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# *Outlining Your Worksheet*

Some types of worksheets may benefit from an outline. An outline enables you to display hierarchical information at different levels of detail.

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- ✓ **Expanding and Contracting an Outline . . . . . 5**
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## Creating an Outline

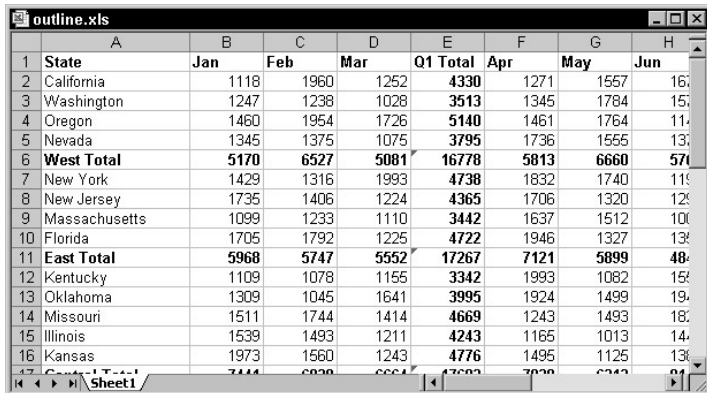
You can have Excel create your outline automatically, or you can create the outline manually. In most cases, you're best off having Excel create the outline for you. If the outline that Excel creates isn't what you want, however, you can always create one manually.

### Creating an outline automatically

To have Excel create an outline, follow these steps:

1. Move the cell pointer anywhere within the range of data that you're outlining.
2. Choose **Data** → **Group and Outline** → **Auto Outline** from the menu bar.

Excel analyzes the formulas in the range and creates the outline. Depending on the formulas you have, Excel creates a row outline, a column outline, or both. The following figures show the appearance of a worksheet before and after Excel creates an outline for the worksheet.



	A	B	C	D	E	F	G	H
1	State	Jan	Feb	Mar	Q1 Total	Apr	May	Jun
2	California	1118	1960	1252	4330	1271	1557	1612
3	Washington	1247	1238	1028	3513	1345	1784	1512
4	Oregon	1460	1954	1726	5140	1461	1764	1112
5	Nevada	1345	1375	1075	3795	1736	1555	1312
6	<b>West Total</b>	<b>5170</b>	<b>6527</b>	<b>5081</b>	<b>16778</b>	<b>5813</b>	<b>6660</b>	<b>5712</b>
7	New York	1429	1316	1993	4738	1832	1740	1112
8	New Jersey	1735	1406	1224	4365	1706	1320	1212
9	Massachusetts	1099	1233	1110	3442	1637	1512	1012
10	Florida	1705	1792	1225	4722	1946	1327	1312
11	<b>East Total</b>	<b>5968</b>	<b>5747</b>	<b>5552</b>	<b>17267</b>	<b>7121</b>	<b>5899</b>	<b>4812</b>
12	Kentucky	1109	1078	1155	3342	1993	1082	1512
13	Oklahoma	1309	1045	1641	3995	1924	1499	1912
14	Missouri	1511	1744	1414	4669	1243	1493	1812
15	Illinois	1539	1493	1211	4243	1165	1013	1412
16	Kansas	1973	1560	1243	4776	1495	1125	1312
17	<b>Grand Total</b>	<b>7444</b>	<b>6930</b>	<b>6644</b>	<b>23993</b>	<b>7009</b>	<b>6242</b>	<b>5524</b>

**Remember:** A worksheet can have only one outline. If the worksheet already has an outline, Excel asks whether you want to modify the existing outline. Click OK to force Excel to remove the old outline and create a new one.

**See also** "Determining Whether a Worksheet is Suitable for an Outline," later in this part.

1	A	B	C	D	E	I	
2	State	Jan	Feb	Mar	Q1 Total	Q2 Total	Q3
3	California	1118	1960	1252	4330	4507	
4	Washington	1247	1238	1028	3513	4703	
5	Oregon	1460	1954	1726	5140	4369	
6	Nevada	1345	1375	1075	3795	4663	
7	<b>West Total</b>	<b>5170</b>	<b>6527</b>	<b>5081</b>	<b>16778</b>	<b>18242</b>	
8	New York	1429	1316	1993	4738	4763	
9	New Jersey	1735	1406	1224	4365	4316	
10	Massachusetts	1099	1233	1110	3442	4155	
11	Florida	1705	1792	1225	4722	4630	
12	<b>East Total</b>	<b>5968</b>	<b>5747</b>	<b>5552</b>	<b>17267</b>	<b>17864</b>	
13	<b>Central Total</b>	<b>7441</b>	<b>6920</b>	<b>6664</b>	<b>17683</b>	<b>17550</b>	
14	<b>Grand Total</b>	<b>18579</b>	<b>19194</b>	<b>17297</b>	<b>51728</b>	<b>53656</b>	

## Creating an outline manually

You must create an outline manually whenever you face the following conditions:

- ✓ The summary rows aren't consistent. (Some formulas are above the data and some are below the data.)
- ✓ The range doesn't contain any formulas. Because Excel uses the formulas to determine how to create the outline, it can't make an outline if no formulas are there.

Creating an outline manually consists of creating groups of rows (for row outlines) or groups of columns (for column outlines).

To create a group of rows, follow these steps:

1. Select the entire row or rows that you want to include in the group — but do *not* select the row that contains the summary formulas.
2. Choose **Data** → **Group and Outline** → **Group**. Excel displays the outline symbols for the group as it creates it.
3. Repeat Steps 1 and 2 for each group that you want to create.

If you collapse the outline (that is, show less detail), rows in the group are hidden. But the summary row, which isn't in the group, isn't hidden.

Follow the same steps to create a group of columns — but select columns instead of rows.



If you group the wrong rows or columns, you can ungroup the group by using the **Data**→**Group** and **Outline**→**Ungroup** command. (You must select the grouped rows or columns before using the Ungroup command.)

**Remember:** You can also select groups of groups to create multi-level outlines. In creating multilevel outlines, always start with the “innermost” groupings and then work your way out.

**See also** “Determining Whether a Worksheet is Suitable for an Outline,” immediately following in this part.

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## *Determining Whether a Worksheet Is Suitable for an Outline*

Before you create an outline, you need to ensure the following:

- ✓ The data is appropriate for an outline.
- ✓ The formulas are set up correctly.

Generally, you want to arrange the data in a hierarchy. An example of hierarchical data is a budget that consists of an arrangement such as shown in the following example:

Division  
    Department  
        Budget Category  
            Budget Item

In this case, each budget item (for example, airfare and hotel expenses) is part of a budget category (for example, travel expenses). Each department has its own budget, and the departments roll up into divisions. This type of arrangement is well suited for a row outline.

Before creating an outline, make sure that you enter summary formulas in the same relative location. Generally, you enter formulas that compute summary formulas (such as subtotals) below the data to which they refer. In some cases, however, you enter the summary formulas above the referenced cells.



If your summary formulas aren’t consistent (that is, some are above and some are below the data), automatic outlining doesn’t produce the results you want. You still can create an outline, but you must do it manually.

**See also** “Creating an Outline,” earlier in this part.

## Expanding and Contracting an Outline

To display various levels of detail in a worksheet outline, click the appropriate outline symbol at the left side of the screen (for row outlines) or the top of the screen (for column outlines). The figure shows an outline report with the details hidden.

	A	E	I	M	Q	R	S
1	State	Q1 Total	Q2 Total	Q3 Total	Q4 Total	Grand Total	
6	West Total	16778	18242	18314	19138	72472	
11	East Total	17267	17864	17910	18925	71966	
17	Central Total	17683	17550	17752	17357	70342	
18	Grand Total	51728	53656	53976	55420	214780	
19							
20							
21							
22							
23							
24							
25							

Number symbols (1,2,3, and so on)	Displays a level corresponding to the number. Clicking the 1 button collapses the outline as small as it can go (less detail). Clicking the 2 button expands the outline to show one level of detail, and so on. Choosing a level number displays the detail for that level, plus any lower levels. To display all the detail, click the highest level number.
Plus (+) or minus (-)	Expands (+) or collapses (-) a particular section symbols of the outline.

If you prefer, you can use the **H**ide Detail and **S**how Detail commands on the **D**ata **G**roup and Outline menu to hide and show details.

## Hiding Outline Symbols

The symbols that appear whenever a worksheet outline is present can take up quite a bit of screen space. If you want to see as much of the data as possible on-screen, you can temporarily hide these symbols without removing the outline. To do so, press Ctrl+8. (Ctrl+8 is a toggle. Press Ctrl+8 to bring back the symbols.)

**Remember:** If you hide the outline symbols, the outline is still in effect, and the worksheet displays the data at the current outline level — that is, some rows or columns may be hidden.

## 6 Online Part I

If you use a custom view to save named views of your outline, the status of the outline symbols is also saved as part of the view. This feature enables you to name some views with the outline symbols and other views without them.

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### *Removing an Outline*

If you decide that you no longer need an outline, you can remove it. (The data remains, but the outline goes away.) Just choose the Data⇨Group and Outline⇨Clear Outline command. The outline fully expands (all hidden rows and columns are unhidden), and the outline symbols disappear.



Removing an outline can't be undone, so make sure that you really want to remove the outline before choosing this command.