

Advanced Features - Quick Reference Card


The Web and External Data

Hyperlinks

You can insert a link in your document to an existing file, web page, an email address, a particular place in the same document, or create a new document to link to.

- Click the **Insert** tab on the Ribbon and click **Hyperlinks** in the Links group. Select the type of link you want to insert and enter the text you want the link to display. Locate the file/page from the folder list if necessary and click **OK**.
- To change this link, right-click the link and click **Remove Hyperlink** or **Edit Hyperlink** from the contextual menu.

Importing Data

- **Importing Data from Access:** Click the **Data** tab and click **From Access** in the Get External Data group. Locate the Database you want to import from and click **Open**. Select how you want the data to appear and where you want it to appear, then click **OK**.
- **Importing Data from Text:** Click the **Data** tab and click **From Text** in the Get External Data group. Locate the ".txt" file you want to import text from and click **Import**. Follow the Import Wizard onscreen prompts and click **Finish**.
- **Importing Data from the Web:** Click the **Data** tab and click **From Web** in the Get External Data group. Browse to the webpage you want to import from and use the  button to select the tables you want to import. Click **Import**. Select where you want to put the data and click **OK**.
- **Importing Data from Other Sources:** You can also import from SQL, OData, XML, OLEDB, ODBC and Windows Azure Marketplace.

Exporting Data

Change your Excel File into a PDF/XPS, CSV, Text or other type of File.

- Click the **File** tab and click **Export**. Click **Create PDF/XPS Document** or for more File Type options, click **Change File Type**.

Data Connections

- **Accessing Data Connections:** Click the **Data** tab and click **Existing Connections** in the Get External Data group. Click the **Tables** or **Connections** tabs to view current connections, or click **Browse for More** to make a new connection. Select the type of connection you want to make and click **Open**. Follow the Connection Wizard onscreen prompts and click **OK**. Use the Connections group on the **Data** tab to manage connections.

Managing Workbooks

Headers and Footers




- **Creating Headers and Footers:** Click the **Page Layout** tab and click the **Dialog Box Launcher** in the Page Setup group. Select the **Header/Footer** tab; choose a Header and or Footer from the drop-down lists, or click the **Custom Header/Custom Footer** buttons to create your own.
- **Inserting Auto Headers and Footers:** Click the **Insert** tab and click the **Headers & Footers** button in the Text group. Use the contextual **Design** tab options to insert auto Headers, Footers and Elements.

Hiding

- **Hide Rows/Columns:** Right-click the Row/Column Heading and click **Hide** on the contextual menu. To unhide Rows/Columns select the Row/Column Headings on either side of the hidden one/s. Right-click and choose **Unhide** from the contextual menu.
- **Hide a Worksheet:** Right-click the **Sheet** tab, click **Hide** on the contextual menu. Right-click any Sheet and select **Unhide** from the contextual menu. Select the Sheet you wish to unhide from the list provided and click **OK**.
- **Hide a Workbook Window:** Click the **View** tab and click **Hide** in the Window group. To unhide the window, click **Unhide**.

Security

Protecting Worksheets and Elements:

1. First you need to unlock the whole worksheet before you begin. Right click **Select All**  on the top left of the worksheet to select the whole worksheet and to display the contextual menu. Select **Format Cells**, the **Protection** tab and click the **Locked** checkbox to deselect it.
2. Select the cell/cells you want to protect and right-click the selection. Click **Format Cells** on the contextual menu. Select the **Protection** tab and click the **Locked** checkbox.
3. Click the **Review** tab and click the **Protect Sheet** button in the Changes group. Enter a password if desired and make sure the **Select locked cells** checkbox is unchecked. Check any other applicable boxes and click **OK**.

Protecting a Workbook:

Click the **File** tab, click the **Info** tab if necessary. Click **Protect Workbook** and select **Encrypt with Password** from the list. Enter a password for the workbook and click **OK**. Confirm the password and click **OK**.

Macros

- **Recording a Macro:** Click the **View** tab. Click the **Macros** list arrow in the Macros group and select **Record Macro**. Enter a name and description for the Macro and click **OK**. Once you've recorded the actions for the Macro, click the **Stop** button on the Status bar.
- **Play a Macro:** Click the **Macros** button in the Macros group on the **View** tab. Select a Macro and click **Run**. To delete this Macro, click **Delete**. Click **Yes** to confirm.
- **Edit a Macro:** Click the **Macros** button in the Macros group on the **View** tab, select a Macro and click **Edit**. Make the required changes in the Visual Basic code and click **Save**. Click the **Close** button to close the Visual Basic Editor.

Defining Names

- **Defining a Name:** Select the cell, cells or cell range you want to name. Click the **Name Box** on the Formula bar and type a Name for the selection. (Remember: no spaces or other cell references can be used). Press **<Enter>**.
- **View/Edit Defined Names:** Click the **Formulas** tab and click **Name Manager** in the Defined Names group. You can **Edit**, **Delete** and **Add** Defined Names from here too.
- **Use Defined Names:** To use Defined Names in a formula, click the **Formulas** tab, click **Use in Formula** in the Defined Names group. Select the Name you want to use in the formula to insert it.



Tables

- **Creating a Table:** Select the cell range you want to convert to a Table. Click the **Insert** tab and click **Table** in the Tables group. If the cell range has headings, check the **My table has headers** checkbox. Click **OK**.
- **Adding/Removing Rows/Columns:** Click anywhere inside the Table area, right-click and point to **Insert** or **Delete** on the contextual menu to make your selection.
- **Formatting a Table:** Click the **Design** contextual tab under **Table Tools** to change the look of the table.
- **Data Validation:** Select the cell or column you want to validate. Click the **Data** tab and click **Data Validation** in the Data Tools group. Select the type of Validation you want to use. (If you choose List, don't forget to use a "," to separate entries). Fill in the rest of the **Settings** tab. (The information on the **Input Message** and **Error Alert** tabs are optional). Click **OK**.
- **Converting to Range:** To convert a Table back to a being part of the normal cell range, select the Table. Click the **Design** tab and click **Convert to Range** in the Tools group.

Charts

- **Editing, Adding and Removing Chart Data:** Changes made to the Source Data will reflect on the Chart. To add data, click the **Design** tab and click **Select Data** in the Data group. Click **Add** under Legend Entries. Select the Series name on the Worksheet, or type it in and click **OK**. Click **OK**. To remove Data, click the **Design** tab, then click **Select Data** in the Data group. Select the Data Series you want to remove and click **Remove** under Legend Entries.
- **Change Chart Layout and Style:** Select the chart and click the **Design** tab. Click **Add Chart Element** in the Layouts group. Point to an element and select a layout from the list, or click the **Quick Layout** button in the Layouts group and select a built-in layout. To change the look of the chart, use the Chart Styles group on the **Design** tab or click the **Format** tab, then click the **Chart Elements** list arrow in the Current Selection group. Select individual elements from the list and use available options on the **Design** and **Format** tabs to edit the way they look.

PivotTables

Creating

- **Creating a PivotTable:** Select a cell in a data range. Click the **Insert** tab and click the **PivotTable** button in the Tables group. Select the data you want to analyze. Select where you want to insert the PivotTable and click **OK**.
- **Specify PivotTable Data:** Click applicable check boxes in the PivotTable Fields list task pane to use as data.
- **Rearrange Data:** Click and drag Fields to different areas in order to change the PivotTable layout.
- **Change Calculations:** Click the cell you want to modify. Click the **Analyze** contextual tab under **PivotTable Tools** and click **Field Settings** in the Active Field group. Use the **Subtotals & Filters** tab to modify the calculation as required. Click **OK**.
- **Show/Hide Elements:** Click the **Analyze** contextual tab and click the elements to hide or show in the Show group.
- **Formatting a PivotTable:** Use the **Design** contextual tab under **PivotTable Tools** to change the look of your PivotTable.



Grouping

- **Group Dates and Times:** Select the Date or Time field. Click the **Analyze** tab and then click **Group Field** in the Group group. Specify the Start and End dates and what to Group by. Click **OK**.
- **Group Numeric Items:** Select the Numeric field that contains the data to

Sorting & Filtering

- **Sorting:** Select the Row or Column Heading you want to sort, click the **Data** tab, and click **Sort A-Z** or **Sort Z-A** in the Sort & Filter group. Click **Sort** in the Sort & Filter group to sort by multiple columns and criteria like icons and colors.
- **Filtering:** Select a cell within a range, click **Filter** in the Sort & Filter group on the **Data** tab. Click the **Filter** list arrow on a cell to Filter data. Select or deselect checkboxes as required to apply a filter to the data. Remove the filter by clicking the **Filter** list arrow and selecting **Clear Filter From** on the contextual menu.

