

Hints and Tips on using Microsoft Excel Auto and Custom Lists

Excel spreadsheets are a useful tool in any business and, although they can be time consuming to build, it is worthwhile to reduce the time you take to build your spreadsheets by learning as many shortcuts as possible.

Often a spreadsheet requires repetitive lists; for example, days of the week for daily records, months of the year for sales and financial spreadsheets. To shortcut the time taken to build these lists, Microsoft Excel has a number of in-built user shortcuts, such as the **Auto List** facility, and the opportunity to create your own **Custom Lists**.

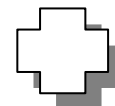
As is standard with Microsoft products, there are often several ways of fulfilling these tasks. What I have listed below is just one of them.

Auto Fill

The key to creating lists is to understand how the information held in each blank cell works and how to use the Fill Handle.

	A	B
1		
2		

When you first put your mouse pointer into a cell within the spreadsheet, in our example on the left the mouse pointer is in the cell defined as 'A1' (column 'A' and row '1'), the mouse pointer will display as a white square.



The cell that you select, in our example A1, will have a black border around it. If you look closely at the black border you will see a small black box in the lower right hand corner of cell A1. This is what is known as the **Fill Handle**.



When you move your mouse pointer over this small black box, your mouse pointer will change to a black cross.



When this happens, hold down the left hand button on your mouse and drag the black cross down the column or across the row. As you do this, Microsoft Excel will either:

- Use the cell contents as the first entry in a consecutive series. This consecutive series will automatically be entered in the selected cells.

OR

- Copy the contents of the cell down the column or across the row.

To experience the auto fill facility in operation in a consecutive series:

1. Enter the word 'Sunday' into cell A1.

	A	B
1	Sunday	
2		
3		

2. Move your mouse pointer over the small black box in the bottom right hand corner of cell A1.
3. Hold down the left hand button on your mouse and drag the black cross down column A to cell A7.
4. Using a predefined consecutive series, Microsoft Excel fills the selected cells with the days of the week.

	A	B
1	Sunday	
2	Monday	
3	Tuesday	
4	Wednesday	
5	Thursday	
6	Friday	
7	Saturday	
8		
9		
10		
11		

5. Selecting to drag your mouse down to cell A14, allows Microsoft Excel to fill the selected cells with the days of the week for two weeks.

	A	B
1	Sunday	
2	Monday	
3	Tuesday	
4	Wednesday	
5	Thursday	
6	Friday	
7	Saturday	
8	Sunday	
9	Monday	
10	Tuesday	
11	Wednesday	
12	Thursday	
13	Friday	
14	Saturday	
15		
16		
17		

If we had started the days of the week in cell A2, across row 1, starting from column B, you could enter headings for your columns that would allow you to capture data.

	A	B	C	D
1		coaching hours	workshop delegates	
2	Sunday			
3	Monday			
4	Tuesday			
5	Wednesday			
6	Thursday			
7	Friday			
8	Saturday			
9	Sunday			
10	Monday			
11	Tuesday			
12	Wednesday			
13	Thursday			
14	Friday			
15	Saturday			
16				

	A	B	C	D
1		coaching hours	workshop delegates	
2	Sunday			
3	Monday	4		
4	Tuesday		9	
5	Wednesday		9	
6	Thursday	5		
7	Friday	5		
8	Saturday	1		
9	Sunday			
10	Monday	4		
11	Tuesday		10	
12	Wednesday		10	
13	Thursday	5		
14	Friday	5		
15	Saturday	1		
16				

Auto Fill Options Box

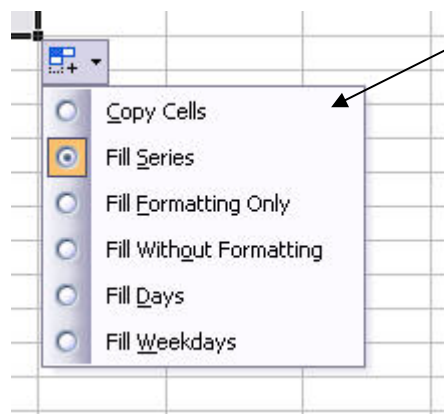
As you complete creating an auto fill list using the Fill Handle that **Auto Fill Options Box** will appear.

	A	B
1	Sunday	
2	Monday	
3	Tuesday	
4	Wednesday	
5	Thursday	
6	Friday	
7	Saturday	
8		
9		
10		
11		

Using the right hand button of your mouse on the little plus sign will display a small downward pointing arrow.

	A	B	C	E
1				
2	Sunday			
3	Monday			
4	Tuesday			
5	Wednesday			
6	Thursday			
7	Friday			
8	Saturday			
9	Sunday			
10	Monday			
11	Tuesday			
12	Wednesday			
13	Thursday			
14	Friday			
15	Saturday			
16				
17				
18				
19				
20				

Clicking on the small downward pointing arrow will display the **Auto Fills Options**.



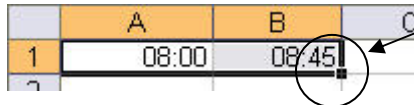
- Copy Cells – copies the data in the first cell down/across the list of cells you have selected. For example, entering 'Sunday' in the first cell – A2, dragging the data through cells 3 to 15 in column A will display the days of the week across two weeks. Selecting the copy cells option from the Auto Fills Options will change the data and replace it with 'Sunday' in each cell – A2 through to cell A15.
- Fill Series – this is the default Auto Fill Option and fills the cells with the selected series of data.
- Fill Formatting Only and Fill Without Formatting – fills the cells with or without the formatting.
- Fill Days – fills your selected cells with the days of the week.
- Fill Weekdays – fills your selected cells with only the days of the week – Monday to Friday.

Non-consecutive Lists

1. Enter the time '08:00' into cell A1.
2. Enter the time '08:45' into cell A2.

It is important that you enter a colon - ':' - between the hours and the minutes. Entering another character i.e. full stop - '.' - will not produce the same result.

3. Using your mouse, select both cells – A1 and A2.
The border will surround both cells, with the Fill Handle in the bottom right hand corner of cell A2.



	A	B	C
1	08:00	08:45	
2			

4. Use the fill handle to drag the data to cell M1.

Microsoft Excel has created a series of different times at 45-minute intervals.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	08:00	08:45	09:30	10:15	11:00	11:45	12:30	13:15	14:00	14:45	15:30	16:15	17:00	
2														

Multiple Lists

1. Enter the month 'January' into cell A1.
2. Enter the day of the week 'Tuesday' into cell B1.
3. Enter the date of the day '01/01/2008' into cell C1.
4. Using your mouse, select all three cells – A1, B1, and C1. The border will surround all three cells, with the fill handle in the bottom right hand corner of cell A3.
5. Use the fill handle to drag the data to row 19.

	A	B	C
1	January	Tuesday	01/01/2008
2	February	Wednesday	02/01/2008
3	March	Thursday	03/01/2008
4	April	Friday	04/01/2008
5	May	Saturday	05/01/2008
6	June	Sunday	06/01/2008
7	July	Monday	07/01/2008
8	August	Tuesday	08/01/2008
9	September	Wednesday	09/01/2008
10	October	Thursday	10/01/2008
11	November	Friday	11/01/2008
12	December	Saturday	12/01/2008
13	January	Sunday	13/01/2008
14	February	Monday	14/01/2008
15	March	Tuesday	15/01/2008
16	April	Wednesday	16/01/2008
17	May	Thursday	17/01/2008
18	June	Friday	18/01/2008
19	July	Saturday	19/01/2008
20			

Microsoft Excel has created consecutive lists of data. Note the different series that Microsoft Excel has created. Are they all correct?

For this type of spreadsheet, creating the data accurately is a process that is created in two steps:

Step one

1. Create the data as explained in steps 1, 2, and 3 above.
2. Using your mouse, select cell B1 and C1. The border will surround both cells, with the fill handle in the bottom right hand corner of cell C1.
3. Use the fill handle to drag the data to row 19.

	A	B	C	D
1	January	Tuesday	01/01/2008	
2		Wednesday	02/01/2008	
3		Thursday	03/01/2008	
4		Friday	04/01/2008	
5		Saturday	05/01/2008	
6		Sunday	06/01/2008	
7		Monday	07/01/2008	
8		Tuesday	08/01/2008	
9		Wednesday	09/01/2008	
10		Thursday	10/01/2008	
11		Friday	11/01/2008	
12		Saturday	12/01/2008	
13		Sunday	13/01/2008	
14		Monday	14/01/2008	
15		Tuesday	15/01/2008	
16		Wednesday	16/01/2008	
17		Thursday	17/01/2008	
18		Friday	18/01/2008	
19		Saturday	19/01/2008	
20				

Step two

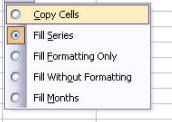
4. Using your mouse, select cell A1. The border will surround this single cell, with the fill handle in the bottom right hand corner of cell A1.
5. Use the fill handle to drag the data to row 19.

	A	
1	January	Tuesda
2	February	Wedne
3	March	Thursd
4	April	Friday
5	May	Saturd
6	June	Sunday
7	July	Monday
8	August	Tuesda
9	September	Wedne
10	October	Thursd
11	November	Friday
12	December	Saturd
13	January	Sunday
14	February	Monday
15	March	Tuesda
16	April	Wedne
17	May	Thursd
18	June	Friday
19	July	Saturd
20		
21		



6. Use the Auto Fill Option – Copy Cells

	A	B	C
1	January	Tuesday	01/01/2008
2	February	Wednesday	02/01/2008
3	March	Thursday	03/01/2008
4	April	Friday	04/01/2008
5	May	Saturday	05/01/2008
6	June	Sunday	06/01/2008
7	July	Monday	07/01/2008
8	August	Tuesday	08/01/2008
9	September	Wednesday	09/01/2008
10	October	Thursday	10/01/2008
11	November	Friday	11/01/2008
12	December	Saturday	12/01/2008
13	January	Sunday	13/01/2008
14	February	Monday	14/01/2008
15	March	Tuesday	15/01/2008
16	April	Wednesday	16/01/2008
17	May	Thursday	17/01/2008
18	June	Friday	18/01/2008
19	July	Saturday	19/01/2008
20			
21			
22			
23			
24			
25			
26			
27			
28			

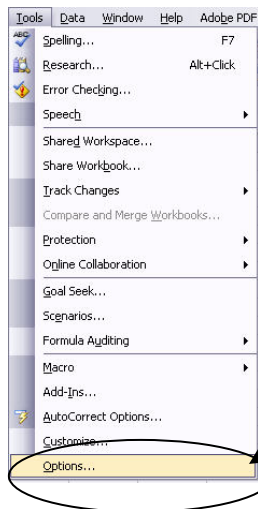


7. The data in each row is accurate in its relationship to the data in the columns – the 1st January, 2008 is on a Tuesday in the month of January.

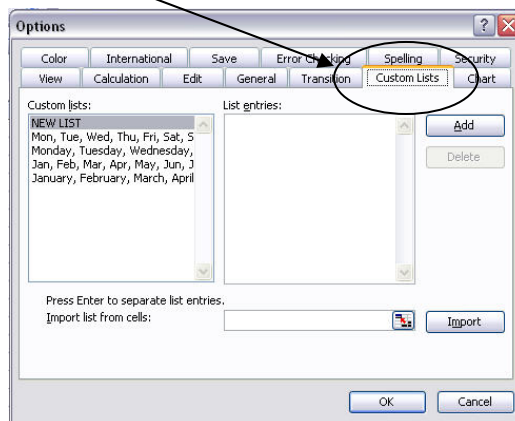
	A	B	C	D
1	January	Tuesday	01/01/2008	
2	January	Wednesday	02/01/2008	
3	January	Thursday	03/01/2008	
4	January	Friday	04/01/2008	
5	January	Saturday	05/01/2008	
6	January	Sunday	06/01/2008	
7	January	Monday	07/01/2008	
8	January	Tuesday	08/01/2008	
9	January	Wednesday	09/01/2008	
10	January	Thursday	10/01/2008	
11	January	Friday	11/01/2008	
12	January	Saturday	12/01/2008	
13	January	Sunday	13/01/2008	
14	January	Monday	14/01/2008	
15	January	Tuesday	15/01/2008	
16	January	Wednesday	16/01/2008	
17	January	Thursday	17/01/2008	
18	January	Friday	18/01/2008	
19	January	Saturday	19/01/2008	
20				
21				
22				

Custom Lists

There are various consecutive series pre-defined within Microsoft Excel. To identify which these are select from the menu options at the top of the screen 'Tools' and then 'Options'.



Select the 'custom lists' tab.



You can create your own custom lists in two different ways. I have provided an explanation of both in the notes below. If we take for our examples, creating times for appointments – in the first example we are creating names of clients and in the second example names of delegates for our workshops.

The **first** is:

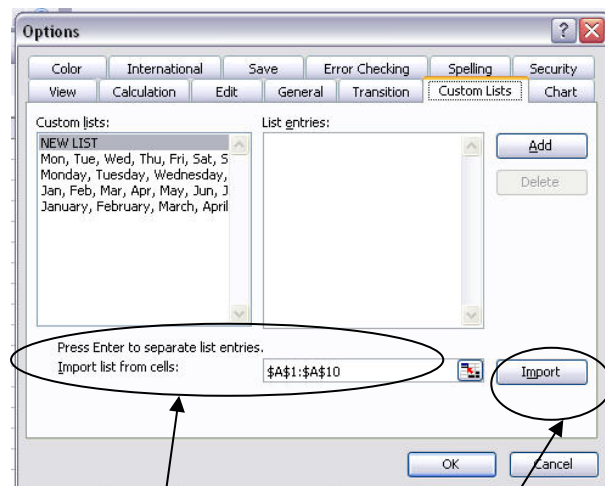
1. Enter the names of your clients in column A, rows 1 to 10.

	A	E
1	Alice	
2	Bill	
3	Claire	
4	David	
5	Edith	
6	Frank	
7	Gail	
8	Helen	
9	Ingrid	
10	Jack	
11		

- Using your mouse, select all cells – A1 to A10. The border will surround all cells.

	A
1	Alice
2	Bill
3	Claire
4	David
5	Edith
6	Frank
7	Gail
8	Helen
9	Ingrid
10	Jack
11	

- Select from the menu at the top of the screen – ‘Tools’, then ‘Options’, and then the ‘Customs Lists’ tab.



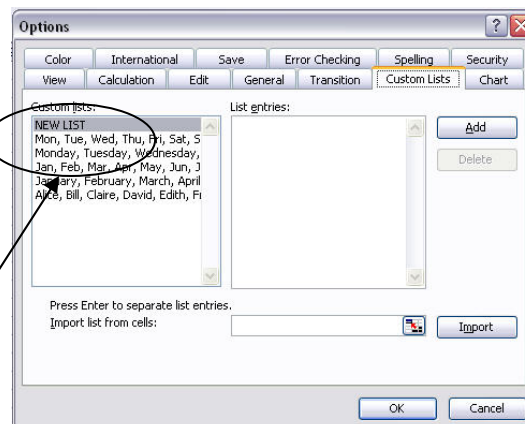
The cells that you selected are shown in the **Import list from cells** box.

- To create a custom list, using your mouse, left click the **Import** button.

Now, entering ‘Alice’ into a cell on your spreadsheet, using the Fill Handle on the bottom right hand corner of the cell, will allow Microsoft Excel to use this list of names as a Non-consecutive List to create your spreadsheet.

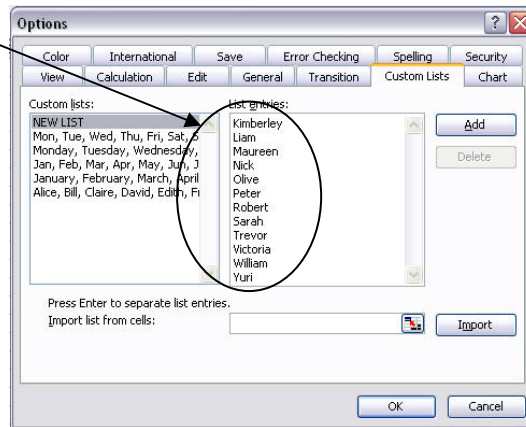
The **second** is:

- Select from the menu at the top of the screen – ‘Tools’, then ‘Options’, and then the ‘Customs Lists’ tab.

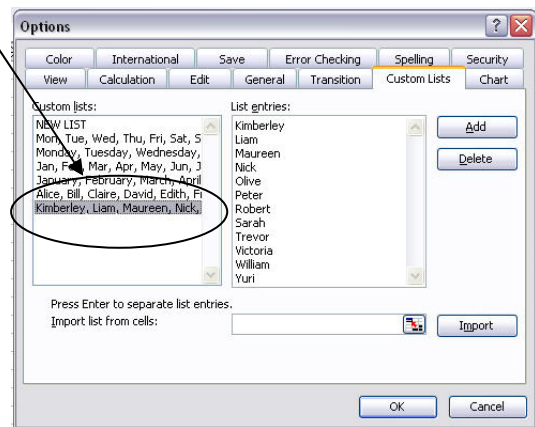


- With the ‘new list’ custom list highlighted,

3. enter your list of names.



4. Click the 'add' button and Microsoft Excel will create your new custom list.



Now, entering 'Kimberley' into a cell on your spreadsheet, using the Fill Handle on the bottom right hand corner of the cell, will allow Microsoft Excel to use this list of names as a Non-consecutive List to create your spreadsheet.

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