

Organizing and Managing Excel Worksheet Structures

As workbooks grow more complex, knowing how to manage their structure becomes essential. This chapter covers the tools and techniques for organizing worksheets effectively, from renaming and reordering tabs to copying, moving, and protecting sheets. For tax and accounting professionals juggling multi-sheet workbooks with client data, financial statements, or supporting schedules, these skills help keep everything organized, accessible, and less prone to costly errors caused by disorganized file structures.

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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 manipulate data within a worksheet.

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TABLE OF CONTENTS

CHAPTER

01

Managing Worksheets 4

1.01 Reorganizing The Worksheet 4

1.02 ***Table 6-1 Outline Buttons*** 13

1.03 Reorganizing The Workbook 21

1.04 Working With Multiple Workbooks 32

1.05 Consolidating Worksheets 34

Test Your Knowledge..... 40

Final Exam Copy 50

Glossary 48

Index

Chapter 1: MANAGING WORKSHEETS

Chapter Objective

After completing this chapter, you should be able to:

- Recognize how to manipulate data within a worksheet.

Being able to manage and reorganize the information in your worksheets is almost as important as being able to input data and edit it. As part of these skills, you need to know how to manipulate the columns and rows of a single worksheet, the worksheets within a single workbook, and, at times, other workbooks that contain supporting or relevant data.

This chapter examines how to reorganize information in a single worksheet by inserting and deleting columns and rows, as well as how to apply outlining to data tables that enables you to expand and collapse details by showing and hiding columns and rows. It also covers how to reorganize and manipulate the worksheets in a workbook and discusses strategies for visually comparing and transferring data between the different workbooks that you have open for editing.

REORGANIZING THE WORKSHEET

Every Excel worksheet that you work with has 16,384 columns and 1,048,576 rows — no more, no less, regardless of how many or how few of its cells you use. As your worksheet grows, you may find it beneficial to rearrange the data so that it doesn't creep. Many times, this involves deleting unnecessary columns and rows to bring the data ranges and tables closer to each other. At other times, you may need to insert new columns and rows in the worksheet to create some breathing room between the groups of data.

Within the confines of this humongous worksheet space, your main challenge is often keeping tabs on all the information spread out throughout the sheet. At times, you may find that you need to split the worksheet window into panes so that you can view two disparate regions of the worksheet together in the same window and compare their data. For large ranges and tables, you may want to outline the worksheet data so that you can immediately collapse the information down to the summary or essential data and then just as quickly expand the information to show some or all of the supporting data.

Being cautious when deleting and inserting columns and rows

The first thing to keep in mind when inserting or deleting columns and rows in a worksheet is that these operations affect all 1,048,576 rows in those columns and all 16,384 columns in those rows. As

a result, you have to be sure that you're not about to adversely affect data in unseen rows and columns of the sheet before you undertake these operations. Note that, in this regard, inserting columns or rows can be almost as detrimental as deleting them if, by inserting them, you split apart existing data tables or lists whose data should always remain together.

One way to guard against inadvertently deleting existing data or splitting apart a single range is to use the Zoom slider on the Status bar to zoom out on the sheet and then check visually for intersecting groups of data in the hinterlands of the worksheet. You can do this quickly by dragging the Zoom slider button to the left to the 25% setting. Of course, even at the smallest zoom setting of 10%, you can see neither all the columns nor all the rows in the worksheet, and because everything's so tiny at that setting, you can't always tell whether the column or row you intend to fiddle with intersects those data ranges that you can identify.

Another way to check is to press **End+→** or **End+↓** to move the cell pointer from data range to data range across the column or row affected by your column or row deletion. Remember that pressing **End** plus an arrow key when the cell pointer is in a blank cell jumps the cell pointer to the next occupied cell in its row or column. That means if you press **End+→** when the cell pointer is in row 52 and the pointer jumps to cell XFD52 (the end of the worksheet in that row), you know that there isn't any data in that row that would be eliminated by your deleting that row or shifted up or down by your inserting a new row. So too, if you press **End+↓** when the cell pointer is in column D and the cell pointer jumps down to cell D1048576, you're assured that no data is about to be purged or shifted left or right by that column's deletion or a new column's insertion at that point.

When you're sure that you aren't about to make any problems for yourself in other, unseen parts of the worksheet by deleting or inserting columns, you're ready to make these structural changes to the worksheet.

Deleting columns and rows

To delete columns or rows of the worksheet, select them by clicking their column letters or row numbers in the column or row header and then, in the Home tab's Cells group, click the Delete button. (Alternatively, click any selected column or row header and then click Delete.) Remember that you can select groups of columns and rows by dragging through their letters and numbers in the column or row header. You can also select nonadjacent columns and rows by holding down the **Ctrl** key as you click them.

When you delete a column, all the data entries within the cells of that column are immediately zapped. At the same time, all remaining data entries in succeeding columns to the right move left to fill the blank left by the now-missing column. When you delete a row, all the data entries within the cells of that row are immediately eliminated, and the remaining data entries in rows below move up to fill in the gap left by the missing row.

Tip

Rather than selecting the columns or rows you want to delete in advance, you can also select just one or more cells in each column or row. Then, in the Home tab's Cells group, click the Delete button's drop-down list and then click either Delete Sheet Columns or Delete Sheet Rows.

Remember

Pressing the Delete key is not the same as clicking the Delete button on the Home tab of the Ribbon. When you press the Delete key after selecting columns or rows in the worksheet, Excel clears the data entries in their cells without adjusting any of the existing data entries in neighboring columns and rows. Click the Delete command button on the Home tab when your purpose is both to delete the data in the selected columns or rows and to fill in the gap by adjusting the position of entries to the right and below the ones you eliminate.

Warning

Should your row or column deletions remove data entries referenced in formulas, the #REF! *error value* replaces the calculated values in the cells of the formulas affected by the elimination of the original cell references. You must then either restore the deleted rows or columns or re-create the original formula and then recopy it to get rid of these nasty formula errors.

Adding new columns and rows

To insert a new column or row into the worksheet, you select the column or row where you want the new blank column or row to appear (again by clicking its column letter or row number in the column or row header):

- For a new column, select the column to the left of which you want the new column to appear.
- For a new row, select the row above which you want the new column to appear. Then, in the Home tab's Cells group, click the Insert button. (Alternatively, click any selected column or row header and then click Insert.)

When you insert a blank column, Excel moves the existing data in the selected column to the right, while simultaneously moving any other columns of data on the right over one. When you insert a blank row, Excel moves the existing data in the selected row down, while simultaneously adjusting any other rows of existing data that fall below it down by one.

To insert multiple columns or rows at one time in the worksheet, select the columns or rows where you want the new blank columns or rows to appear (by dragging through their column letters and row numbers in the column and row header) before you click the Home tab's Insert command.

Tip

Rather than first selecting entire columns or rows, you can also select just one or more cells in each column or row. Then, in the Home tab's Cells group, click the Insert command's drop-down menu and then click either the Insert Sheet Columns or Insert Sheet Rows option, respectively.

Remember

Whenever your column or row insertions reposition data entries that are referenced in other formulas in the worksheet, Excel automatically adjusts the cell references in the formulas affected to reflect the movement of their columns left or right or rows up or down.

Splitting the worksheet into panes

Excel enables you to split the active worksheet window into two or four panes. After splitting up the window into panes, you can use the Excel workbook's horizontal and vertical scroll bars to bring different parts of the same worksheet into view. This is great for comparing the data in different sections of a table that would otherwise not be legible if you zoomed out far enough to have both sections displayed in the worksheet window. You can split a worksheet window in three ways:

- **Two horizontal panes:** Position the cell pointer in column A of the worksheet in the cell where you want the horizontal division to take place. Every row above that cell appears in the top pane, while the cell's row and every row below it appears in the bottom pane.
- **Two vertical panes:** Position the cell pointer in the first row of the column where the split is to occur. Every column to the right of that cell appears in the right pane, while the cell's column and every column to its left appears in the left pane.
- **Four panes:** Position the cell pointer in the cell in the column to the right of where you want the vertical dividing line and in the row below where you want the horizontal dividing line. After you create the split, the cell pointer is in the upper-left corner of the lower-right pane.

To perform the split, in the View tab's Window group, click the Split button (or press Alt+WS).

Excel displays the borders of the window panes you create in the document window with a bar that ends with the vertical or horizontal split bar. To modify the size of a pane, you position the white-cross pointer on the appropriate dividing bar. When the pointer changes to either a double-headed

arrow (if you're adjusting two panes) or a four-headed arrow (if you're adjusting four panes), drag the bar until the pane is the correct size and release the mouse button.

When you split a window into panes, Excel automatically synchronizes the scrolling, depending on how you split the worksheet. When you split a window into two horizontal panes, as shown in Figure 6-1 (sample workbook: Income Analysis.xlsx), the worksheet window contains a single horizontal scroll bar and two separate vertical scroll bars. This means that all horizontal scrolling of the two panes is synchronized, while the vertical scrolling of each pane remains independent.

FIGURE 6-1: THE REGIONAL INCOME WORKSHEET WITH THE WINDOW DIVIDED INTO TWO HORIZONTAL PANES AT ROW 10. (SAMPLE WORKBOOK: INCOME ANALYSIS.XLSX)

	A	B	C	D	E	F	G	H	I
1	Regional Income								
2		<i>Jan</i>	<i>Feb</i>	<i>Mar</i>	<i>Qtr 1</i>	<i>Apr</i>	<i>May</i>	<i>Jun</i>	<i>Qtr 2</i>
3	Sales								
4	Northern	\$56,000	\$61,600	\$67,760	\$185,360	\$74,536	\$81,990	\$90,189	\$246,714
5	Southern	20,572	22,629	24,892	\$68,093	27,381	30,119	33,131	\$90,632
6	Central	131,685	144,854	159,339	\$435,877	175,273	192,800	212,080	\$580,153
7	Western	94,473	103,920	114,312	\$312,706	125,744	138,318	152,150	\$416,211
8	International	126,739	139,413	153,354	\$419,506	168,690	185,559	204,114	\$558,363
9	Total Sales	\$429,469	\$472,416	\$519,657	\$1,421,542	\$571,623	\$628,786	\$691,664	\$1,892,073
10									
11	Cost of Goods Sold								
12	Northern	10,341	11,272	12,286	\$33,899	13,392	14,597	15,911	43,900
13	Southern	6,546	7,135	7,777	\$21,458	8,477	9,240	10,072	27,789
14	Central	65,843	71,769	78,228	\$215,840	85,269	92,943	101,308	279,519
15	Western	63,967	69,724	75,999	\$209,690	82,839	90,295	98,421	271,555
16	International	72,314	78,822	85,916	\$237,053	93,649	102,077	111,264	306,990
17	Total Cost of Goods Sold	\$219,011	\$238,722	\$260,207	\$717,940	\$283,626	\$309,152	\$336,976	929,753
18									
19	Operating Expenses								
20	Northern	\$21,529	\$23,036	\$24,649	\$69,214	\$26,374	\$28,220	\$30,196	\$84,790
21	Southern	15,946	17,062	18,257	\$51,265	19,535	20,902	22,365	\$62,802
22	Central	27,554	29,483	31,547	\$88,583	33,755	36,118	38,646	\$108,518

When you split a window into two vertical panes, as shown in Figure 6-2 (sample workbook: Income Analysis.xlsx), the situation is reversed. The worksheet window contains a single vertical scroll bar and two separate horizontal scroll bars. This means that all vertical scrolling of the two panes is synchronized, while horizontal scrolling of each pane remains independent.

FIGURE 6-2: THE REGIONAL INCOME WORKSHEET WITH THE WINDOW DIVIDED INTO TWO VERTICAL PANES AT COLUMN F. (SAMPLE WORKBOOK: INCOME ANALYSIS.XLSX)

	A	B	C	D	E	F	G	H	I
1	Regional Income								
2		<i>Jan</i>	<i>Feb</i>	<i>Mar</i>	<i>Qtr 1</i>	<i>Apr</i>	<i>May</i>	<i>Jun</i>	<i>Qtr 2</i>
3	Sales								
4	Northern	\$56,000	\$61,600	\$67,760	\$185,360	\$74,536	\$81,990	\$90,189	\$246,714
5	Southern	20,572	22,629	24,892	\$68,093	27,381	30,119	33,131	\$90,632
6	Central	131,685	144,854	159,339	\$435,877	175,273	192,800	212,080	\$580,153
7	Western	94,473	103,920	114,312	\$312,706	125,744	138,318	152,150	\$416,211
8	International	126,739	139,413	153,354	\$419,506	168,690	185,559	204,114	\$558,363
9	Total Sales	\$429,469	\$472,416	\$519,657	\$1,421,542	\$571,623	\$628,786	\$691,664	\$1,892,073
10									
11	Cost of Goods Sold								
12	Northern	10,341	11,272	12,286	\$33,899	13,392	14,597	15,911	43,900
13	Southern	6,546	7,135	7,777	\$21,458	8,477	9,240	10,072	27,789
14	Central	65,843	71,769	78,228	\$215,840	85,269	92,943	101,308	279,519
15	Western	63,967	69,724	75,999	\$209,690	82,839	90,295	98,421	271,555
16	International	72,314	78,822	85,916	\$237,053	93,649	102,077	111,264	306,990
17	Total Cost of Goods Sold								
18	Sold	\$219,011	\$238,722	\$260,207	\$717,940	\$283,626	\$309,152	\$336,976	929,753
19	Operating Expenses								
20	Northern	\$21,529	\$23,036	\$24,649	\$69,214	\$26,374	\$28,220	\$30,196	\$84,790
21	Southern	15,946	17,062	18,257	\$51,265	19,535	20,902	22,365	\$62,802
22	Central	27,554	29,483	31,547	\$88,583	33,755	36,118	38,646	\$108,518

When you split a window into two horizontal and two vertical panes, as shown in Figure 6-3 (sample workbook: Income Analysis.xlsx), the worksheet window contains two horizontal scroll bars and two separate vertical scroll bars. This means that vertical scrolling is synchronized in the top two window panes when you use the top vertical scroll bar and synchronized for the bottom two window panes when you use the bottom vertical scroll bar. Likewise, horizontal scrolling is synchronized for the left two window panes when you use the horizontal scroll bar on the left, and it's synchronized for the right two window panes when you use the horizontal scroll bar on the right.

FIGURE 6-3: SPLITTING THE WORKSHEET WINDOW INTO FOUR PANES: TWO HORIZONTAL AND TWO VERTICAL AT CELL F10. (SAMPLE WORKBOOK: INCOME ANALYSIS.XLSX)

	A	B	C	D	E	F	G	H	I
1	Regional Income								
2		Jan	Feb	Mar	Qtr 1	Apr	May	Jun	Qtr 2
3	Sales								
4	Northern	\$56,000	\$61,600	\$67,760	\$185,360	\$74,536	\$81,990	\$90,189	\$246,714
5	Southern	20,572	22,629	24,892	\$68,093	27,381	30,119	33,131	\$90,632
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9	Total Sales	\$429,469	\$472,416	\$519,657	\$1,421,542	\$571,623	\$628,786	\$691,664	\$1,892,073
10									
11	Cost of Goods Sold								
12	Northern	10,341	11,272	12,286	\$33,899	13,392	14,597	15,911	43,900
13	Southern	6,546	7,135	7,777	\$21,458	8,477	9,240	10,072	27,789
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17	Total Cost of Goods Sold	\$219,011	\$238,722	\$260,207	\$717,940	\$283,626	\$309,152	\$336,976	929,753
18									
19	Operating Expenses								
20	Northern	\$21,529	\$23,036	\$24,649	\$69,214	\$26,374	\$28,220	\$30,196	\$84,790
21	Southern	15,946	17,062	18,257	\$51,265	19,535	20,902	22,365	\$62,802
22	Central	27,554	29,483	31,547	\$88,583	33,755	36,118	38,646	\$108,518

To remove all panes from a window when you no longer need them, you click the View tab's Split button, press Alt+WS, or drag the dividing bar (with the black double-headed split arrow cursor) either for the horizontal or vertical pane until you reach one of the edges of the worksheet window. You can also remove a pane by positioning the mouse pointer on a pane-dividing bar and then, when it changes to a double-headed or four-headed split arrow, double-clicking it.

Tip

Remember that on a touchscreen, you can also remove the panes in a worksheet by directly double-tapping the pane-dividing bar with your finger or stylus.

Remember

You can freeze panes in the window so that information in the upper pane and/or in the leftmost pane remains in the worksheet window at all times, no matter what other columns and rows you scroll to or how much you zoom in and out on the data.

Outlining worksheets