Tips and Tricks

“The Fun Part of Excel!”
Group / Ungroup
( for YTD details by month)

To see the YTD by month, click the 2 to ungroup the detail.
**Group / Ungroup**
( for summed details by account)

- To see all summed detail (Office Supplies, Travel, Meals, etc.), click the  to ungroup the detail.

- You can also click on the individual + or -.
Filters have been added to the labels row.

- To filter data:
  - Click the drop-down arrow to bring the menu
  - Select the filter criteria and click OK
To filter:

- Click the drop-down arrow to bring the menu
- Select the filter criteria and click OK
- Note: The report now provides subtotal for filtered data.
To get a quick sum from a group of cells, highlight the cells you want to sum.

The sum will appear at the bottom of the screen.
Subtotaling

To subtotal:

• First, sort by field you want to subtotal.
  • Delivered report is sorted by PO number.
• Next, highlight the area to subtotal
• Then, select “Subtotal” on the “DATA” tab
• From the Subtotal window, set:
  • At each change in: PO No.
  • Use function: Sum
  • Add subtotal to: Amount
  • Click “OK”
To find open PO’s:
- Click on the 2 to get subtotals.
To find open PO's:

- Click on the button to get subtotals.
- Any amount other than zero shows an open PO.
  - Positive Number = Balance Remaining on PO
  - Negative Number = Overspent PO
Hiding / Unhiding

To hide a column or row:

- Right-click the column or row header to bring up the menu
- Select “Hide”
Hiding / Unhiding (continued)

To unhide a column or row:

- Right-click the column or row headers surrounding the hidden column/row to bring up the menu
  - Select “Unhide”
To copy a worksheet to a new workbook:
• Right-click the tab you would like to copy
• From the menu, select “Move or Copy”
• Then, select “New Book” and check the box for “Create a Copy”
• Click “OK”