

St. Lucie

PUBLIC SCHOOLS



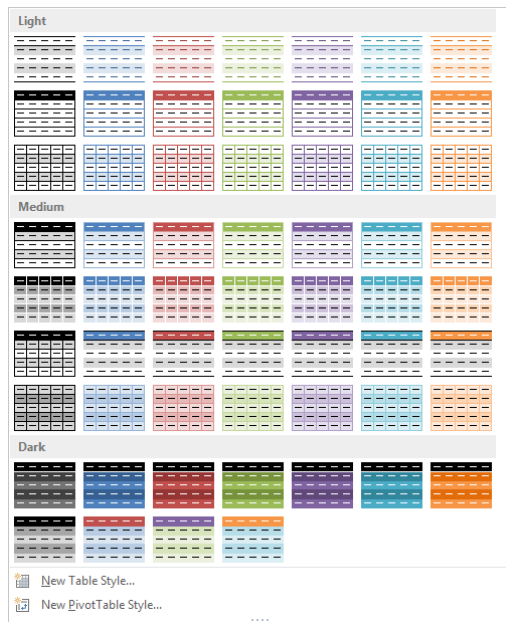
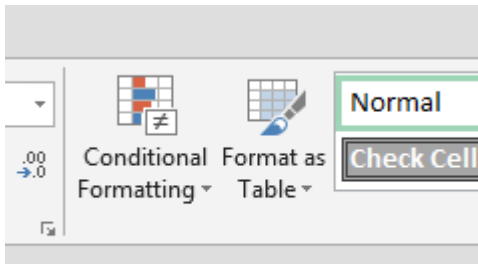
# Advanced Excel Training

April 18, 2018

# Agenda

- Formating
- Pivot Tables
- Charts
- Paste Special
- Formulas
- Short cuts
- Requisition Import – If needed

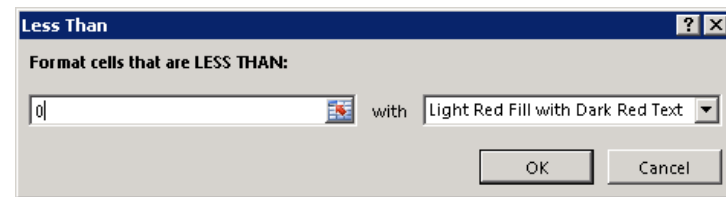
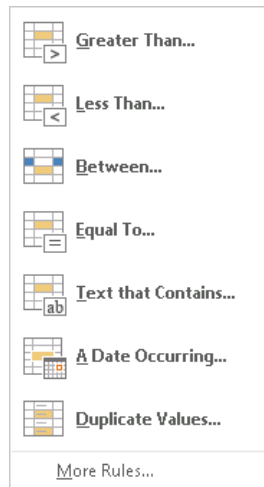
# Formatting - Tables



	A	B	C	D
1	Last Name	First	Email	
2	ALMIRON	MARTA	MARTA.ALMIRON@stlucieschools.org	
3	ARTILES	OSCAR	OSCAR.ARTILES@stlucieschools.org	
4	AVILLA	KELLY	Kelly.Avilla@stlucieschools.org	
5	BEAN	AMANDA	AMANDA.BEAN@stlucieschools.org	
6	BEATY	JULIE	Julie.Beaty@stlucieschools.org	
7	BERGGREN	JESSICA	Jessica.Berggren@stlucieschools.org	
8	BOLTERSDF	LINDA	Linda.Boltersdorf@stlucieschools.org	
9	BOWMAN	KRISTIN	Kristin.Bowman@stlucieschools.org	
10	BRAWLEY	WENDY	WENDY.BRAWLEY@stlucieschools.org	
11	BREWI	JANET	Janet.Brewi@stlucieschools.org	
12	BUEHRIG	BEVERLY	Beverly.Buehrig@stlucieschools.org	
13	BUEHRIG	DANA	DANA.BUEHRIG@stlucieschools.org	
14	BURNEY	ERICA	ERICA.BURNEY@stlucieschools.org	
15	CALVO	CHRISTOPHER	CHRISTOPHER.CALVO@stlucieschools.org	
16	CARROLL	SHANE	Shane.Carroll@stlucieschools.org	
17	CHAMBERY	LAUREN	LAUREN.CHAMBERY@stlucieschools.org	
18	COLE	MICHELLE	Michelle.Cole@stlucieschools.org	
19	COLLIS	NATALIE	Natalie.Collis@stlucieschools.org	
20	CORRIGAN	KELSEY	KELSEY.CORRIGAN@stlucieschools.org	
21	DEMET	KIMBERLY	Kimberly.Demet@stlucieschools.org	
22	DEVRIES	STEPHANIE	Stephanie.Devries@stlucieschools.org	
23	DOWNING	ANITA	ANITA.DOWNING@stlucieschools.org	
24	EFRON	MELISSA	MELISSA.EFRON@stlucieschools.org	
25	ERNST	KELLY	KELLY.ERNST@stlucieschools.org	
26	GALLAGHER	KIMBERLY	KIMBERLY.GALLAGHER@stlucieschools.org	
27	GIFFORD	JEAN	JEAN.GIFFORD@stlucieschools.org	
28	GLAUBER	AMY	AMY.GLAUBER@stlucieschools.org	
29	GODOV	IRMA	Irma.Godov@stlucieschools.org	

# Conditional Formatting

- Example – School Budget Reports – look for lines with negatives. Use conditional formatting to easily highlight the lines.



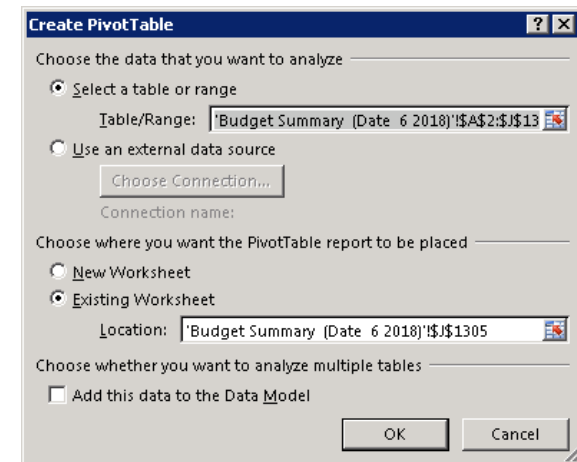
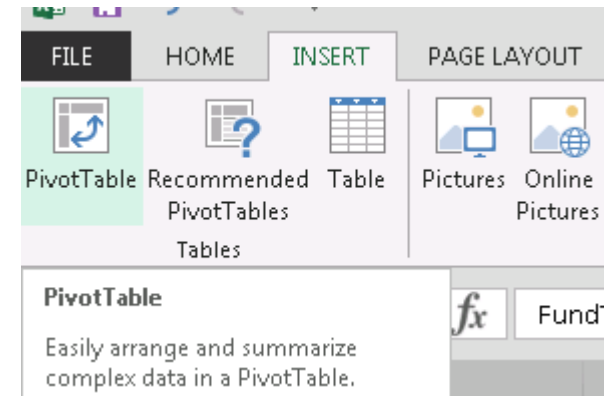
09	1000E7300	7300	0081	10100	00000	00000	81	10100	DUES & FEES		118	59			59
10	1000E7900	1620	0081	10100	00000	00000	81	10100	OVERTIME-OTH SU			30.94			-30.94
11	1000E7900	2100	0081	10100	00000	00000	81	10100	RETIRE			2.46			-2.46
12	1000E7900	2200	0081	10100	00000	00000	81	10100	EMPL BENEFITS S			2.32			-2.32
13	1000E7900	5100	0081	10100	00000	00000	81	10100	SUPPLIES		80		65.48		14.52
14	1000E5100	2100	0091	10100	00000	00000	91	10100	RETIRE		70.85				70.85
15	1000E5100	2200	0091	10100	00000	00000	91	10100	EMPL BENEFITS S		88.46	15.34			73.12
16	1000E5100	2310	0091	10100	00000	00000	91	10100	HEALTH INSURANC		55.67				55.67
17	1000E5100	3610	0091	10100	00000	00000	91	10100	ANNUAL FEES LIC		518	510			8
18	1000E5100	3700	0091	10100	00000	00000	91	10100	COMMUNICATIONS/		180.75	157.5			23.25
19	1000E5100	3901	0091	10100	00000	00000	91	10100	FIELD TRIPS		-76.75	-248.65			171.9

# Pivot Tables

- Pivot tables are a great way to summarize, analyze, explore and present your data.
- Pivot tables are flexible and can be quickly adjusted depending on how you need to display your results
- Data should be organized in tabular form, and not have any blank rows or columns.
- Data must include column headers
- Pivot tables are fluid and can change as data is added

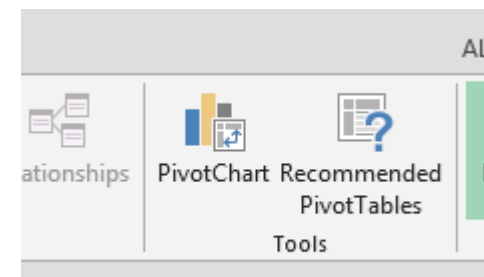
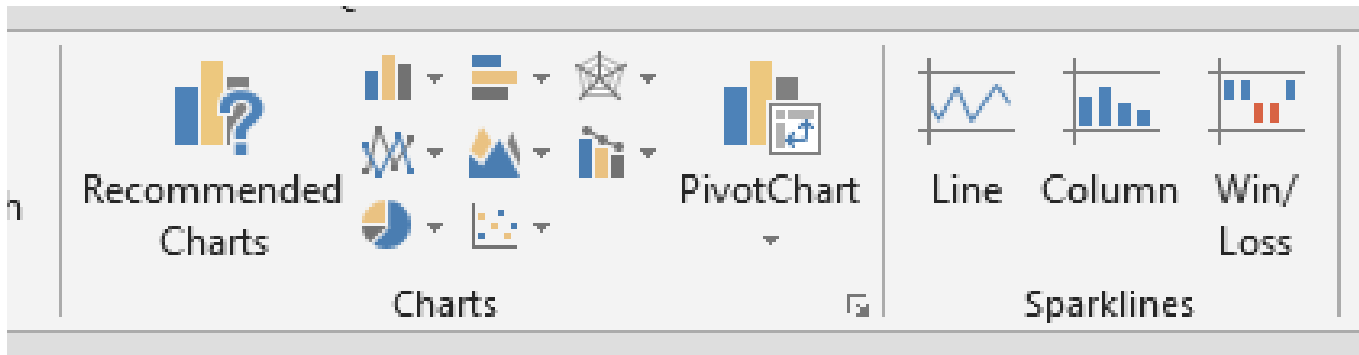
# Pivot Tables

- Select the data set to include. Highlight all rows and columns.
- Click Insert/Pivot Table
- The data should already populate into the select table or range (since you selected it first)
- Select where you want the table to appear, same worksheet or new worksheet.

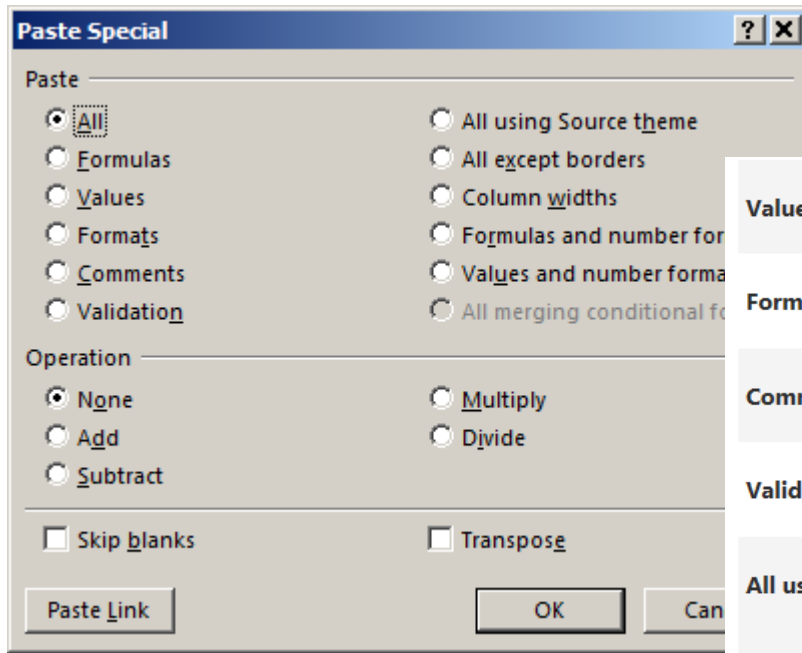


# Charts

- Select data set
- Click recommended charts, or select a specific chart
- Charts are great for presentations, visual learners



# Paste Special



**Values** Pastes only the values of the copied data as displayed in the cells.

**Formats** Pastes only cell formatting of the copied data.

**Comments** Pastes only comments attached to the copied cell.

**Validation** Pastes data validation rules for the copied cells to the paste area.

**All using Source theme** Pastes all cell contents in the document theme formatting that is applied to the copied data.

**All except borders** Pastes all cell contents and formatting applied to the copied cell except borders.

**Column widths** Pastes the width of one copied column or range of columns to another column or range of columns.

**Formulas and number formats** Pastes only formulas and all number formatting options from the copied cells.

**Values and number formats** Pastes only values and all number formatting options from the copied cells.

# Page Settings

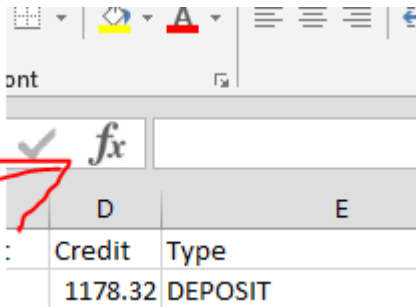
- Print to one Sheet
- Repeat Rows on each page
- Headers & Footers
- Print Area

# Formulas

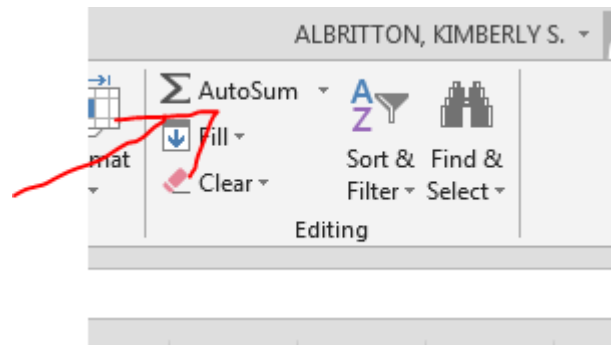
- Did You know? You can use up to 64 additional IF functions inside an IF Function!
- Did you know? You can join multiple text strings (and cells) using the Concatenate function.
- Did you know? You can add and subtract dates.
- Did you know? You can use a function to find data in a large spreadsheet?

# Formulas - Adding

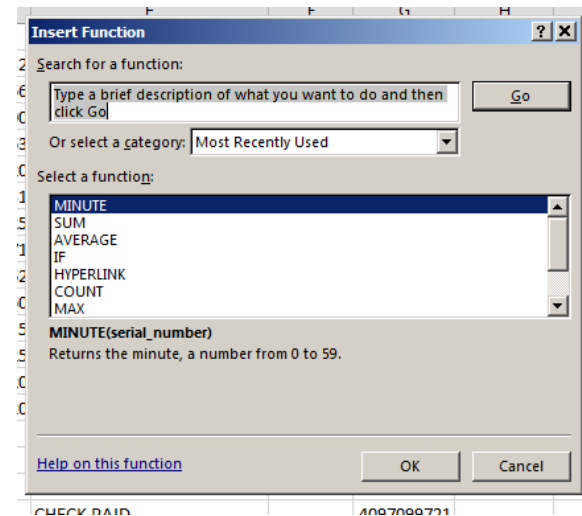
- There are several ways to access formulas (functions)



Formula Bar



Editing Menu



Shift + F3

# Formulas – References

- Relative – will change column and row numbers as it is copied to other cells. This is the default reference in Excel.
- Absolute – a reference that does not change. If you refer to a cell in a certain row and column, copy that reference elsewhere, it stays exactly the same.
- Mixed – is half relative and half absolute.

Absolute reference is defined by the use of the “\$” symbol.

Relative	A4	A4:B4
Absolute	\$A\$4	\$A\$4:\$B\$5
Mixed	\$A4 or A\$4	\$A4:B\$5

The “\$” sign can be typed or inserted using F4. As you press F4 the cell address will cycle through the variations.

# Formulas – IF Statements

- IF function's job is to test on criteria then return different answers depending on whether the results are true or false.
- EXAMPLE: A student pass or fail grade based on a certain score.

# Formulas - Concatenate

- Concatenate function joins strings of text together
- Referencing cells, makes updating easy. Change it once and everything else updates

# Formulas – VLOOKUP

- VLOOKUP enters information into a spreadsheet from a table made up of possible values. The result can be a value or text.
- Advantages of VLOOKUP:
  - Avoid the need for repetitious data
  - Cuts down on the possibility of entering data incorrectly
  - Allows automatic updating of entries by changing the values in the lookup table.
- Organize your data so that the value you look up is to the left of the value you want
- Try to make sure your lists/data set is sorted numerically or alphabetical.
- when working with vlookup, numbers will not match numbers stored as text.

# Short Cuts - Text

Syntax	Description	Example
=lower(cell address)	Gives you the text all in lower case	=lower(A1) would return "richards"
=upper(cell address)	Returns text string in upper case	=upper(A1) would return "RICHARDS"
=left(cell address)	Returns the leftmost character in a text string	=left(A1) would return "R"
=right(cell address)	Returns the rightmost character in a text string	=right(A1) would return "s"
=mid(cell_address,where_to_start,how_many_characters_to_return)	Returns characters from a specified point in the text Has 3 arguments. <ol style="list-style-type: none"><li>1. Cell address</li><li>2. Which character to start from (first character is no 1)</li><li>3. How many characters do you want to appear</li></ol>	Example - to return the 1 <sup>st</sup> three letters of the surname  =mid(A1,1,3) would return "Ric"
=proper	Makes the first letter of character string uppercase	=proper(B1) would return "Julia"

# Beyond CRL+F

In Excel "Question mark(?)", "Asterik(\*)", and "Tilda(~)" are the wild card characters that are used to complete your search.

- **Question mark (?)** : can take a place of single character. For example "L?gs" matches with Logs, Legs but not with "Lungs"
- **Asterik (\*)** : can take place of any number of characters. In the above example if we replace "?" with "\*" like "L\*gs" then it gives results that matches with Logs, Legs and lungs as well.
- **Tilda (~)** : It indicates that following character should be treated as a normal character not as a wildcard character. For example "L~?gs" will match with only "L~?gs".

# Multiple Worksheets

- Double click to rename worksheet
- Move or Copy worksheet (also re-arrange)
- Why Multiple Worksheets
  - Duplicate copy of data
  - Don't delete the original data set
  - Test formulas/tables/etc
  - Sort large groups of data
  - Separate information by year/month

# Keyboard Tricks

- Ctrl + F (Find)
- Ctrl + C (Copy)
- Ctrl + V (Paste)
- Ctrl + X (Cut)
- Ctrl + Z (Undo)
- Ctrl + Y (Redo)
- Ctrl + End (end of sheet/data)
- Ctrl + Home (A1)
- Ctrl + Shift + End (highlight current to last cell)
- Ctrl + B (Bold)
- Ctrl + D (Fill down)
- F2 (edit cell)
- Ctrl + Page UP/Down (toggle between sheets)

# Requisition Import

- Use the template for all imports
- Only 4 Columns of data are required
  - M/N ; Description; Quantity; Unit Cost
- **COLUMN A**
  - M/N – Stands for Merchandise or Narrative
    - (M) Merchandise – used when entering items for purchase
    - (N) Narrative – descriptive sentence(s) that should be included on the PO, but are not associated with a dollar amount.
- **COLUMN B**
  - Description of item, could be item numbers, ISBN, book titles or all of the above
  - All descriptive information has to be included in this one column
  - If needed, use concatenate to join text strings together

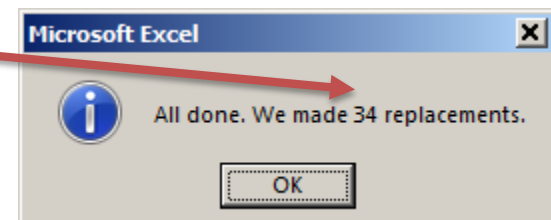
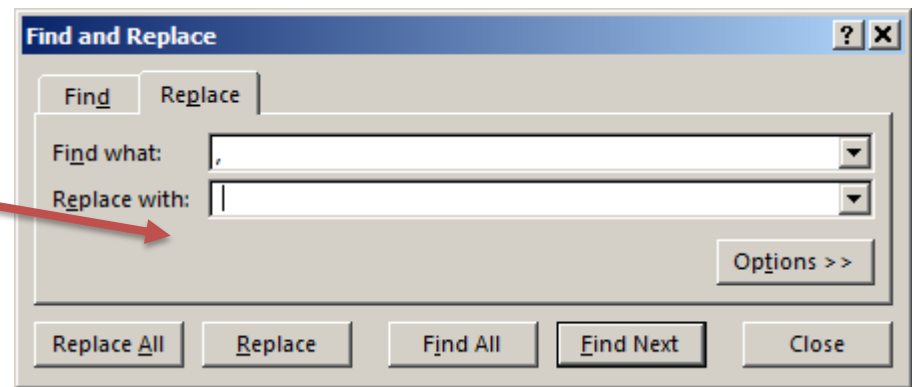
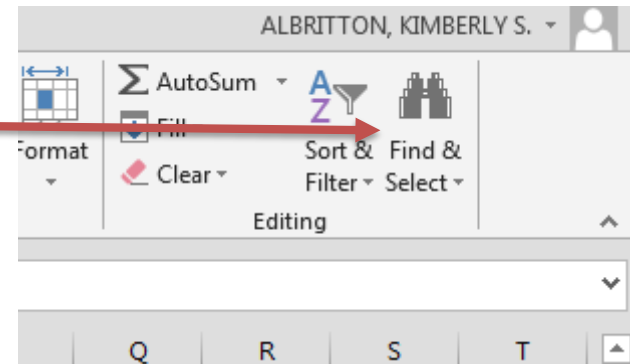
# Requisition Import - Continued

- **COLUMN C**
  - Enter the Quantity for this line item.
- **COLUMN D**
  - Enter the cost per item
- The file **CANNOT** contain any commas, use the find/replace to remove commas and insert a space

Merchandise (M) or Narrative (N)	Description	Quantity	Unit Cost
M	978-1-4263-1872-6 300 Bite-Size Facts about In	1.00	16.90
M	978-0-553-49904-9 365 Days of Wonder: Mr. Br	1.00	14.99
M	978-1-4263-2452-9 5,000 Awesome Facts About	1.00	19.99
M	978-1-4263-1049-2 5,000 Awesome! Facts about	1.00	19.95
M	978-1-4844-7443-3 Amelia Bedelia on the Job	1.00	13.95
M	978-1-4965-0220-9 Attack of the Mud Creature	1.00	19.49
M	978-1-59889-325-0 Attack of the paper bats	1.00	17.49
M	978-1-101-93485-2 Auggie & Me: Three Wonde	1.00	16.99
M	978-1-4342-3772-9 Avalanche Alert	1.00	18.49
M	978-1-4844-7213-2 Battle for the Nether	1.00	20.95
M	978-0-375-85860-4 Bear Ate Your Sandwich	1.00	16.99
M	978-1-59889-323-6 Beast Beneath the Stairs	1.00	17.49
M	978-1-4844-7726-7 Beneath	1.00	16.95
M	978-1-4494-2043-7 Big Nate and Friends	1.00	20.95
M	978-0-06-211111-1 Big Nate Blasts Off	1.00	13.99
M	978-0-06-199661-0 Big Nate Goes for Broke	1.00	12.99
M	978-0-06-199665-8 Big Nate in the Zone	1.00	13.99
M	978-0-06-211108-1 Big Nate Lives It Up	1.00	13.99
M	978-0-06-194438-3 Big Nate on a Roll	1.00	12.99
M	978-1-4494-0718-6 Big Nate Out Loud	1.00	20.95

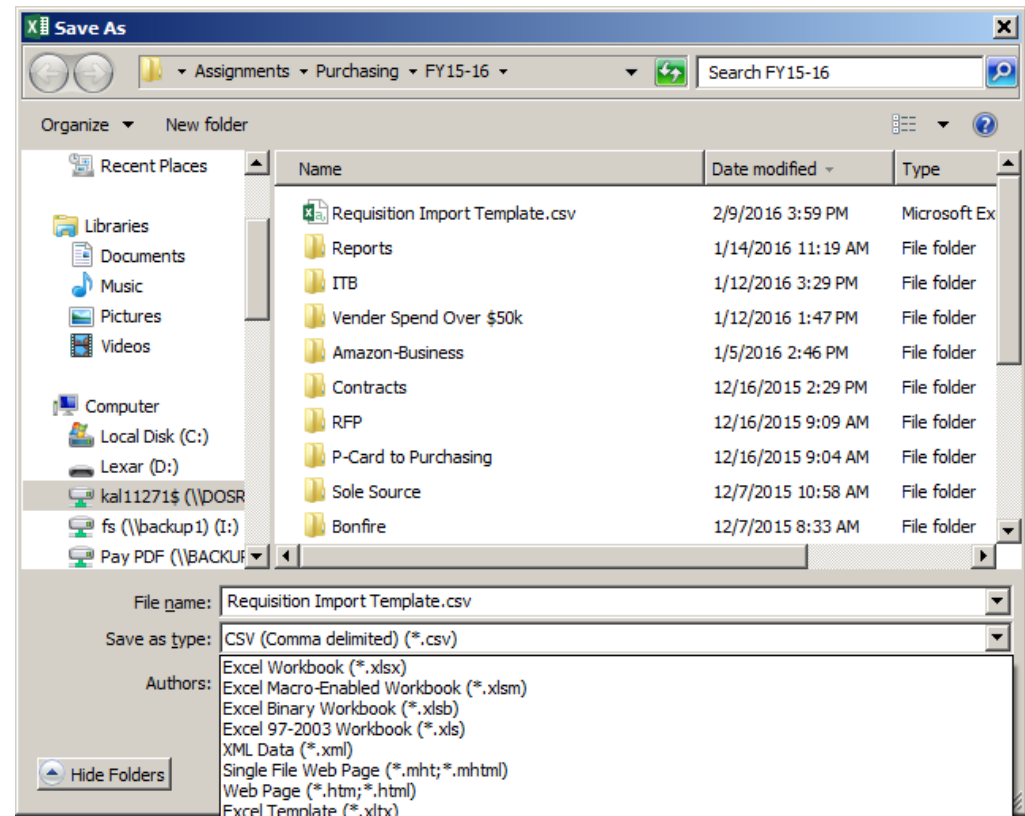
# Requisition Import - Continued

- Click Find & Select, then click Replace.
- In “Find What” enter a comma ( , )
- In “replace with”, click in the white box and hit the space bar one time.
- Click replace all
- Excel will show how many commas were removed



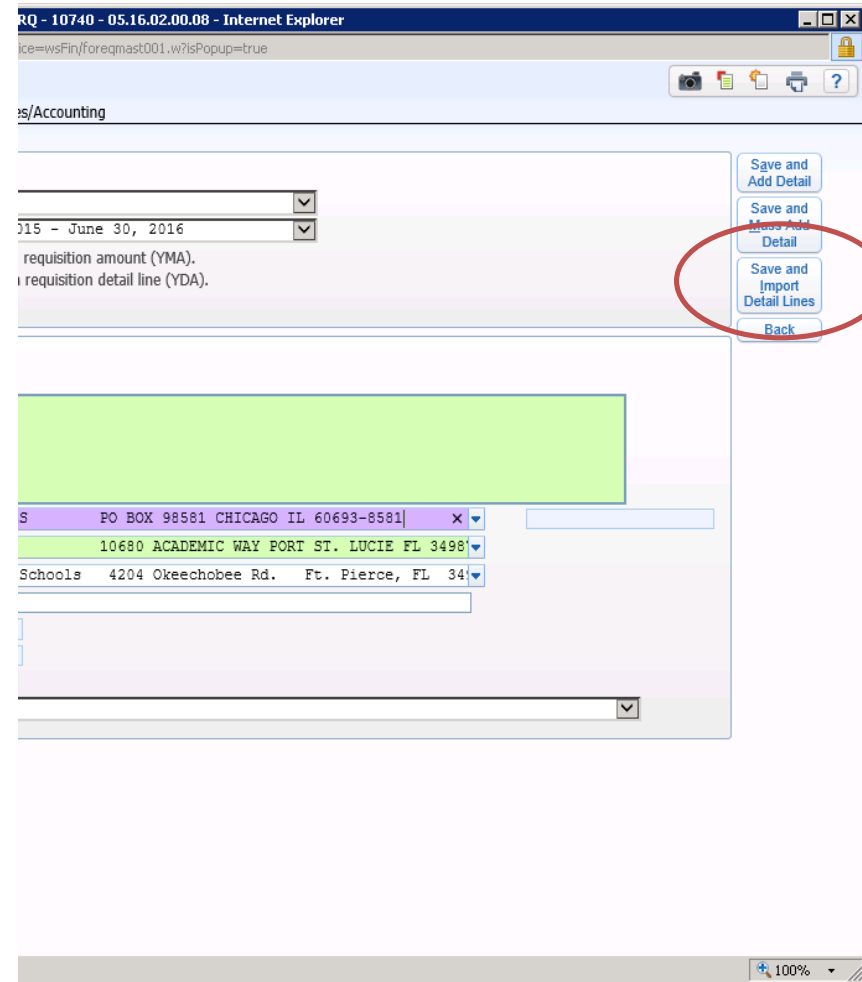
# Requisition Import - Continued

- Once all items/columns are entered, click File, Save As
- Enter the File Name
- On the “Save as Type” click the drop down and select CSV (comma delimited) (\*.csv)



# Requisition Import - Continued

- Go into Skyward and click “add” in requisitions
- Select All info (as normal) on the first Requisition screen (requisition master information)
- Click Save and Import Detail Lines



# Requisition Import - Continued

- The below screen will appear

Import Options - WF\PU\MR\RE\RQ - 10740 - 05.16.02.00.08 - Internet Explorer

https://business.stlucie.k12.fl.us/scripts/wsisa.dll/WService=wsFin/foreqimpt001.w?masterId=1088056&isPopup=true

### Import Options

\* **Format:** Req DTL - Req DTL - Requisition Detail

Only Formats flagged as "Used for imports outside Skybuild" are able to be selected.

\* **File Location:**  Browse...

Asterisk (\*) denotes a required field

Run  
Back

100%

- Browse to the file you saved (as a CSV) and select it, then click open

# Requisition Import - Continued

- Click Run

Import Options - WF\PU\MR\RE\RQ - 10740 - 05.16.02.00.08 - Internet Explorer

https://business.stlucie.k12.fl.us/scripts/wsisa.dll/WService=wsFin/foreqimpt001.w?masterId=1088056&isPopup=true

### Import Options

\* **Format:** Req DTL - Req DTL - Requisition Detail

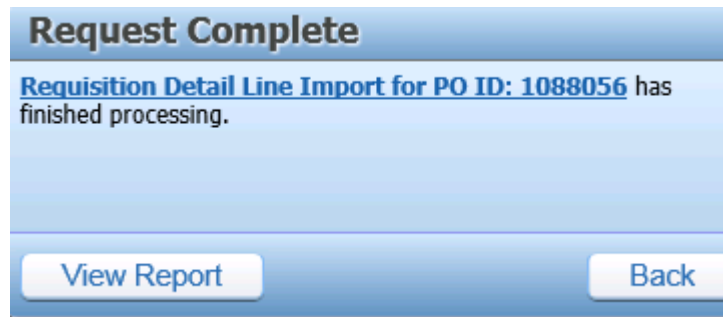
Only Formats flagged as "Used for imports outside Skybuild" are able to be selected.

\* **File Location:** H:\My Documents\Assignments\Purchasing\FY15-16\Import Templates\Requisition Import Template-REE.csv

Asterisk (\*) denotes a required field

100%

- Allow the process to run, once it is done you should see this:



# Requisition Import - Continued

- Click View Report
- You need to view (and save this report if you see any error messages)

11mpttool001.p 28-2 St. Lucie School District 05/13/16 Page:1  
05.16.02.00.07 Req DTL Import Report 3:34 PM

**File Information**  
C:\fakepath\Requisition Import Template-REE.csv (Requisition Import Template-REE.csv) ==> Imported

**Errors for Req DTL - C:\fakepath\Requisition Import Template-REE.csv**

Line #	Value	Error Message
--------	-------	---------------

**Update Counts for Req DTL - C:\fakepath\Requisition Import Template-REE.csv**

Lines with Errors:	0
Record(s) Created:	152
Record(s) Updated:	0
Record(s) Unchanged:	0
-----	
Line(s) Imported:	152

\*\*\*\*\* End of report \*\*\*\*\*

1 / 1

# Requisition Import - Continued

- What your requisition should look like:

Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.16.02.00.08 - Internet Explorer

https://business.stlucie.k12.fl.us/scripts/wsa.dll/WService=wsFin/foreqdet001.w?importdetail=yes

### Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

#### Requisition Detail Lines/Accounting

**Requisition Master Information**

Batch Number: **WEBREQ**

Requisition Number: **0001088056**      Accounting: **Account allocation by total requisition amount.**      [Edit Master](#)

Group: **(020) Palm Point K-8**      Amount: **2,694.53**      [Notes](#)

Fiscal Year: **2015 - 2016**      Ship To: **PALM POINTE**      [Attachments](#)

Vendor: **FOLLETT EDUCATIONAL SERVICES**      Description: **TEST**

**PO BOX 98581**

**CHICAGO IL 60693-8581**

Invoice To: **(Default) St. Lucie Public Schools 4204**

**Okeechobee Rd. Ft. Pierce, FL 34947-5414**

[Submit For Approval](#)  
[Save and Finish Later](#)  
[Back](#)

#### Requisition Detail Line Items

Views: **General**    Filters: **\*Skyward Default**

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc	Original Unit Cost	T
100		978-1-4263-1872-6 300 Bite-Size Facts about Incredible Edibles!	1		16.90000	16.90		0		
110		978-0-553-49904-9 365 Days of Wonder: Mr. Browne's Book of Precepts	1		14.99000	14.99		0		
120		978-1-4263-2452-9 5 000 Awesome Facts About Everything!	1		19.99000	19.99		0		
130		978-1-4263-1049-2 5 000 Awomesl Facts about Everything!	1		19.95000	19.95		0		
140		978-1-4844-7443-3 Amelia Bedelia on the Job	1		13.95000	13.95		0		
150		978-1-4965-0220-9 Attack of the Mud Creatures	1		19.49000	19.49		0		
160		978-1-59889-325-0 Attack of the paper bats	1		17.49000	17.49		0		
170		978-1-101-93485-2 Auggie & Me: Three Wonder Stories	1		16.99000	16.99		0		
180		978-1-4342-3772-9 Avalanche Alert	1		18.49000	18.49		0		
190		978-1-4844-7213-2 Battle for the Nether	1		20.95000	20.95		0		
200		978-0-375-85860-4 Bear Ate Your	1		16.99000	16.99		0		

[Add](#)  
[Edit](#)  
[Delete](#)  
[Mass Add Detail](#)  
[Add Requisition Accounts](#)  
[Import Detail Lines](#)

# Requisition Import - Continued

- Checks and Balances
  - Your requisition total **MUST** match the total on your quote.
  - If they don't match, something did not import
- Once your items are all entered, add requisition accounts and continue the requisition like normal.