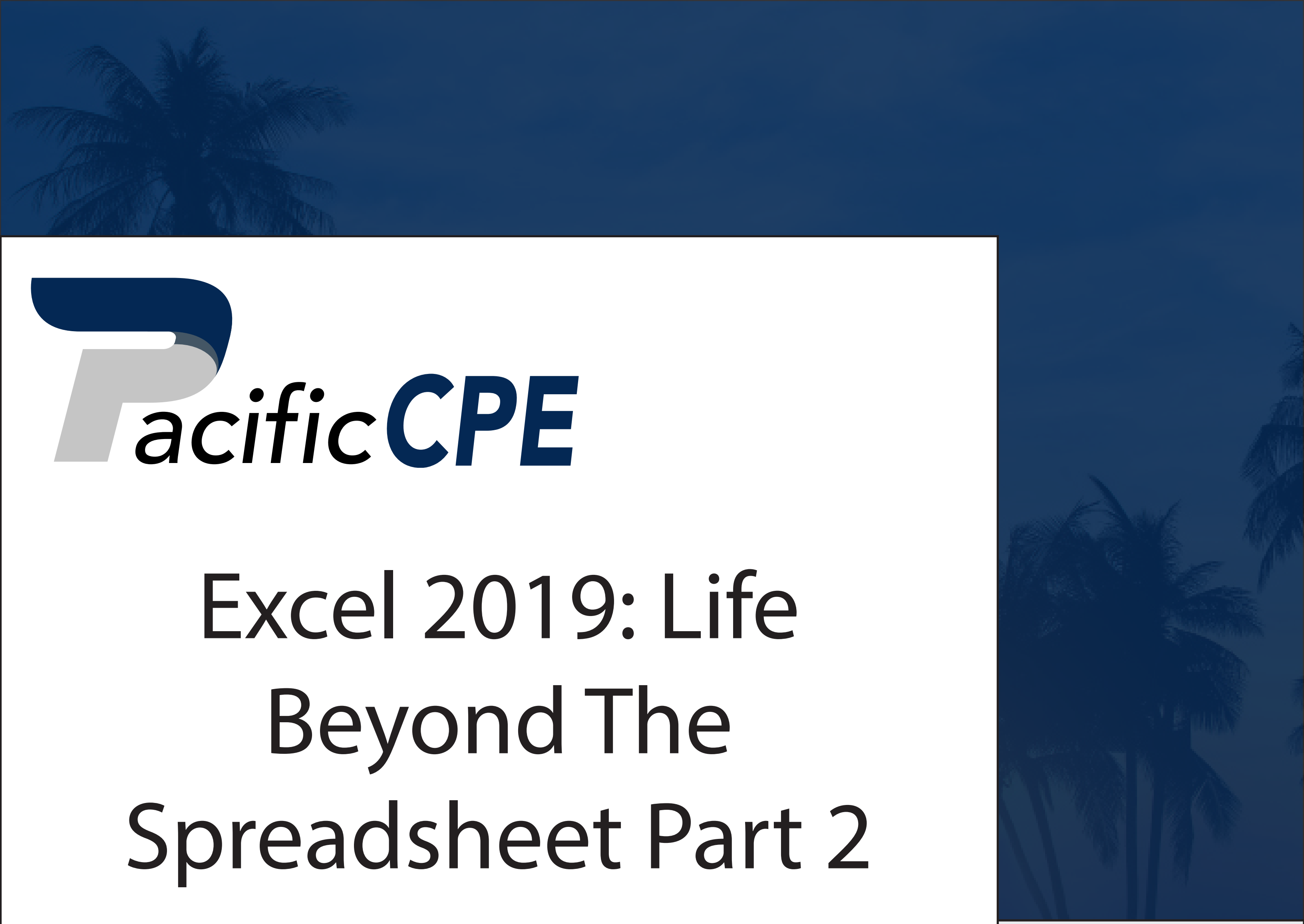


PacificCPE

Excel 2019: Life Beyond The Spreadsheet Part 2

Course #4168A

Business

2 Credit Hours

Support@PacificCPE.com | (800) 787-5313

PacificCPE.com

EXCEL 2019: LIFE BEYOND THE SPREADSHEET PART 2

This course covers how to manage data lists and features for enhancing and sharing spreadsheets. Topics include: setting up a data list, entering and editing records, importing external data, using Office and Excel add-ins, hyperlinks, sharing worksheets on the web, and more.

LEARNING ASSIGNMENTS AND OBJECTIVES

As a result of studying each assignment, you should be able to meet the objectives listed below each individual assignment.

SUBJECTS

Chapter 1: Getting On The Data List
Chapter 2: Linking, Automating And Sharing Spreadsheets

Study the course materials from pages 1 to 51

Complete the review questions at the end of each chapter

Answer the exam questions 1 to 10

Objectives:

- Recognize how to manage data lists.
- Identify features for enhancing and sharing spreadsheets

NOTICE

This course and test have been adapted from supplemental materials and uses the materials entitled Excel 2019 for Dummies by Greg Harvey, PhD. Copyright © 2018 by John Wiley & Sons, Inc. Displayed by permission of the publisher, John Wiley & Sons, Inc., Hoboken, New Jersey. All rights reserved.

Limit of Liability/Disclaimer of Warranty: While the publisher and author have used their best efforts in preparing this book, they make no representations or warranties with respect to the accuracy or completeness of the contents of this book and specifically disclaim any implied warranties or merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives or written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor author shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

The End User shall be permitted to use the Licensed Content for internal purposes only and not for resale or distribution. The Licensed Content is provided on an "as is" basis and without any warranties of any kind, express or implied. CCH INCORPORATED AND ITS LICENSORS AND AFFILIATES DISCLAIM ALL WARRANTIES WITH RESPECT TO THE LICENSED CONTENT, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO, WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, NON-INFRINGEMENT, TITLE, QUIET ENJOYMENT AND INFORMATION COMPLETENESS, CURRENCY OR ACCURACY.

End User assumes all responsibilities and obligations with respect to the selection of the Licensed Content to achieve End User's intended results. End User assumes all responsibilities and obligations with respect to any decision or advice made or given as a result of the use or application of the Licensed Content. CCH and its licensors and affiliates are not engaged in the rendering of legal, accounting, tax or other professional advice or services. If legal, accounting, tax or other expert assistance is required, the services of a competent professional should be sought.

This course is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional advice and assumes no liability whatsoever in connection with its use. Since laws are constantly changing, and are subject to differing interpretations, we urge you to do additional research and consult appropriate experts before relying on the information contained in this course to render professional advice.

© Pacific CPE, LP 2021

Program publication date 11/05/2018

EXAM OUTLINE

- **TEST FORMAT:** The final exam for this course consists of 10 multiple-choice questions and is based specifically on the information covered in the course materials.

- **ACCESS FINAL EXAM:** Log in to your account and click Take Exam. A copy of the final exam is provided at the end of these course materials for your convenience, however you must submit your answers online to receive credit for the course.

- **LICENSE RENEWAL INFORMATION:** This course qualifies for **2** CPE hours.

- **PROCESSING:** You will receive the score for your final exam immediately after it is submitted. A score of 70% or better is required to pass.

- **CERTIFICATE OF COMPLETION:** Will be available in your account to view online or print. If you do not pass an exam, it can be retaken free of charge.

TABLE OF CONTENTS

Chapter 1: Getting on the Data List **1**
- Creating Data Lists 1
- Sorting Data Lists 9
- Filtering Data Lists 13
- Importing External Data 19

Chapter 1: Test Your Knowledge **24**
Chapter 1: Solutions and Suggested Responses **25**

Chapter 2: Linking, Automating, and Sharing Spreadsheets **26**
- Using Office Add-ins 26
- Using Excel Add-Ins 28
- Adding Hyperlinks to a Worksheet 30
- Automating Commands with Macros 33
- Sharing Your Worksheets 40
- Editing Worksheets in Excel Online 45

Chapter 2: Test Your Knowledge **50**
Chapter 2: Solutions and Suggested Responses **51**

Index **52**

Final Exam Copy **56**

CHAPTER 1: GETTING ON THE DATA LIST

Chapter Objective

After completing this chapter, you should be able to:

- Recognize how to manage data lists.

In This Chapter

- Setting up a data list in Excel
- Entering and editing records in the data list
- Sorting records in the data list
- Filtering records in the data list
- Importing external data into the worksheet

The purpose of all the worksheet tables that I discuss elsewhere in this book has been to perform essential calculations (such as to sum monthly or quarterly sales figures) and then present the information in an understandable form. However, you can create another kind of worksheet table in Excel: a *data list* (less accurately and more colloquially known as a *database table*). The purpose of a data list is not so much to calculate new values but rather to store lots and lots of information in a consistent manner. For example, you can create a data list that contains the names and addresses of all your clients, or you can create a list that contains all the essential facts about your employees.

CREATING DATA LISTS

Creating a new data list in a worksheet is much like creating a worksheet table except that it has only column headings and no row headings. To set up a new data list, follow these steps:

1. **Click the blank cell where you want to start the new data list and then enter the column headings (technically known as *field names* in database parlance) that identify the different kinds of items you need to keep track of (such as First Name, Last Name, Street, City, State, and so on) in the columns to the right.**

   After creating the fields of the data list by entering their headings, you're ready to enter the first row of data.

2. **Make the first entries in the appropriate columns of the row immediately following the one containing the field names.**

   These entries in the first row beneath the one with the field names constitute the first record of the data list.

3. **Click the Format as Table button in the Styles group of the Ribbon's Home tab and then click a thumbnail of one of the table styles in the drop-down gallery.**

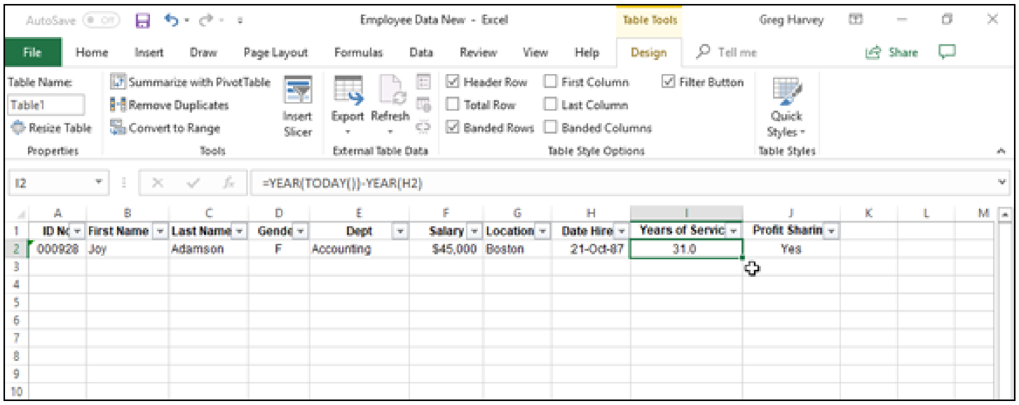
   Excel puts a marquee around all the cells in the new data list, including the top row of field names. As soon as you click a table style in the drop-down gallery, the Format As Table dialog box appears listing the address of the cell range enclosed in the marquee in the Where Is the Data for Your Table text box.

4. **Click the My Table Has Headers check box to select it, if necessary.**
5. **Click the OK button to close the Format As Table dialog box.**

Excel formats your new data list in the selected table format and adds filters (drop-down buttons) to each of the field names in the top row (see Figure 11-1).

FIGURE 11-1

Create a new data list by formatting the field names and the first record as a table.



AutoSave Off
Employee Data New - Excel
Table Tools
Greg Harvey
File
Home
Insert
Draw
Page Layout
Formulas
Data
Review
View
Help
Design
Tell me
Share
Summarize with PivotTable
Remove Duplicates
Convert to Range
Resize Table
Properties
Tools
Insert Slicer
Export
Refresh
External Table Data
Table Style Options
Quick Styles
Table Styles

Table Name: Table1

☑ Header Row ☐ First Column ☑ Filter Button
☐ Total Row ☐ Last Column
☑ Banded Rows ☐ Banded Columns

I2 =YEAR(TODAY())-YEAR(H2)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ID No	First Name	Last Name	Gende	Dept	Salary	Location	Date Hire	Years of Servic	Profit Sharin			
2	000928	Joy	Adamson	F	Accounting	$45,000	Boston	21-Oct-87	31.0	Yes			
3													
4													
5													
6													
7													
8													
9													
10													

Adding records to data lists

After creating the field names and one record of the data list and formatting them as a table, you're ready to start entering the rest of its data as records in subsequent rows of the list. The most direct way to do this is to press the Tab key when the cell cursor is in the last cell of the first record. Doing this causes Excel to add an extra row to the data list where you can enter the appropriate information for the next record.

CALCULATED FIELD ENTRIES

When you want Excel to calculate the entries for a particular field by formula, you need to enter that formula in the correct field in the first record of the data list. In the sample Employee Data list, for example, the Years of Service field in cell I2 of the first record shown in Figure 11-1 is calculated by the formula =YEAR(TODAY())-YEAR(H2). Cell H2 contains the date of hire that this formula uses to compute the number of years that an employee has worked at the company. Excel then inserts the result of this calculation into the cell as the field entry to which you can then assign the appropriate Number format.

Tip

When doing data entry directly in a data list table, press the Tab key to proceed to the next field in the new record rather than the → key. That way, when you complete the entry in the last field of the record, you automatically extend the data list, add a new record, and position the cell cursor in the first field of that record. If you press → to complete the entry, Excel simply moves the cell cursor to the next cell outside the data list table.

Using the Form button

Instead of entering the records of a data list directly in the table, you can use Excel's data form to make the entries. The only problem with using the data form is that the command to display the form in a worksheet with a data list is not part of the Ribbon commands. You can access the data form only by adding its command button to the Quick Access toolbar or a custom Ribbon tab.

To add this command button to the Quick Access toolbar, follow these steps:

1. **Click the Customize Quick Access Toolbar button at the end of the Quick Access toolbar and then click the More Commands item at the bottom of its drop-down menu.**

   Excel opens the Excel Options dialog box with the Quick Access Toolbar tab selected.

   The Form command button you want to add to the Quick Access toolbar is only available when you click the Commands Not in the Ribbon option on the Choose Commands From drop-down list.

2. **Click the Commands Not in the Ribbon option near the top of the Choose Commands From drop-down list.**

3. **Click Form in the Choose Commands From list box and then click the Add button.**

   Excel adds the Form button to the very end of the Quick Access toolbar. If you so desire, you can click the Move Up and Move Down buttons to reposition the Form button on this toolbar.

4. **Click OK to close the Excel Options dialog box and return to the worksheet with the data list.**

Adding records via the data form

The first time you click the custom Form button you added to the Quick Access toolbar, Excel analyzes the row of field names and entries for the first record and creates a data form. This data form lists the field names down the left side of the form with the entries for the first record in the appropriate text boxes next to them. In Figure 11-2, you can see the data form for the new Employee Data database; it looks kind of like a customized dialog box.