

Excel Tips, Tricks and PivotTables

Formatting/Misc.

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Format (no space, number)

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Time line

Keystroke number formats

Style	Shortcut	Result
Apply the General format	Ctrl+Shift+~	43035
Apply the Number format	Ctrl+Shift+!	43,035.00
Apply the Time format	Ctrl+Shift+@	12:00 AM
Apply the Date format	Ctrl+Shift+#	27-Oct-17
Apply the Currency format	Ctrl+Shift+\$	\$43,035.00
Apply the Percentage format	Ctrl+Shift+%	4303500%
Apply the Exponential number format	Ctrl+Shift+^	4.30E+04

Change the width of columns by using the mouse

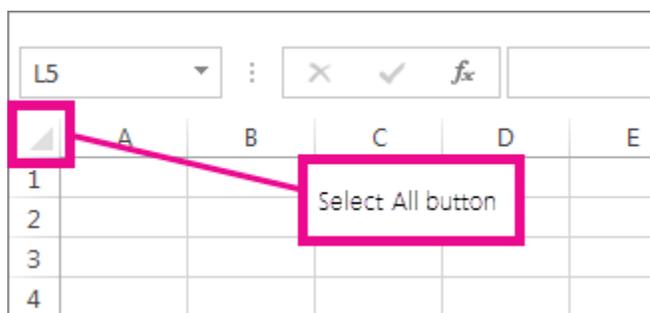
Do one of the following:

- To change the width of one column, drag the boundary on the right side of the column heading until the column is the width that you want.

Drag to resize |

	A	B	↔C
1			
2			
3			

- To change the width of multiple columns, select the columns that you want to change, then drag a boundary to the right of a selected column heading.
- To change the width of columns to fit the contents, select the column or columns that you want to change, then double-click the boundary to the right of a selected column heading.
- To change the width of all columns on the worksheet, click the **Select All** button, and then drag the boundary of any column heading.



Filter a range of data

1. Select the data you want to filter. For best results, the columns should have headings.

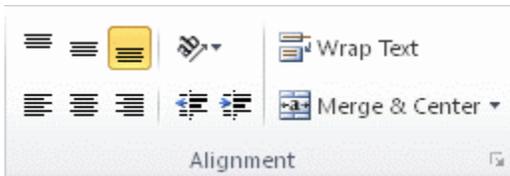


2. Click the arrow  in the column header, and then click **Text Filters** or **Number Filters**.

Indent instead of spaces

Avoid leading or trailing spaces to avoid errors. Avoid inserting spaces at the beginning or end of a cell to indent data. These extra spaces can affect sorting, searching, and the format that is applied to a cell. Instead of typing spaces to indent data, you can use the **Increase Indent** command within the cell.

To move the position of data in a cell, click **Home** and use the alignment options.



Select the cell containing the data you want aligned and choose from the following alignment options:

- To move data closer to the left cell border, click **Decrease Indent**  .
- To move data further away from the left cell border, click **Increase Indent**  .

SUBTOTAL function

Applies To: Excel 2016, Excel 2013, Excel 2010, Excel 2007, Excel 2016 for Mac

This article describes the formula syntax and usage of the **SUBTOTAL** function in Microsoft Excel.

Description

Returns a subtotal in a list or database. It is generally easier to create a list with subtotals by using the **Subtotal** command in the **Outline** group on the **Data** tab within the Excel desktop application. Once the subtotal list is created, you can modify it by editing the SUBTOTAL function.

Syntax

SUBTOTAL(function_num,ref1,[ref2],...)

The SUBTOTAL function syntax has the following arguments:

- **Function_num** Required. The number 1-11 or 101-111 that specifies the function to use for the subtotal. 1-11 includes manually-hidden rows, while 101-111 excludes them; filtered-out cells are always excluded.

Function_num (includes hidden values)	Function_num (ignores hidden values)	Function
1	101	AVERAGE
2	102	COUNT
3	103	COUNTA
4	104	MAX
5	105	MIN
6	106	PRODUCT
7	107	STDEV
8	108	STDEVP
9	109	SUM
10	110	VAR
11	111	VARP

- **Ref1** Required. The first named range or reference for which you want the subtotal.
- **Ref2,...** Optional. Named ranges or references 2 to 254 for which you want the subtotal.

Remarks on **Subtotal**:

- If there are other subtotals within ref1, ref2,... (or nested subtotals), these nested subtotals are ignored to avoid double counting.
- For the function_num constants from 1 to 11, the SUBTOTAL function includes the values of rows hidden by the **Hide Rows** command under the **Hide & Unhide** submenu of the **Format** command in the **Cells** group on the **Home** tab. Use these constants when you want to subtotal hidden and nonhidden numbers in a list. For the function_num constants from 101 to 111, the SUBTOTAL function ignores values of rows hidden by the **Hide Rows** command. Use these constants when you want to subtotal only nonhidden numbers in a list.
- The SUBTOTAL function ignores any rows that are not included in the result of a filter, no matter which function_num value you use.
- The SUBTOTAL function is designed for columns of data, or vertical ranges. It is not designed for rows of data, or horizontal ranges. For example, when you subtotal a horizontal range using a function_num of 101 or greater, such as SUBTOTAL(109,B2:G2), hiding a column does not affect the subtotal. But, hiding a row in a subtotal of a vertical range does affect the subtotal.
- If any of the references are 3-D references, SUBTOTAL returns the #VALUE! error value.

Set rounding precision

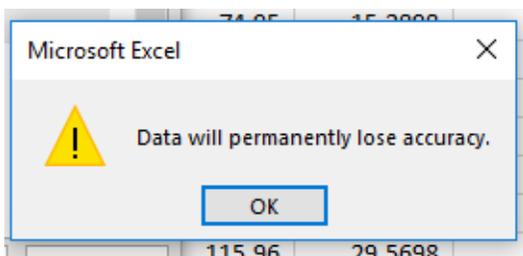
Applies To: Excel 2016, Excel 2013, Excel 2010, Excel 2007

You can frequently prevent floating point rounding errors from affecting your work by setting the **Precision as displayed** option before you apply a number format to your data. This option forces the value of each number in the worksheet to be at the precision that is displayed on the worksheet.

NOTE: Using the **Precision as displayed** option can have cumulative calculation effects that can make your data increasingly inaccurate over time. Use this option only if you are certain that the displayed precision will maintain the accuracy of your data.

Caution: before you use “Set precision as displayed” you should save your worksheet or file to a new workbook.

1. Click **File > Options**.
2. In Excel 2007: Click the Microsoft Office Button , then click **Excel Options**.
3. Click **Advanced**, then under **When calculating this workbook**, select the **Set precision as displayed** check box, and then click **OK**.



4. Click **OK**.

Use **Goal Seek** to determine the sales

1. On the **Data** tab, in the **Data Tools** group, click **What-If Analysis**, then click **Goal Seek**.
2. In the **Set cell** box, enter the reference for the cell that contains the formula that you want to resolve. In the example below, this reference is cell C11.
3. In the **To value** box, type the formula result that you want. In the example below, this is \$0.
4. In the **By changing cell** box, enter the reference for the cell that contains the value that you want to adjust. In the example below, this reference is cell C5.

NOTE: The cell that Goal Seek changes must be referenced by the formula in the cell that you specified in the **Set cell** box.

5. Click **OK**.

	A	B	C	D	E	F	G	H	I	J
1	COGS %	67%								
2										
3										
4										
5		Sales	\$1,500,000	100%		What do sales need to be in order to get NI to \$0.00				
6		COGS	\$1,005,000	67%						
7		Margin	\$495,000	33%						
8		Personnel	\$355,000	24%						
9		Occupancy	\$75,000	5%						
10		Operating	\$75,000	5%						
11		Net Income	(\$10,000)	-1%						
12										
13										
14										

Goal Seek ? X

Set cell: C11

To value: 0

By changing cell: \$C\$5

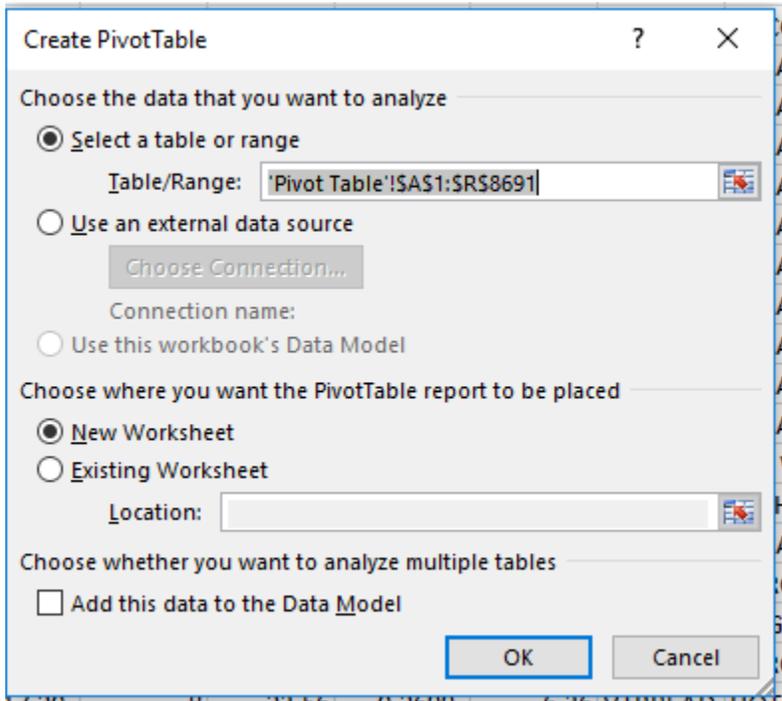
OK Cancel

Pivot Tables:

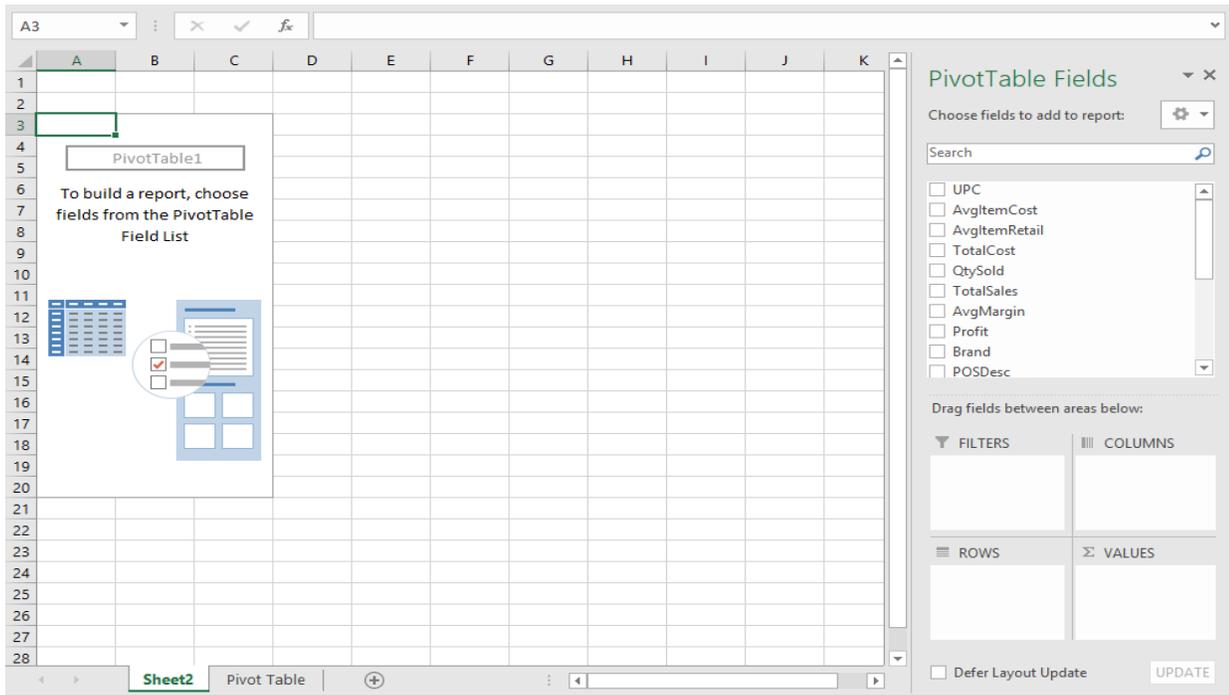
Have data in the form of a table, with no breaks in the columns. Headers are required.

Put cursor in the first column and row with header.

On the **Insert** tab click PivotTable. A window will open that allows you to select the data and where you want the PivotTable to go. If there are no breaks in column and rows, your data will be auto selected and a new worksheet will be created.



Your new worksheet will open with an area for the PivotTable and the Fields window that lists your data headers. You can now just click and drag your data into the filters, columns, rows, and value fields.



Some things to remember:

Excel tries to think for you and may count your data instead of sum it. You can change the Value Field Settings by clicking on the down arrow next to the data field you put in Values Box.

When formatting numbers, you want to make the change in Value Field Settings instead of just highlighting the cells you want to change.

The following is a URL to MS's PivotTable info:

<https://support.office.com/en-us/article/Create-a-PivotTable-to-analyze-worksheet-data-A9A84538-BFE9-40A9-A8E9-F99134456576>

Slicer and Timelines

There are a lot of advanced tools in Excel to help you analyze your PivotTable data.

You can use Slicers and Timelines to filter your PivotTable data, and at a glance, you can see the filters that are applied.

To add a slicer, click a cell within your PivotTable, and the **PIVOTTABLE TOOLS** tab appears.

Click **ANALYZE**, click **Insert Slicer**. The **Insert Slicer** dialog box has options for each field in the PivotTable.

Check the fields you want to slice the PivotTable with, and click **OK**.

Adjust the size of the slicers, move them where you want, and you are ready to slice your PivotTable.

To reset the slicers, click the **Clear Filter** button at the top right of each slicer.

To add a timeline, click a cell in your PivotTable. On the **ANALYZE** tab, click **Insert Timeline**. The **Insert Timelines** dialog has an option for each date field in your PivotTable.

Check the field and click **OK**.

Adjust the size of the timeline and move to where you want.

In the upper-right of the timeline, click the drop-down arrow, and choose a time frame, such as **Days**.

Use the slider to move along the timeline.

Select the day, click an end of the selector, and drag it to cover the time period you want.

The PivotTable now displays the sales for the time period.

You can use timelines and slicers together to filter your PivotTable data.

To reset the timeline, click the **Clear Filter** button at the top right of the timeline.

URL to Video on Slicer and Timeline:

<https://support.office.com/en-us/article/Use-slicers-timelines-and-PivotCharts-to-analyze-your-PivotTable-data-4DB5DE3B-735E-4B03-B3B2-F2105D79DCB5#ID0EAABAAA=Transcript>

References:

Most of the above information was cut and pasted from the Microsoft Excel Support pages.

<https://support.office.com/en-US/Excel>