

Editing and Proofing Excel Spreadsheet Data

Even experienced Excel users make data-entry mistakes. This chapter focuses on how to efficiently edit and proof your worksheets, covering the differences between editing directly in a cell versus using the Formula Bar, and when each approach works best. You'll also explore Excel's proofing and correction options so you can catch errors before they affect your financial models or client deliverables. Clean, accurate data is the backbone of reliable accounting work, and these skills help you get there.

CREDIT HOURS 2 | FIELD OF STUDY BUSINESS | EXAM QUESTIONS 10

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LEARNING ASSIGNMENTS AND OBJECTIVES

Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

Course Objectives

- Recognize how to efficiently edit and move data around in an Excel worksheet.

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Chapter 1: EDITING AND PROOFING WORKSHEETS

Chapter Objective

After completing this chapter, you should be able to:

- Recognize how to efficiently edit and move data around in an Excel worksheet.

Creating a worksheet is seldom a one-time experience. In fact, some of the worksheets that you create with Excel require routine changes on a regular basis, whereas others require more radical changes only once in a while. Regardless of the extent of the changes and their frequency, you can be sure that sooner or later, most of the worksheets you create in Excel will require editing.

In this chapter, you find out how to make basic editing changes in a worksheet by modifying the contents of a cell as well as how to do more complex editing in your worksheets. These techniques include how to use the Undo and Redo features, zoom in and out on data, move and copy data, delete data entries and insert new ones, search and replace data entries, and proof the contents of the final worksheet.

However, before you can use any of these fine editing techniques, you have to open the workbook whose contents require editing. So, with that in mind, this chapter starts out by giving you the lowdown on finding and opening workbooks in Excel.

OPENING A WORKBOOK

One way to open a workbook for editing in Excel is to navigate to the workbook's folder using File Explorer and then double-click the workbook file icon. If Excel isn't running, Windows launches Excel and then opens the file.

Remember

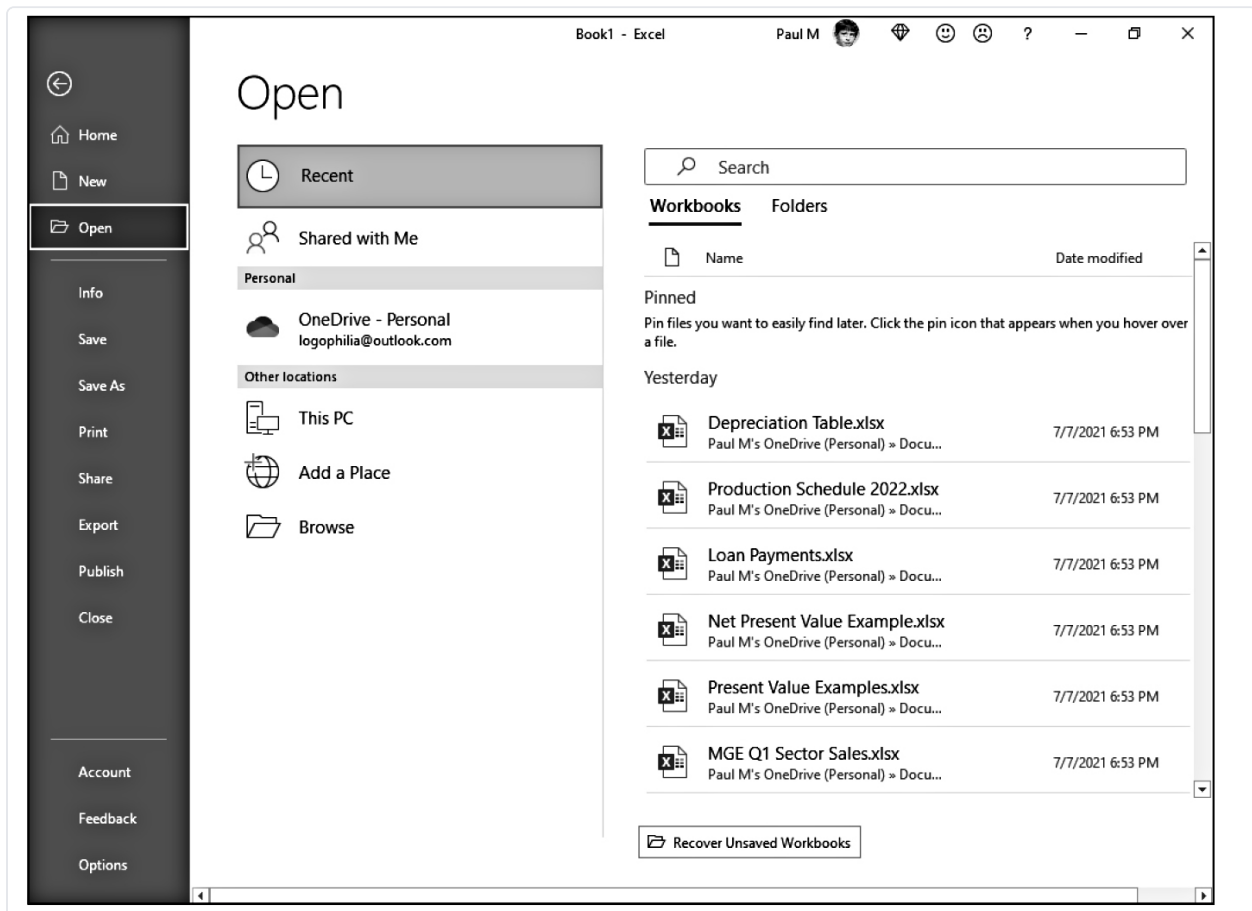
Excel automatically saves workbook files in your Documents folder on your OneDrive unless you select another folder or you save your workbooks locally on a hard drive or network drive connected to your device. You can type the name of the workbook file in the taskbar's Type Here to Search text box, or you can use Cortana to locate the file by saying to her "Find ..." followed by the name of the workbook file.

Using the Open screen in the Backstage view

If Excel is already running and you want to open a workbook file for editing from within Excel, you can choose File→Open or press Alt+FO or Ctrl+O to launch the Open screen in the Backstage view and locate and open the file.

When Excel displays the Open screen (similar to the one shown in Figure 5-1), the program selects the Recent option on the left, while listing recently opened files under the Workbooks tab on the right. If the workbook file you want to edit is listed there, you can open the file by clicking its name in the list. If the Excel file you want to edit isn't in the list of workbooks but in one of the folders in which you routinely save your workbooks, click the Folders tab to the immediate right of the Workbooks tab to switch to a list of folders from which you've recently retrieved workbooks. When you locate the folder with the file you need, double-click it and then double-click its file icon to open the workbook in Excel.

FIGURE 5-1: USE THE OPEN SCREEN TO FIND AND OPEN A WORKBOOK FOR EDITING.



If the workbook file isn't among those in the Recent list, you need to select its location from another location:

- **Shared with Me:** Displays a list of workbooks that your coworkers or clients have shared with you.
- **OneDrive:** Displays your OneDrive folders.
- **This PC:** Displays your PC's folders, which includes removable storage devices connected to your computer or tablet PC.
- **Add a Place:** Enables you to add a folder on your OneDrive or SharePoint website to the list of places in the Open screen for easy access.
- **Browse:** Displays the Open dialog box where you can search for misplaced workbook files or open a folder not listed in the Open screen.

Remember

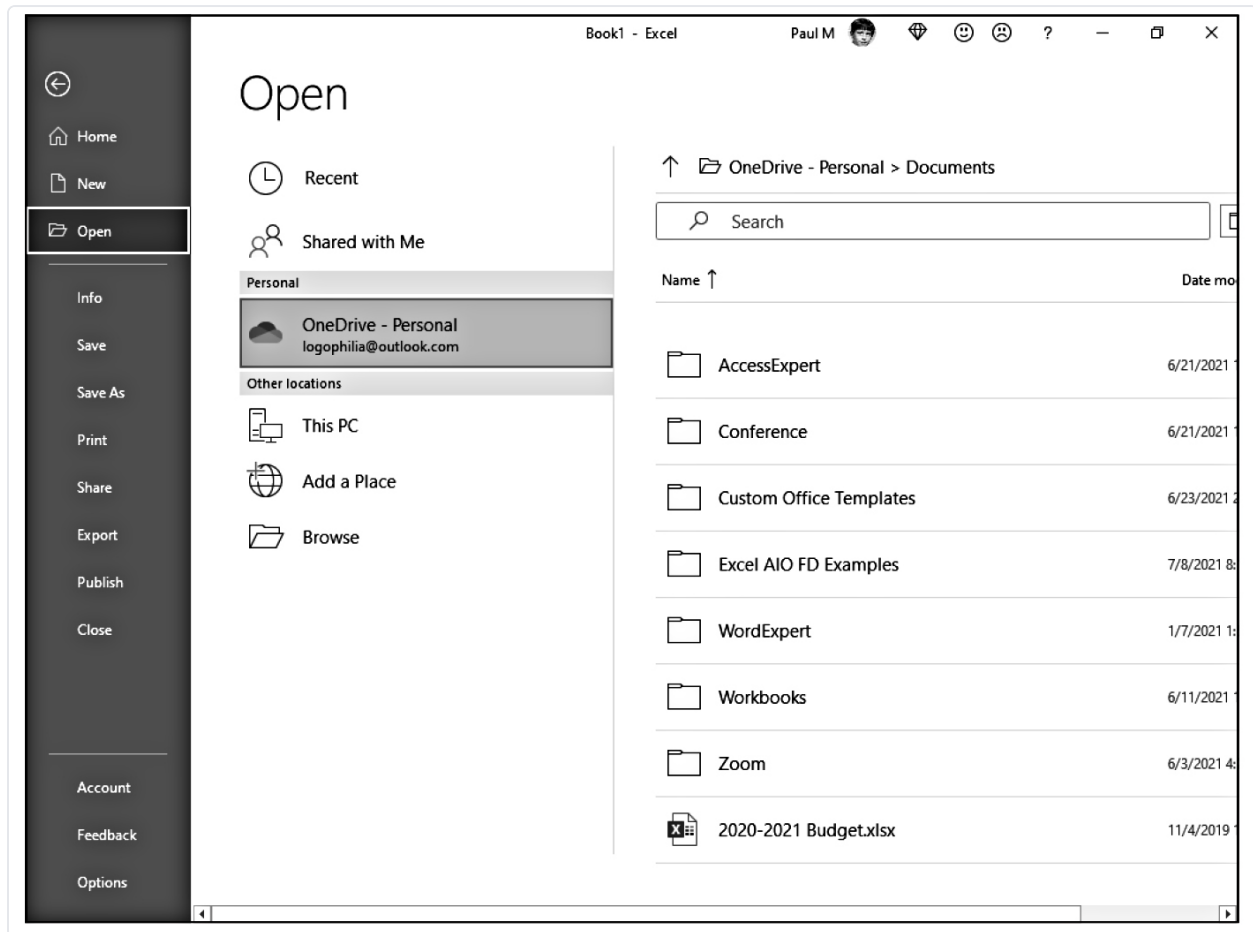
If your company maintains a SharePoint Team website where you save Excel workbook files and you've added it as a place (with the Add a Place link), its name will also appear under the Places heading on the Excel Open screen.

Tip

Click the Recover Unsaved Workbooks button at the bottom of the Recent screen if you ever need to open a workbook that you inadvertently didn't save on one of your computer's local drives before you closed the file. Excel displays the Open dialog box showing the contents of the UnsavedFiles folder, containing a list of any workbook files that the program automatically saved there before closing the Excel program window. Unfortunately, the filenames in this list, as in Book1((Unsaved 50685148768452)), are pretty nondescript, and there are no worksheet previews available (because the files never got saved, so no previews got created). This means that you need to rely on the date and time listed in the Date Modified column of the Open dialog box to help you identify the file you want to open for editing. When you click the filename of the unsaved file to open followed by the Open button, Excel opens it in the program window in Read Only mode with an alert appearing beneath the Ribbon indicating that this is a recovered file. You can then click the Save As button at the end of the alert text to open the Save As dialog box where you can properly name and save the file, thus enabling you to edit its contents.

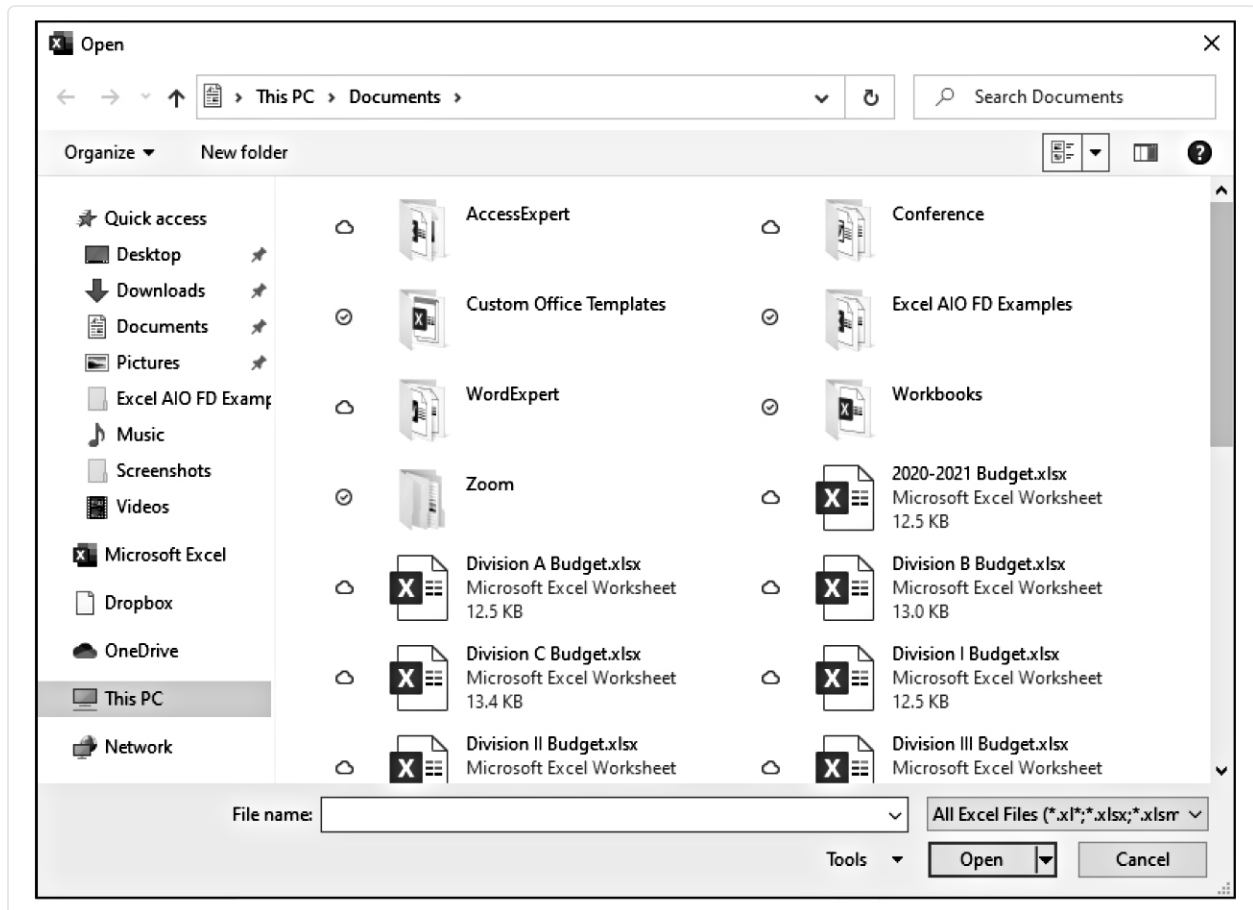
When you select the location containing your workbook file, the Open screen displays links to that location's folders. (See Figure 5-2.) You can click one of these links to select its folder and display its files. If you can't find the workbook you want to open, you can select the Browse button to peruse the folders and files on the selected location in the ensuing Open dialog box.

FIGURE 5-2: SELECT A LOCATION TO SEE ITS FOLDERS.



When the Open dialog box is displayed, the contents of the selected location or recently visited folder are listed in its main pane. (See Figure 5-3.) If you see the name of the workbook you want to edit in this list, double-click the file, or click the file and then click Open to load the workbook into Excel.

FIGURE 5-3: YOU CAN USE THE OPEN DIALOG BOX TO SELECT THE WORKBOOK FILE YOU WANT TO OPEN.



Remember

If you open a new folder and it appears empty of all files (and you know that it's not an empty folder), this just means the folder doesn't contain any of the types of files that Excel can open directly, such as workbooks, template files, and macro sheets. To display all the files, whether Excel can open them directly (meaning without some sort of conversion), click the drop-down button that says All Excel Files and then select the All Files option at the top of its drop-down menu.

Note that you can change the way folder and file icons appear in the dialog box. To do so, use the slider attached to the Change Your View drop-down list button located on the right side of the toolbar at the top of the Open dialog box. When you select Large Icons or Extra Large Icons on this slider (or anywhere in between), the Excel workbook icons actually show data in the upper-left corner of the first worksheet. This *applies* to all Excel workbooks saved with the Save Thumbnail

check box selected and Excel 97 through 2005 workbooks saved with the Save Preview Picture check box on the *Summary* tab of the workbook's Properties dialog box selected. This preview of part of the first sheet helps you quickly identify the workbook you want to open for editing or printing.

Tip

If you're comfortable opening workbook files directly from the Open dialog box, you can completely bypass the Open screen by selecting the Don't Show the Backstage When Opening or Saving Files check box on the Save tab of the Excel Options dialog box (Alt+FTS). Just be aware that when you select this check box, Excel not only immediately displays the Open dialog box when you choose File→Open to open a workbook file for editing but also displays the Save As dialog box when you choose File→Save option (or any of its equivalents) to save a new workbook file. This means that you must be as comfortable using the Save As dialog box to select the place to save a new file as you are using the Open dialog box to select the place containing the file to edit.

Opening more than one workbook at a time

If you know that you need to edit worksheets saved in multiple workbook files, you can open them all in Excel at the same time by selecting all their files in the Folder and File List in the Open dialog box before you select the Open button.

Remember

To select multiple files that appear sequentially in the Open dialog box, click the first file and then hold down the Shift key while you click the last file. To select files that aren't listed sequentially, click the first file and then hold down the Ctrl key while you click the other files.

After the workbook files are open in Excel, you can then switch documents by selecting their filename buttons on the Windows taskbar or by using the Flip feature (Alt+Tab) to select the workbook's thumbnail.

Finding misplaced workbooks

Everything's hunky-dory as long as you correctly remember the folder containing the workbook file or files you need to edit. But what about those times when they seem to have mysteriously migrated and are now nowhere to be found? For those rare occasions, use the Search Documents text box in the Open dialog box (see Figure 5-3) that enables you to search for missing notebooks right from within the dialog box.

To use this search feature to find a workbook, click the Search Documents text box in the upper-right corner of the Open dialog box and then begin typing search characters used in the workbook's filename or contained in the workbook itself.

As Windows finds any matches for the characters you type, the names of the workbook files (and other Excel files such as templates and macro sheets as well) appear in the Open dialog box. As soon as the workbook you want to open is listed, you can open it by clicking its icon and filename followed by the Open button or by double-clicking it.

Using the other Open options

The drop-down menu attached to the Open button in the Open dialog box enables you to open the selected workbook file(s) in special ways. These ways include:

- **Open Read-Only:** Opens the files you select in the Open dialog box's list box in a read-only state, which means that you can look but you can't touch. (Actually, you can touch; you just can't save your changes.) To save changes in a read-only file, you must choose File→Save As from the Excel menu bar and give the workbook file a new filename, a new location, or both.
- **Open as Copy:** Opens a copy of the files you select in the Open dialog box. Use this method of file opening as a safety net: If you mess up the copies, you always have the originals to fall back on.
- **Open in Browser:** Opens workbook files you save as web pages in your default web browser. Note that this command isn't available unless the program identifies that the selected file or files were saved as web pages rather than plain, old Excel worksheet files.
- **Open in Protected View:** Opens the selected workbook in Protected View, which prevents you from making any editing changes to its worksheets until you click the Enable Editing button that appears in the red Protected View panel at the top of the worksheet area.
- **Open and Repair:** Attempts to repair corrupted workbook files before opening them in Excel. When you select this command, a dialog box appears, giving you a choice between attempting to repair the corrupted file or opening the recovered version, extracting the data out of the corrupted file, and placing it in a new workbook (which you can save with the Save command). Click the Repair button to attempt to recover and open the file. Click the Extract Data button if you previously tried unsuccessfully to have Excel repair the file.
- **Show Previous Versions:** Displays a list of various versions of the workbook file automatically saved by Excel's AutoRecover feature and given filenames that describe when the file and under what circumstances the version was saved.