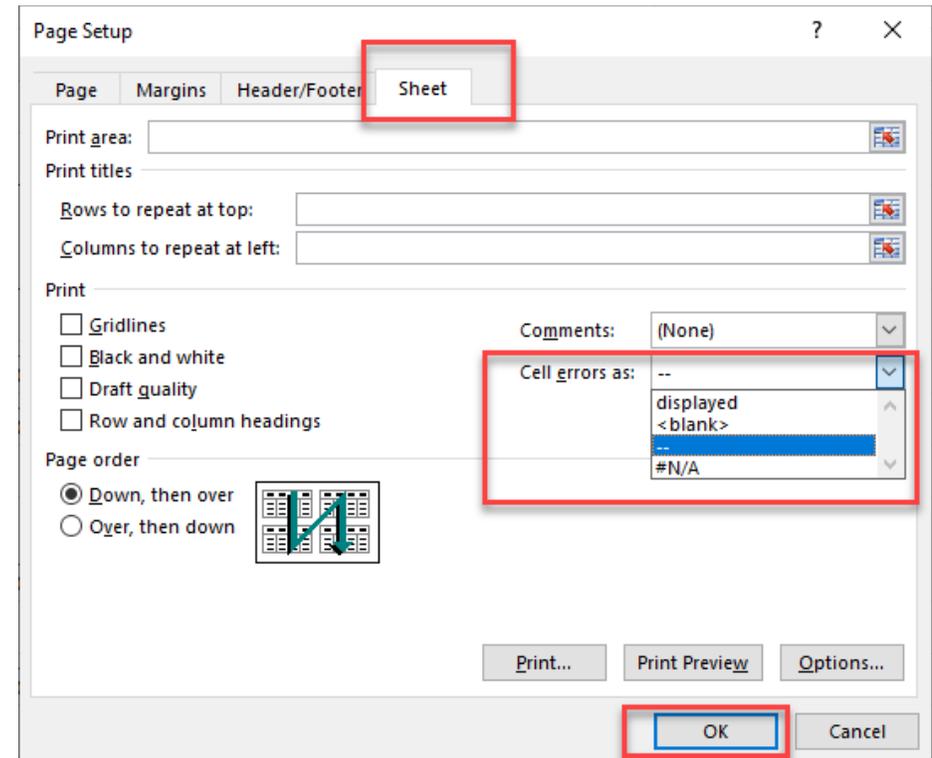
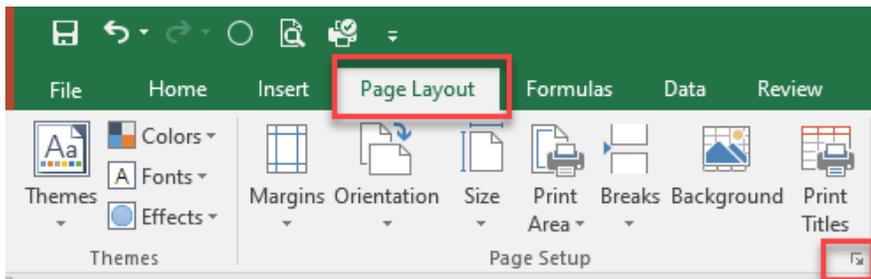
# #7 - #DIV/0! ERROR

You have two options to hide the error:

## Option #1 – Hide when printing:

- Select the **Page Layout** tab on your ribbon
- Expand the Page Layout options
- Select the **Sheet** tab
- In the **Cell errors as** dropdown – select your choice

**NOTE:** The error will still show on your screen but not when you print



# #7 - #DIV/0! ERROR

## Option #2 – Use an IFERROR formula

- The IFERROR formula evaluates the result of a nested formula and if the result is an error (TRUE) then Excel will place the data after the comma in the cell with the error.
- If the result of the IFERROR evaluation is not an error (FALSE) then Excel will perform the calculation.

	Feb-20	Mar-20	\$ Change	% Change
<b>Income</b>				
400 Tutoring Revenue	2,995.00	2,655.00	\$ (340.00)	-11%
405 Workshops Revenue	3,750.00	4,000.00	\$ 250.00	7%
408 Training	0.00	1,450.00	\$ 1,450.00	--
420 Sales of Product				
Income	1,227.00	4,983.00	\$ 3,756.00	306%
480 Markup Income		34.71	\$ 34.71	--
490 sales discount	-175.00	-220.75	\$ (45.75)	26%
<b>Total Income</b>	<b>\$ 7,797.00</b>	<b>\$12,901.96</b>		

**=IFERROR  
(D9/C9,"--")**

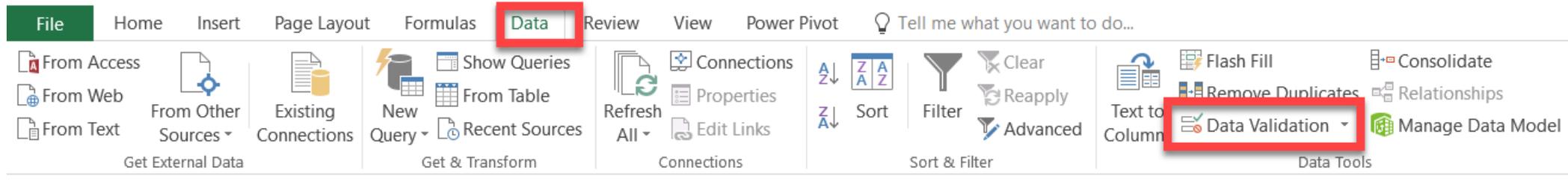
# #8 - DATA VALIDATION

You can check the input of data that is being entered into a worksheet to reduce input errors

EE Name	EE ID	Pay Rate	Hours Worked	Total Pay
Fred	1234	\$ 22.50		\$ -
Bobx	4567	\$ 35.00		\$ -
Sara	5456	\$ 12.50		\$ -
Jen	3541	\$ 15.00		\$ -

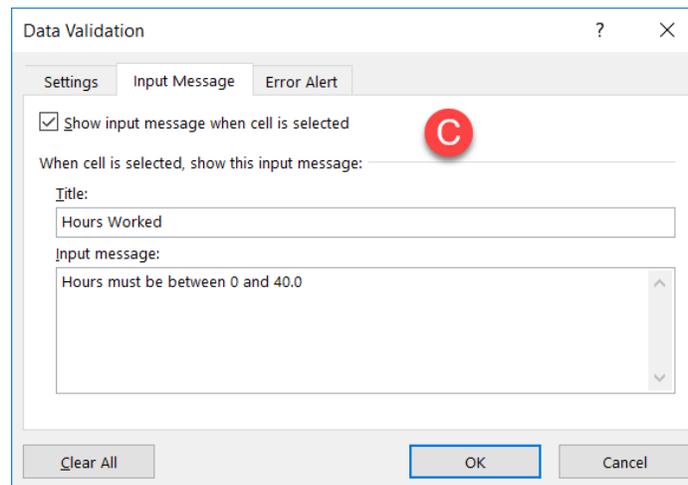
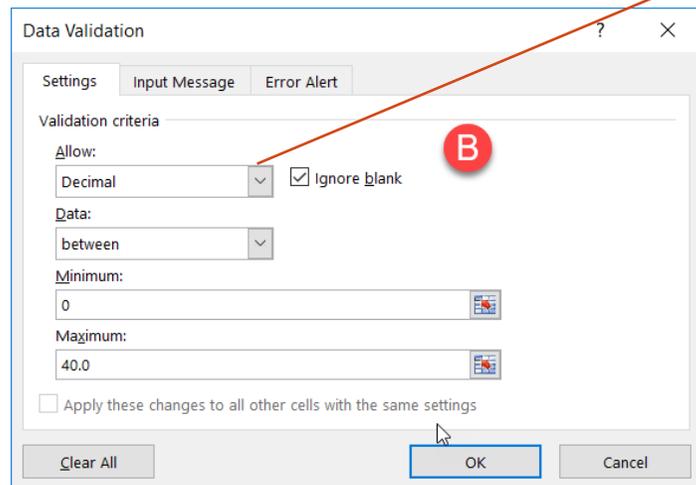
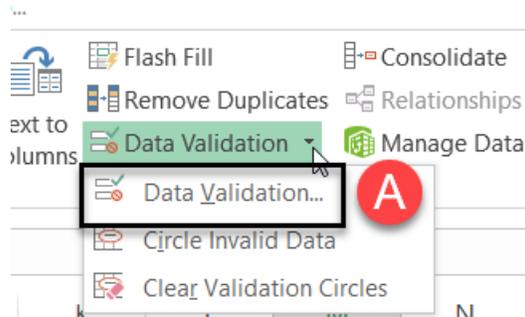
We want to validate the date input in hours worked column

Data validation options are located on the Data tab on the Ribbon in the Data Tools Group



# #8 - DATA VALIDATION

- Select the cell(s) you want to be validated and select **Data Validation** from the Data Validation drop down option.
- On the setting tab, determine the input criteria for data that you want to allow.
- Enter any helpful messages for the user on the Input Message tab



## What you can ALLOW:

**Any Value** - no validation is performed.

**Whole Number** - only whole numbers are allowed.

**Decimal** - works like the whole number option, but allows decimal values. For example, with the Decimal option configured to allow values between 0 and 3, values like .5, 2.5, and 3.1 are all allowed.

**List** - only values from a predefined list are allowed. The values are presented to the user as a dropdown menu control. Allowed values can be hardcoded directly into the Settings tab, or specified as a range on the worksheet.

**Date** - only dates are allowed.

**Time** - only times are allowed. For example, you can require a time between 9:00 AM and 5:00 PM, or only allow times after 12:00 PM.

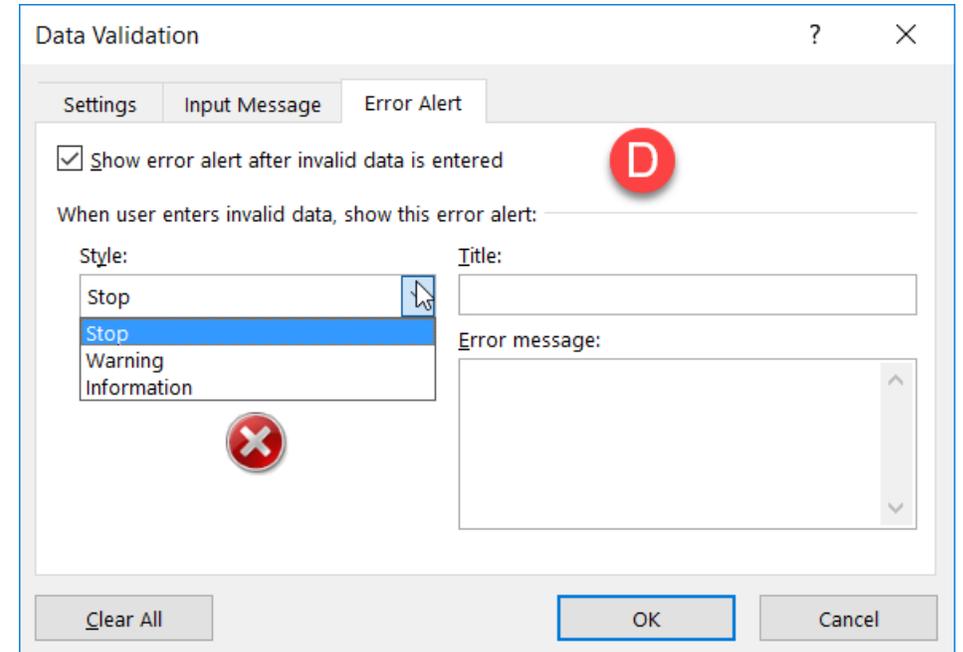
**Text length** - validates input based on number of characters or digits. For example, you could require code that contains 5 digits.

**Custom** - validates user input using a custom formula. In other words, you can write your own formula to validate input.

# #8 - DATA VALIDATION

D. Determine how to respond to incorrect or invalid data entry:

Alert Style	Behavior
<b>Stop</b>	Stops users from entering invalid data in a cell. Users can retry, but must enter a value that passes data validation. The Stop alert window has two options: Retry and Cancel.
<b>Warning</b>	Warns users that data is invalid. The warning does nothing to stop invalid data. The Warning alert window has three options: Yes (to accept invalid data), No (to edit invalid data) and Cancel (to remove the invalid data).
<b>Information</b>	Informs users that data is invalid. This message does nothing to stop invalid data. The Information alert window has 2 options: OK to accept invalid data, and Cancel to remove it.



# #9 - HYPERLINKS

You can create a table of contents within Excel. By utilizing hyperlinks users can jump to specific worksheets quickly.

To insert a hyperlink to another worksheet:

1. Select the cell where you want the hyperlink
2. Select **Hyperlink** from the **Insert** tab on the ribbon.
3. Select **Place In This Document**
4. Add a good description in the **Text to display**
5. Select the worksheet reference in **Cell Reference**
6. Select **OK**

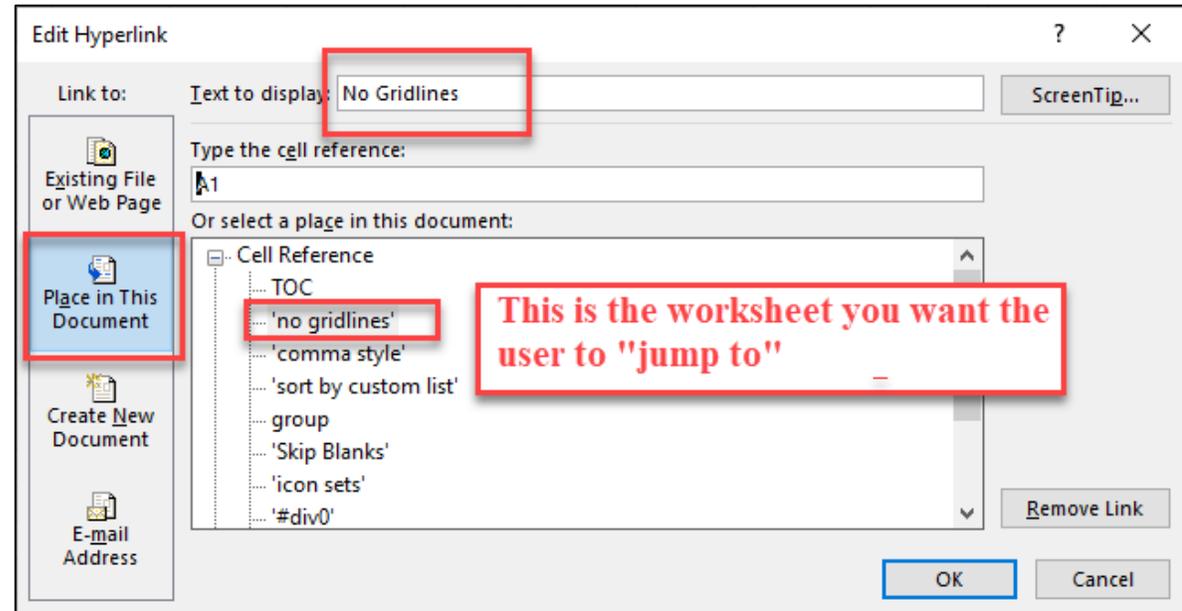
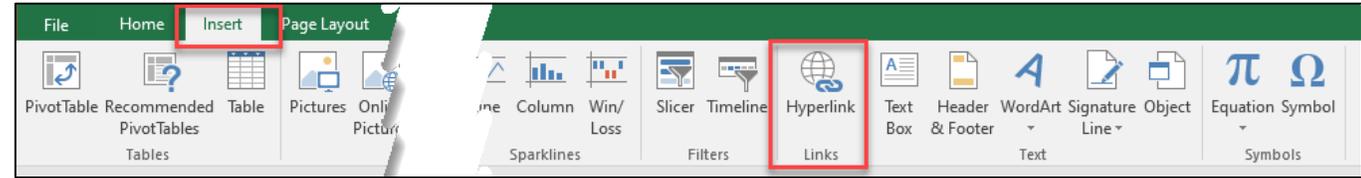
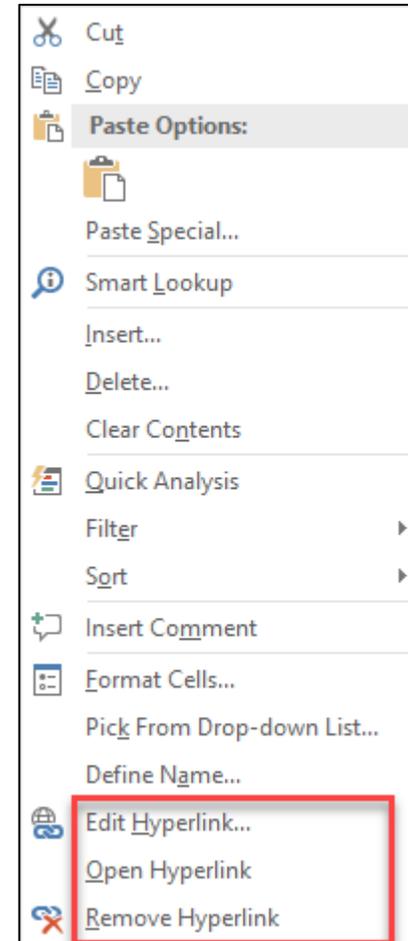
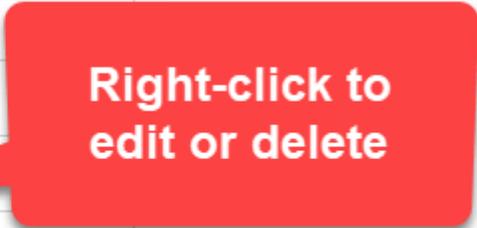


Table of Contents
<a href="#">No Gridlines</a>
<a href="#">Comma Style</a>
<a href="#">Sort List by Custom</a>

# #9 - HYPERLINKS

Once Hyperlinks are in place you can edit them or remove them by Right-Clicking on a hyperlink.

<b>Table of Contents</b>
<a href="#">No Gridlines</a>
<a href="#">Comma Style</a>
<a href="#">Sort List by Custom</a>





# THANK YOU!

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