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WITH MICROSOFT® EXCEL

2000–2003

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Maintain confidentiality with password protection

Everyone has figures that are not meant for general distribution. Whether your confidential files reflect current net worth, pending business deals, or private client information, Excel lets you protect them from prying eyes and sabotage.

Protecting a workbook file

The Tools | Protection commands are fine for preventing changes, but they won't keep out prying eyes. Instead, choose File | Save As, then click on the Tools dropdown menu and choose General Options, as shown in Figure A, to open the Save Options dialog box.

The first option in the File Sharing panel is the Password To Open text box. If you want to protect your document from unauthorized personnel, type a password in this text box. Passwords are case-sensitive and have 1 to 15 characters. When you type a password here and click OK, you'll be asked to confirm it. You'll also see a strong caution to remember it.

Once you confirm your password, and save and close the file, Excel will prompt you (and everyone else) for the password whenever you try to open

the file. *Don't* lose or forget the password, or you'll have to try your luck with a password recovery program to open the file.

Write access and Read-Only

Another option in the Save Options



Figure A

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You told us you wanted a better newsletter, and we listened. Your *Working Smarter with Microsoft Excel* is now an 8-page monthly, packed with more tips, illustrations, and challenges than ever before. We want to make you a power user. Please tell us how we're doing by writing to me at editor@working-smarter.com.

Coming next month...

- 5 ways to make yourself at home in Excel

Password protection

(continued from page 1)

Don't type the same entries over and over: Select from a dropdown list instead

Beyond the fact that it wastes your time, retyping repetitive list entries also brings a greater risk of spelling errors in your worksheet. By activating the Pick From Drop-Down List feature, you can use a dropdown list that Excel creates for you automatically.

The dropdown list contains every unique entry in the current column. Instead of typing repeated entries manually, just display the dropdown list and select the list item you want.

To make Excel display your list of options, activate the Pick From Drop-Down List feature. There are two ways to do so—the method you pick depends on whether you use the keyboard or mouse.

- **Keyboard.** Press [Alt][Down Arrow].
- **Mouse.** Right-click on the cell you want to fill, then select Pick From Drop-Down List (Pick From List in 2000/2002) from the resulting shortcut menu.

Use your dropdown list: Once you activate the Pick From Drop-Down List feature, each unique cell value in the current column displays alphabetically on a convenient dropdown list, as shown in Figure A.

Picking the value you want doesn't require that you switch between the keyboard and mouse. You can use either method:

- **Keyboard.** Navigate the dropdown list using the arrow keys, then press [Enter].
- **Mouse.** Use the mouse to select the list item you want, as shown in Figure A.

Last Name	First Name	Department	Hire Date
Allison	James	Marketing	1/21/1997
DeGroot	Maren	Editorial	11/1/2004
Dryant	Renee	Human Resources	5/15/2005
Eastburn	Josh	Executive	5/30/2002
Chang	Don	Information Technology	3/20/1999
Dickerson	Wyatt	Marketing	6/30/2004
Dullittle	Phenix	Editorial	4/1/2000
Giffin	Amy	Editorial	

Figure A

dialog box is Password To Modify. You enter a password here, click OK, confirm the password, then save and close the file.

When users try to reopen it, the Password dialog box appears, as shown in Figure B, asking them to enter a password for "write access," which gives them the ability to make and save changes in the file. Without the password, they can click the dialog box's Read Only button, open the file, and enter changes in the data. But when they try to save their changes to disk, a message appears saying that the file is read-only. They can close the workbook without saving their changes, or save it with a different filename.

Below the Password To Modify text box in the Save Options dialog box is the Read-Only Recommended check box.

If you select it and save the file, you'll get a message when you reopen it that suggests that this file should be opened as read-only, unless you need to save changes to it. Click Yes to open the file as read-only. Or, click No to open the file normally—without any restriction on saving changes.

Multiple protection levels

For added flexibility, you can use more than one option. For example, if you use Password To Open text box plus Password To Modify text box, some users can be locked out completely because they don't know the first password, while others who do know it can open the file, but have no way to save any changes to disk, because they don't know the second password. ■

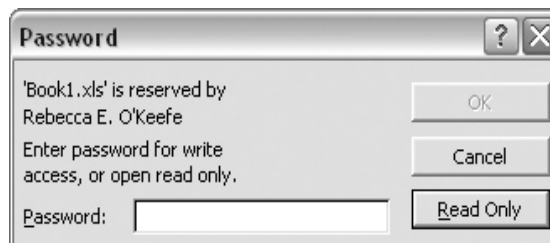


Figure B

T.O.P.S. AWARD



Are you *T.O.P.S.* (The Office Problem Solver) in your office? Surely you've encountered many challenges in your job. Is there a task or project in Microsoft Office that you or a coworker found particularly difficult and then successfully solved? We want to hear about it.

Submit your story and examples of your work, and we'll choose a *T.O.P.S.* winner based on creativity and resourcefulness. We will announce the winner and print their story in a future issue. The winner will receive a free 6-month subscription to one of our other publications. Check out our titles at <http://www.workingsmartertraining.com>.

Email your submissions to editor@working-smarter.com with the subject line, "The Office Problem Solver."

Give your data a unique look with 3-D Cylinder charts

The most common type of graph is the Column chart. These charts are good for graphing measurements that occur in more or less regular intervals, usually representing time periods. Column charts with multiple series are often used for comparing different items by placing the columns side-by-side (Figure A).

A variation of the column chart is the Bar chart. This chart type uses the same information as a Column chart, but displays that information horizontally. Bar charts are particularly well suited to goal-oriented subjects (Figure B).

While both of these chart types are extremely useful, Excel offers a different chart type that can be used as a direct replacement for either a Column or Bar chart. This chart type is called a Cylinder chart.

In a typical Excel installation, Column is the default chart type. But when you display the Chart type dialog box (by choosing Chart | Chart Type for an existing chart, or as Step 1 of the Chart Wizard when you create a chart), and select the Standard Types tab, scroll down to the Chart Type section and you'll find Cylinder, along with other chart types in Excel.

Note that while there are 3-D versions of both Bar and Column charts, there's no 2-D Cylinder chart. After all, cylinders are by definition 3-D objects. So, changing Figure A's 2-D Column chart to a vertical Cylinder chart gives you Figure C's 3-D chart. And changing Figure B's 2-D bar chart to a horizontal Cylinder chart gives you Figure D's 3-D chart. (The cylinders may look jagged on your monitor's screen, but they'll print just fine.)

While the data in both sets of graphs may be the same, you can use Cylinder charts as an attention-grabbing variation on the more common chart types, or simply to increase the visual impact of your data. ■



Figure A

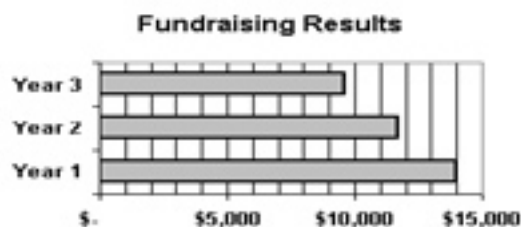


Figure B

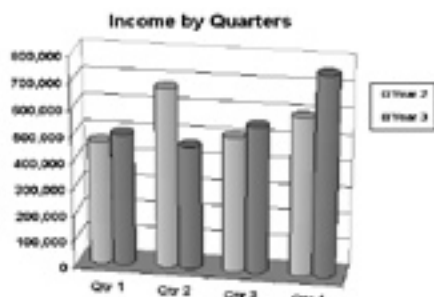


Figure C

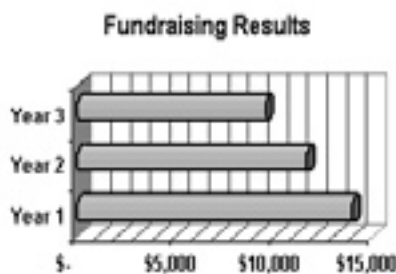


Figure D

Hide cell data without hiding the entire row or column

You may want to hide data in your worksheet, but what if there's other information in that row or column you wish to remain visible? Here's a solution you can apply to individual cells instead of entire rows or columns. To hide only particular cells of data:

1. Select the cells with data you'd like to hide.
2. Press [Ctrl]1 to open the Format Cells dialog box or choose Format | Cells from the menu bar.
3. If your data is formatted as numbers, click on the Number tab and ensure that your number format doesn't include red text from the Negative Numbers list box.
4. Select the Font tab, click on the Color dropdown list, and choose White from the color palette.
5. Click OK to hide the data. Note that this data still appears in the formula bar when you select a cell in which the data is hidden this way.

Instantly create a chart without opening the Chart Wizard

Excel offers seemingly innumerable possibilities for creating charts that will display your data in just the right way. But, if you don't want to plow through every step of the Chart Wizard—you just want to create a chart on the fly—you've got to learn the secret of the [F11] key. To create a quick chart:

1. Select the data you want to pull into the chart.
2. Press [F11]. The chart appears on a new sheet.

Take matters into your own hands when mail merge values don't translate correctly

Mail merges are extremely timesaving when you want to import Excel data into a letter or some other similar Word document. However, when you merge numeric data formatted as currency or percentage into a Word mail merge document, all of the number values lose their formatting. This is because Word ignores the number formatting when you merge Excel data into a document.

However, you can make sure that the numbers in your Excel spreadsheet translate correctly to your mail merge document, saving you the effort of changing the formatting by hand. You can achieve the results you want if you know how to manipulate merge fields when you perform the mail merge.

Put your own spin on a merge field

The beauty of mail merge is that you spend a little extra time up front and then watch Word create hundreds of personalized documents at lightening speed. But what if your best laid plans result in nonsensical merged values, as shown in **Figure A**? The merge didn't work because Word didn't recognize the formatting already in place in the spreadsheet.

Many power users don't realize that Word uses MERGEFIELD field codes to

indicate where it should insert external data into a document. Therefore, you can apply a general switch to the field code. The general switch allows you to define the way in which Word formats the data.

Set up the sample data

To demonstrate, we'll create a simple mail merge example that illustrates the problem. Let's say your Excel worksheet contains the data shown in **Figure B**.

To create the sample from scratch:

1. Launch Excel and enter the data, as shown in **Figure B**.
2. Choose File | Save from the menu bar and save the new workbook as **newprices.xls**.
3. Close the file by choosing File | Close.

Generate a Word document

Next, we'll create a sample document that represents what you might send as an announcement to your salespeople about changes in their products' prices. We'll create a mail merge document like the one in **Figure C**.

To create the mail merge document:

1. Open a new blank file in Word.
2. Choose Tools | Letters And Mailings |

Mail Merge Wizard from the menu bar.

3. Click on the Next links on the task pane until you get to Step 3 of the wizard. Ensure that the Use An Existing List Option button is selected and click on the Browse link.

4. Locate and select the **newprices.xls** file and click Open. When the Select Table dialog box appears, click OK.

5. Click OK on the subsequently displayed Mail Merge Recipients dialog box. Click Next to move to the wizard's Write Your Letter screen.

6. Use **Figure C** as a guide for setting up the main document. When you need to insert a merge field, click on the More Items link on the task pane. Then, select the appropriate field and click Insert.

Examine the problem

To see how the document appears when merged with the Excel source data, click on the Next: Preview Your Letters link. As shown in **Figure A**, the new sales price and original sales price from our first record displays as an unformatted number. Also, the Change percentage is formatted in a Scientific number format.

Apply the Numeric Picture general switch

The general switch you use to assign number formats is the Numeric Picture, so

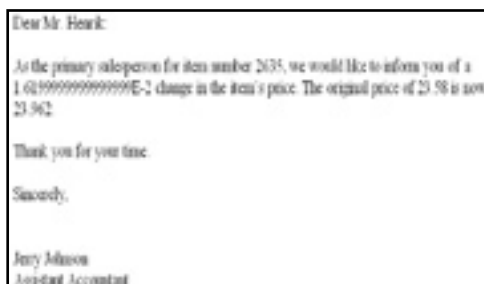


Figure A

	A	B	C	D	E	F
1	Salutation	Salesperson	Item No.	Price	Change	New Price
2	Mr.	Henrik	2635	\$23.99	1.62%	\$23.96
3	Ms.	Jones	1154	\$54.36	-2.30%	\$53.11
4	Mr.	Smitters	2947	\$14.65	1.27%	\$15.04
5	Miss	VanVorst	2095	\$47.26	5.24%	\$49.74
6	Miss	Manning	1875	\$15.42	-4.21%	\$14.77
7	Mrs.	Anderson	4668	\$75.31	3.20%	\$77.72
8	Ms.	Brown	5876	\$52.04	-3.94%	\$49.99
9	Mr.	Whitman	2233	\$52.49	-4.28%	\$49.81
10	Mr.	Owen	6589	\$47.21	4.98%	\$49.56
11	Mrs.	Zchwek	2985	\$75.95	2.97%	\$78.22

Figure B

named because you use symbols to define how the number should look. The Numeric Picture switch itself is written as:

\#

For the most part, the symbols you use to define the format picture are the same as those you use to create a custom number format in Excel.

To display the prices using a Currency number format:

1. Press [Alt][F9] to display the document's MERGEFIELD codes, as shown on the top in **Figure D**.
2. Apply a general switch by entering it within the MERGEFIELD code's braces, followed by the keyword or picture you want to use to modify the field's display, as shown in **Figure D**.
3. Press [Alt][F9] again to view the result.

If the number appears the same as it did before, click the Next record button to update the view (or save the document, close, and reopen it). Once the data is refreshed, you'll see a properly formatted result, as shown in **Figure E**.

Other general switches

You aren't limited to just formatting numbers when you mail merge Excel data into Word. Just as you define Numeric Pictures using the same symbols Excel uses for custom number formats, you can define date and time formats for merged data. ■



Figure C

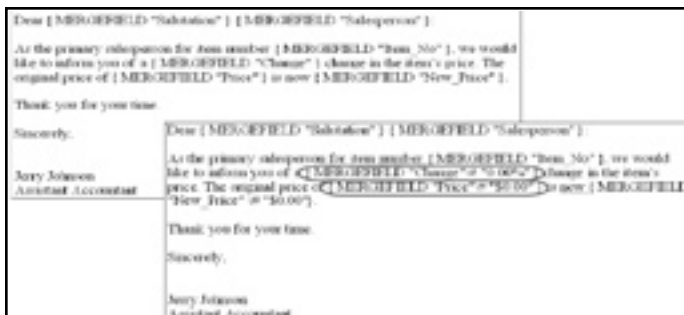


Figure D

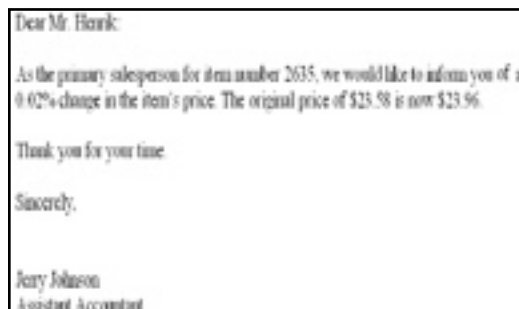


Figure E

Avoid the pain of resizing pasted columns: Let Excel do it for you

Though it's very handy to be able to copy data from one worksheet to another, sometimes it still takes a long time to get all of the columns sized to the same widths you had in the source worksheet. Instead of doing this by hand, leverage the Paste Option Smart Tag.

To retain column sizes when pasting (2002/2003):

1. Copy your range of cells from the source by pressing [Ctrl]C.
2. Paste the range into another worksheet by selecting the first destination cell and pressing [Ctrl]V.

3. Click the Paste Options Smart Tag and select Keep Source Column Widths from the dropdown list.

In Excel 2000, there's no Paste Option Smart Tag, but we've devised a workaround for you. To retain column sizes when pasting (2000):

1. Press [Ctrl]C to copy your range of cells.
2. Select the first destination cell and select Edit | Paste Special.
3. Select the Column Widths option button in the Paste area and click OK.
4. Press [Ctrl]V to paste the selection.

Insert references from multiple worksheets at once

3-D references are timesavers in and of themselves, but you can streamline the process even more when you need to add a bunch of 3-D references to a single formula. This shortcut works when the 3-D references are all in the same cell of multiple worksheets. To add the reference to your formula:

1. Click on the sheet tab for the first worksheet in the range.
2. Hold down [Shift], then click on the last worksheet in the range.
3. Select the cell(s) you want to include in the 3-D reference.



Merging and unmerging cell hints

Q After I've used the Merge And Center tool to merge adjacent cells into one big cell with data centered in it, is there any way to undo the merge later, and get the individual cells back?

A There is a way to undo a cell merge, but it isn't very well known. Choose Tools | Customize and then click on the Commands tab. In the Categories list box, select Format, then in the Commands list box, scroll down until you see three merge tools, as shown in **Figure A**.

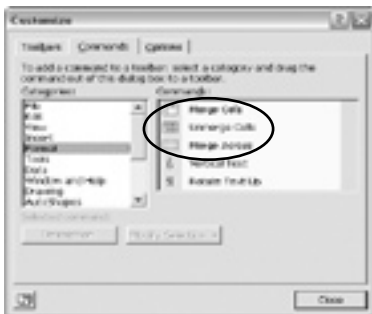


Figure A

- **Merge Cells** acts like the Merge and Center tool to merge adjacent cells, but instead of centering the data in the merged cell, it left-aligns text and right-aligns numbers.
- **Unmerge Cells** is an "undo merge" tool. Select the merged cell, and click Unmerge Cells. The merged cells revert to individual cells, with the merged data in the top left cell.
- **Merge Across** merges adjacent cells of a single row into a single merged cell, instead of merging multiple rows of cells into a single merged cell.

For details about a tool, select it and click the Description button. To use one of these tools, drag it out of the dialog box and drop it onto one of your visible toolbars. Close the Customize dialog. (To remove a tool, open the Customize dialog box and drag the tool off of the toolbar.)

3 quick ways to check your workbook's file size

Q Is there an easy way to check a workbook's file size before I try to copy it to a floppy disk?

A One way is to choose File | Open. In the Open dialog box, click on the Views dropdown arrow and choose Details, as shown in **Figure B**. Look in the Name and Size columns for the desired file.



Figure B

You can also right-click on the file-name, and choose Properties. Click on the General tab and note the size, as shown in **Figure C**.

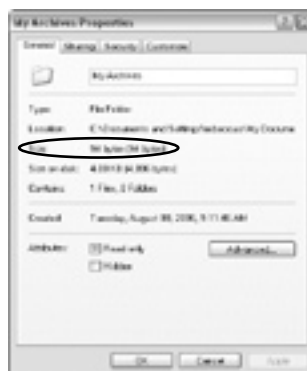


Figure C

If the file that interests you is already open, you can check its size by choosing File | Properties and clicking on General tab to note the size.

Finding your Formula bar when it pulls a disappearing act

Q Help! My Formula bar has disappeared. How do I get it back?

A Occasionally someone will turn off the Formula bar to see a little more data onscreen. One of your coworkers probably did this and forgot to turn it back on.

Choose Tools | Options, then click on the View tab. In the Show panel, select the Formula Bar check box. Take note of the Status Bar check box next to the Formula Bar check box. When you're ready, click OK. The Formula bar and Status bar settings remain in effect until you change them (even if you exit and re-launch Excel).

There is a quicker way to hide or display the Formula bar or the Status bar. Just choose View | Formula Bar or Status Bar. Either of these commands automatically changes the corresponding setting on the View tab in the Options dialog box.

Show Excel you want a quotient, not a date

Q When I try to enter a simple division formula in a cell, sometimes I get a date instead of the division result. Why?

A Although the slash is the division operator, it is also commonly used to signal a date. If you want Excel to perform division, make sure you begin the formula with an equal sign, for example =8/2. The equal sign tells Excel to perform a calculation, so it does the math and returns a result of 4.

On the other hand, if you just enter 8/2 into a cell that has the General format, you get 2-Aug or 02-Aug, since Excel assumes that you want a date when you enter two or three numbers separated by slashes, with the first number a valid month (1-12). ■

Better direct users with customized error messages

You probably know you can use Data Validation to control which values users enter in a cell. And, you know that when a user enters a value that doesn't meet your validation criteria, Excel displays an error message.

Although this generic error message explains that there's a problem with the entry, it doesn't do much to guide the user in the right direction. To help users understand which values they can enter, create a custom error alert.

1. Select the cell(s) you want to affect. Choose Data | Validation and click on the Error Alert tab.

2. Select the Show Error Alert After Invalid Data Is Entered check box.

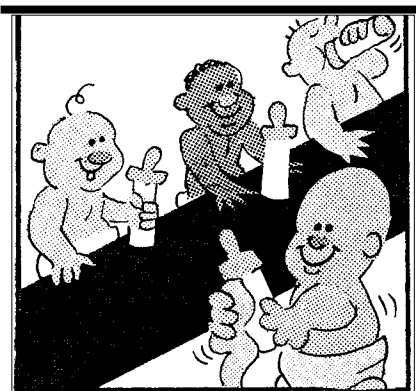
3. Choose the desired error type from the Style dropdown list. The error type's corresponding icon displays below the Style dropdown list.

Important! Remember that the Stop style is the only error alert that forces users to provide a valid entry. The Warning and Information styles tell users when an entry doesn't meet the validation criteria; but, the user can just click a button to make Excel accept the invalid entry.

4. In the Title text box, enter the text to appear in the error message's title bar.

5. In the Error Message text box, enter the desired error message and click OK. The next time user input doesn't meet the validation criteria, Excel displays your custom message. ■

BOTTOM LINE



Happy Hour at the Formula Bar!

TEST YOUR PC IQ

Are you a good doctor? Keep your data healthy by performing the correct operation

Excel uses several mathematic and comparison operators in its calculations and formulas. See if you can match each of the following operators with its correct operation or meaning.

Mathematic and comparison operators

A. =	G. ^
B. /	H. +
C. <	I. <=
D. >=	J. *
E. <>	K. >
F. -	L. %

Operations and meanings

- ___ 1. Less than
- ___ 2. Minus
- ___ 3. Greater than
- ___ 4. Plus
- ___ 5. Equal to
- ___ 6. Greater than or equal to
- ___ 7. Divided by
- ___ 8. Exponentiation (to the power of)
- ___ 9. Not equal to
- ___ 10. Multiplied by
- ___ 11. Percent of
- ___ 12. Less than or equal to cell

Answers

1-C 2-F 3-K 4-H 5-A 6-D
7-B 8-G 9-E 10-J 11-L 12-I

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