As of 6/23/2025

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Introduction

In this course, we go further than just an introduction to Excel. You will learn skills that are vital to productive with Excel. You will also learn some tips and techniques that many experienced Excel users lack.

For this handout (in color) and more, visit my teacher's website at:

www.clearcutcomputing.com/school



Data Managment in Excel.

SORTING

First, click somewhere within the range of data. Doing this will allow Excel to "stretch out" and detect the range of the data, which will become highlighted. Now from the menu, choose:

DATA—SORT

You can choose up to three levels of sorting. If the first row in your sheet or selection contains the column headings, click the "Header row" button.

AUTOFILTERS

Autofilters allow you to quickly limit the display of rows of information based on criteria you select. To activate the Autofilters, choose from the menu:

DATA—FILTER

You will notice that pull-down arrows will have been added to the tops of each column. These arrows do not print. To turn off the Autofilters, repeat the menu command again.

When you click on a pull-down arrow, you will see a unique list of the entries in that column. Simply choose one of those items in the list and your list will be limited to only those records.

SUBTOTALS

You can Sum, Count or Average the information in a column with the Subtotals feature. Before you use this feature, however, you must SORT you data first to match the desired Subtotal. Choose from the menu: DATA—SUBTOTAL

A window will appear from which you must set:

- <u>At each change in:</u> this should be the same as the top level of sorting you chose (ie: City).
- <u>Use function</u>:

If you want to total up salaries or quantities, set this to "Sum." If you want to count the number of people in a town, choose "Count."

• <u>Add subtotal to:</u>

Here you would check off the columns you want to apply the above function to. You can select multiple columns.

To remove the subtotals, simply repeat the menu choice and click the "Remove All" button from the Subtotal window.



Complex Spreadsheet Example

This is part of a spreadsheet we will use in our lesson. There is a lot of variety going on here.

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nviə. Dr	lames	Newsworthy	2 College Way	Garden City	NV	11520	2/29/00	56 Nowsworthy	lamos	1002 0	Jow1002	BCBS	6/6/14	\$ 754.00				
Mr	Walter	Smith	56 St Patrick Avenue	Garden City	NV	11530	12/25/74	48 Smith Moltor	James	1003	Smi1003	Cigna	6/8/14	\$ 700.59				
Mr	Robert	Dino	720 Northern Blvd	Brookville	NY	11549	7/30/60	62 Dino Robert		1004 0	Din1004	Humana	4/17/14	\$ 763.37				
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Me	Diane	Balle	PO Box 11576	Brookville	NY	11548	6/30/61	62 Balle Diane		1007 6	Sal1007	Aetna	A/8/14	\$ 859.96				
Mc	Maryanne	Northrun	1775 E. Chestnut Street	Long Beach	NV	11561	2/15/67	56 Northrup Mar	nanno	1007 1	Jor1008	Oxford	4/0/14	\$ 242.16				
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Dr	Andrew	Milner	100 Stewart Ave	Levittown	NY	11756	11/8/71	51 Milner Andres	w	1011	Jil1011	Humana	5/10/14	\$ 98.40				
Mr.	Pete	Gwangi	4925 Mexico Road	Levittown	NY	11756	4/24/72	51 Gwandi Pete		1012 0	Swa1012	United HC	7/3/14	\$ 373.71				
Mr	Ken	Smith	200 Jerusallem Ave	Levittown	NY	11756	9/29/65	57 Smith Ken		1013 5	Smi1013	Aetna	4/30/14	\$ 975.46				
Ms.	Betty	Barfello	2345 South Service Road	Plainview	NY	11803	9/4/59	63 Barfello Beth	v	1014 F	Bar1014	United HC	5/23/14	\$ 191 79				
	Geogian	Krespe	50 Roosevelt Drive	Plainview	NY	11803	4/1/81	42 Krespe Geor	gian	1015 H	(re1015	Aetna	6/19/14	\$ 762.56				
Mr.	Sean	Connerv	123 Secret Service Rd	London	NY	12345	8/25/30	92 Connerv Sea	an	1016 0	Con1016	Oxford	5/22/14	\$ 847.12				
Mr.	Ignatz	Schmurtz	1500 Seamans Neck Road	Seaford	NY	TBA	5/12/59	64 Schmurtz Ian	natz	1017 \$	Sch1017	BCBS	4/18/14	\$ 992.27				
Mrs	Marion	Eberthal	PO Box 9999	Levittown	NY	TBA	11/22/62	60 Eberthal Mar	rion	1018 E	be1018	Cigna	5/5/14	\$ 342.23				
Mr.	Dick	Clark	1 Times Square	New York	NY	10001	11/30/29	93 Clark, Dick		1000 0	Cla1000	Humana	5/14/14	\$ 723.40				
Ms.	Ronda	Tolstoy	30 Cucumber Avenue	Great Neck	NY	11020	10/10/77	45 Tolstov, Rono	da	1001 7	Fol1001	United HC	6/8/14	\$ 792.14				
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Dr.	James	Newsworthy	2 College Way	Garden City	NY	11530	8/31/66	56 Newsworthy,	James	1003 N	Vew1003	Oxford	6/28/14	\$ 934.16				
Mr.	Walter	Smith	56 St Patrick Avenue	Garden City	NY	11530	12/25/74	48 Smith, Walter	r	1004 \$	Smi1004	BCBS	5/28/14	\$ 76.29				
Mr.	Robert	Dino	720 Northern Blvd	Brookville	NY	11548	7/30/60	62 Dino, Robert		1005 [Din1005	Cigna	4/2/14	\$ 746.37				
Mr.	Joseph	Smith	1053 Broadway	Brookville	NY	11548	6/4/57	66 Smith, Joseph	h	1006 \$	Smi1006	Humana	6/20/14	\$ 494.40				
Ms.	Diane	Balle	PO Box 11576	Brookville	NY	11548	6/30/61	62 Balle, Diane		1007 E	Bal1007	BCBS	4/8/14	\$ 196.19				
Ms.	Maryanne	Northrup	1775 E. Chestnut Street	Long Beach	NY	11561	3/15/67	56 Northrup, Mar	ryanne	1008	Vor1008	Cigna	6/21/14	\$ 471.66				
Mr.	Louis	Hues	150 Washington St.	Farmingdale	NY	11735	1/15/56	67 Hues, Louis		1009 H	lue1009	Humana	5/21/14	\$ 885.79				
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Freeze Panes

-the most popular choice for this is to keep the top row of a spreadsheet visible on the screen while the rest of the sheet can be scrolled up and down. This would be: Freeze Top Row.

Used much less is the choice Freeze First Column. Now, when you scroll left and right, the first column stays put.

But the most versatile is the first choice of the three, Freeze Panes, where you select a cell, such as D4, and choose Freeze Panes. Now, everything above D4 and to the left of D4 stays put while you scroll up, down, left and right.

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A Great Totaling Trick

When most people total a column of numbers, they use the SUM function at the bottom of the column. This is cumbersome in cases where there are a lot of rows of data. Why not put the total *above* the column being totaled?

- 1. Insert a row above row 1.
- 2. Click where you want the answer to be -in this case, in empty cell above "Inv Amt."
- 3. Now click the AutoSum button on the *Home* tab. It may not be able to guess what cells you want to add up. Even if it does load a guess, you are going to replace that guess.
- 4. Select the first few cells below Inv Amt; in this case I may have selected O3:O6.
- 5. Now, since the data sheet is empty below the last row (row 93), erase the 6 and type 10000.
- 6. The formula becomes =SUM(O3:O10000). Now, if you add more data below row 93, the total(s) in row 1 will update automatically.

NOTE: I used the "s" at the end of the word total(s) to encourage you to use totals on many columns. Try a formula that counts the number of records in the list (suggestion: count the Last Names).

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2	Title	First Name	Last Name	Address	City	State	Zip Code	DOB	Age	Name	lnv#	Patient#	Ins	Inv Date	Inv	Amt	
3	Mr.	Dick	Clark	1 Times Square	New York	NY	10001	11/30/29	93	B Clark, Dick	1000	Cla1000	Aetna	4/20/14	\$	470.17	
4	Ms.	Ronda	Tolstoy	30 Cucumber Avenue	Great Neck	NY	11020	10/10/77	45	o Tolstoy, Ronda	1001	Tol1001	Oxford	6/30/14	\$	173.14	
5	Ms.	Marilyn	Struddle	235 N. Pond Avenue	Freeport	NY	11520	2/29/80	43	Struddle, Marilyn	1002	Str1002	Oxford	6/6/14	\$	31.48	
6	Dr.	James	Newsworthy	2 College Way	Garden City	NY	11530	8/31/66	56	Newsworthy, James	1003	New1003	BCBS	6/6/14	\$	754.09	
7	Mr.	Walter	Smith	56 St Patrick Avenue	Garden City	NY	11530	12/25/74	48	8 Smith, Walter	1004	Smi1004	Cigna	6/8/14	\$	790.58	

Formulas that span multiple Worksheets or Workbooks

Let's take this further and use the steps above to put the total on another Worksheet. First, review the basics of the point-&-shoot method of building a formula. See the box to the RIGHT \rightarrow

Now, insert an new sheet labeled SUMMARY and follow the basic steps. Thanks to the Point=&-Shoot method, the intelligence of identifying the target worksheet, whether it be in the same Workbook, or another file is handled by Excel.

=SUM('Expanded DB'!O3:O10000)

REMEMBER *To CREATE a FORMULA*:

- 1. **CLICK** on the cell where you want the answer to be.
- 2. Press on the keyboard (the equals sign).
- 3. Build your formula.

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Microsoft Excel II — Essential Skills



When you select the function you want to use and click OK, the Function Arguments window will appear. Fill in the arguments and click OK. Arguments can be cell references, constants, or a formula using either or both of those. Some arguments can be left blank.

Function Arguments		?	\times
SUM Number1 Number2	t = number t = number		
Adds all the numbers in a range	= of cells. Number1: number1,number2, are 1 to 255 numbers to sum. Logical values and text are included if typed as arguments.	gnored in	cells,
Formula result =			

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Text Functions – There are a host of Text functions that are useful for manipulating and cleaning up data in spread-sheets. Let's start with a couple that are used in this sheet.

Concatenation—is when you put two or more pieces of text together. In basic math, we could add cells B3 + C3 if they both contained numbers. Using the Concatenate symbol (&) instead of the (+) produces the answer: DickClark

The formula would look like this: =B3&C3

But we should have a space between the names. That is a text constant and text constants must be surrounded with double quotes ("). Hence we need to add to the middle of the equation, DoubleQuote—space—DoubleQuote

That revised formula would be: =B3&" "&C3 –which looks a bit odd.

While it would work line that, we can clean it up by adding spaces before and after the & to get: =B3 & " " & C3

The actual formula in cell J3 uses a text constant of ", " and the formula reads: =C3 & ", " & B3

The MID function lets you extract a portion of a text string. Its syntax is:

MID(text,start_num,num_chars)

Used in cell L3, the formula is:



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1												
2	Title	First Name	Last Name	Address	City	State	Zip Code	DOB	Age	Name	lnv#	Patient#
3	Mr.	Dick	Clark	1 Times Square	New York	NY	10001	11/30/29	93	Clark, Dick	1000	Cla1000
4	Ms.	Ronda	Tolstoy	30 Cucumber Avenue	Great Neck	NY	11020	10/10/77	45	Tolstoy, Ronda	1001	Tol1001
5	Ms.	Marilyn	Struddle	235 N. Pond Avenue	Freeport	NY	11520	2/29/80	43	Struddle, Marilyn	1002	Str1002
6	Dr.	James	Newsworthy	2 College Way	Garden City	NY	11530	8/31/66	56	Newsworthy, James	1003	New1003
7	Mr.	Walter	Smith	56 St Patrick Avenue	Garden City	NY	11530	12/25/74	48	Smith, Walter	1004	Smi1004
8	Mr.	Robert	Dino	720 Northern Blvd	Brookville	NY	11548	7/30/60	62	Dino, Robert	1005	Din1005
9	Mr.	Joseph	Smith	1053 Broadway	Brookville	NY	11548	6/4/57	66	Smith, Joseph	1006	Smi1006
10	Ms.	Diane	Balle	PO Box 11576	Brookville	NY	11548	6/30/61	62	Balle, Diane	1007	Bal1007
11	Ms.	Maryanne	Northrup	1775 E. Chestnut Street	Long Beach	NY	11561	3/15/67	56	Northrup, Maryanne	1008	Nor1008
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Other popular Text functions include:

RIGHT(text,[num_chars])	Returns the last character or characters in a text string, based on the number of characters you specify.
LEFT(text,[num_chars])	Returns the first character or characters in a text string, based on the number of characters you specify.
MID(text,start_num,num_chars)	Returns part of the text from the start number you provide, and for the total number of characters you specify.
TRIM(text)	Removes all spaces from text except for single spaces between words. Useful on data received from another application that may have irregular spacing.
TEXTJOIN(delimiter, ignore_empty,	text1, [text2],) Combines text in multiple cells separating them with a delimiter.

Case Modifying functions	
LOWER(text)	Converts the text to all lower case.
UPPER(text)	Converts the text to all upper case.
PROPER(text)	Converts text so the 1st letter of each word is capitalized.

ROUND(number, num digits)

ROUNDUP(number, num digits)

ROUNDDOWN(number, num digits)

Date Functions – Excel saves dates as a number of days since Jan 1 1900 to whatever date you typed in.

Excel Dates Notes

- A) Entering dates (mm/dd/yy)
- B) The "1930" threshold
- C) The NOW () function returns the current date and time
- D) The TODAY() function returns just the current date
- E) Dates are stored as a serial number representing the number of days from January 1, 1900.
 - 1900 date system vs. 1904
 - 1900 date system is used by Excel & Lotus 1-2-3 for Windows
 - 1904 date system was used by Excel for Macintosh All versions of Excel for Windows calculate dates based on the 1900 date system. Excel 2008 for Mac and earlier Excel for Mac versions calculate dates based on the 1904 date system. Excel 2016 for Mac and Excel for Mac 2011 use the 1900 date system, which guarantees date compatibility with Excel for Windows.

You can use the options menu to change this

- F) Date Math to calculate an age, you might try =NOW() date value. The result will be the number of days between the dates.
- G) The formula to calculate the person's age in cell I3 is: =ROUNDDOWN((NOW()-H3)/365.25,0)
 - --or--

One interesting benefit of the ROUNDDOWN function is that the number of digits can be negative. Thus the formula in J3 of the AgeGrp column is:

EXCEL's Popular Rounding Functions

- round the number upward to the specified number of digits.

- round the number downward to the specified number of digits.

- round the number to the specified number of digits.

=ROUNDDOWN((NOW()-H3)/365.25,-1)

		=INT((NOW()-	-H3)/365.25)	uses the	Intege	r functio	n.									
	А	В	С	D	Е	F	G	н	1	J	к	L	М	Ν	0		P
1																\$ 44,	078.99
2	Title	First Name	Last Name	Address	City	State	Zip Code	DOB	Age	AgeGrp	Name	lnv#	Patient#	Ins	Inv Date	Inv	Amt
3	Mr.	Dick	Clark	1 Times Square	New York	NY	10001	11/30/29	93	90	Clark, Dick	1000	Cla1000	Aetna	4/20/14	\$	470.17
4	Ms.	Ronda	Tolstoy	30 Cucumber Avenue	Great Neck	NY	11020	10/10/77	45	40	Tolstoy, Ronda	1001	Tol1001	Oxford	6/30/14	\$	173.14
5	Ms.	Marilyn	Struddle	235 N. Pond Avenue	Freeport	NY	11520	2/29/80	43	40	Struddle, Marilyn	1002	Str1002	Oxford	6/6/14	\$	31.48
6	Dr.	James	Newsworthy	2 College Way	Garden City	NY	11530	8/31/66	56	50	Newsworthy, James	1003	New1003	BCBS	6/6/14	\$	754.09
7	Mr.	Walter	Smith	56 St Patrick Avenue	Garden City	NY	11530	12/25/74	48	40	Smith, Walter	1004	Smi1004	Cigna	6/8/14	\$	790.58
8	Mr.	Robert	Dino	720 Northern Blvd	Brookville	NY	11548	7/30/60	62	60	Dino, Robert	1005	Din1005	Humana	4/17/14	\$	763.37
9	Mr.	Joseph	Smith	1053 Broadway	Brookville	NY	11548	6/4/57	66	60	Smith, Joseph	1006	Smi1006	United HC	5/26/14	\$	567.86

Other popular Date	functions include:
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NOW()	Returns the current date and time formatted as a date and time.
TODAY()	Returns the current date formatted as a date.
DAY(serial_number)	Extracts the day from a date.
MONTH(serial_number)	Extracts the month number from a date.
YEAR(serial_number)	Extracts the 4-digit year from a date.
DATE(year,month,day)	Assembles a date (as a serial number).
WEEKDAY(serial_number,[return	_type]) Returns a number representing the day of the week for the date. (Incorporate the CHOOSE function to show the day name).

As the formulas get more advanced, remember what you (probably) learned in elementary school mathematics; Order of Operations. For example the following could lead you to think of two possible answers:

3 + 4 * 5

...as written, it would equal 23. But you could force it to equal 35 by adding parenthesis as follows:

(3+4) * 5

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ORDER OF OPERATIONS

1) () parenthesis

2) * /

(3) + -

Paste Operations - Excel saves dates as a number of days since Jan 1 1900 to whatever date you typed in.

STEPS:

a) We know that if we add a number to a date, we get an answer of a date that number of days later. Examples:

11/8/71 + 7 = 11/15/71 (one week later)

4/24/72 + 10 = 5/4/72 (10 days later and into the next month)

- b) From the list in column "O" (Inv Date), we need to determine the oldest and most recent dates. The functions for that are MIN and MAX.
- c) But here's a twist—I want to calculate those on the SUMMARY sheet.
- d) Once we find out the oldest and most recent dates, we need to calculate how old the most recent date is and add that number to every Inv Date.
- e) But will do that with the PASTE—ADD feature under Paste Operations.

In this Invoice Aging Report-

In order to make a useful representation of the last four columns, we need to bring all of these dates forward to a current time period. In short, the most recent date in the list will be changed to today's date. *This is only for the day when this class is taught.*

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															\$ 4	4,078.99				
Tit	e First Nam	e Last Name	Address	City	State	Zip Code	DOB	Age A	AgeGrp	Name	Inv#	Patient#	Ins	Inv Date	In	iv Amt	<30	31-60	61-90	>9
Mr.	Dick	Clark	1 Times Square	New York	NY	10001	11/30/29	93	90 C	lark, Dick	1000	Cla1000	Aetna	4/20/14	\$	470.17				
Ms	Ronda	Tolstoy	30 Cucumber Avenue	Great Neck	NY	11020	10/10/77	45	40 T	olstoy, Ronda	1001	Tol1001	Oxford	6/30/14	\$	173.14				
i Ms	Marilyn	Struddle	235 N. Pond Avenue	Freeport	NY	11520	2/29/80	43	40 S	truddle, Marilyn	1002	Str1002	Oxford	6/6/14	\$	31.48				
Dr.	James	Newsworthy	2 College Way	Garden City	NY	11530	8/31/66	56	50 N	ewsworthy, James	1003	New1003	BCBS	6/6/14	\$	754.09				
Mr.	Walter	Smith	56 St Patrick Avenue	Garden City	NY	11530	12/25/74	48	40 S	mith, Walter	1004	Smi1004	Cigna	6/8/14	\$	790.58				
Mr.	Robert	Dino	720 Northern Blvd	Brookville	NY	11548	7/30/60	62	60 E	ino, Robert	1005	Din1005	Humana	4/17/14	\$	763.37				
Mr.	Joseph	Smith	1053 Broadway	Brookville	NY	11548	6/4/57	66	60 S	mith, Joseph	1006	Smi1006	United HC	5/26/14	\$	567.86				
) Ms	Diane	Balle	PO Box 11576	Brookville	NY	11548	6/30/61	62	60 E	alle, Diane	1007	Bal1007	Aetna	4/8/14	\$	859.96				
1 Ms	Maryanne	Northrup	1775 E. Chestnut Street	Long Beach	NY	11561	3/15/67	56	50 N	orthrup, Maryanne	1008	Nor1008	Oxford	4/2/14	\$	242.16				
2 Mr.	Louis	Hues	150 Washington St.	Farmingdale	NY	11735	1/15/56	67	60 H	ues, Louis	1009	Hue1009	BCBS	4/24/14	\$	807.82				
3 Dr.	John	Egon	100 Eagle Place	Levittown	NY	11756	5/20/79	44	40 E	gon, John	1010	Ego1010	Cigna	5/21/14	\$	22.50				
1 Dr.	Andrew	Milner	100 Stewart Ave.	Levittown	NY	11756	11/8/71	51	50 N	lilner, Andrew	1011	Mil1011	Humana	5/10/14	\$	98.40				
5 Mr.	Pete	Gwangi	4925 Mexico Road	Levittown	NY	11756	4/24/72	51	50 0	wangi, Pete	1012	Gwa1012	United HC	7/3/14	\$	373.71				
6 Mr.	Ken	Smith	200 Jerusallem Ave.	Levittown	NY	11756	9/29/65	57	50 S	mith, Ken	1013	Smi1013	Aetna	4/30/14	\$	975.46				
7 Ms	Betty	Barfello	2345 South Service Road	Plainview	NY	11803	9/4/59	63	60 E	arfello, Betty	1014	Bar1014	United HC	5/23/14	\$	191.79				
3	Geogian	Krespe	50 Roosevelt Drive	Plainview	NY	11803	4/1/81	42	40 K	respe, Geogian	1015	Kre1015	Aetna	6/19/14	\$	762.56				
Mr.	Sean	Connery	123 Secret Service Rd	London	NY	12345	8/25/30	92	90 C	onnery, Sean	1016	Con1016	Oxford	5/22/14	\$	847.12				
Mr.	Ignatz	Schmurtz	1500 Seamans Neck Road	Seaford	NY	TBA	5/12/59	64	60 S	chmurtz, Ignatz	1017	Sch1017	BCBS	4/18/14	\$	992.27				
1 Mr	. Marion	Eberthal	PO Box 9999	Levittown	NY	TBA	11/22/62	60	60 E	berthal, Marion	1018	Ebe1018	Cigna	5/5/14	\$	342.23				
2 Mr.	Dick	Clark	1 Times Square	New York	NY	10001	11/30/29	93	90 C	lark, Dick	1000	Cla1000	Humana	5/14/14	\$	723.40				
3 Ms	Ronda	Tolstoy	30 Cucumber Avenue	Great Neck	NY	11020	10/10/77	45	40 T	olstoy, Ronda	1001	Tol1001	United HC	6/8/14	\$	792.14				
4 Ms	Marilyn	Struddle	235 N. Pond Avenue	Freeport	NY	11520	2/29/80	43	40 S	truddle, Marilyn	1002	Str1002	Aetna	5/12/14	\$	786.51				
5 Dr.	James	Newsworthy	2 College Way	Garden City	NY	11530	8/31/66	56	50 N	ewsworthy, James	1003	New1003	Oxford	6/28/14	\$	934.16				
6 Mr.	Walter	Smith	56 St Patrick Avenue	Garden City	NY	11530	12/25/74	48	40 S	mith, Walter	1004	Smi1004	BCBS	5/28/14	\$	76.29				
7 Mr.	Robert	Dino	720 Northern Blvd	Brookville	NY	11548	7/30/60	62	60 E	ino, Robert	1005	Din1005	Cigna	4/2/14	\$	746.37				
B Mr.	Joseph	Smith	1053 Broadway	Brookville	NY	11548	6/4/57	66	60 S	mith, Joseph	1006	Smi1006	Humana	6/20/14	\$	494.40				
9 Ms	Diane	Balle	PO Box 11576	Brookville	NY	11548	6/30/61	62	60 E	alle, Diane	1007	Bal1007	BCBS	4/8/14	\$	196.19				
0 Ms	Marvanne	Northrup	1775 E. Chestnut Street	Long Beach	NY	11561	3/15/67	56	50 N	orthrup Marvanne	1008	Nor1008	Cigna	6/21/14	\$	471.66				

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paulj@clearcutcomputing.com www.clearcutcomputing.com

Page – 8 (516) 845-4081x1 The "If" Function — Easily the most popular of the conditional functions. This function applies a test to a cell or formula and allows you to apply one value if the test is successful (true) or a different value if the test fails (false). First, let's prepare our Mail Merge DB spreadsheet as follows:

	A	B	C	D	F	F	G	Н	1	.1	
1	Title	First Name	Last Name	Address	City	State	Zip Code	ate of Bir	Age	Age group	
2	Mr.	Sean	Connery	123 Secret Service Rd	London	NY	12345	8/25/30	69.4	, i i i i i i i i i i i i i i i i i i i	
3	Mr.	Dick	Clark	1 Times Square	New York	NY	10001	11/3	70.1		
4	Mr.	Joseph	Smith	1053 Broadway	Westbury	NY	11590	0/4/57	42.6		
5	Mr.	Robert	Dino	720 Northern Blvd	Brookville	NY	11.48	7/30/60	Ad	d this head	lino
		Enter the	following	formula: = (NOW) -H	42)/365				110	a this nead	iiig
		And copy	y it to all th	ne cells below.							

We want

to test the age of each person in the list and if they are over the age of 59.5, we would like to have the Age Group say "SENIOR." Otherwise, the function should place "Too young" in this column. The syntax for the If function is as follows:

IF(logical test, value if true, value if false)

Let's break down what we want for each of the three parameters:

logical_value:	I2 > 59.5	{is the contents of the first age column greater than 59.5?}
value_if_true:	"SENIOR"	{if yes, enter the word "SENIOR" - be sure to include the quotes}
value_if_false:	"Too young"	{if no, enter the words "Too young" - again, with the quotes}

Put it all together, and you should have entered into cell J2: =IF(I2>59.5, "SENIOR", "Too young")

Copy the formula down into all the necessary cells below and you should see different results depending on the various age values. Try changing a few of the birth dates to make different people older that 59.5 and the Age Group value should change automatically.

We really don't need to list the non-seniors as "Too young." Let's make the Age Group cells for those people be blank. To do this, just remove the value if false component of the function - BUT LEAVE THE COMMA. Hence, chnge the formula to: =IF(I2>59.5, "SENIOR",) and copy it to the necessary cells below it.

COMPARISON SIGNS = is equal to > is greater than < is less than >= is greater than or equal to \leq is less than or equal to > not equal to NOT(test)

But this should produce zeros for the non-seniors - not exactly what we wanted. This is because of the formatting of the cell to display zero values, which is the equivalent to a False result from a logical test. To fix this, we could create a custom number format for these cells of a single "#" symbol. BUT, there is an easier way to do this within the IF function. Change the formula of the first cell to: =IF(12>59.5, "SENIOR","") and copy it to the necessary cells below it. Notice that the value if false parameter is set to a pair of double quotes with no space in-between. This tells Excel that we want to put the NULL value in the cell.

Nesting IF functions – it is possible to create many layers of IF tests in a formula. The process is referred to as "nesting."

In our example above, we now want to display the word "Minor" in the **Age Group** for the people under 21 years old. We still want our over-59.5 folks to be shown as "SENIOR" and the rest to be blank. In words, we wish to perform the test: "if not a senior, test to see if a minor." Well, "if not a senior" the **value_if_false** would be applied. So, in place of the double-quotes, we will insert another IF function. Hence, the first cell should be as follows:

=IF(I2>59.5, "SENIOR", IF(I2<21, "Minor", ""))

Enter this formula and copy it to the necessary cells below it. Try changing the birth dates of various people to see the effect of this function.

This tutorial used the IF function to place text in cells. It could also be used to conditionally place a numeric value. For example, if you were to insert the sales tax rate based on a State column, you could build an IF function as follows: =IF(F2="NY", 0.085, IF(F2="CT", 0.06, 0)) which simply says that if the State is "NY," put 8.5% in the target cell; if not, and the State is "CT," put 6% in the target cell; otherwise use zero (the zero is unnecessary, but helps the "readability" of the formula).

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Ms	5. Ronda 5. Marilyi	n Struddle	235 N. Pond Avenue	Freeport	NY	11020	2/29/80	45	40 Tolstoy, Ronda 40 Struddle, Marilyn	1001 1011001 1002 Str1002		Oxford	6/6/14	5 173.14 5 31.48					
Dr	James	Newsworth	y 2 College Way	Garden City	NY	11530	8/31/66	56 48	50 Newsworthy, James 40 Smith Walter	1003 New1003		BCBS	6/6/14	754.09					
Mr	Robert	Dino	720 Northern Blvd	Brookville	NY	11548	7/30/60	62	60 Dino, Robert	1005 Din1005		Humana	4/17/14	763.37					
Mr	: Josepl 5. Diane	n Smith Balle	1053 Broadway PO Box 11576	Brookville Brookville	NY	11548 11548	6/4/57 6/30/61	66 62	60 Smith, Joseph 60 Balle, Diane	1006 Smi1006 1007 Bal1007		United HC Aetna	5/26/14 9	567.86 859.96					
Ms	. Marya	nne Northrup	1775 E. Chestnut Street	Long Beach	NY	11561	3/15/67	56	50 Northrup, Maryanne	1008 Nor1008		Oxford	4/2/14	242.16					
Mr	: Louis : John	Hues Egon	150 Washington St. 100 Eagle Place	Farmingdale Levittown	NY	11735 11756	1/15/56 5/20/79	67 44	60 Hues, Louis 40 Egon, John	1009 Hue1009 1010 Ego1010		BCBS Cigna	4/24/14 \$ 5/21/14 \$	807.82 22.50					
Dr	Andre	v Milner	100 Stewart Ave.	Levittown	NY	11756	11/8/71	51	50 Milner, Andrew	1011 Mil1011		Humana	5/10/14	98.40					
Mr	. Pete Ken	Gwangi Smith	4925 Mexico Road 200 Jerusallem Ave.	Levittown	NY NY	11756 11756	4/24/72 9/29/65	51 57	50 Gwangi, Pete 50 Smith, Ken	1012 Gwa1012 1013 Smi1013		United HC Aetna	4/30/14 9	373.71 975.46					
Ms	Betty	Barfello	2345 South Service Road	Plainview	NY	11803	9/4/59	63	60 Barfello, Betty	1014 Bar1014		United HC	5/23/14	191.79					
Mr	Geogia	In Krespe Connerv	50 Roosevelt Drive 123 Secret Service Rd	London	NY	11803 12345	4/1/81 8/25/30	42 92	40 Krespe, Geogian 90 Connery, Sean	1015 Kre1015 1016 Con1016		Aetna Oxford	5/22/14 \$	6 762.56 847.12					
Mr	Ignatz	Schmurtz	1500 Seamans Neck Road	Seaford	NY	TBA	5/12/59	64	60 Schmurtz, Ignatz	1017 Sch1017		BCBS	4/18/14	992.27					
Mr	 Marior Dick 	Clark	1 Times Square	New York	NY	10001	11/22/62	60 93	90 Clark, Dick	1018 Ebe1018 1000 Cla1000		Cigna Humana	5/5/14 \$	5 342.23 5 723.40					
Ms	Ronda	Tolstoy	30 Cucumber Avenue	Great Neck	NY	11020	10/10/77	45	40 Tolstoy, Ronda	1001 Tol1001		United HC	6/8/14	792.14					
Dr	James	Newsworth	y 2 College Way	Garden City	NY	11520	8/31/66	43 56	50 Newsworthy, James	1002 Sti 1002 1003 New1003		Oxford	6/28/14	934.16					
Mr	Walter	Smith	56 St Patrick Avenue	Garden City	NY	11530	12/25/74	48	40 Smith, Walter	1004 Smi1004		BCBS	5/28/14	76.29					
Mr	Josepl	n Smith	1053 Broadway	Brookville	NY	11548	6/4/57	66	60 Smith, Joseph	1005 Din1005		Humana	6/20/14	5 140.31 5 494.40					
Ms	Diane	Balle Northrup	PO Box 11576	Brookville	NY	11548	6/30/61	62	60 Balle, Diane	1007 Bal1007		BCBS	4/8/14	196.19					
Mr	. Marya . Louis	Hues	150 Washington St.	Farmingdale	NY	11735	1/15/56	67	60 Hues, Louis	1009 Hue1009		Humana	5/21/14	885.79					
Dr	. John	Egon	100 Eagle Place	Levittown	NY	11756	5/20/79	44	40 Egon, John	1010 Ego1010		United HC	6/3/14 \$	771.15					
Mr	. Pete	Gwangi	4925 Mexico Road	Levittown	NY	11756	4/24/72	51	50 Gwangi, Pete	1012 Gwa1012		Oxford	4/16/14	5 778.39					
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Mr	Ken	Smith	200 Jerusallem Ave. 2345 South Service Road	Levittown	NY	11756	9/29/05	63	50 Smith, Ken 60 Barfello, Bethy	1013 Smi1013		BCBS	4/7/14 \$	2/1/0					
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Paul J. Montenero Clear-Cut Computing Corp. paulj@clearcutcomputing.com www.clearcutcomputing.com

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Ms. Ro Ms. Ma	arilyn Struddle	30 Cucumber Avenue 235 N. Pond Avenue	Great Neck Freeport	NY 11020 NY 11520	10/10/77 2/29/80	45 43	40 Tolstoy, Ronda 40 Struddle, Marilyn	1001 Tol1001 1002 Str1002	Oxford Oxford	6/30/14 6/6/14	\$ 173.14 \$ 31.48					
Dr. Jan Mr. Wa	imes Newswo alter Smith	thy 2 College Way 56 St Patrick Avenue	Garden City Garden City	NY 11530 NY 11530	8/31/66 12/25/74	56 48	50 Newsworthy, James 40 Smith, Walter	1003 New1003 1004 Smi1004	BCBS Cigna	6/6/14 6/8/14	\$ 754.09 \$ 790.58					
Mr. Rol Mr. Jos	obert Dino seph Smith	720 Northern Blvd 1053 Broadway	Brookville	NY 11548 NY 11548	7/30/60 6/4/57	62 66	60 Dino, Robert 60 Smith, Joseph	1005 Din1005 1006 Smi1006	Humana United HC	4/17/14 5/26/14	\$ 763.37 \$ 567.86					
Ms. Dia Ms. Ma	ane Balle	PO Box 11576 1775 E. Chestnut Street	Brookville	NY 11548 NY 11561	6/30/61 3/15/67	62 56	60 Balle, Diane 50 Northrup, Maryanne	1007 Bal1007 1008 Nor1008	Aetna	4/8/14	\$ 859.96 \$ 242.16					
Mr. Lou	uis Hues	150 Washington St. 100 Eagle Place	Farmingdale	NY 11735	1/15/56	67	60 Hues, Louis 40 Egon, John	1009 Hue1009 1010 Eco1010	BCBS	4/24/14	\$ 807.82					
Dr. An	ndrew Milner	100 Stewart Ave.	Levittown	NY 11756	11/8/71	51	50 Milner, Andrew	1010 Ego1010 1011 Mil1011	Humana	5/10/14	\$ 98.40 \$ 272.71					
Mr. Per Mr. Ker	an Smith	200 Jerusallem Ave.	Levittown	NY 11756	9/29/65	57	50 Gwangi, Pete 50 Smith, Ken	1012 Gwa1012 1013 Smi1013	Aetna	4/30/14	\$ 975.46					
Ms. Bet Ge	etty Bartello eogian Krespe	50 Roosevelt Drive	Plainview	NY 11803 NY 11803	9/4/59 4/1/81	63 42	40 Krespe, Geogian	1014 Bar1014 1015 Kre1015	Aetna	5/23/14 6/19/14	\$ 191.79 \$ 762.56					
Mr. Sei Mr. Ign	ean Conner natz Schmur	z 123 Secret Service Rd 1500 Seamans Neck Road	London Seaford	NY 12345 NY TBA	8/25/30 5/12/59	92 64	90 Connery, Sean 60 Schmurtz, Ignatz	1016 Con1016 1017 Sch1017	Oxford BCBS	5/22/14 4/18/14	\$ 847.12 \$ 992.27					
Mrs. Ma Mr. Dic	arion Ebertha ck Clark	PO Box 9999 1 Times Square	Levittown New York	NY TBA NY 10001	11/22/62 11/30/29	60 93	60 Eberthal, Marion 90 Clark, Dick	1018 Ebe1018 1000 Cla1000	Cigna Humana	5/5/14 5/14/14	\$ 342.23 \$ 723.40					
Ms. Ro Ms. Ma	arilyn Struddle	30 Cucumber Avenue 235 N. Pond Avenue	Great Neck Freeport	NY 11020 NY 11520	10/10/77 2/29/80	45 43	40 Tolstoy, Ronda 40 Struddle, Marilyn	1001 Tol1001 1002 Str1002	United HC Aetna	6/8/14 5/12/14	\$ 792.14 \$ 786.51					
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Ms. Dia Ms. Ma	ane Balle	PO Box 11576 1775 F. Chestnut Street	Brookville Long Beach	NY 11548 NY 11561	6/30/61 3/15/67	62 56	60 Balle, Diane 50 Northrup, Marvanne	1007 Bal1007 1008 Nor1008	BCBS	4/8/14	\$ 196.19 \$ 471.66					
Mr. Lou	uis Hues	150 Washington St. 100 Eagle Place	Farmingdale	NY 11735	1/15/56	67	60 Hues, Louis	1009 Hue1009	Humana United HC	5/21/14	\$ 885.79 \$ 771.15					
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Mr. Kei	en Smith	200 Jerusallem Ave.	Levittown	NY 11756	9/29/65	57	50 Smith, Ken	1013 Smi1013	BCBS	4/7/14	\$ 636.85					
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Paul J. Montenero Clear-Cut Computing Corp. paulj@clearcutcomputing.com www.clearcutcomputing.com **Templates** – With Microsoft Excel, you can create a spreadsheet (or workbook) that can be used as a "form" to be used on a regular basis. Take, for example, an Expense Report.

We will use the PMT function (Payment). The SYNTAX of the function is:

PMT(rate, nper, pv, [fv], [type]) the arguments, [fv] & [type] are in square brackets because they are optional.



When you're done creating the sheet, you're ready to save it.

- 1. On the File tab, click Save As. Unlike Save, Save As allows you to "translate" your spreadsheet (or workbook) into different formats.
- 2. Then click **Browse** to bring up the file save dialog window.
- 3. The Save As window at the right should appear.
- 4. In the *Save as type* field, near the bottom, select "Excel Template." The folder in the *Save in* field will change to the <u>Templates</u> folder for the user's account.
- 5. Enter a *File name* (such as "invoice"), and click the save button.
- 6. Finally, close your template with File Close.

Now, when you need to use the template, you must open a new workbook with the File New menu command, and choose the <u>invoice</u> template from the top of the window or from the templates area.



4

Some Useful Keyboard Shortcuts

FORMATTING	
Cut	Ctrl+X
Сору	Ctrl+C
Paste	Ctrl+V
Open the Paste Special dialog box.	Ctrl+Alt+V
Bold text	Ctrl+B
Italic text	Ctrl+I
Underline text	Ctrl+U
Open Format Font Window	Ctrl+Shift+P
Format as currency (with red negatives)	Ctrl+Shift+\$
Format as a percent	Ctrl+Shift+%
INSERTING	
Insert today's date	Ctrl+;
Invoke the SUM function	Alt+=
Insert a Function	Shift+F3
MOVING AROUND	
Move one cell down (unless program options changed)	Enter key
Move one cell up	Shift+Enter
Move one cell to the right	Tab key
Move one cell to the left	Shift+Tab
Go to cell A1 (or to the top left of the worksheet)	Ctrl+Home
Go to the lower right of Overall worksheet size	Ctrl+End
Move to the first column in the current row	Home
Skip over blank or filled cells	Ctrl+ <arrow></arrow>
Move one screen downward	Ctrl+Page Down
Move one screen upward	Ctrl+Page Up
MISCELLANEOUS	
HIDE the current ROW	Ctrl+9
HIDE the current COLUMN	Ctrl+0
SELECT the entire ROW	Shift+Spacebar
SELECT the entire COLUMN	Ctrl+Spacebar

Aontenero paulj@clear

Display FORMAT CELLS Window

SELECT the Entire sheet

Undo the last action **Redo** the last Undo action

Save the Spreadsheet

To enter "In-Cell Editing"

Print Preview

Ctrl+0 Shift+Spacebar Ctrl+Spacebar Ctrl+A Ctrl+Z Ctrl+Z Ctrl+Y Ctrl+1 Alt+Ctrl+I or Ctrl+P Ctrl+S F2 Ctrl+F

Find