Excel Tips & Techniques

for

Customizing QCC

Downloaded Reports

Includes:

1. Create Custom Lists
2. Change Case
3. Combine Data
4. Split Data
5. Create and Execute Macros

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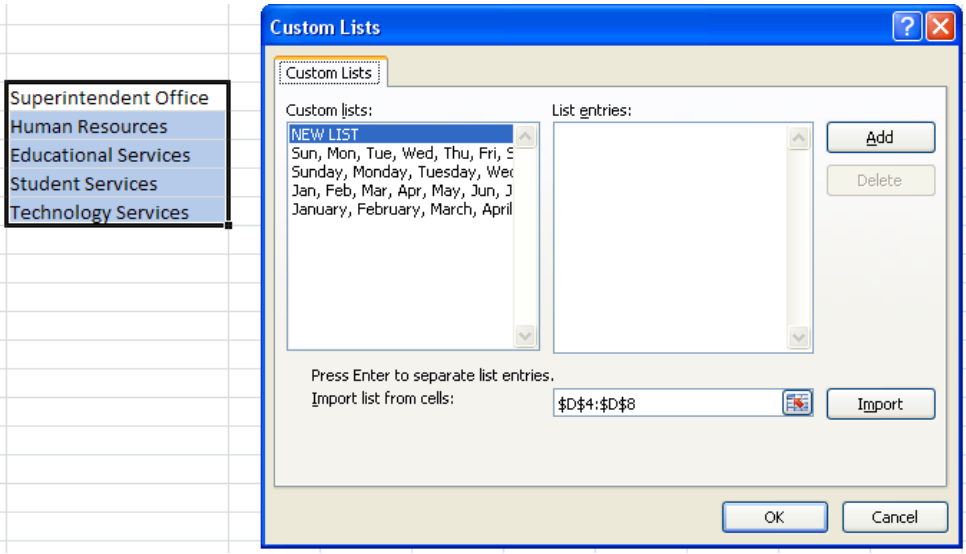
Fill data by using a Custom Fill Series (CUSTOM LIST)

A custom fill series can be based on a list of existing items on a worksheet, or you can type the list from scratch.

Use a custom fill series based on an existing list of items

1. On the worksheet, select the list of items that you want to use in the fill series.
2. Click on *File tab, Excel Options, Advanced, General group, Edit Custom Lists*.
3. Verify that the list of items that you selected is displayed in the **Import list from cells** box, and then click **Import**. The items in the list that you selected are added to the Custom lists box.
4. On the worksheet, type the item in the custom fill series that you want to use to start the list.
5. Drag across the cells that you want to fill.



Use a custom fill series based on a new list of items

1. Click on *File tab, Excel Options, Advanced, General group, Edit Custom Lists*.
2. In the Custom lists box, click **New list**, and then type the entries in the List entries box, beginning with the first entry. Press **ENTER** after each entry.
3. When the list is complete, click **Add**.
4. On the worksheet, type the item in the custom fill series that you want to use to start the list.
5. Drag the fill handle across the cells that you want to fill.

Change The Case Of The Data

This function allows you to change the case of the data into all caps, or to sentence case.

1. To change the text data string to PROPER Case: The First Letter In Each Word In Uppercase, The Rest In Lowercase.
    a. In a blank cell, type **=PROPER(** and type in or click the cell that you want to modify. Finish with a closed parentheses and **ENTER.** **=PROPER(a3)**
2. To change the text data string to UPPER Case: ALL CAPS
    a. In a blank cell, **type =UPPER(** and type in or click the cell that you want to modify. Finish with a closed parentheses and ENTER. **=UPPER(a3)**

Tip: Since the data in your destination cell is actually the "active" results of a formula, you might want to make it 'real data' by **COPYing** the new data and **PASTING/VALUES** right on top of itself

Extracting Data From The Left, Right, Or Middle Of A Data String

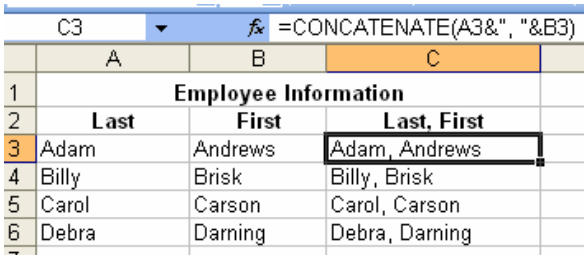
These functions will allow you to copy data from the left side, right side, or anywhere in-between from a data string into a new cell.

1. Copying data from the LEFT side of a data string
    a. In an empty cell, type **=LEFT(**
    b. Type in or click on the cell in which the data resides. Follow with a comma
    c. Type in the number of characters starting with the leftmost piece of data in the data string that you would like to copy over to this new cell.
    d. Finish with a closed right parentheses and ENTER. **=left(a3,3)**
2. Copy data from the RIGHT side of the data string
    a. Proceed as above, using **=RIGHT(a3,7)**
3. Sometimes the data you want is not located on the left or right edge, but somewhere in-between. For these instances, you will use the function MID.
    a. In an empty cell, type **=MID(**
    b. Type in or click on the cell in which the data resides. Follow with a comma
    c. Counting from the left-most side of the data string, enter the number where your desired data starts. Is it the 8th character? Type in an 8 followed by a comma.
    d. Enter the number of characters to copy into the new cell. Starting with the first character of data that you want (possibly the 8th character), how many pieces of data do you want to copy over? If it is the 8th, 9th, 10th, and 11th characters, you will enter a 4.
    e. Finish with a closed right parentheses and ENTER. **=mid(a3,8,4)**
4. Tip: Since the data in your destination cell is actually the "active" results of a formula, you might want to make it 'real data' by COPYing the new data and PASTING/VALUES right on top of itself.

Combining Cell Contents (Concatenate)

Combine (link together) the contents of one cell with another by:

1. In a new column, enter the concatenation function: **=CONCATENATE(cellA,", ",cellB)**
   - You can also write this manually: **=cellA&" "&cellB** (the & being the concatenation operator)
   - Whatever is set between the double quotes (i.e. a space, a comma, a comma and a space) will be exactly what Excel will put in the cell.
   - The formula can be copied to the adjacent rows.

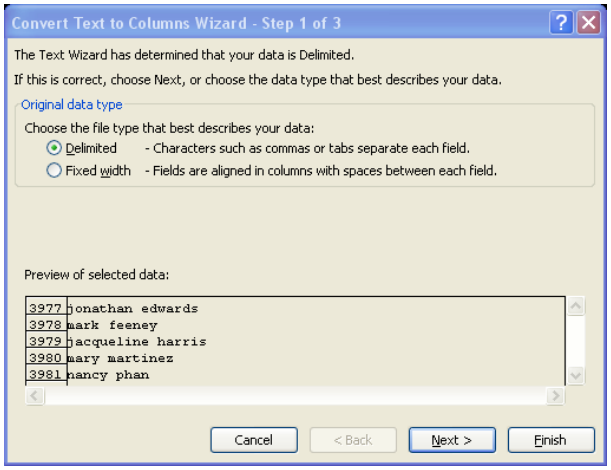


Note: the data that shows in each cell is simply a result of the formula shown in the Formula Bar.

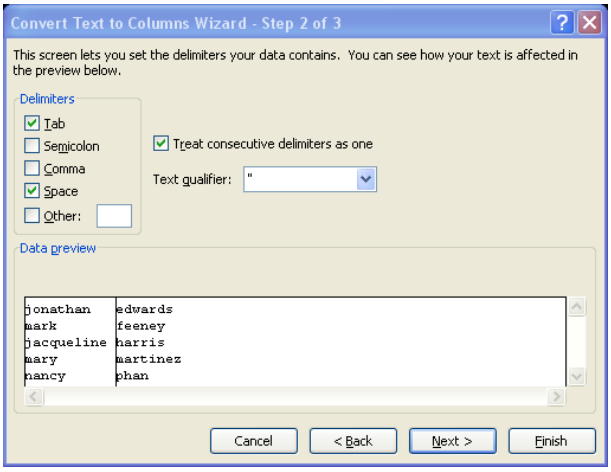
To make the data in the new cells permanent, you must copy over the actual values of the previous cells from which they were created.

1. Create a new column next to your new combined/concatenated column.
2. Copy the formulas from the combined column.
3. Right-click the cell and choose *Paste > Special > Values.*
4. Delete the original combined column (the one containing only the formulas).

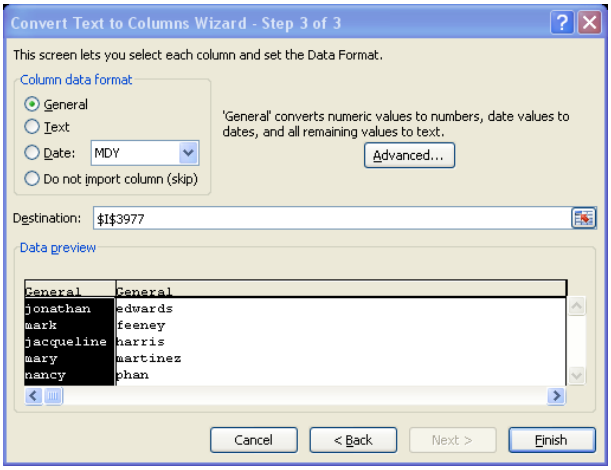
Splitting Data



1. Choose the data cells you wish to split into 2 separate cells.
2. Add (or make sure there is) a blank column to the right of the cell(s) to be split.
3. Choose **Text to Columns** in the Data Tools group on the Data tab.
4. On the **Convert Text to Columns Wizard**, choose **Delimited** and click **Next**.



5. Click on the type of delimiter that your text or data in the cell is separated by (most likely a space). Click **Next** to continue.



6. On Step 3, if you want to apply special formatting to either of the new columns, indicate such now.
7. Click **Finish**.

Record a macro *(from Microsoft.com)*

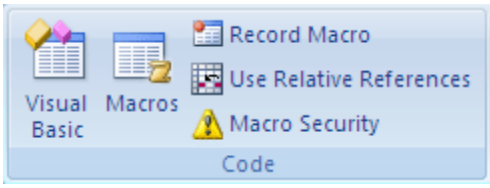
When you record a macro, the macro recorder records all the steps required to complete the actions that you want your macro to perform. Navigation on the Ribbon is not included in the recorded steps.

If the **Developer** tab is not available, do the following to display it:

1. Click the **File** tab.
2. Click **Options**, and then click **Customize Ribbon**.
3. In the **Customize Ribbon** category, in the **Main Tabs** list, select the **Developer** check box, and then click **OK**.

To set the security level temporarily to enable all macros, do the following:

1. On the **Developer** tab, in the **Code** group, click **Macro Security**.



2. Under **Macro Settings**, click **Enable all macros (not recommended, potentially dangerous code can run)**, and then click **OK**.

Note To help prevent potentially dangerous code from running, we recommend that you return to any one of the settings that disable all macros after you finish working with macros..

BEGIN RECORDING YOUR MACRO: *(from Microsoft.com)*

1. On the **Developer** tab, in the **Code** group, click **Record Macro**.
2. In the **Macro name** box, enter a name for the macro.

   Note The first character of the macro name must be a letter. Subsequent characters can be letters, numbers, or underscore characters. Spaces cannot be used in a macro name; an underscore character works well as a word separator. If you use a macro name that is also a cell reference, you may get an error message that the macro name is not valid.

3. To assign a CTRL combination shortcut key to run the macro, in the **Shortcut key** box, type any lowercase letter or uppercase letter that you want to use.

   Note The shortcut key will override any equivalent default Excel shortcut key while the workbook that contains the macro is open..

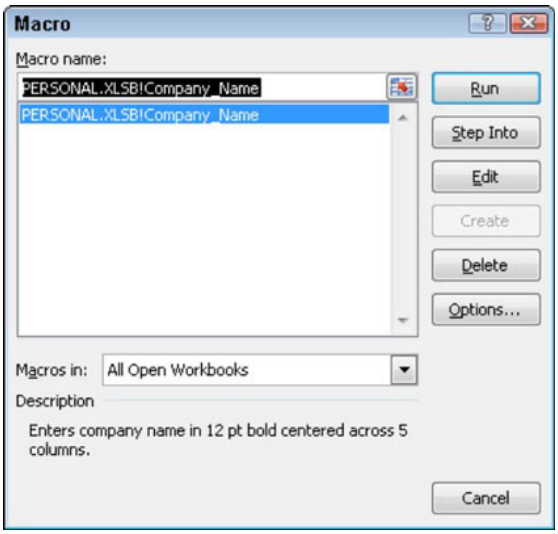
4. In the **Store macro in** list, select the workbook where you want to store the macro.

   Tip If you want a macro to be available whenever you use Excel, select **Personal Macro Workbook**. When you select **Personal Macro Workbook**, Excel creates a hidden personal macro workbook (Personal.xlsb) if it does not already exist, and saves the macro in this workbook. In Windows Vista, this workbook is saved in the C:\Users*user name*\AppData\Local\Microsoft\Excel\XLStart folder. In Microsoft Windows XP, this workbook is saved in the C:\Documents and Settings*user name*\Application Data\Microsoft\Excel\XLStart folder. Workbooks in the XLStart folder are opened automatically whenever Excel starts. If you want a macro in the personal macro workbook to be run automatically in another workbook, you must also save that workbook in the XLStart folder so that both workbooks are opened when Excel starts.

5. In the **Description** box, type a description of the macro.
6. Click **OK** to start recording.
7. Perform the actions that you want to record.
8. On the **Developer** tab, in the **Code** group, click **Stop Recording** .

   Tip You can also click **Stop Recording** on the left side of the status bar.

RUN YOUR MACRO



1. Click the Macros button in the Code group of the Developer tab.

   The Macro dialog box appears. Excel lists the names of all the macros in the current workbook and in your Personal Macro Workbook in the Macro Name list box.

2. Click the name of the macro in the list box and click the Run button.

If you assigned a shortcut keystroke to the macro, you don't have to open the Macro dialog box to run the macro. Simply press the shortcut keys that you assigned and Excel immediately plays back all of the commands that you recorded.

NOTE: If you run your macro in a worksheet that already contains data in the cells that the macro uses, you run the risk of having existing data and/or formatting overwritten during the macro's execution. Keep in mind that, although you can use the Undo feature to reverse the very last action performed by your macro, most macros perform a series of actions, so you may end up using multiple levels of Undo before you are able to successfully reconstruct your worksheet.

If you no longer need a macro that you've created or you want to delete one and start over again, click the Macros button in the Code group of the Developer tab, select the macro you want to remove in the Macro dialog box, and click the Delete button.