

# Excel 2002: Expert Task Reference List

## KEY

Description of task

Exercise reference(s)

3-D effect

9-11

Select the object and click the 3-D Style button  on the Drawing toolbar. Choose a style.

Summary of recommended procedure


Advanced Filter, in place <b>19-17</b>	19-17
Create criteria range, and name it. Key criteria below label. Click in list and choose <b>D</b> ata, <b>F</b> ilter, <b>A</b> dvanced Filter. Specify <b>L</b> ist and <b>C</b> riteria ranges and Click <b>O</b> K.	
Advanced Filter, to another location <b>19-17</b>	19-17
Create criteria range and name it. Key criteria below label. Create output range and name it. Click in list and choose <b>D</b> ata, <b>F</b> ilter, <b>A</b> dvanced Filter. Click in list and choose <b>D</b> ata, <b>F</b> ilter, <b>A</b> dvanced Filter. Specify <b>L</b> ist and <b>C</b> riteria ranges, select <b>C</b> opy to another location. Specify <b>C</b> opy to location. Click <b>O</b> K.	
AutoFilter, by selection <b>19-11</b>	19-11
Click in cell to be matched. Click the AutoFilter button  (if available on toolbar).	
AutoFilter, custom <b>19-14</b>	19-14
With AutoFilter on, click the drop-down arrow for field and select (Custom...) Choose first operator and a value. Choose <b>A</b> nd or <b>O</b> r if desired and set second operator and value. Click <b>O</b> K.	
AutoFilter, from the list <b>19-12</b>	19-12
With AutoFilter on, click the drop-down arrow for filtered field and select item to filter.	
AutoFilter, Top 10 <b>19-13</b>	19-13
With AutoFilter on, click the drop-down arrow for field, and select (Top 10...).	
Button, remove <b>13-21</b>	13-21
Press and hold <b>A</b> lt and drag button from its toolbar into the worksheet.	
Cell errors, print <b>11-12</b>	11-12
Click the Print Preview button  . Click <b>S</b> etup and click the <b>S</b> heet tab. In Print group, choose an option for <b>C</b> ell errors as.	
Changes, accept or reject <b>17-9</b>	17-9
In a merged workbook, choose <b>T</b> ools, <b>T</b> rack Changes, <b>A</b> ccept or Reject Changes. Select <b>N</b> ot yet reviewed for <b>W</b> hen. Click <b>O</b> K. Click <b>A</b> ccept or <b>R</b> eject for each change.	
Changes, print change history <b>17-6</b>	17-6
In a shared workbook, choose <b>T</b> ools, <b>T</b> rack Changes, <b>H</b> ighlight Changes. Select <b>L</b> ist changes on a new sheet. Click <b>O</b> K.	
Changes, set change history options <b>17-2</b>	17-2
In a shared workbook, choose <b>T</b> ools, <b>S</b> hare Workbook. Select number of days for <b>K</b> eep change history for. Choose options for <b>U</b> ppdate Changes group and <b>C</b> onflicting changes between users. Click <b>O</b> K.	
Changes, track <b>17-4</b>	17-4
In a shared workbook, choose <b>T</b> ools, <b>T</b> rack Changes, <b>H</b> ighlight Changes. Select <b>H</b> ighlight changes on <b>s</b> creen. Click <b>O</b> K.	
Circular reference <b>11-15</b>	11-15
Click <b>O</b> K in message box. Read <b>H</b> elp window. Edit formula.	
Close multiple files <b>16-14</b>	16-14
Press and hold <b>S</b> hift. Choose <b>F</b> ile, <b>C</b> lose All. Save workbooks if prompted.	
Comment, insert <b>17-5</b>	17-5
Click the New Comment button  on Reviewing toolbar. Key comment and click another cell.	
Compare and merge workbooks <b>17-7</b>	17-7
Choose <b>T</b> ools, <b>C</b> ompare and Merge <b>W</b> orkbooks. Navigate to appropriate folder and double-click the filename to be merged into the open workbook.	
Conditional formatting <b>12-12</b>	12-12
Select cells. Choose <b>F</b> ormat, <b>C</b> onditional Formatting. Specify <b>C</b> ondition 1 options. Click <b>F</b> ormat and specify format. Click <b>O</b> K twice.	

Consolidate data	16-2	Export, worksheet as text file	18-14
Select empty cells for the consolidated data. Choose <b>D</b> ata, <b>C</b> onsolidate. Choose function and select <b>R</b> eference box. Click the worksheet tab and select first range of cells for consolidation. Click <b>A</b> dd. Click each worksheet tab and add corresponding ranges. Select <b>C</b> reate links to <b>s</b> ource data for a dynamic consolidation. Click <b>O</b> K.		Choose <b>F</b> ile, <b>S</b> ave <b>A</b> s. In Save as type box, choose <b>T</b> ext (tab delimited). Key a filename. Click <b>S</b> ave. Click <b>O</b> K and then <b>Y</b> es.	
Constant, create	11-6	Export, worksheet to Word	18-13
Press <b>C</b> trl + <b>F</b> 3. Key constant name in Names in <b>w</b> orkbook text box. Key the value with equals sign in <b>R</b> efers to text box. Click <b>O</b> K.		Select data to export. Click the Copy button  . Open Word document. Click the Paste button  .	
Data form, use	19-4	Export, worksheet to XML worksheet	18-15
Click in any cell in named list. Choose <b>D</b> ata, <b>F</b> orm. Press <b>T</b> ab to move from field to field. Click <b>N</b> ew to add a record. Click <b>C</b> lose.		Choose <b>F</b> ile, <b>S</b> ave <b>A</b> s. In Save as type box, choose <b>X</b> ML Spreadsheet. Navigate to folder and key a filename. Click <b>S</b> ave. Click <b>Y</b> es.	
Data table, One-variable data, create	19-1	File properties, edit	12-4
Key input values in a row. Key nonchanging value in a cell. Key formula one column to left of and one row below input values, using any empty cell as input cell. Select data table range and choose <b>D</b> ata, <b>T</b> able. Key input cell for row values. Click <b>O</b> K.		Choose <b>F</b> ile, <b>P</b> roperties. Click the appropriate tab and key or select data. Click <b>O</b> K.	
Data table, two-variable data, create	19-5	Find, records	19-7
Key first set of input values in a row. Key second set of input values in a column. Key formula one column to left of row values and one row above column values, using two empty cells as input cells. Select data table range and choose <b>D</b> ata, <b>T</b> able. Key input cell for row values and input cell for column values. Click <b>O</b> K.		Display data form. Click <b>C</b> riteria. Key criteria, with wildcards if necessary. Click <b>F</b> ind <b>N</b> ext. Click <b>F</b> orm to return to the forms. Click <b>C</b> lose.	
Delete a watch	14-7	Format, create custom	18-3
Select cell reference in Watch Window. Press <b>D</b> elete.		Select cells. Choose <b>F</b> ormat, <b>C</b> ells. Click the <b>N</b> umber tab and select <b>C</b> ustom. Key custom format in <b>T</b> ype text box, Click <b>O</b> K.	
Embed, Word document	18-5	Goal Seek	15-9
Select cell in workbook. Choose <b>I</b> nsert, <b>O</b> bject. Click the <b>C</b> reate from File tab and select file. Click <b>I</b> nsert. Click <b>O</b> K.		Select cell to be set to a value. Choose <b>T</b> ools, <b>G</b> oal <b>S</b> eek. In <b>T</b> o <b>v</b> alue box, key the target value. In <b>B</b> y <b>c</b> hanging cell box, click the cell to be adjusted. Click <b>O</b> K. Click <b>O</b> K or <b>C</b> ancel.	
Evaluate formula	14-1	Go To Special	12-11
Select cell with Trace Error button  . Click the <b>E</b> valuate in Formula Auditing toolbar. Click <b>S</b> tep <b>I</b> n to view an argument. Click <b>S</b> tep <b>O</b> ut to leave argument. Click <b>C</b> lose after viewing each argument.		Press <b>C</b> trl + <b>G</b> or <b>F</b> 5. Click the appropriate button to select category of cells. Click <b>O</b> K.	
		Import, Access table/query	18-12
		Choose <b>D</b> ata, <b>I</b> mport <b>E</b> xternal <b>D</b> ata, <b>N</b> ew <b>D</b> atabase <b>Q</b> uery. Choose <b>M</b> S <b>A</b> ccess <b>D</b> atabase and click <b>O</b> K. Select database file and click <b>O</b> K. Select table or fields. Click <b>N</b> ext and enter criteria to filter data if desired. Click <b>N</b> ext and enter sorting options if desired. Click <b>N</b> ext and choose <b>R</b> eturn <b>D</b> ata to <b>M</b> icrosoft <b>E</b> xcel. Click <b>O</b> K.	
		Import, HTML file	18-10
		Open Web page in a browser. Size windows to display browser and workbook. Select data in the Web page and drag to a cell in the worksheet.	

Import, text file <b>18-6</b>	Click the Open button  . Set Files of type to Text files. Locate text file and double-click. Complete wizard dialog box options and click Next. Click Finish at the last box.
Import, Word data with copy/paste <b>18-1</b>	Open document in Word and select data to be copied. Click the Copy button  . Return to workbook. Click in appropriate cell and click the Paste button  .
Import, Word data with drag/drop <b>18-4</b>	Open document in Word. Size windows to display Word file and workbook. Select data to be copied. Press <b>Ctrl</b> . Drag data to appropriate cell in workbook. Release <b>Ctrl</b> and then release mouse.
Increase indent <b>11-16</b>	Select cells and click the Increase Indent button  .
Link, Word document <b>18-8</b>	Select cell in workbook. Choose Insert, Object. Click the Create from File tab. Select file. Click Insert and select Link to file. Click OK.
Link, workbooks <b>16-9</b>	Open workbooks and arrange windows. Click the formula cell in dependent workbook and key = to start formula. Click the cell in source workbook and then key arithmetic operator. Complete formula by clicking where necessary. Press <b>Enter</b> .
Links, break <b>16-13</b>	Open the dependent workbook. Choose Edit, Links. Select the source workbook. Click Break Link. Click Break Links again. Click Close.
Links, edit <b>16-12</b>	Open dependent workbook. Choose Edit, Links. Select source workbook. Click Change Source. Navigate to new folder, select file, and click OK. Click Close.
List, create <b>19-1</b>	Key a row of labels for each column. Enter data in columns, leaving no blank rows. Do not mix values and text. Name the list.
Locked property <b>12-16</b>	Right-click the selected cells or object(s). Choose Format Cells or Format Picture. Click the Protection tab. Select or deselect Locked. Click OK.
Macro, delete <b>13-9</b>	Choose Tools, Macro, Macros. Select macro name. Click Delete and choose Yes.
Macro, edit <b>13-4</b>	Open workbook with macro. Press <b>Alt</b> + to open Visual Basic Editor. Make changes in Code window. Close editor and save workbook.
Macro, print <b>13-5</b>	Open Visual Basic Editor. Display macro module. Choose File, Print, Current Module in the Range group. Choose Code in Print what group. Click OK.
Macro, record <b>13-8</b>	Choose Tools, Macro, Record New Macro. Key macro name. Add shortcut if desired. Choose location and description. Click OK. Perform task. Click the Stop Recording button  .
Macro, run from menu <b>13-2</b>	Choose Tools, Macro, Macros or press <b>Alt</b> + <b>F8</b> . Select macro name. Click Run.
Macro, run from shortcut <b>13-5</b>	Press <b>Ctrl</b> + <b>Shift</b> + and character for shortcut.
Macro, set security level <b>13-1</b>	Choose Tools, Macro, Security. Set level. Click OK.
Outline, create <b>19-23</b>	Sort the rows by appropriate column. Insert blank row below each planned group. Key label for group if desired. Select rows for the group. Choose Data, Group and Outline, Group.
PivotChart report, create <b>19-20</b>	Select any cell in PivotTable. Click the Chart Wizard button  .
PivotTable, AutoFormat <b>19-11</b>	Select any cell in PivotTable. Click the Format Report button  and select AutoFormat. Click OK.

PivotTable, calculated field	19-18	Range, go to	11-1
Select column for the calculation. Click the <b>PivotTable</b> button on PivotTable toolbar. Choose <b>Formulas</b> and then choose <b>Calculated Field</b> . Name field and key formula. Click <b>OK</b> .		Click the down arrow next to Name Box and choose range name.	
PivotTable, create	19-10	Range, in formula	11-2
Choose <b>Data</b> , <b>PivotTable</b> and <b>PivotChart Report</b> . Choose <b>Microsoft Excel list or database and PivotTable</b> . Select list name or range. Select a new or existing worksheet. Click <b>Finish</b> . Drag fields to row, data, and column areas in table template.		Press <b>F3</b> when range name is needed while building the formula. Choose name. Click <b>OK</b> .	
PivotTable, custom calculation	19-19	Range, name	11-3
Select cell to show calculation. Click the <b>Field Settings</b> button  . Click <b>Options</b> . Select from <b>Show data as</b> text box. Click <b>OK</b> .		Select range of cells. Click the Name Box. Key name and press <b>Enter</b> .	
PivotTable, field, delete	19-8	Range, redefine	11-10
Select field name in PivotTable. Drag field out of the table.		Press <b>Ctrl</b> + <b>F3</b> . Edit address in <b>Refers to</b> text box. Click <b>OK</b> .	
PivotTable, field, insert	19-9	Range names, create	11-5
Select field name in PivotTable Field List. Drag field to the table in desired location.		Select range adjacent to labels. Choose <b>Insert</b> , <b>Name</b> , <b>Create</b> . Check options and click <b>OK</b> .	
PivotTable, field, rotate	19-9	Range names, print	11-11
Select field name in PivotTable Field List. Drag field to another location in the PivotTable.		Position insertion point where printed range names should appear. Press <b>F3</b> . Click <b>Paste List</b> .	
PivotTable, field settings, edit	19-14	Records, show all	19-11
Select field in PivotTable. Click the <b>Field Settings</b> button  . Change name or function. Click <b>OK</b> .		Click the drop-down arrow for filtered field. Select <b>(All)</b> .	
PivotTable List, create	19-22	Remove precedent/dependent arrows	14-2
Click anywhere in PivotTable. Choose <b>File</b> , <b>Save as Web Page</b> . Select <b>Selection: Sheet</b> and <b>Add interactivity</b> . Key filename and change title if desired. Click <b>Publish</b> . Select <b>PivotTable</b> and set <b>Add interactivity with to PivotTable functionality</b> . Click <b>Publish</b> .		Select cell. Click the <b>Remove Precedent Arrows</b> button  or <b>Remove Dependent Arrows</b> button  .	
PivotTable, options	19-17	Reviewing toolbar	17-5
Select any cell in PivotTable. Click the <b>PivotTable</b> button on PivotTable toolbar and choose <b>Table Options</b> . Make selections and click <b>OK</b> .		Right-click any toolbar and choose <b>Reviewing</b> .	
Range, delete	11-8	Scenario, create	15-2
Press <b>Ctrl</b> + <b>F3</b> . Choose name. Click <b>Delete</b> .		Choose <b>Tools</b> , <b>Scenarios</b> . Click the <b>Add</b> tab. Name scenario. Select cells or range name in <b>Changing cells</b> text box. Key comment if desired. Click <b>OK</b> . Key changing values and click <b>OK</b> .	
		Scenario, edit	15-5
		Choose <b>Tools</b> , <b>Scenarios</b> . Choose scenario name. Click <b>Edit</b> . Edit <b>Changing cells</b> or comment. Click <b>OK</b> . Edit values and click <b>OK</b> .	
		Scenario, report	15-6
		Choose <b>Tools</b> , <b>Scenarios</b> . Click <b>Summary</b> . Choose <b>Scenario summary</b> . In <b>Results cells</b> text box, select cells to be shown in report. Click <b>OK</b> .	

Scenario, show	15-4	Template, save	12-18
Choose <b>T</b> ools, <b>S</b> cenarios. Choose scenario name. Click <b>S</b> how. Close dialog box.		Press <b>(F12)</b> . Key template name in <b>F</b> ile name box. Click the down arrow next to <b>S</b> ave as type and choose <b>T</b> emplate. Navigate to appropriate <b>S</b> ave in folder. Click <b>S</b> ave.	
Shared workbook, create	17-1	Template, use Excel template	12-1
Choose <b>T</b> ools, <b>S</b> hare <b>W</b> orkbook. Click <b>A</b> llow changes by more than one user at the same time on <b>E</b> ditng tab. Click <b>O</b> K.		Click <b>G</b> eneral <b>T</b> emplates in <b>N</b> ew <b>W</b> orkbook task pane. Click the <b>S</b> preadsheet <b>S</b> olutions tab. Double-click the template.	
Solver	15-11	Toolbar, add menu/button	13-14
Select target cell. Choose <b>T</b> ools, <b>S</b> olver. Choose <b>E</b> qual <b>T</b> o option. Select cell range in <b>B</b> y changing cells text box. Click <b>A</b> dd to add constraints, if desired. Click <b>S</b> olve. Keep solution, save it as scenario, or return to original values. Click <b>O</b> K.		Click the toolbar. Choose <b>T</b> ools, <b>C</b> ustomize. Click the <b>C</b> ommands tab and choose category. Drag menu name or button to toolbar. Click <b>C</b> lose.	
Sort, multiple columns	19-9	Toolbar, create	13-14
Click in named list. Choose <b>D</b> ata, <b>S</b> ort. Choose first <b>S</b> ort by field and <b>A</b> scending or <b>D</b> escending. Choose <b>T</b> hen by fields and <b>A</b> scending or <b>D</b> escending. Click <b>O</b> K.		Choose <b>T</b> ools, <b>C</b> ustomize. Click the <b>T</b> oolbars tab and click <b>N</b> ew. Key toolbar name. Click <b>C</b> lose.	
Sort, single column	19-8	Toolbar, delete	13-20
Click in a named list in column to be sorted. Click the Sort Ascending button  or Sort Descending button  .		Right-click the toolbar. Choose <b>C</b> ustomize. Click the <b>T</b> oolbars tab and select toolbar name. Click <b>D</b> elate, Click <b>O</b> K. Click <b>C</b> lose.	
Subtotals, remove	19-22	Toolbar, display/hide	13-11
Click in subtotaled list. Choose <b>D</b> ata, <b>S</b> ubtotals. Click <b>R</b> emove <b>A</b> ll.		Right-click any toolbar. Choose toolbar to be displayed/hidden.	
Subtotals, show	19-21	Toolbar, modify	13-16
Sort list by column to be used for subtotaling. Choose <b>D</b> ata, <b>S</b> ubtotals. Choose field for <b>A</b> t each change in. Choose function. In <b>A</b> dd subtotal to box, select fields that should show subtotals. Click <b>O</b> K.		Choose <b>T</b> ools, <b>C</b> ustomize. Click the <b>C</b> ommands tab. Click the button or menu name. Click <b>M</b> odify <b>S</b> election, Choose option from shortcut menu and make changes. Click <b>C</b> lose.	
Template, delete	12-5	Trace dependents	14-3
Click <b>G</b> eneral <b>T</b> emplates in <b>N</b> ew <b>W</b> orkbook task pane. Select template. Press <b>(Delete)</b> . Click <b>Y</b> es and then click <b>C</b> ancel.		Select cell. Click the <b>T</b> race <b>D</b> ependents button  .	
Template, edit Excel template	12-3	Trace error	14-8
Click the <b>O</b> pen button  . Navigate to folder with <b>S</b> preadsheet <b>S</b> olutions templates. Open template. Save template with same or different name.		Select cell. Click the <b>T</b> race <b>E</b> rror button  .	
		Trace precedents	14-2
		Select cell. Click the <b>T</b> race <b>P</b> recedents button  .	
		Trendline, add	15-8
		Select chart. From <b>C</b> hart menu, choose <b>A</b> dd <b>T</b> rendline. Choose type of trendline on <b>T</b> ype tab. On <b>O</b> ptions tab, set number of periods for forecasting. Click <b>O</b> K.	

Unprotect, workbook <b>12-20</b>	Validate, input message <b>12-10</b>
Choose <u>T</u> ools, <u>P</u> rotection, <u>U</u> nprotect <u>W</u> orkbook. Key password if prompted. Click OK.	Select cells. Choose <u>D</u> ata, <u>V</u> alidation. Click the <u>I</u> nput <u>M</u> essage tab. Key title in <u>T</u> itle box. Key message in <u>I</u> nput message box. Click OK.
Unprotect, worksheet <b>12-20</b>	Watch Window, display/hide <b>14-6</b>
Choose <u>T</u> ools, <u>P</u> rotection, <u>U</u> nprotect Sheet. Key password if prompted. Click OK.	Click the Show Watch Window button  .
Validate, data <b>12-8</b>	Web query, create <b>18-11</b>
Select cells. Choose <u>D</u> ata, <u>V</u> alidation. Click the <u>S</u> ettings tab. Choose options in <u>A</u> llow box. Complete other text boxes if necessary. Click OK.	Choose <u>D</u> ata, <u>I</u> mport <u>E</u> xternal <u>D</u> ata, <u>N</u> ew <u>W</u> eb <u>Q</u> uery. Key Web address in <u>A</u> ddress text box and press <u>[E</u> nter]. Click the table marker for data to be imported. Click <u>I</u> mport and choose <u>E</u> xisting worksheet. Click OK.
Validate, error alert <b>12-9</b>	Workspace, create <b>16-14</b>
Select cells. Choose <u>D</u> ata, <u>V</u> alidation. Click the <u>E</u> rror <u>A</u> lert tab. Choose option in <u>S</u> tyl <u>e</u> list. Key title in <u>T</u> itle box. Key message in <u>E</u> rror message box and click OK.	Open workbooks and arrange windows. Choose <u>F</u> ile, <u>S</u> ave <u>W</u> orkspace. Navigate to folder and key filename. Click <u>S</u> ave.