

# 10 Excel Secrets Every Planner Should Know

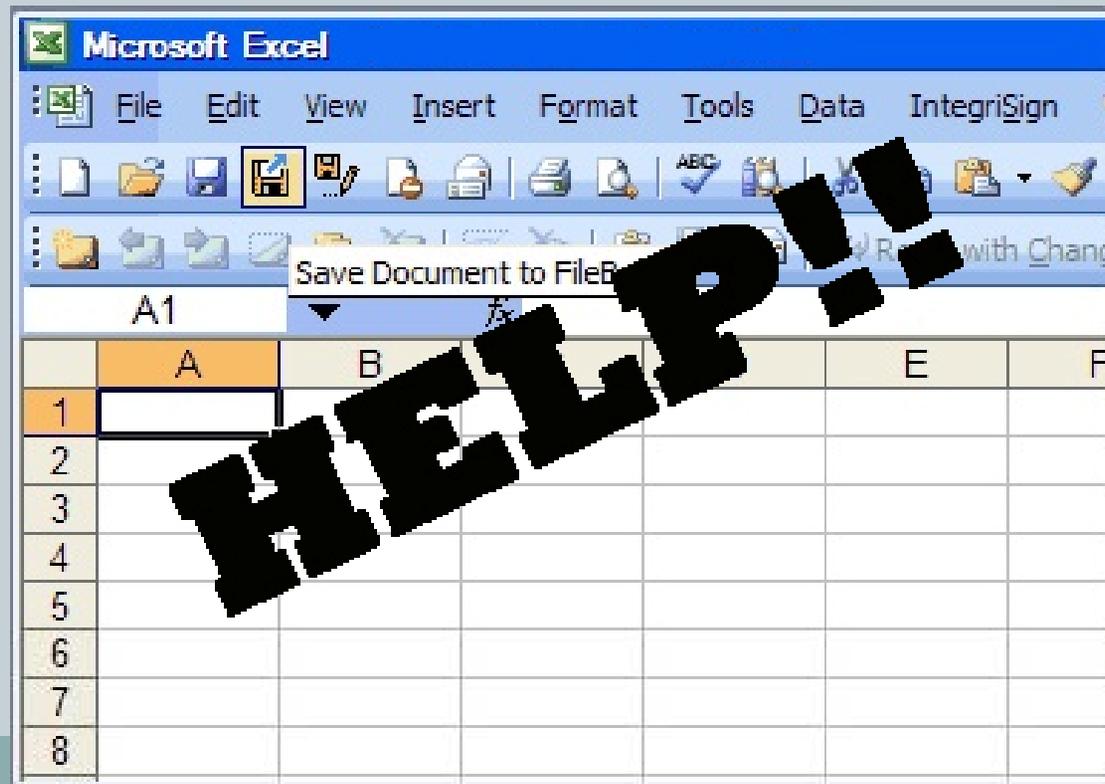


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# 10 Excel Secrets Every Planner Should Know



# 1. Create a PDF with Excel

PDF



- You receive an e-mail from your manager. Your manager asks you to create a report of some sort and wants you to send it to a client, but making sure that they cannot manipulate the information.

The only problem is that you don't have Adobe Acrobat to create PDFs with and need this done quickly and properly.

There is a simple way of getting this type of report to anyone without having to use Adobe Acrobat.

All you need to do is go through your regular print routine in Excel with the following steps:

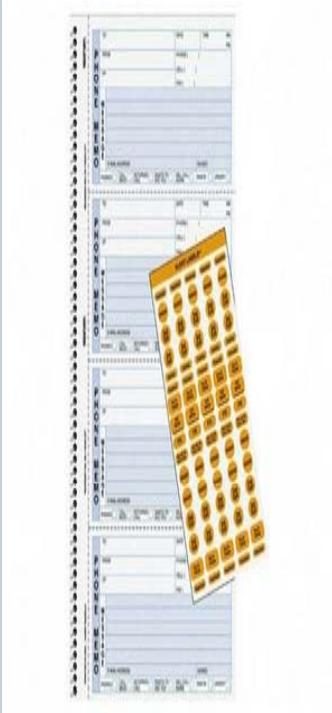
1. Click File, Print or -P as the keyboard shortcut.
2. Now select Microsoft Office Document Image Writer.

This will enable you to create a -like file where no one can manipulate information. This is especially great for contracts if you are not willing or don't have a copy of Adobe Acrobat.

Now you can e-mail the report to the client without any problems.

So the next time you need to get something printed quickly and in read-only mode, use this simple method and expand your productivity. Your manager will be surprised that you thought of this!

## 2. Creating Call Logs



- The way to track calls is to create a Microsoft Excel spreadsheet for the month. Create a sheet for each week, having the “from” and “to” dates in the sheet name.
- Then create worksheets within each sheet with headings such as:
- \* Name
- \* Time of Call
- \* Reason for Call

If you work for more than one manager or you need to track calls for more than one person, you might want to create a heading that states something like “Person Receiving Call” or something along the lines of this.

- Remember to create a filename for each year, so you can keep yourself organized. Also, remember to archive these files, just in case you need to go back and check who called when for what reason. You can purge the files as needed, depending on your company’s situation and/or policy.

# 3. Import Data from a Web Page



- Your manager comes up to you and asks you to open a web page. You see that there is quite a large amount of data on this particular page, looking like a spreadsheet. The manager then asks you to add this information onto an existing Microsoft Excel spreadsheet and for you to manipulate the data so that it flows with the original file.

Oh, one more thing, the manager asks you to do this right away, as they need it for a meeting in one hour.

Ok, don't panic. There is a very simple method of adding data directly from the web page onto a Microsoft Excel spreadsheet.

- 
- 
- 1. Click File, Open.
- 2. Type in the web address of where the data is located, including the http://.
- 3. Make sure to use Web Pages and Web Archives (\*.htm; \*.html; \*mht; \*mhtml) in the Files of Type section below where you have entered the web address.
- 4. Click Open.

As you can see, the entire web page imports directly into Microsoft Excel. You can now remove any useless information and have all of the data copied and pasted directly into your original spreadsheet.

# 4. Filtering the Right Results



- You have a tremendously large spreadsheet in front of you. Your boss asks you to find client information on particular criteria. You look at your spreadsheet and think to yourself, “This will take me forever. I would have to find every client that has these criteria.”

Thankfully, Microsoft Excel comes equipped with a very easy to use feature called “Auto Filter”. This function allows you to be able to filter as many criteria as you wish from an existing spreadsheet. It really cuts down on the amount of work you have to do in finding this information.



Here are the 4 simple steps on using this function:

# Filtering...



Open the file that you want to gather information from

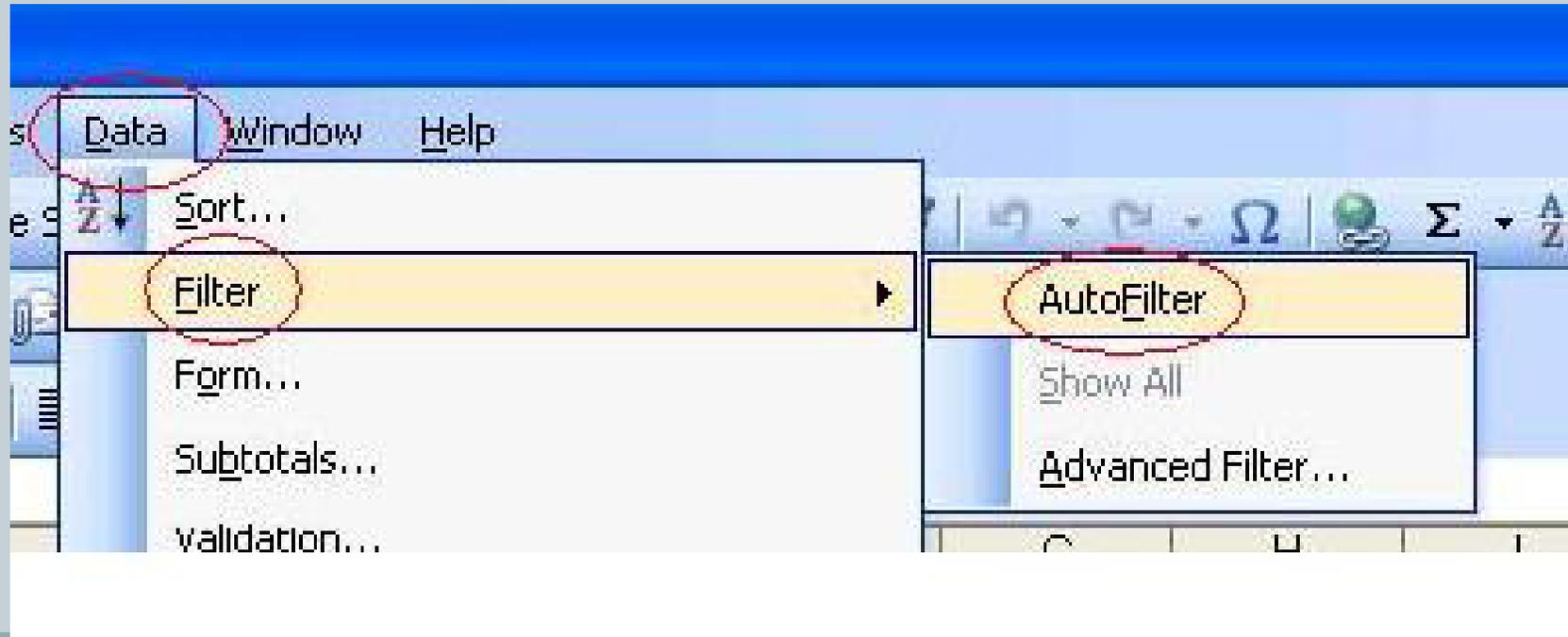
The screenshot shows the Microsoft Excel interface with the following data table:

	A	B	C
1	FirmName	LastName	FirstName
2	ABC	Smith	Bob
3	DEF	Doe	Jane
4	XYZ	Doe	John
5			
6			
7			
8			

# Filtering...



- Click on the cell shown below. Then the entire spreadsheet will be highlighted. Click on Data, Filter, AutoFilter.



# Filtering...



- Now you will notice that there are little boxes for each column with drop down arrows. You can now select the particular criteria in each column that fits your query. You can use as many drop down arrows or filters as you like to narrow down your search.
- **Tip:** If you are looking for particular words within the filters, you can click (Custom...) and type in the information you are looking for. Just make sure to use the “and” and “or” commands correctly.

The screenshot shows the Microsoft Excel interface with a table containing data. The table has three columns: A (FirmName), B (LastName), and C (FirstName). The data rows are: Row 2: ABC, Smith, Bob; Row 3: DEF, Doe, Jane; Row 4: XYZ, Doe, John. The dropdown arrows in the header row are circled in red, indicating they are active filters.

	A	B	C
1	FirmName	LastName	FirstName
2	ABC	Smith	Bob
3	DEF	Doe	Jane
4	XYZ	Doe	John
5			

# 5. Link Different Excel Pages



Have you ever wondered how you can link information between files in Microsoft Excel? For example, you want to show last year's sales figures on this year's sales figures spreadsheet, but your boss wants you to have two separate files for each.

1. Open or create the new spreadsheet with the destination cell (such as this year's sales figures).
2. Click on the particular cell that you want the information to go to, then type "+" without the quotes, on either the new spreadsheet or on the particular sheet that you want to copy the information to (sheets are tabs at the bottom of your Excel spreadsheet).
3. Click on the cell that has the source information (such as last year's sales figure) and hit enter.
4. Make sure to save the new or opened file. Now when you open it, make sure to click "Update" as this will update any changes to the original file (where you had your last year's sales figures).

You can do this for as many cells and as many files as you like. Just make sure not to delete the originating file, since the link will be broken at that point, since Microsoft Excel can't read the source data.



## 6. Counting Sums



- You are near completion of a sales tracking spreadsheet and your boss asks you to find out how many clients have purchased a particular product, how many times they have purchased this year, last year, etc. You think to yourself, “How would I get this done, since it’s such a large spreadsheet and would take me hours to count it by hand?”

There’s a very simple solution to this problem. There are two functions in Microsoft Excel that can help you accomplish this task within a matter of seconds.

The two functions are “count” and “counta”. Don’t worry, the latter one isn’t misspelled.

1. The “count” function is used for counting numbers.
2. The “counta” function is used for counting everything but numbers, such as client’s names, company names, etc.

To use the count function:

1. Click on the particular cell that you want to have your count shown in.
2. Type “=count(“ without the quotes, then select the range of cells that you want to capture, such as a list of sales, then type “)” without the quotes and hit enter.

To use the counta function, simply follow the steps above, but replace “count” with “counta”. Make sure that you are using this function for non-numerical data.

Now you can show your boss that you can get these details in a snap!

# 7. View Excel Documents Without Excel Software

- You're sick at home, can't seem to get access to your computer at work through your computer at home and your boss calls you up and asks if you can review a particular file. You scratch your head and start wondering, "How do I go about doing this?"

I'm sure that almost every company has computers and Microsoft Office software installed for all of their staff members. But there are times when you need to access certain Microsoft Office files that you cannot open, due to the fact that you don't have the software installed, for example, on your home computer.

You can download the following viewers for Microsoft Office files, where you don't have to purchase the entire piece of software.

- [Microsoft Excel Viewer](#)
- [Microsoft Word Viewer](#)
- [Microsoft PowerPoint Viewer](#)

Now you can rest assured that your boss will get the information they need from you.

# 8. Calculating Discounts



- Have you ever wondered how to calculate discounts on certain products/services that you or your firm offers? One of my colleagues had this dilemma a few days ago.

I tried searching around for an answer on Google, but no luck. It kept providing me topics that weren't relevant to the particular answer I was looking for. I then checked Excel's help file and there it was.

Here is how to calculate the difference between two numbers as a percentage:

For example, your earnings are \$2,342 in November and \$2,500 in December. What is the percentage change in your earnings between these two months? To do this task, use the ABS function and the subtraction (-) and division (/) operators.

A = November earnings: 2342

B = December earnings: 2500

The formula for this is:

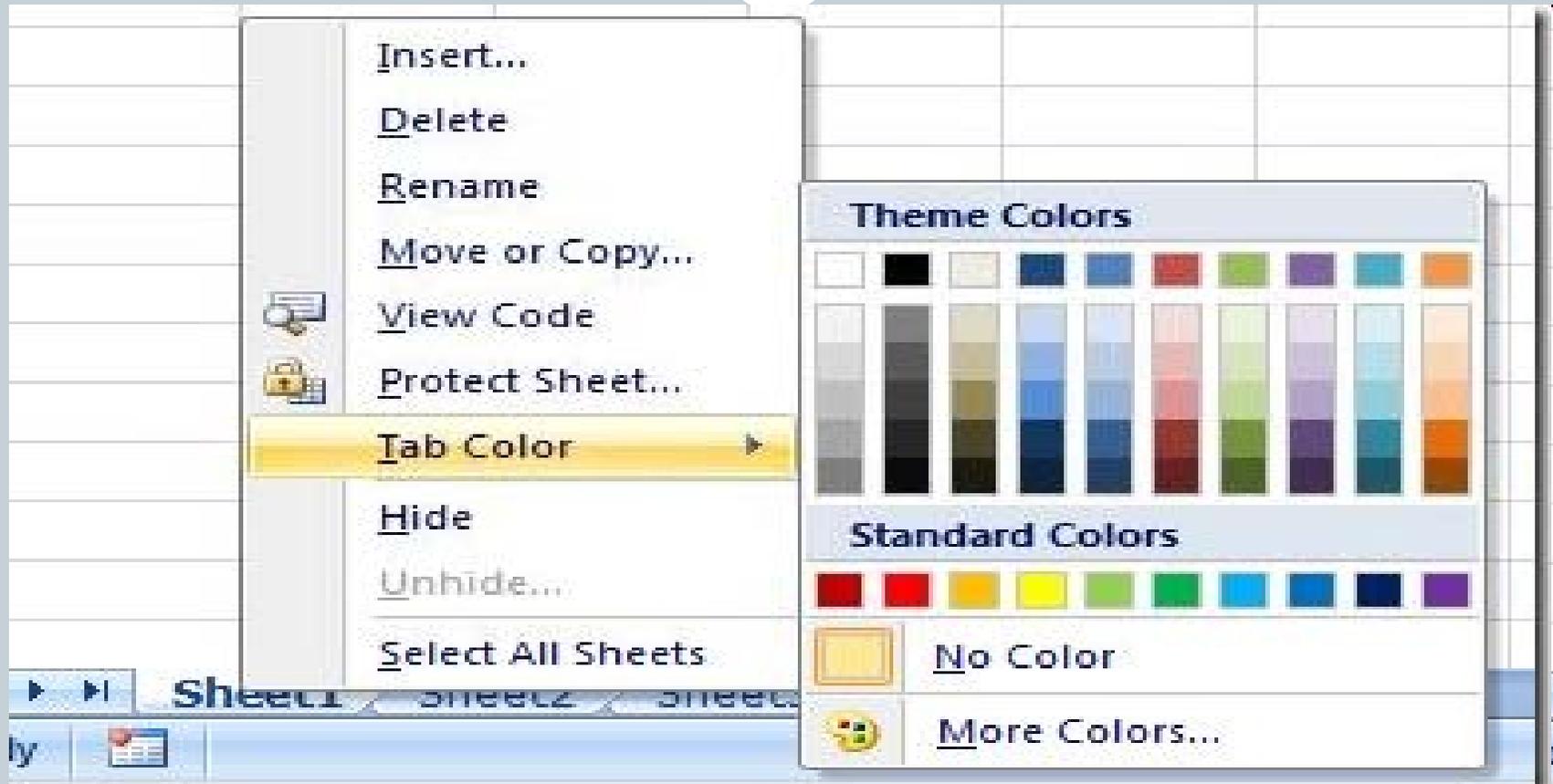
$$=(B2-A2)/A2$$

Description:

Divides the difference between the second and first numbers by the absolute value of the first number to get the percentage change (0.06746 or 6.75%)

And don't forget to click the % icon to format it into a percentage.

# 9. Change the Color of Sheet Tabs



This one's quick, easy *and* fun. Right click on sheet and select "Tab color" option to change the worksheet tab colors. Group them with similar colors if you have lot of sheets, it looks nice.

# 10. Shortcuts



- One way to really lessen the time you spend in Excel is to learn the shortcuts. In these cases, the + symbol indicates that the two keys should be typed together, not that you should add in that symbol.
- Moving within a sheet without your mouse:
  - tab moves right
  - tab+shift moves left
  - enter moves down
  - enter+shift moves up
- To display print menu: Ctrl+P
- To save: Ctrl+S
- To create a new worksheet: Ctrl+N or Alt+Shift+F1
- Undo: Ctrl+Z  
Redo: Ctrl+Y  
Cut: Ctrl+X  
Copy: Ctrl+C  
Paste: Ctrl+V

# More Shortcuts



- **Font Options:**
  - Ctrl+2 Bold**
  - Ctrl+3 Italic**
  - Ctrl+4 Underline**
  - Ctrl+5 Strikethrough**
  - Shift+Ctrl+F Font Drop Down List**
  
- **Ctrl+9 Hide rows**
  - Ctrl+0 Hide columns**
  - Ctrl+Shift+( Unhide rows**
  - Ctrl+Shift+) Unhide columns**

# Amy's toolbox



- Use Excel for your RFP Comparisons

Venue	location	contact	planner rate	supplier rate	all concessions	exceptions	comments	age	last renov	green	resturants	cvb	suppo	cgmp	clas	break out:	menu prices	shuttle
	Boca Raton		82	82	yes				26	2007	yes	yes	yes	yes	yes		20%	\$ 32.00
	Cocoa Beach		99	129	most				24	2006	yes	yes	yes	yes	yes	none		TBD
	Daytona Beach		84	139	most		didn't return the rfp details						yes				10%	
	Destin		112	139	yes				25	2009	yes	yes	yes	yes	yes		20%	TBD
	Fort Lauderdale		95	115	no	no reception			30	2008	yes	yes	yes	yes	yes		10%	\$ 11.00
	Fort Lauderdale		103	129	most	no comp parking			73	2002	no	yes		yes	yes		20%	\$ 23.00
	Fort Lauderdale		103	139	most	no comp parking	fully transformed into a westin 2009		0	2009	yes	yes	yes	yes	yes		10%	\$ 15.00
	Lake Buena Vista		90	90	no				37	2007	yes		yes	yes			20%	\$ 19.00
	Lake Buena Vista		90	90	no				26	2007	yes	yes	yes	yes			15%	\$ 32.00
	Naples		59	109	yes				10	2009	yes		yes	yes			20%	\$ 35.00
	Naples		99	109	no				64	2010	yes	yes		yes	yes	none		\$ 75.00
	Orlando		90	119	yes		largest doubletree in the world		30	2009	yes	yes		yes	yes		20%	\$ 23.00
	Orlando		129	129	no		didn't return the rfp details											
	Orlando		90	90	no		didn't return the rfp details											
	Orlando		85	85	yes		new hotel opened Feb 2010		0	NA	yes	yes	yes	yes	yes		20%	\$ 20.00
	Orlando		149	149	no				25	2009	yes	yes	yes	yes	no		10%	\$ 19.00
	Orlando		90	90	most	no comp parking			16	2010	yes	yes		yes	yes		20%	0
	Orlando		90	109	yes				28	2007	yes	yes	yes	yes	yes		20%	0
	Orlando		90	90	yes				11	2007	yes	yes		yes	yes		20%	0
	Orlando		90	109	no	no reception			15	2010	yes	yes		yes	yes		10%	\$ 29.00
	Orlando		79	79	most				19	2010	yes	yes		yes	yes		20%	\$ 29.00
	Orlando		149	149	no	no reception			4	none	yes	yes	yes	yes	yes		10%	\$ 18.00
	Orlando		89	109	yes				38	2006	yes	yes	yes	yes	yes		20%	\$ 35.00
	Orlando		90	90	most	no comp parking			24	2010	yes	yes	yes	yes	yes		20%	0
	Orlando		90	90	no				14	2009	yes	yes		yes	yes	special gov r	\$ 19.00	
	Orlando		79	79	no		didn't return the rfp details											
	Palm Beach		69	79	most	no upgrades			20	2009	yes	yes	yes	yes	yes		20%	0
	Palm Beach		69	69	most	no upgrades			26	2007	yes	yes					20%	0
	Palm Beach		79	109	yes				20	2006	yes	yes	yes	yes	yes		20%	0
	Ponte Vedra		97	149	most				20	2009	yes	yes	yes	yes	yes		10%	\$ 45.00
	St. Augustine		85	129	yes				12	2008	yes	yes		yes	yes		10%	\$ 75
	St. Pete Beach		92	92	yes				25	2010	yes	yes	yes	yes	yes		20%	\$ 23.00
	Tallahassee		90	99	most		no break out sessions		37	2010	yes	yes	yes	yes	no		20%	
	Tampa		79	99	yes				30	2010	yes	yes	yes	yes	yes		20%	0
	Tampa		92	129	no	no reception			28	2010	yes	yes	yes	yes	yes		10%	\$ 13.00
	Tampa		103	103	yes				30	2000	yes	yes	yes	yes	yes		20%	0
	Tampa		103	103	no	no reception			10	2009	yes	yes	yes	yes	yes		10%	\$ 12.00
	Wesley Chapel		99	99	no				30	2009	yes	yes	yes	yes	yes		10%	\$ 40.00
	Weston		103	125	most				28	2007	yes	yes	yes	yes	yes		0%	\$ 40.00
	Boca Raton		129	129	yes		didn't return the rfp details				yes	yes						

## Amy's toolbox cont.



- Meeting Budgets
- Rooming lists
- Don't forget to utilize your templates (Work Smarter, Not Harder)



## Amy's toolbox Cont.



- **Import spreadsheets to Access or Visa Versa**



Again work “smarter” not harder



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*Program was created by Charles Sadler, CGMP, CHSP, CHSC*