# Excel Tips

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**Description:** This document provides various tips to assist a Consultant with Excel.

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| Saving Excel File as PDF |

To save an excel file as a PDF and ensure all pertinent information fits on one page, perform the following steps:

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| **Step** | **Action** |
| **1** | Select the **View** tab. |
| **2** | Select **Page Break Preview.** |
| **3** | Drag the dotted line to where the page view should end.  **Before:**    **After:** |
| **4** | Select **Normal.** |

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| Pin Commonly Accessed Items to Recent Files |

Perform the following steps:

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| **Step** | **Action** |
| **1** | Open a Microsoft Suite program.  **Example:** Excel, Word, etc. |
| **2** | Select **File.** |
| **3** | Select **Open.** |
| **4** | Locate document the **Recent** tab and select the **Thumbtack** icon.    **Result:** The document will save to the top of **Pinned.** |

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| Continuous Formatting Cells |

Perform the steps below to create a continuous format for dates/attendance:

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| **Step** | **Action** |
| **1** | Enter 2 or 3 dates in the desired cells to set a pattern. |
| **2** | Highlight the cells. |
| **3** | Drag the same black box to add dates into more cells.    **Result:** Dates will automatically populate based on pattern. |

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| Highlighting a Row Based Upon Content of One Cell |

When to use:

* Pending Items
* Completed Items

Perform the following steps:

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| **Step** | **Action** |
| **1** | Open spreadsheet. |
| **2** | Highlight cells to format. |
| **3** | Select **Conditional Formatting – New Rule.** |
| **4** | Select **Use a formula to determine which cells to format.** |
| **5** | Enter the formula - =$<column letter><active cell>=“<trigger word>”.  **Example:** =$C2=“Smith”    **Note:** The formula will change depending upon the cell used to trigger highlighting the row.For this example, the entire first row based upon the name Smith in column 3 is highlighted. |
| **6** | Select **Font.** |
| **7** | Select the **Fill** tab to pick color to be used.  **Note:** Click on the **More Colors…** button if needed. |
| **8** | Select **OK.**  **Result:** The **New Formatting Rule Screen** will display. |
| **9** | Select **OK** to return to the spreadsheet.    **Result:** The entire row should be highlighted. |

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| Edit Range |

Perform the following steps:

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| **Step** | **Action** |
| **1** | Select the entire spreadsheet. |
| **2** | Select **Conditional Formatting – Manage Rules.** |
| **3** | Select **This Worksheet** from Showing formatting rules for field. |
| **4** | Highlight the rule to be revised and select **Edit Rule.** |
| **5** | Revise the cell range as needed by selecting the  under the **Applies to** column. |
| **6** | Highlight the new cell range. |
| **7** | Select the down arrow to the right of the selection window. |
| **8** | Select **Apply** and then **OK.**    **Result:** All rows that fit the rule will be highlighted. |

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| Formatting Date Cells |

Cells containing dates can be formatted:

* Manually
* Macros

This section describes how to format the date fields in the weekly inventory reports.

### Manually

Perform the following steps:

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| **Step** | **Action** |
| **1** | Select the columns to format.  **Example:** Columns I (D RELEASE DATE) and J (D EXPIRATION DATE) in the Inventory Report. |
| **2** | Right-click and select **Format Cells.** |
| **3** | Select Date format **\*3/14/2012,** then select **OK.**    **Result:** The columns will update to display the dates in the selected format. |

### Macro

Perform the following steps:

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| **Step** | **Action** |
| **1** | Save the following [macro](file:///C:\Users\u006181\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\JST8705A\TSRC-PROD-011368) to your personal workbook:  Columns("I:J").Select  Selection.NumberFormat = "m/d/yyyy" |
| **2** | Run the Macro.  **Result:** The columns will update. |

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| Formatting Cell - Days Until Expiration |

Perform the following steps:

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| **Step** | **Action** |
| **1** | Add a column to the spreadsheet titled **Days Until Expired.** |
| **2** | In first cell of column enter formula: =(cell that contain expiration date)-TODAY().  **Example:** =A2-TODAY()    **Result:** Field will the display number of days until expired. |

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| Macros |

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| **Macro Name/Function** | **Macro Details** |
| Cleanup  Clears anything in <> brackets and replaces &nbsp with a space | Sub Cleanup()  ' Cleanup Macro  Cells.Replace What:="<\*>", Replacement:="", LookAt:=xlPart, SearchOrder \_  :=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False \_  , FormulaVersion:=xlReplaceFormula2  Cells.Replace What:="&nbsp;", Replacement:=" ", LookAt:=xlPart, \_  SearchOrder:=xlByRows, MatchCase:=False, SearchFormat:=False, \_  ReplaceFormat:=False, FormulaVersion:=xlReplaceFormula2  End Sub |
| Format Date | Columns("I:J").Select  Selection.NumberFormat = "m/d/yyyy" |

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| Changing Excel Into Dark Mode |

Perform the following steps:

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| **Step** | **Action** |
| **1** | Open Snagit. |
| **2** | Capture a sample of the dark image below and save to your computer as a .jpg. |
| **3** | Open a new Excel document. |
| **4** | Click **Page Layout** and then click **Background**.    Result: **Insert Picture** pop up displays. |
| **5** | * Click **Browse** on the **From a file** line. * Select the .jpg image from your computer. * Click **OK.**     **Result:** Background changes to black. |
| **6** | Change the font to white by highlighting all of the cells. Click the font color dropdown to select white.    **Notes:**   * This process may also be performed on an existing document. * Cells previously shaded in other colors will not change to dark mode. * This is not a permanent setting for future Excel documents. * Each new page will require this process. The entire Excel document cannot be done at once. |

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| Related Documents |

**Parent SOP:** [DOC-048959 Learning & Development Document Management Policy and Procedure](https://policy.corp.cvscaremark.com/cs/groups/public/@pnp/@nu/@all/@all/@6700/documents/sop/b2mt/mdq4/~edisp/doc-048959.pdf)

**Abbreviations/Definitions:** [Training and Development Abbreviations, Definitions, and Terms](file:///C:\Users\u006181\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\JST8705A\TSRC-PROD-011253)

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