



## **Elements of Excel Workbooks**

1. Workbook vs. Worksheet vs. Cells
  - a. A workbook is comprised of one or more worksheets.
  - b. Each worksheet is made up of individual cells. Worksheets are accessible by clicking the tab at the bottom of the workbook.
  - c. Each cell contains a value, a formula, or text.
2. Worksheet fundamentals
  - a. Default number of tabs (Tools, Options, General, Sheets in new workbook)
  - b. Add/delete tabs (no Undo options)
  - c. Renaming (right click, delete)
  - d. Reordering (left click, drag and drop)
  - e. Scroll buttons (lower left) first, prior, next, last
  - f. Hide worksheets (Format, Sheet, Hide)
  - g. Unhide worksheets (Format, Sheet, Unhide)
3. Worksheet Views
  - a. Viewing a worksheet in multiple windows (Window, New Window)
  - b. Comparing worksheets side by side (Windows, Arrange) Tiled, vertical, horizontal, cascade
  - c. Freezing panes (Windows, Freeze Panes or hold left button, drag and drop)
  - d. Monitoring cells with Watch Window (View, Toolbars, Watch Window) move to top
4. Worksheet Formatting
  - a. Creating and applying styles (Format, Style) add to toolbar



## Linked Worksheets

When you link worksheets, you connect them together in such a way that one depends on the other.

Why link? Linking can allow you to:

- Avoid having to update the same information in multiple locations.
- Allow consolidation of files without rekeying (i.e. create a summary workbook)
- Allow for large models to be broken into smaller files

### 1. Types of links

- a. Cells
- b. Worksheets
- c. Hyperlinks
- d. Data

### 2. Creating links

- a. Type the cell references manually
- b. Point to cell references
- c. Use Edit > Paste > Special > Paste Link option
- d. Consolidate worksheets

### 3. Syntax

- a. =[WorkbookName]SheetName!CellAddress
- b. Absolute reference vs. relative reference

### 4. Updating data

- a. Linked data automatically updated unless Tools > Options > Calculation > Automatic is disabled



## Custom Views

A named view allows the user to easily recall spreadsheet settings without having to go through the same setup steps. A named view can recall settings for window and position, frozen panes or titles, outlining, zoom factor, the active cell, print area, and many of the settings in the Options dialog box\*, hidden print settings, also settings for hidden rows and columns.

\* no documentation of which settings are saved in the Options dialog box.

### 1) Create

- a) Change the settings that you want to save in the view.
- b) On the View menu, click Custom Views.
- c) Click Add.
- d) In the Name box, type a name for the
  - (a) Make sure to include the active sheet name in the name of a view to make it easier to identify. When you display a view, Microsoft Excel switches to the sheet that was active when you created the view. Excel lists all views in the workbook in the Custom Views dialog box.
- e) Under Include in view, select the options you want.
  - i) **Note** You cannot create a custom view when a worksheet contains an Excel list. If one or more worksheets contain an Excel list, the Custom Views command is disabled for the entire workbook.

### 2) Display

- a) On the View menu, click Custom Views.
- b) In the Views box, click the name of the view (view: A set of display and print settings that you can name and apply to a workbook. You can create more than one view of the same workbook without saving separate copies of the workbook.) you want.
- c) Click Show.

### 3) Print

- a) On the View menu, click Custom Views.
- b) In the Views box, click the name of the view (view: A set of display and print settings that you can name and apply to a workbook. You can create more than one view of the same workbook without saving separate copies of the workbook.) you want to print.
- c) Click Show.
- d) Click Print

### 4) Making changes to an existing View

- a) On the View menu, click Custom Views
- b) In the Views Box, click on the name of the view



- c) Click Show
- d) Repeat steps A-B
- e) Click Delete
- f) Click Add
- g) Enter name of the View