WORKSHEET TECHNIQUES

Excel workbooks are three-dimensional. They have **rows**, **columns** and **worksheets**. The **rows** and **columns** that form a worksheet are the two core dimensions. A workbook can be made up of multiple **worksheets** – forming a third dimension.

The ability to have a number of worksheets in a workbook allows you to separate your data according to use and purpose. For example, different worksheets can be used for raw data, consolidated data, list of assumptions, constants and charts.

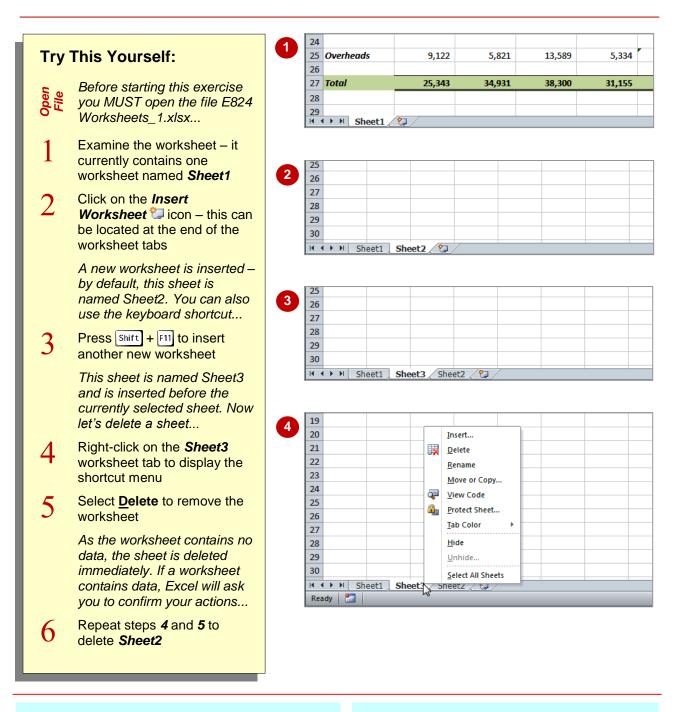
To be able to create and manage a three-dimensional workbook effectively, you need to master a number of worksheet techniques.

In this session you will:

- ✓ learn how to insert and delete worksheets
- ✓ learn how to copy a worksheet
- ✓ learn how to rename a worksheet
- ✓ learn how to move a worksheet
- ✓ learn how to hide a worksheet
- ✓ learn how to unhide a worksheet
- ✓ learn how to copy a worksheet to another workbook
- ✓ learn how to move a worksheet to another workbook
- ✓ learn how to change worksheet tab colour
- ✓ learn how to group worksheets
- ✓ learn how to hide rows and columns
- learn how to restore rows and columns that have been hidden
- ✓ learn how to freeze and unfreeze rows and columns
- ✓ learn how to split windows.

INSERTING AND DELETING WORKSHEETS

Once you've settled on a structure for your workbook, you may find that you have some worksheets that can be *deleted*. Alternatively, you may find that you need additional blank worksheets *inserted*. However, users beware: deletion of worksheets is permanent and can't be undone! Save your workbook before making these changes.



For Your Reference...

To *insert* a *worksheet*:

- 1. Click on the *Insert Worksheet* ¹ icon **OR**
- 2. Press Shift + F11

To **delete** a **worksheet**.

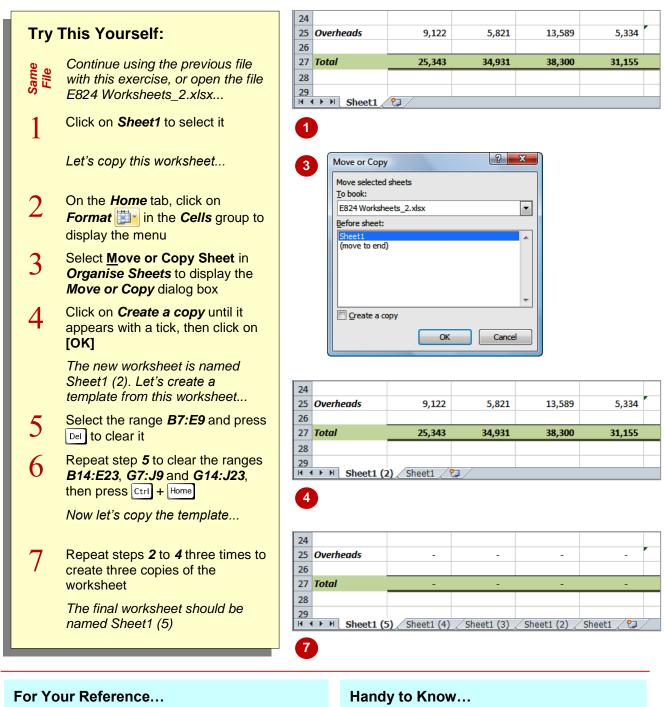
1. Right-click on the worksheet tab and select <u>Delete</u>

Handy to Know...

 Alternatively, to insert a worksheet between existing worksheets, right-click on the worksheet tab before which you want to insert a new sheet and select <u>Insert</u> to display the *Insert* dialog box. Select *Worksheet* and click on [OK]. This method also enables you to insert other objects.

COPYING A WORKSHEET

Just as you can copy the contents of cells and ranges within a worksheet, you can *copy worksheets* within a workbook. This technique is ideal for replicating layouts. For example, if you have a budget workbook that contains data for several departments, you can create a worksheet for the first department and then copy it to create identical worksheets for other departments.



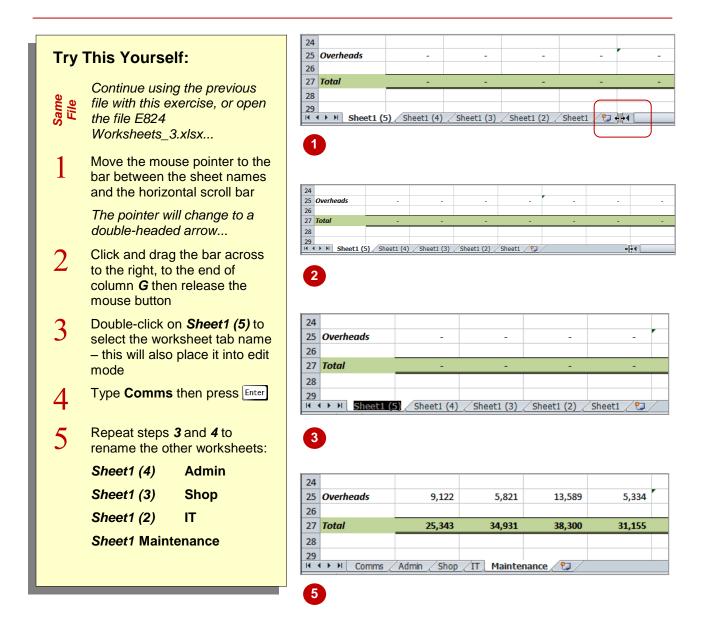
To **copy** a **worksheet**.

- 1. Click on the worksheet tab to copy
- 2. On the *Home* tab, click on *Format* in the *Cells* group
- 3. Click on *Create a copy* until it is ticked
- 4. Click on [OK]

- To place a copy of the selected worksheet after the existing worksheets, click on (move to end) in the Move or Copy dialog box.
- To copy a worksheet to another workbook, open the workbook before copying. It will then appear in the *Move or Copy* dialog box.

RENAMING A WORKSHEET

By default, Excel provides three worksheets in each new workbook. These are named **Sheet1**, **Sheet2** and **Sheet3**. These names are fine if you are not planning to share the workbook, but **worksheet tab names** make it much easier to understand the purpose of a worksheet. You can also adjust the horizontal scroll bar to make room for longer, more meaningful worksheet names.



For Your Reference...

To rename worksheets:

- 1. Double-click on a worksheet name
- 2. Type the new name
- 3. Press Enter

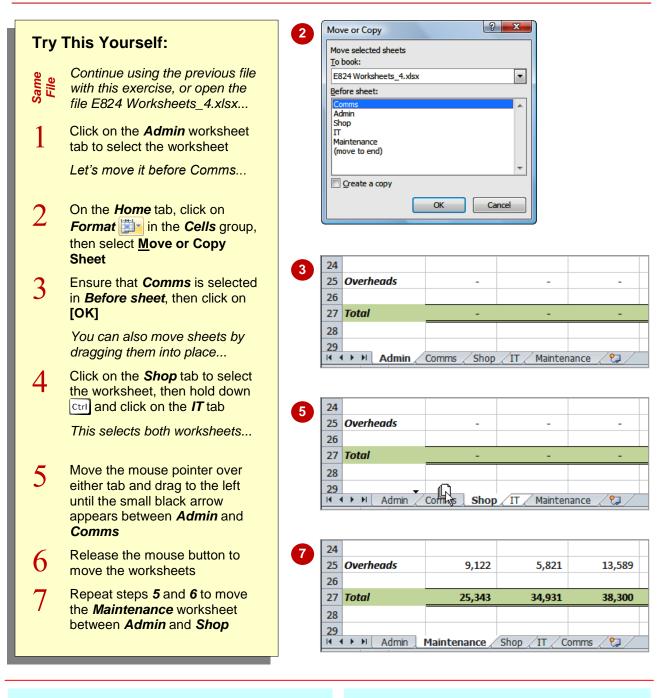
Handy to Know...

- You can also rename a worksheet by right-clicking on the worksheet tab to display the shortcut menu. Then click on **<u>Rename</u>**.
- A worksheet tab name can contain up to 31 characters including spaces.

MOVING A WORKSHEET

Moving a worksheet refers to the process of changing the order of the worksheets in the workbook. There are times when you may want to reorganise the worksheets in a workbook to

match the business hierarchy, or to retain a chronological order. Worksheets can be dragged into position, one or more at a time, or moved via the *Move or Copy* dialog box.



For Your Reference...

To move a worksheet:

- 1. Select the worksheet(s)
- 2. Drag the worksheet(s) into place OR
- On the *Home* tab, click on *Format* then select <u>Move or Copy Sheet</u>
- 3. Click on a sheet in *Before sheet* and click on **[OK]**

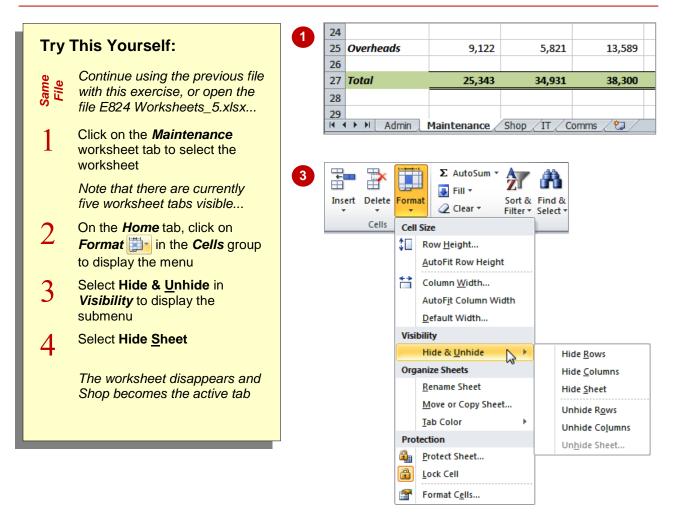
Handy to Know...

 You can select a continuous range of worksheets by clicking on the first worksheet tab in the range, then holding down <u>shift</u> and clicking on the last worksheet tab in the range. Holding <u>Ctrl</u> enables you to select a non-continuous range of worksheets.

HIDING A WORKSHEET

Hiding a worksheet is good, for example, if you want to hide lookup tables or special calculations so that the user is not distracted by the detail or tempted to make any unnecessary changes. You

might like to hide specific departmental worksheets so that they are not visible to other departments. One worksheet in a workbook, however, must always be visible.



	24					
4	25	Overheads	-	-	-	
	26					
	27	Total	-	-	-	
	28					
	29					
	14 4	🕩 🕨 🛛 Admin 🖉	Admin Shop IT Comms 🖓			

For Your Reference...

To hide a worksheet.

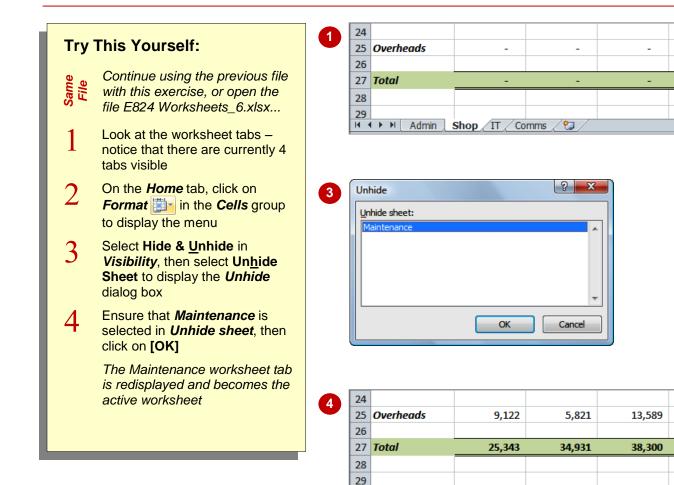
- 1. Click on the worksheet tab
- On the *Home* tab, click on *Format* in the *Cells* group
- 3. Select Hide & Unhide in Visibility
- 4. Select Hide Sheet

Handy to Know...

 If you want to hide more than one worksheet simultaneously, you can select multiple sheets by clicking on the first sheet in the range and then holding either <u>Shift</u> or <u>Ctrl</u> and clicking on the other sheets. You can then hide the sheets as normal.

UNHIDING A WORKSHEET

Although it is possible to hide worksheets in a workbook, you must always keep at least one worksheet visible. It is not obvious by simply looking at a workbook if any worksheets are hidden, but by displaying the **Unhide** dialog box all the hidden worksheets will be listed. It is then a simple matter of selecting the worksheet that you want to make visible again.



For Your Reference...

To *unhide* a *worksheet*.

- 1. On the *Home* tab, click on *Format*
- Select Hide & <u>Unhide</u> in *Visibility* then select Un<u>h</u>ide Sheet
- 3. Click on the worksheet name then click on [OK]

Handy to Know...

• It is not possible to unhide more than one worksheet at a time.

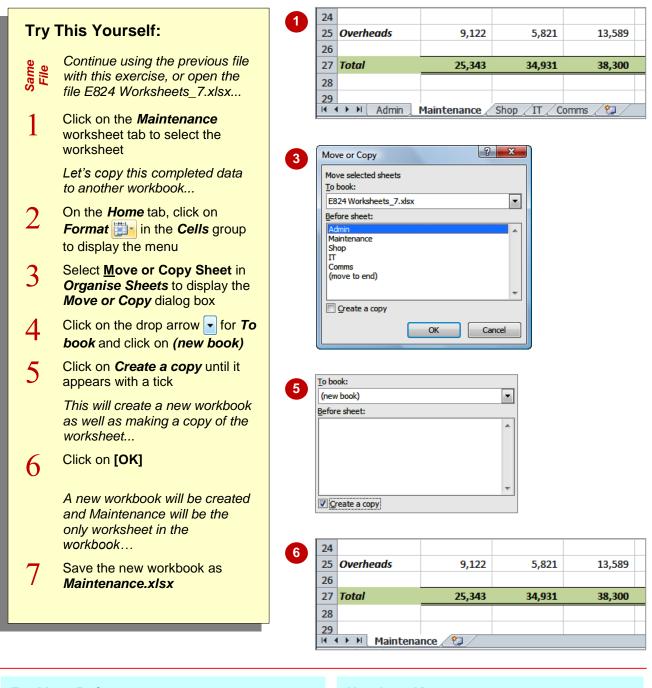
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 You can also right-click on a worksheet tab to display the shortcut menu and select <u>Unhide</u> to display the Unhide dialog box.

COPYING A WORKSHEET TO ANOTHER WORKBOOK

You can *copy worksheets to other workbooks* as required. For example, you might need to keep records for six different divisions – rather than send each division the entire set of records,

you can copy their worksheet to another workbook and send them their data only. If worksheets exist in the other workbook, you will need to determine the order in which to place the copied worksheet.



For Your Reference...

To copy a worksheet to another workbook:

- 1. Select the worksheet to copy
- On the *Home* tab, click on *Format* then select <u>Move or Copy Sheet</u>
- 3. Select the *Book* and position
- 4. Click on Create a copy and click on [OK]

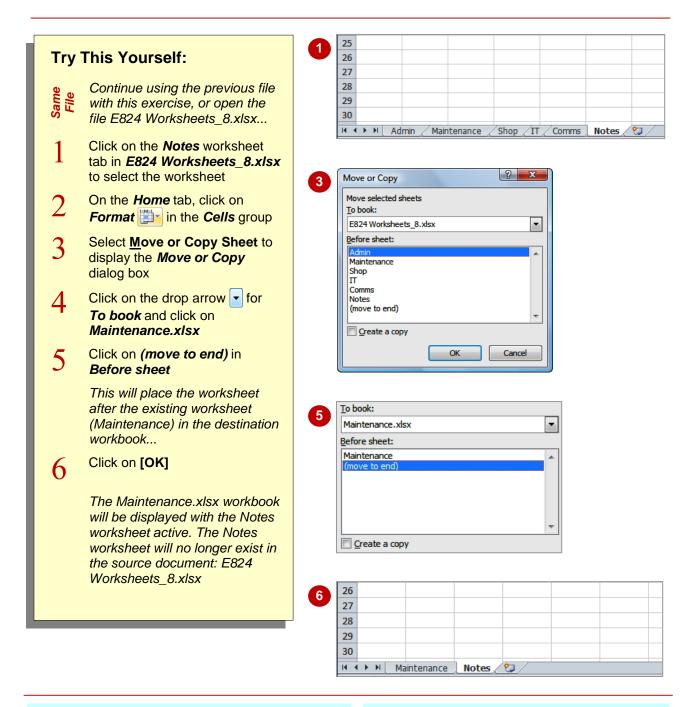
Handy to Know...

 To copy a worksheet into an existing workbook, make sure that you open the destination workbook to ensure that it is listed in *To book* in the *Move or Copy* dialog box.

MOVING A WORKSHEET TO ANOTHER WORKBOOK

You can *move worksheets to other workbooks* as required. For example, you might need to summarise the records for six different divisions and, rather than send management the entire set

of records, you can move the summary worksheet to another workbook and send just the summary. The moved worksheet will retain any links that exist in formulas to cells in the other workbook.



For Your Reference...

To *move* a *worksheet* to another *workbook*:

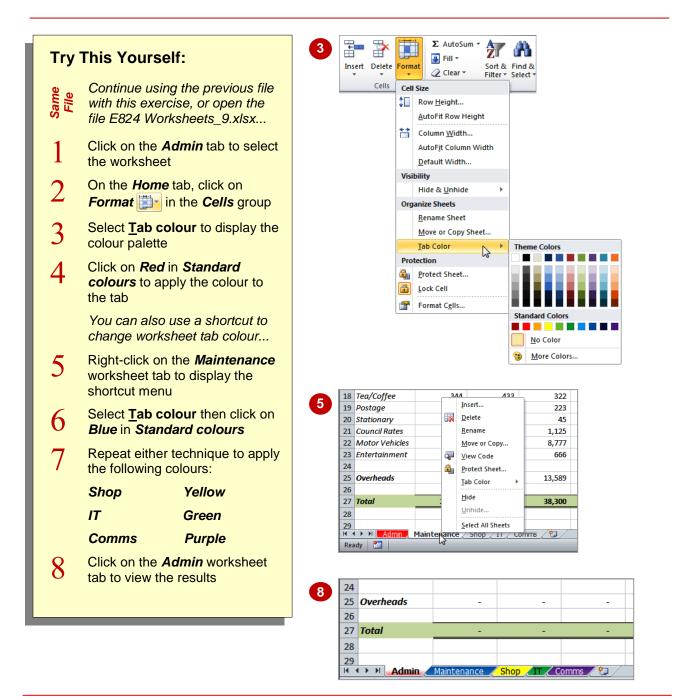
- 1. Select the worksheet to move
- On the *Home* tab, click on *Format* then select <u>Move or Copy Sheet</u>
- 3. Select the *Book* and position
- 4. Click on [OK]

Handy to Know...

 You can move more than one worksheet at the same time. Click on one worksheet tab to select the worksheet, then hold down <u>Ctrl</u> and click on the worksheet tabs for the other sheets that you want to move. Move the selected sheets as normal.

CHANGING WORKSHEET TAB COLOURS

To make it easier for you to distinguish worksheets, Excel enables you to **colour code worksheet tabs**. This enables you, for example, to quickly distinguish between different financial years, departments or months. The *active sheet* will be underlined in the selected colour, while inactive tabs will display a solid colour background.



For Your Reference...

To change worksheet tab colour:

- 1. Select the worksheet tab
- 2. On the *Home* tab, click on *Format*
- 3. Select Tab colour and select a colour OR
- 1. Right-click on the worksheet tab
- 2. Select $\underline{T}ab \ colour$ and select a colour

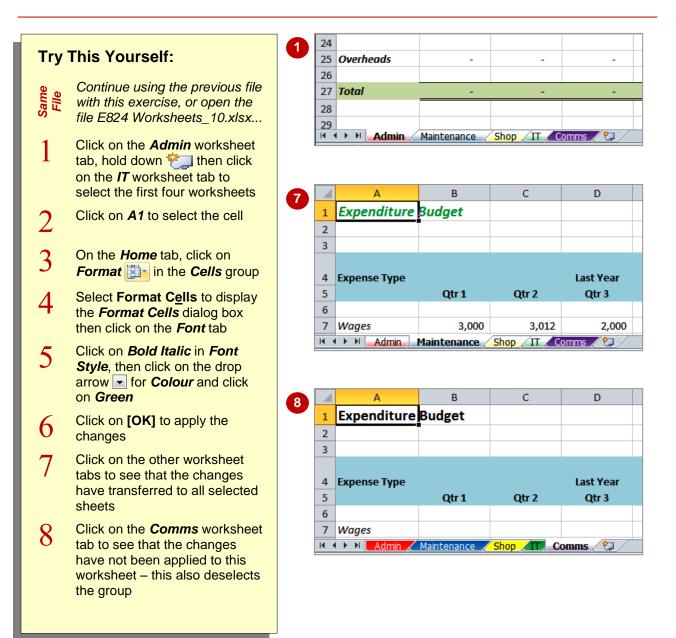
Handy to Know...

 To apply the same colour to two or more sheets at once, select them first. Hold down shift to select consecutive worksheets or hold down Ctrl to select non-consecutive worksheets.

GROUPING WORKSHEETS

Worksheet *grouping* enables you to make the same change at once to all selected worksheets. This is ideal for situations where your worksheets have identical layouts or text. For example, if you

want to format or change the heading for multiple worksheets, you simply *group* the worksheets, make a change to one worksheet and the other worksheets will reflect the change also.



For Your Reference...

To group worksheets:

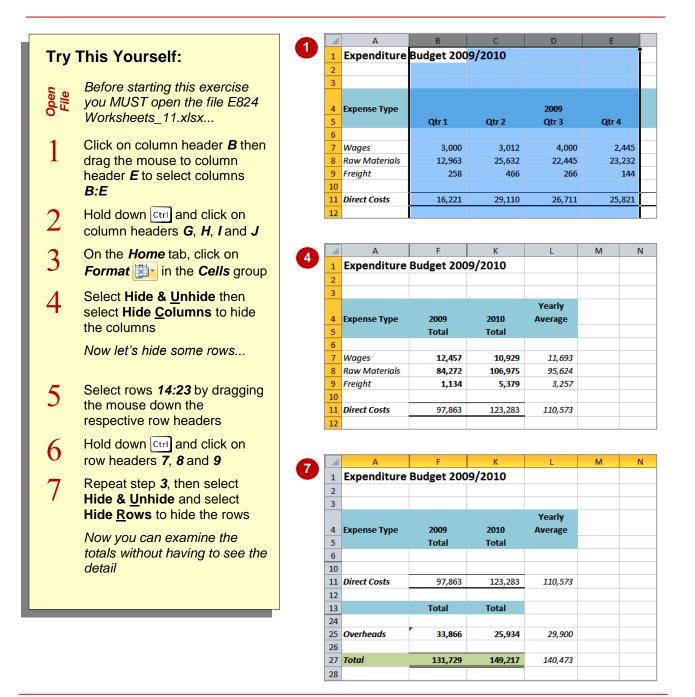
- 1. Click on the first worksheet tab
- 2. Hold down <u>Shift</u> and click on the last worksheet tab

Handy to Know...

- You can also use <u>ctrl</u> to group worksheets that are arranged non-consecutively in a workbook.
- To deselect a group, either click on the tab of a worksheet that is not in the group, or right-click on a tab and select **Ungroup Sheets**.

HIDING ROWS AND COLUMNS

Rows and columns can be *hidden* from view for a number of reasons. Firstly, you may want to hide the cells that hold the detail values and just show the totals. You may want to protect sensitive data, such as pay scales, from modification or the public eye. You can hide columns so that their contents are still accessible, but are not visible on the screen and do not print.



For Your Reference...

To hide rows or columns

- 1. Select the row/column header(s)
- 2. On the *Home* tab, click on *Format* in the *Cells* group, then select Hide & <u>Unhide</u>
- 3. Select Hide <u>Columns</u> or Hide <u>Rows</u>

Handy to Know...

- You can also hide a row or column by changing the row height or column width to zero.
- You can also hide a row or column by rightclicking on the selected row or column, then clicking on <u>Hide</u>.

Yearly

Average

110.573

29,900

140,473

Total

12,457

84,272

1,134

97,863

2,209

4,966

Total

Otr 1

2,488

5,644

8,190

334

1,233

Otr 1

58

м

UNHIDING ROWS AND COLUMNS

Rows or columns that have been hidden from view in a worksheet are still there - they just can't be seen. It is almost as if their relative row or column height has been shrunk to zero.

Unhiding rows and columns involves selecting the adjacent rows or columns and then using the Hide & Unhide command to see them again.

2010

Total

Total

123,283

25,934

149,217

Otr 4

266

554

2,445

23,232

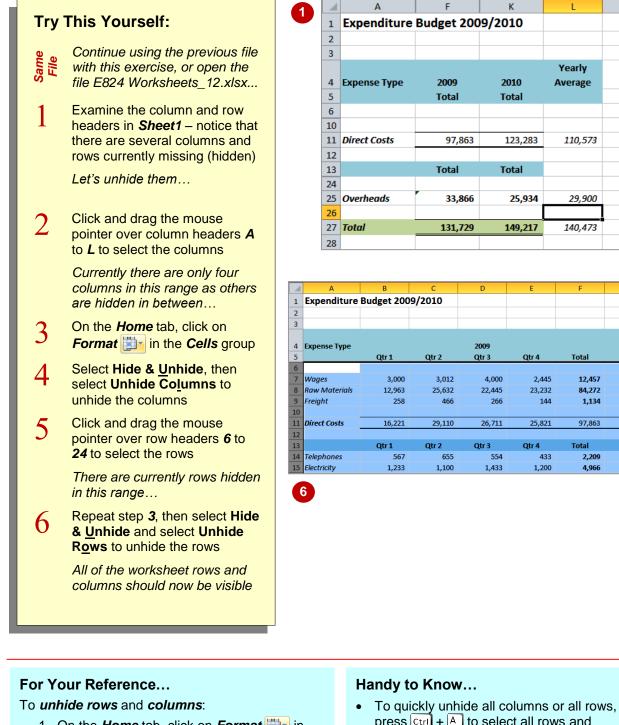
25,821

433

1,200

Otr 4

144



- press Ctrl + A to select all rows and columns and then unhide the rows or columns as usual.
- 1. On the *Home* tab, click on *Format* in the Cells group
- 2. Select Hide & Unhide
- 3. Select Unhide Columns or Unhide Rows

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Qtr 4

Qtr 4

2,445

23,232

144

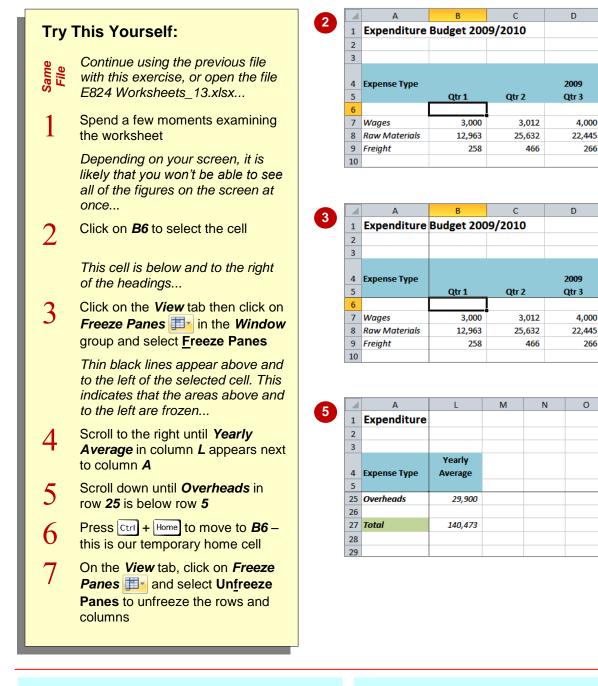
2,445

23,232

144

FREEZING ROWS AND COLUMNS

When you lay out your data in rows and columns, it is most likely that your headings end up at the top or at the left of your data. If you have a large amount of data, you may find that when you scroll across or down to particular cells, the headings scroll out of view. This problem can be resolved by *freezing* the rows and/or columns that hold the headings.



For Your Reference...

To freeze and unfreeze panes:

- 1. Click in the cell below and to the right of the area you want to freeze/unfreeze
- On the View tab, click on Freeze Panes III* in the Window group and select Freeze Panes or Unfreeze Panes

Handy to Know...

If you want to freeze only the rows above the selected cell (leaving all columns unfrozen), select the cell in column *A* of that row – e.g. to freeze rows *1* to *6*, click on cell *A7*. The same applies to freezing only columns and leaving the rows unfrozen: select the cell in row *1*.

2,488

5.644

58

8,190

334

544

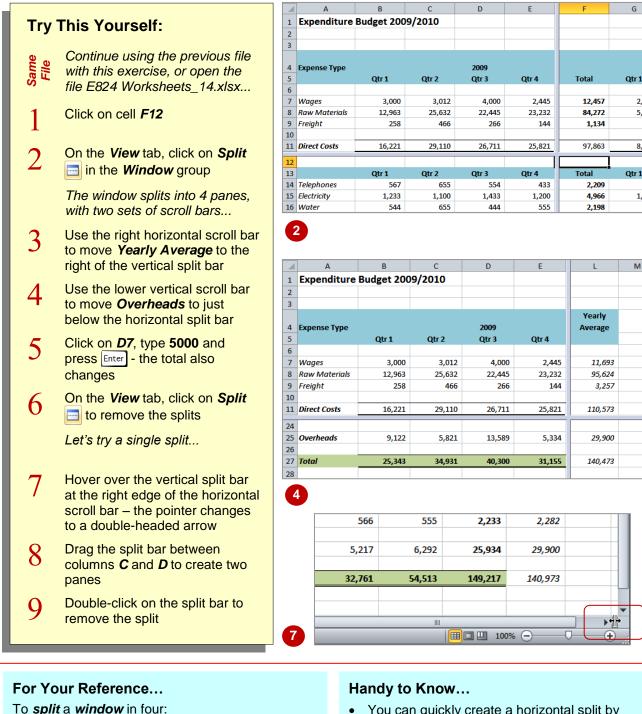
1,233

tr 1

SPLITTING WINDOWS

When you split a window, you actually divide the screen into separate working areas. You are able to scroll to any part of the worksheet in any of the panes. This method is ideal if you want to

be able to modify figures and see the end result at the same time. You can split windows vertically or horizontally to form two panes, or both vertically and horizontally to form four panes.



You can quickly create a horizontal split by dragging the horizontal split bar down into position. This split bar is located at the top of the vertical scroll bar.

To remove splits:

1. Click on the cell where you want the split

2. On the View tab, click on Split

1. On the View tab, click on Split

NOTES:

