



Week 2 Basic Excel Workshop

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Freeze Panes

Overview

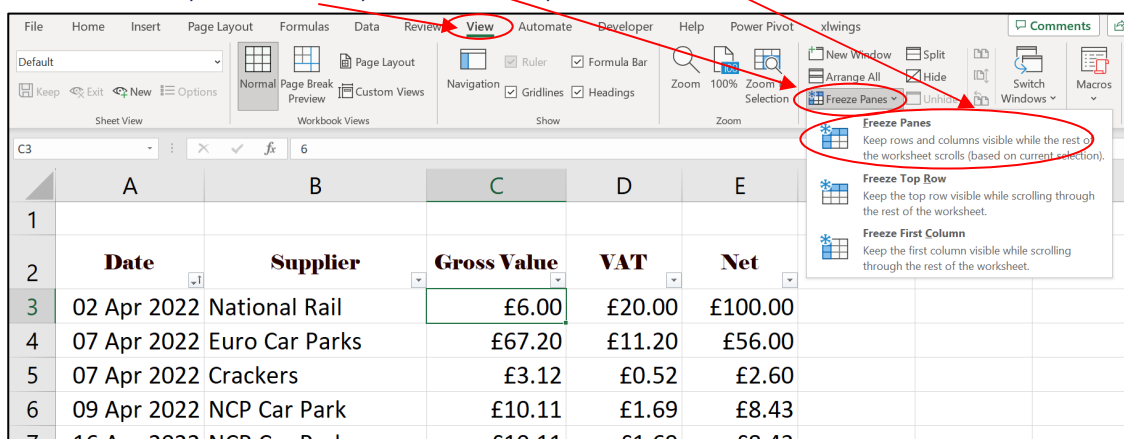
This function is useful for providing visibility when working with large spreadsheets. This means that you can freeze the panes at a selected point within the spreadsheet, so that no matter how far you travel around the spreadsheet, selected rows and columns will always be visible.

This is really useful if you always need to see the 'Title' Row etc.

You can either freeze both Rows & Columns together or individually.

Freeze Panes

- Position the cursor in the adjoining cell to where you want the panes to be frozen.
- From the menu, select: 'View', 'Freeze Panes', then 'Freeze Panes':



- This option will freeze:
 - ALL Rows **above** the selected cell
 - ALL Columns to the **left** of the selected cell
- In this example, the columns will be frozen at Column C, and the Rows will be frozen at Row 3 (as that was the selected cell).
- To Remove the 'Freeze Panes' function, select 'Freeze Panes' again, and select 'Unfreeze Panes'.

Freeze Rows or Columns Only

- If you only need to freeze ROWS, select a cell in column A.
As there are no columns to the left of Column A, only ROWS will be frozen.
- If you only need to freeze COLUMNS, select a cell in ROW 1.
As there are no rows above row 1, only COLUMNS will be frozen.

Find & Replace

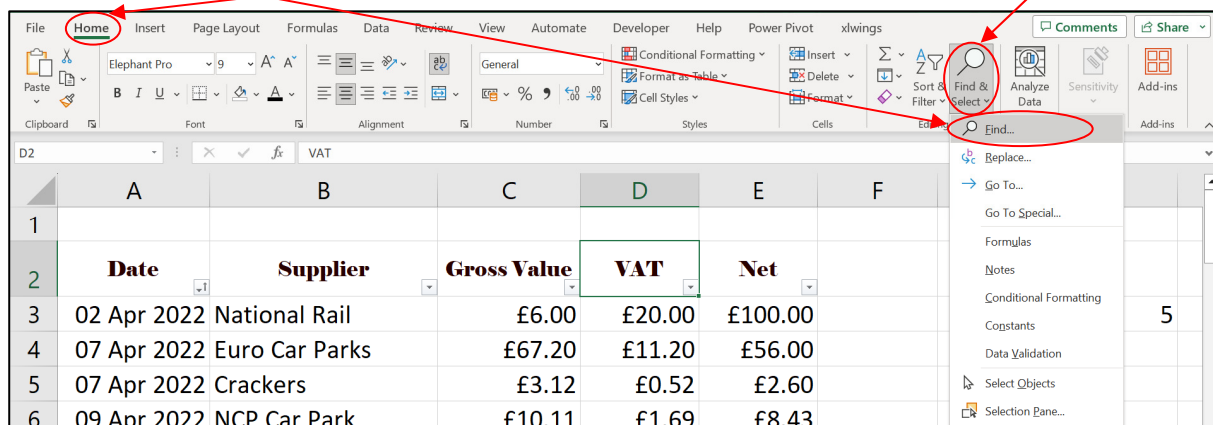
Overview

The 'Find' function allows you to quickly go to cells that contain your search criteria.

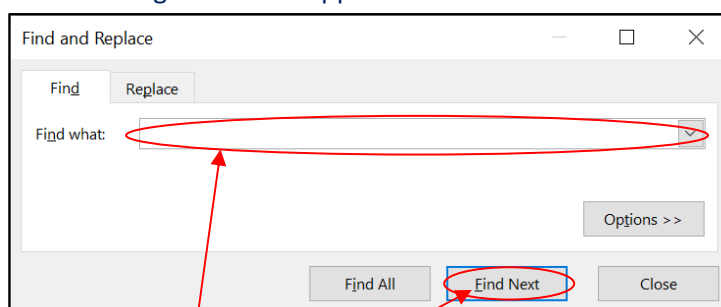
The 'Replace' function allows you to quickly amend part or all of text within cells.

How to use

- Either use the keyboard shortcut (Ctrl + Find) or, from the Home Ribbon, select 'Find & Select', then 'Find':

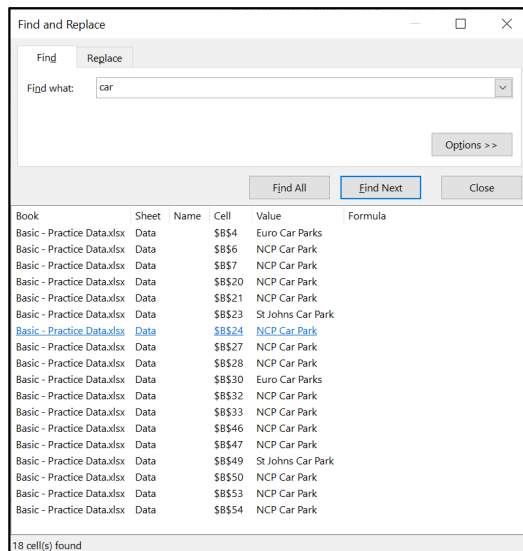


- The following screen will appear:



- Type into this box, part or all of the 'value' that you are trying to find. This can be text, date or numbers.
- Click 'Find Next' and the cursor will move to the first cell that it finds that contains that search criteria.
- This search box will remain on the screen, and you can click 'Find Next' again to find the next cell that also contains this criteria.

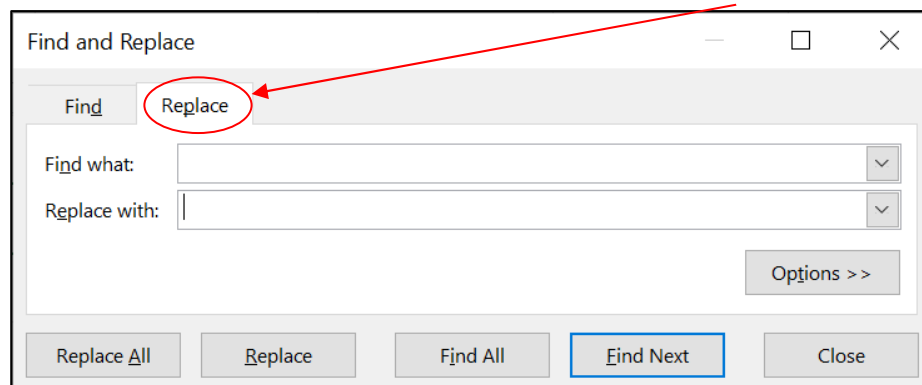
- Clicking 'Find All' will return a Summary underneath the box, of every occurrence that has been found and you can select from this list to navigate to the required cell:



- The search will begin from the cell that you are positioned within, and search the entire sheet.
- If you know which column, row or range of cells you expect to find the item within, highlighting that row / column will restrict the search to only that row / column / range. This not only makes the search quicker, but will also return fewer and more relevant results.

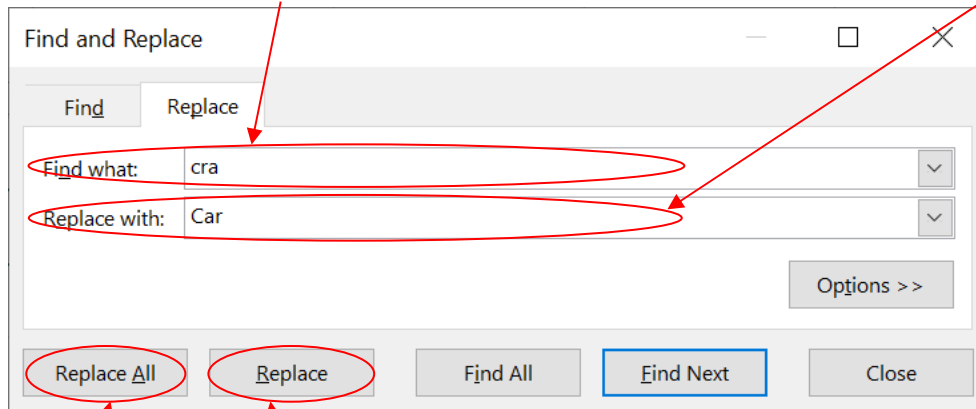
Replace

From the 'Find' screen, you will notice an extra Tab, called 'Replace':



This can be used to replace text with something else, i.e. 'cra', can be amended to 'car'.

Simply enter the current text into this box, and the text to replace it with, into this box:

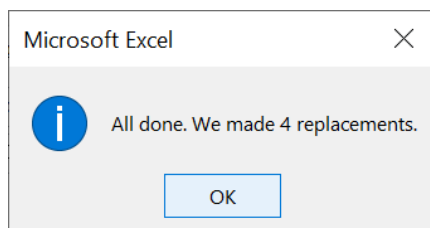


Click 'Replace All' and the entire sheet will be scanned and all cells matching the criteria will be amended, or click 'Replace' to amend individual cells.

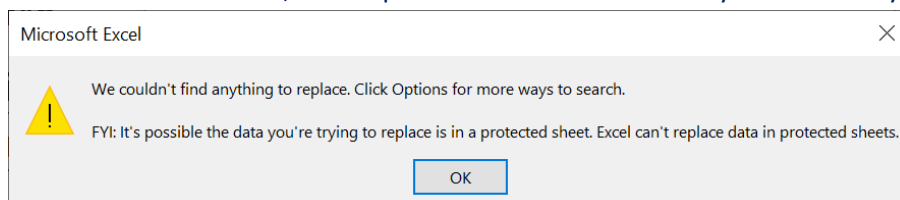
Note: In the 'Find What' box, capitalisation is irrelevant, as only the characters are matched, regardless of the case sensitivity.

In the 'Replace with' box, the specified case sensitivity will be replaced.

Once the 'Replace' is complete, you will see this screen to advise you how many cells have been amended:



You will see this screen, if the operation is unable to find any matches for your search criteria:



Conditional Formatting

Overview

This function allows you to format cells, dependant on the data that is input into them (or others).

This could be used within an expenditure analysis, to highlight any expenditure that exceeds a specified value by changing the cell colour to (say) 'Red'.

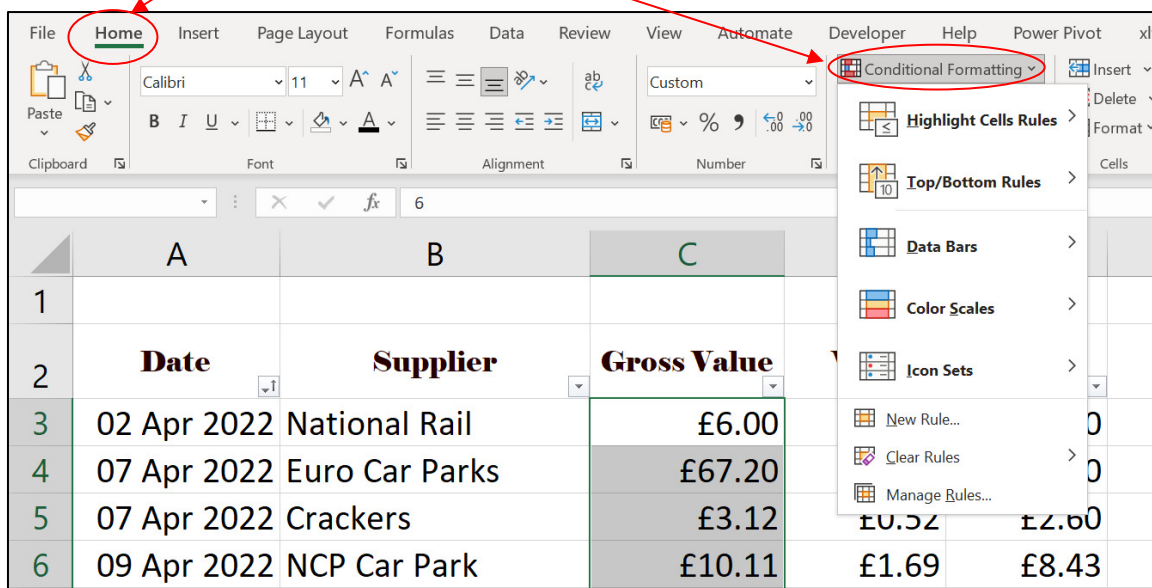
This function does not only apply to numbers and can also be applied to text or dates.

The Format applied can be text colour, cell colour, borders and can even display 'Data Bars', 'Colour Scales' or 'Icons' such as ticks or crosses.

Apply Conditional Formatting

Select the range of data to which the 'Conditional Formatting' should be applied.

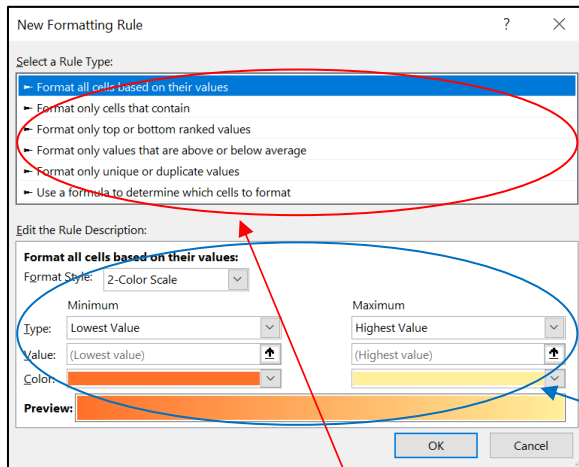
From the 'Home' ribbon, select 'Conditional Formatting':



The list that appears contains shortcuts for conditional formats that can be applied, and by scrolling over these options (you don't need to select them!) you will be able to see the format's that will be applied to your data. **Beware of these, as the criteria that is used, may not be in line with your expectations, so always ensure you know how to check and edit the criteria.**

Specify Conditional Formatting Rules

In order to set specific criteria by which to apply the formatting, you will need to select 'New Rule' from the above list and the following screen will appear:

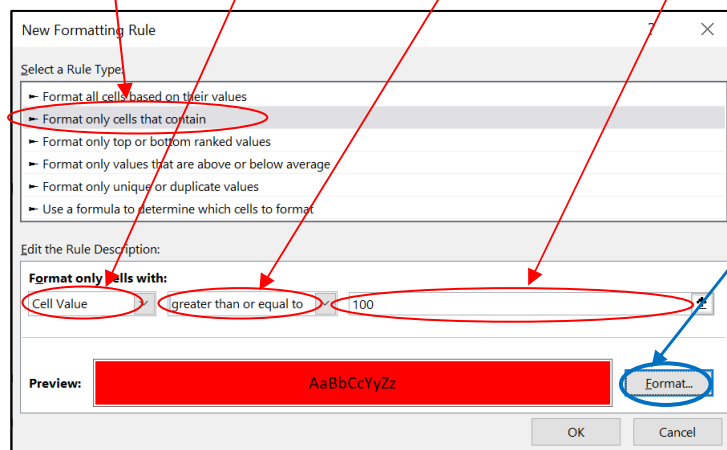


Here you can choose the 'Type' of rule that you want to apply, and the rule description will update at the bottom.

In this instance, the criteria is:

When the 'cell value' is 'greater than or equal to' '100', the cell fill will turn RED.

The rule type should be as follows, with the following selections made from the pick lists in each box, or entered:



If this is correct, click 'OK' to apply the Conditional Formatting to the selected cells.

You will return to the original sheet, and see the 'Conditional Formats' applied to the selected cells:

	A	B	C	D	E
1					
2	Date	Supplier	Gross Value	VAT	Net
3	02 Apr 2022	National Rail	£111.00	£20.00	£100.00
4	07 Apr 2022	Euro Car Parks	£67.20	£11.20	£56.00
5	07 Apr 2022	Crackers	£3.12	£0.52	£2.60
6	09 Apr 2022	NCP Car Park	£10.11	£1.69	£8.43
7	16 Apr 2022	NCP Car Park	£10.11	£1.69	£8.43
8	21 Apr 2022	Staples	£8.15	£1.36	£6.79

In future as the values change in column C, the red colour will be applied automatically, as the criteria is met (or not).

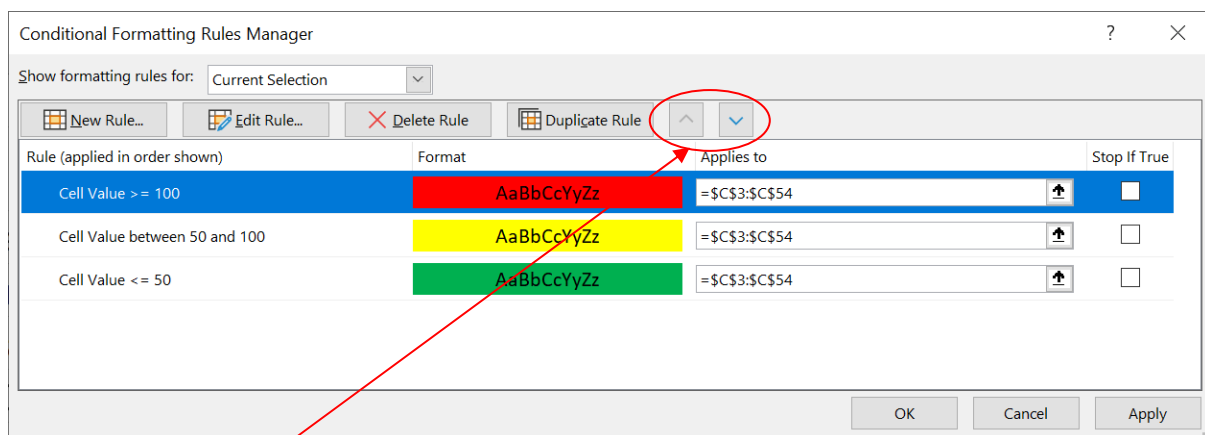
It is also possible to apply multiple criteria to the same range such as:

Cell value less than 50 = Green fill

Cell value between 50 and 100 = Yellow fill

Cell value greater than 100 = Red fill

This would appear as follows:



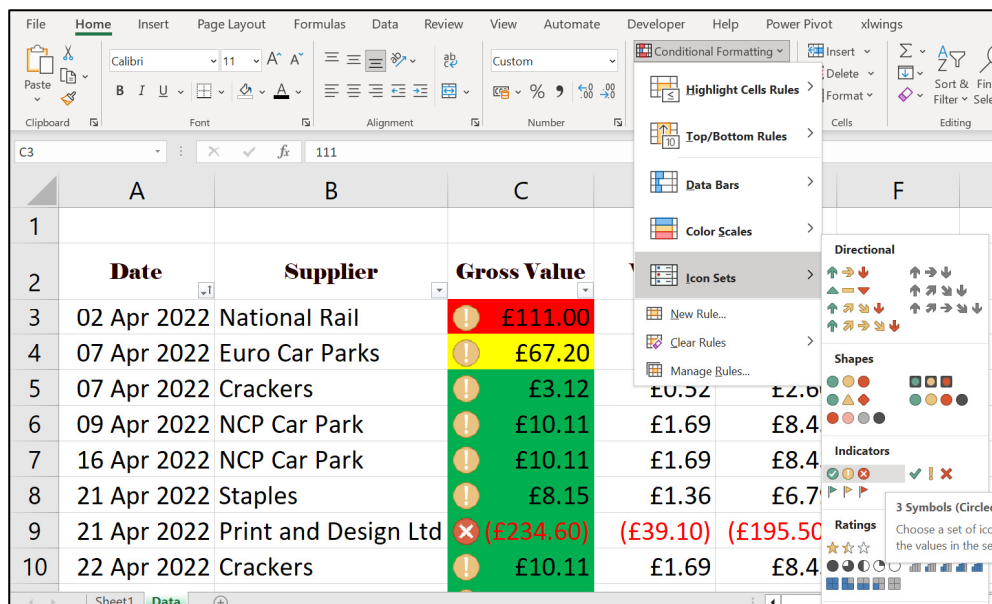
To access Rule Manager: Home ribbon >> Conditional Formatting >> Manage Rules

The rules would apply in the order shown above. This can be amended by selecting a rule, then using the arrows to change the order.

Within the Rule Manager, the Ranges to apply the Conditional Formatting to can be amended too.

Icon Sets

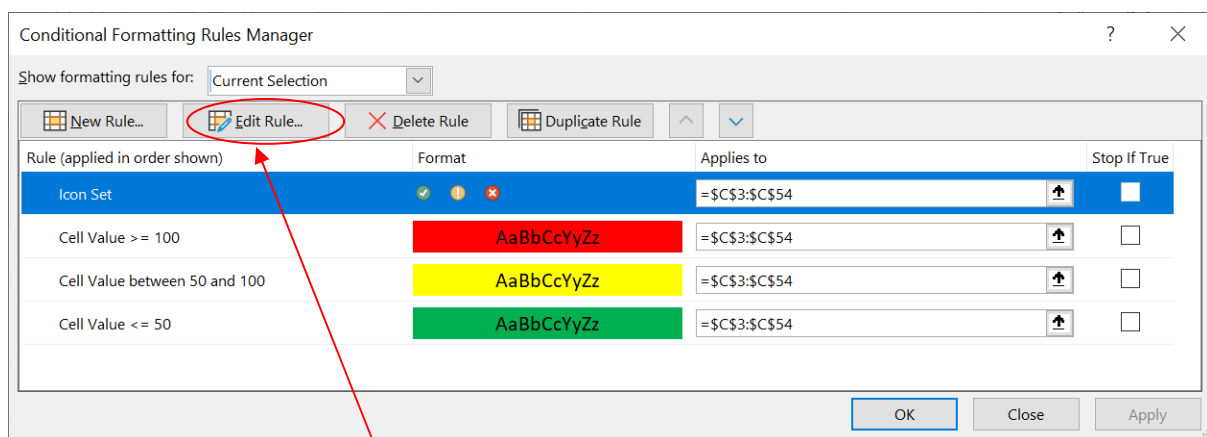
To apply an Icon Set, select the range to apply it to first, then select 'Conditional Formatting' from the 'Home' ribbon, choose 'Icon Sets' and select the preferred set:



The selected Icon Set will immediately applied to the data, as can be seen in the above example.

However, the yellow exclamation mark is being applied to cells that are red, green AND yellow, so this indicates that the criteria used for the Icons differs to what we have created manually for the fill colours and we may need to amend the criteria.

From the 'Conditional Formatting' menu, select 'Manage Rules' to see ALL of the rules:



Select the Icon Set rule and 'Edit Rule'.

The rule has been created as follows:

Edit Formatting Rule

Select a Rule Type:

- Format all cells based on their values
- Format only cells that contain
- Format only top or bottom ranked values
- Format only values that are above or below average
- Format only unique or duplicate values
- Use a formula to determine which cells to format

Edit the Rule Description:

Format all cells based on their values:

Format Style: Icon Sets ☒ Reverse Icon Order

Icon Style: ☐ Show Icon Only

Display each icon according to these rules:

Icon	when value is	Value	Type
	>=	67	Percent
	>=	33	Percent
	<	33	

OK Cancel

In this instance, the 'Green Tick' will appear when the cell value is greater than or equal to 67% of the column total.

This is **NOT** the rule we need, so we can amend the rule accordingly.

We want the rule to apply the 'Green Tick' when the cell value is less than 50 (as a number). Unfortunately the drop down on this criteria does not include 'less than', so we will need to click the 'Reverse Icon Order':

Edit Formatting Rule

Select a Rule Type:

- Format all cells based on their values
- Format only cells that contain
- Format only top or bottom ranked values
- Format only values that are above or below average
- Format only unique or duplicate values
- Use a formula to determine which cells to format

Edit the Rule Description:

Format all cells based on their values:

Format Style: Icon Sets ☒ Reverse Icon Order

Icon Style: ☐ Show Icon Only

Display each icon according to these rules:

Icon	when value is	Value	Type
	>=	67	Percent
	>=	33	Percent
	<	33	

OK Cancel

This will move the 'Green Tick' to the bottom of the list, where the rule can be 'less than'. Now the red rule is at the top, and we can amend this to apply when the cell value is greater than or equal to 100 (as a number):

Notice that the Yellow rule has also partially updated (automatically) based on the red rule above.

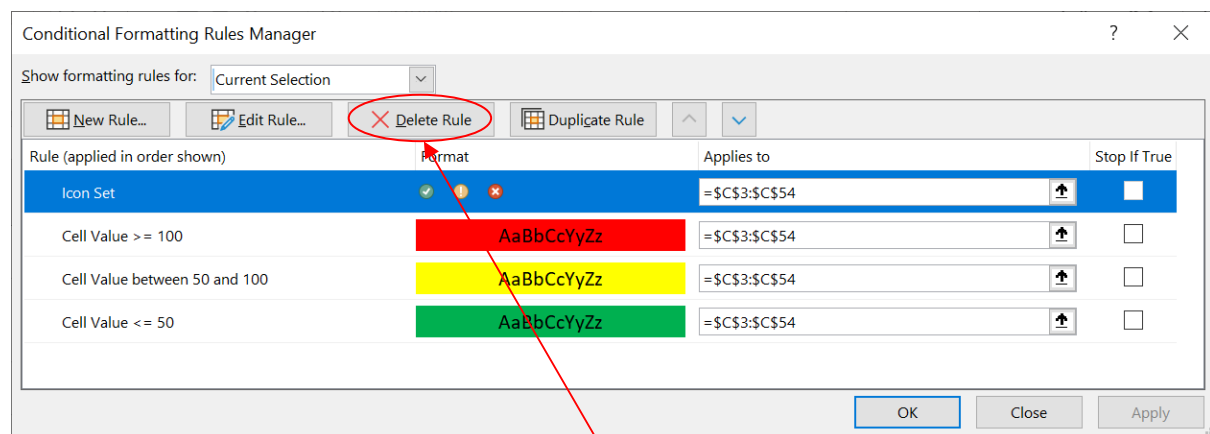
We can now update the rest of the yellow rule and then the green rule also automatically updates, based on the yellow rule:

When we click OK and return to the spreadsheet, the icons are now in line with the fill colours, and therefore we know the criteria is the same for both sets of rules:

	A	B	C
1			
2	Date	Supplier	Gross Value
3	02 Apr 2022	National Rail	✖ £111.00
4	07 Apr 2022	Euro Car Parks	⚠ £67.20
5	07 Apr 2022	Crackers	✓ £3.12
6	09 Apr 2022	NCP Car Park	✓ £10.11
7	16 Apr 2022	NCP Car Park	✓ £10.11
8	21 Apr 2022	Staples	✓ £8.15

At this point we may want to remove the rules for the fill colours and just leave the icons:

From the 'Conditional Formatting' menu, select 'Manage Rules':



Select the relevant rule to delete, then press 'Delete Rule'.

Beware that there is no way to retrieve these again.

Print Range & Page Set Up

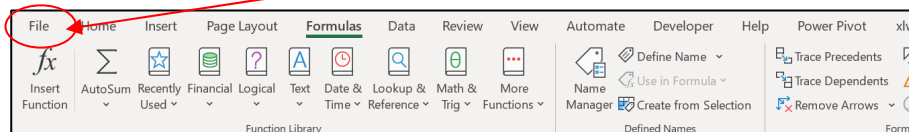
Overview

This function is used to set a range of data to be printed, and to define the settings for printing.

Print Selection

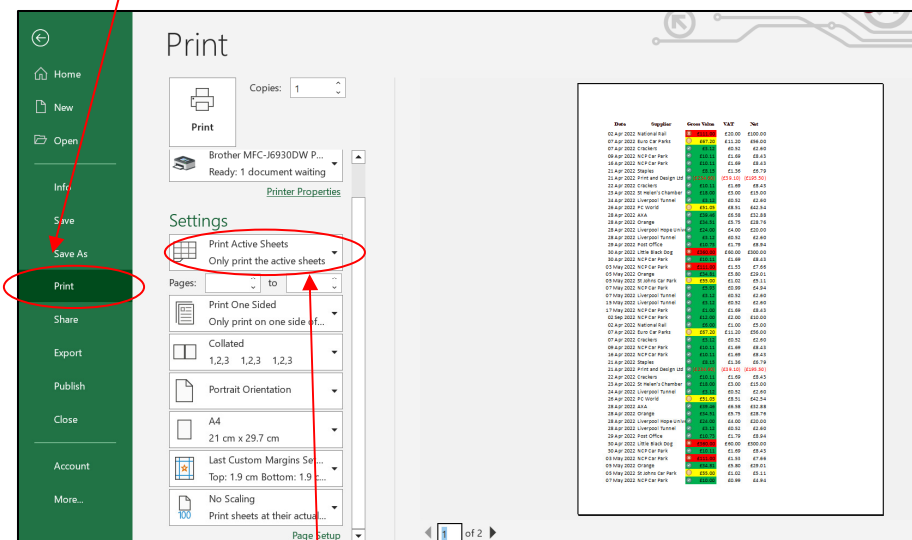
If the print area changes on a regular basis, then this option is really useful.

- Highlight the range of data to be printed (just the first 5 rows in this instance)
- From the ribbon, select File



	A	B	C	D	E
1					
2	Date	Supplier	Gross Value	VAT	Net
3	02 Apr 2022	National Rail	£111.00	£20.00	£100.00
4	07 Apr 2022	Euro Car Parks	£67.20	£11.20	£56.00
5	07 Apr 2022	Crackers	£3.12	£0.52	£2.60
6	09 Apr 2022	NCP Car Park	£10.11	£1.69	£8.43
7	16 Apr 2022	NCP Car Park	£10.11	£1.69	£8.43
8	21 Apr 2022	Staples	£8.15	£1.36	£6.79

- Select: Print to see the Print Preview page:

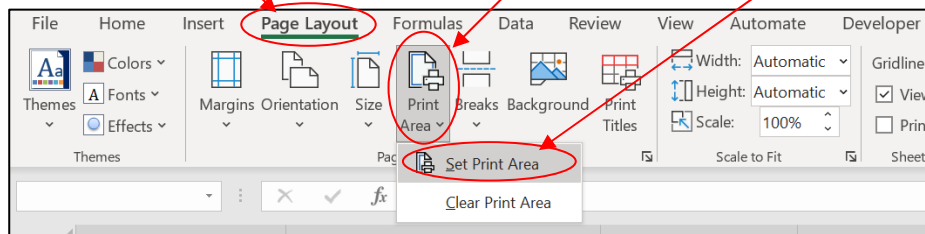


This obviously includes a lot more than the first 5 rows that I selected. This is because the Print Preview is set to 'Print Active Sheet', and therefore it will include all cells that have been used.

The screenshot shows the Windows 'Print' settings window. The left sidebar contains navigation options: Home, New, Open, Info, Save, Save As, **Print**, Share, Export, Publish, Close, Account, and More... The main area is titled 'Print' and shows the printer 'Brother MFC-J6930DW P...'. Below this, the 'Settings' section is expanded, showing options for 'Print Selection' (set to 'Only print the current sel...'), 'Pages' (1 to 1), 'Print One Sided' (Only print on one side of...), 'Collated' (1,2,3), 'Portrait Orientation', 'A4' (21 cm x 29.7 cm), 'Last Custom Margins Set...' (Top: 1.9 cm Bottom: 1.9 c...), and 'No Scaling' (Print sheets at their actual...). A red circle highlights the 'Print' button in the top left corner. A red arrow points from this circle to the 'Printer Properties' link. Another red circle highlights the 'Print Selection' dropdown menu, with a red arrow pointing to it from the 'Printer Properties' link. A red line extends from the 'Print Selection' dropdown towards the bottom right of the window.

Set Print Area

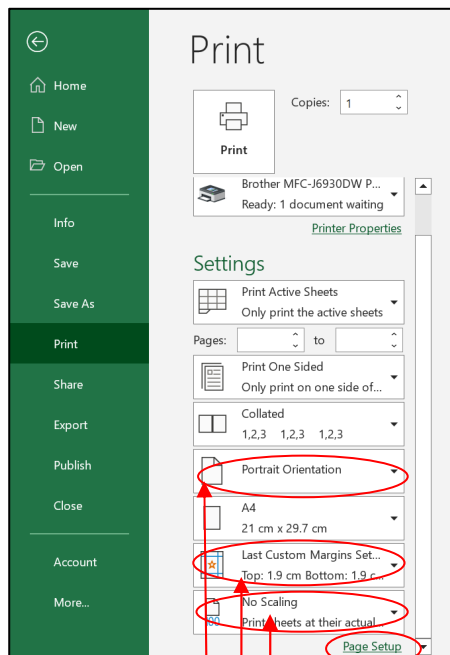
- Highlight the range of data to be printed
- From the Page Layout ribbon, select Print Area, then select Set Print Area



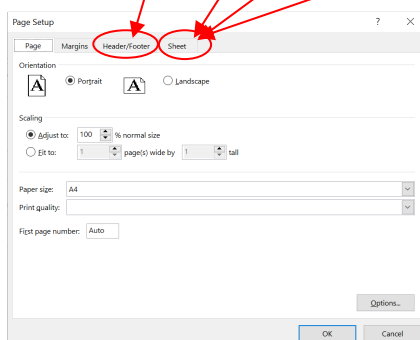
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Print Preview options

Here you can choose the relevant 'layout' options, and see the impact on 'Print Preview' as you make the selections.



- There are many options on each of these Tabs including:
 - Orientation
 - Margins
 - Scaling
- For all other Options, select 'Page Setup', where you will find the options for:
 - Headers & Footers
 - Printing Gridlines
 - Printing in Colour or Black & White
 - Printing Rows / Columns on every page



When you have selected all of the required options, click 'OK' and you will return to the previous Print Preview Page.

From here you can either choose to 'Print', or return to the spreadsheet by clicking the arrow at the top left of the screen.