

Excel List Management Tips

2001-2002

What characterizes an Excel list

- row = record
- column = field
- header row = 1st row; formatted differently
- no blank rows or columns in the data (though blank cells within records are OK)
- formulas to calculate data items are OK

Excel list example

	A	B	C	D	E	F	G
1	Data in List Format						
2							
3							
4	KBF Consulting						
5							
6	Date	Client	Project	Task	Billed Time	Hourly Rate	Fee
7	1/13/99	Pacific Pallasades	Market Study	Initial client meeting	3	\$ 125	\$375
8	1/17/99	Pacific Pallasades	Market Study	Secondary research	12	\$ 75	\$900
9	1/23/99	Pacific Pallasades	Market Study	Primary research	6	\$ 100	\$600
10	1/24/99	Pacific Pallasades	Market Study	Draft report outline	6	\$ 75	\$450
11	1/27/99	Spectrum Foods Inc.	Business Plan	Initial client meeting	2	\$ 125	\$250
12	1/29/99	Pacific Pallasades	Market Study	Competitive analysis	18	\$ 65	\$1,170
13	1/30/99	Spectrum Foods Inc.	Business Plan	Review internal documents	25	\$ 75	\$1,875
14	1/31/99	Pacific Pallasades	Market Study	Questionnaire analysis	3	\$ 65	\$195

Excel list navigation tips

Move to list corners	CTRL+arrow keys
Select a single record	CTRL+SHIFT+right arrow
Select the entire list quickly	CTRL+* (e.g., CTRL+SHIFT+8)
Move between the 4 corners of a selected range	CTRL + . (e.g., CTRL + period)

Excel Data Addition Tips

Insert current date	CTRL + ; (e.g., CTRL + semicolon)
Insert current time	CTRL + : (e.g., CTRL + colon)
Autocomplete “Pick from List”	Start in a blank cell beneath a list column and press ALT + down arrow to see a pick list. Or right click and choose <i>Pick from List</i> .

Excel’s Data Form

To start: With the insertion point anywhere in the list, choose *Data, Form* from the menus.

- Features:
- View records one by one
 - Add a new record
 - Delete a record
 - Search using criteria

Viewing Excel List Data

Freezing Panes: Two Methods

1. Make the cell current to the right and below where you want the “freeze location”. Then choose *Window, Freeze Panes*.
2. Drag the horizontal and/or vertical pane markers and drop them into the workspace.

	A	B	C	D	E
6	Date	Client	Project	Task	Billed Time
7	1/13/99	Pacific Pallasades	Market Study	Initial client meeting	3 \$
8	1/17/99	Pacific Pallasades	Market Study	Secondary research	12 \$
9	1/23/99	Pacific Pallasades	Market Study	Primary research	6 \$
10	1/24/99	Pacific Pallasades	Market Study	Draft report outline	6 \$
11	1/27/99	Spectrum Foods Inc.	Business Plan	Initial client meeting	2 \$
12	1/29/99	Pacific Pallasades	Market Study	Competitive analysis	18 \$
13	1/30/99	Spectrum Foods Inc.	Business Plan	Review internal documents	25 \$
14	1/31/99	Pacific Pallasades	Market Study	Questionnaire analysis	3 \$
15	2/4/99	Spectrum Foods Inc.	Business Plan	Draft report outline	3 \$
16	2/5/99	Pacific Pallasades	Market Study	First draft completed	22 \$
17	2/11/99	Spectrum Foods Inc.	Business Plan	Competitive analysis	13 \$
18	2/12/99	Pacific Pallasades	Market Study	Second draft completed	12 \$
19	2/12/99	Johnson Supplies	Expansion Review	Initial client meeting	6 \$

Horizontal & vertical pane markers.

Markers in place in a worksheet.

	A	B	C	D	E
6	Date	Client	Project	Task	Billed Time
33	3/21/99	Johnson Supplies	Expansion Review	Final report completed	15 \$
34	3/24/99	Stan Wong & Assoc.	Legal Review	Working papers review	55 \$
35	4/18/99	Stan Wong & Assoc.	Legal Review	Secondary research	42 \$
36	4/28/99	Stan Wong & Assoc.	Legal Review	Primary research	18 \$
37	5/13/99	Stan Wong & Assoc.	Legal Review	First draft completed	30 \$
38	5/15/99	Stan Wong & Assoc.	Legal Review	Client review meeting	6 \$
39	5/20/99	Stan Wong & Assoc.	Legal Review	Proceedings review	12 \$
40	6/10/99	Stan Wong & Assoc.	Legal Review	Primary research	15 \$
41	6/12/99	Stan Wong & Assoc.	Legal Review	Client review meeting	6 \$
42	6/28/99	Stan Wong & Assoc.	Legal Review	Proceedings review	15 \$
43	7/24/99	Stan Wong & Assoc.	Legal Review	Second draft completed	28 \$
44	7/27/99	Stan Wong & Assoc.	Legal Review	Client review meeting	2 \$

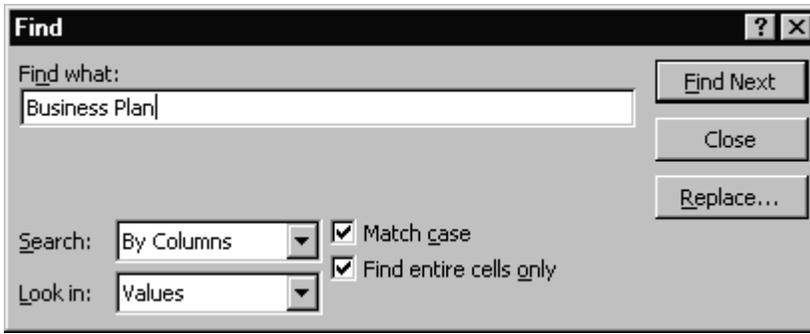
Double-click a horizontal or vertical pane marker to remove it.
Or, just drag it back to its original location.

Hiding/unhiding Excel rows/columns

- To hide: Select the row or column.
 Right-click.
 Choose *Hide*.
- To unhide: Select the range around the hidden row(s) or column(s).
 Choose *Format, Column, Unhide* or *Format, Row, Unhide*.

Finding data in an Excel list

Works in a similar fashion as in Word.
Edit, Find and complete the “Find” dialog.



The *Look in* prompt allows you to restrict the search to just formulas, values, or cell comments.

Sorting data in an Excel list

The usual sort is a top to bottom sort in the list. Up to 3 sort specifications are allowed.
Also available: a left to right sort; see the *Options* button on the “Sort” dialog.
To sort on *more than* 3 columns, use multiple sorts starting with the least important first.
You can create your own sort orders (custom lists).

List Subtotals

Often overlooked but very powerful and easy-to-use feature. Used most often *after* sorting data in a list. Think of sorting whenever you consider using the subtotal feature.

Data, Subtotals.

