

Excel- Templates and Linking

By Don Bremer

Excel Templates

Instead of doing a lot of the same work over again – use a template to off load some of your work for you.

File->New-> Loan Amortization Schedule

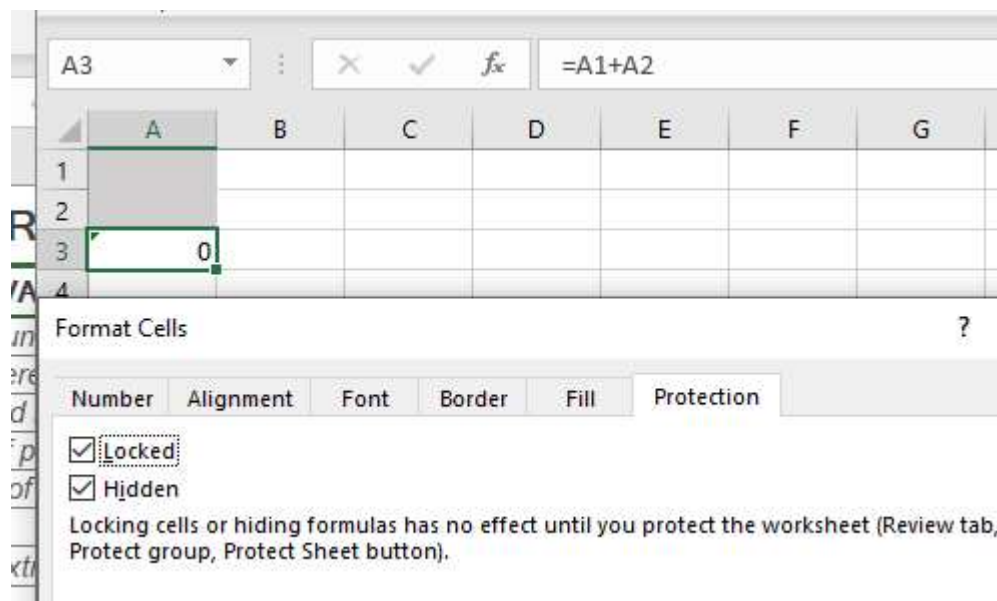
A lot of work has been done to make this useful – all we need to do is add our information.

Create our own template-

In A1 and A2 – make the background gray. In A3 – create the formula =A1+A2.

Right click on the cell A3 and go to Format Cells...

Under the Protection Tab – Check Locked and Check Hidden.

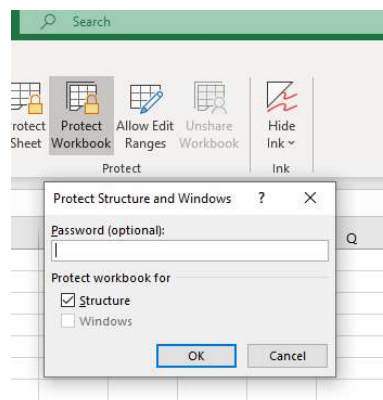
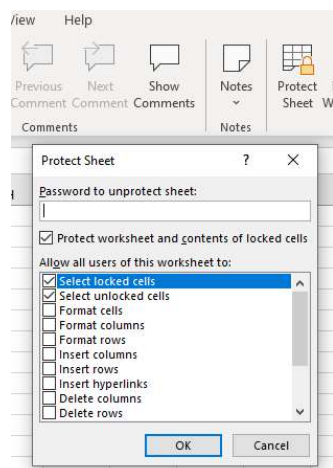


Select A1 and A2 and the Uncheck Locked.

Before we save this, let's protect the worksheet or workbook:

Worksheet:

or Workbook:

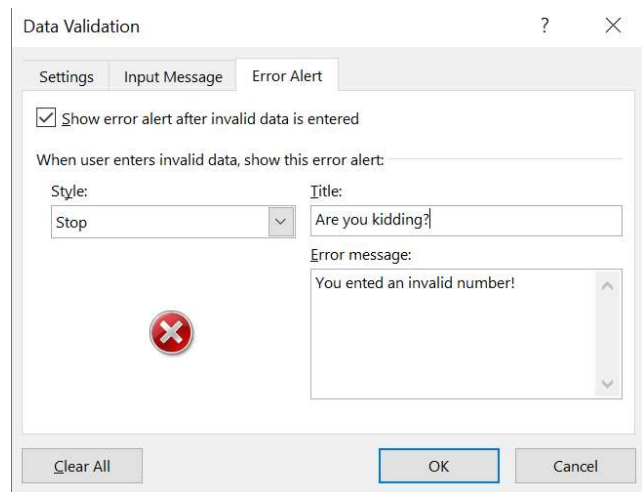
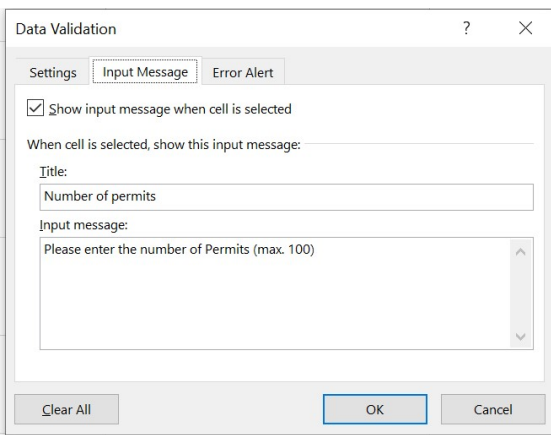
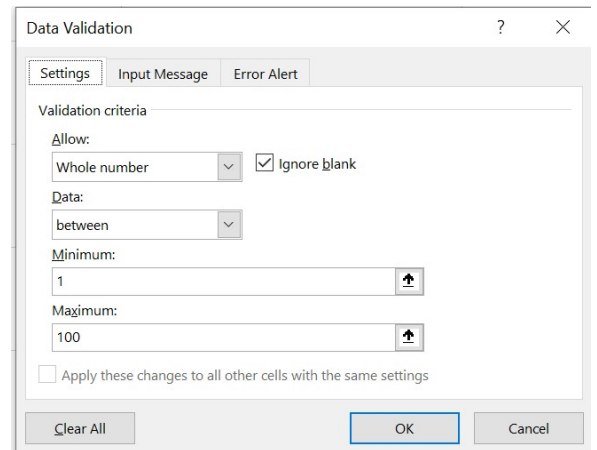
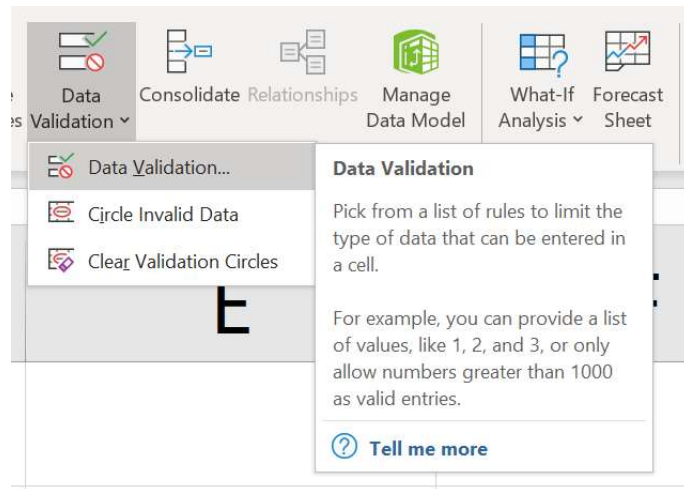


Adding Data Validation

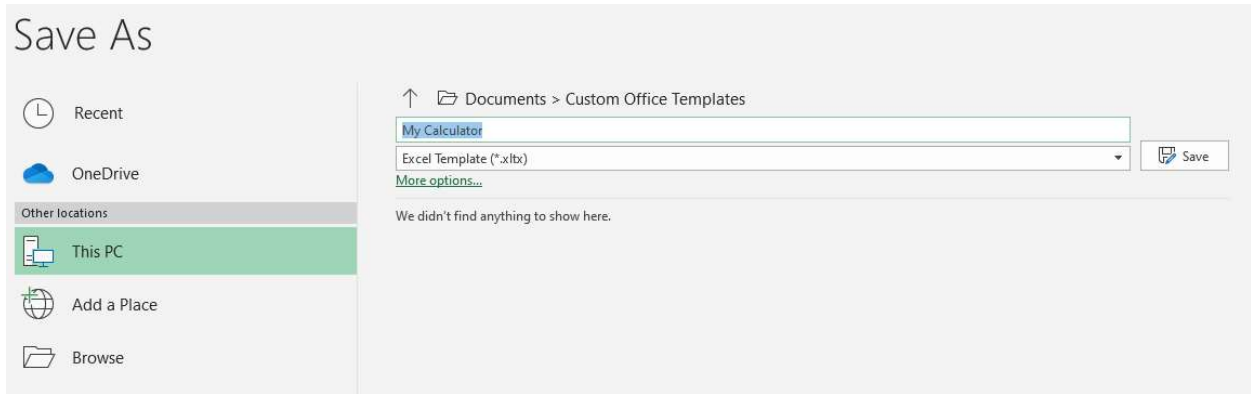
Now, suppose the numbers for A1 and A2 can only be positive numbers between 1 and 100. How can we make sure that those are the only things that can be entered?

Data Validation

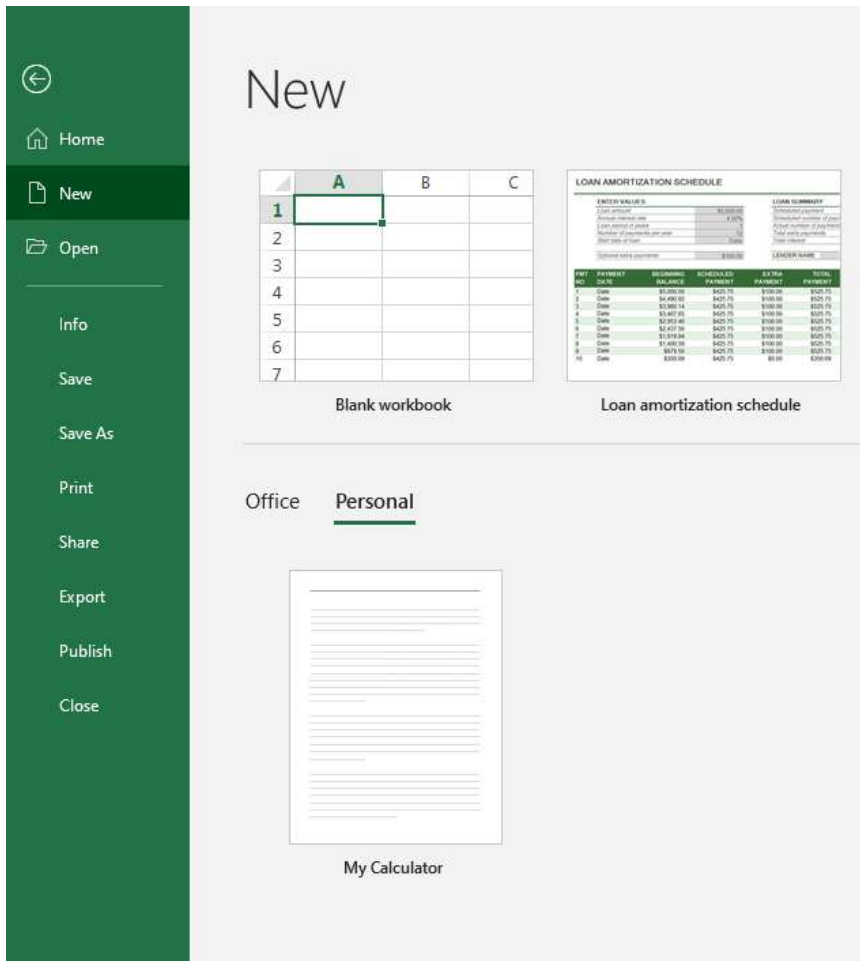
Under Data, select data validation.



Save the Workbook as My Calculator



It will then be something you can use under File->New....

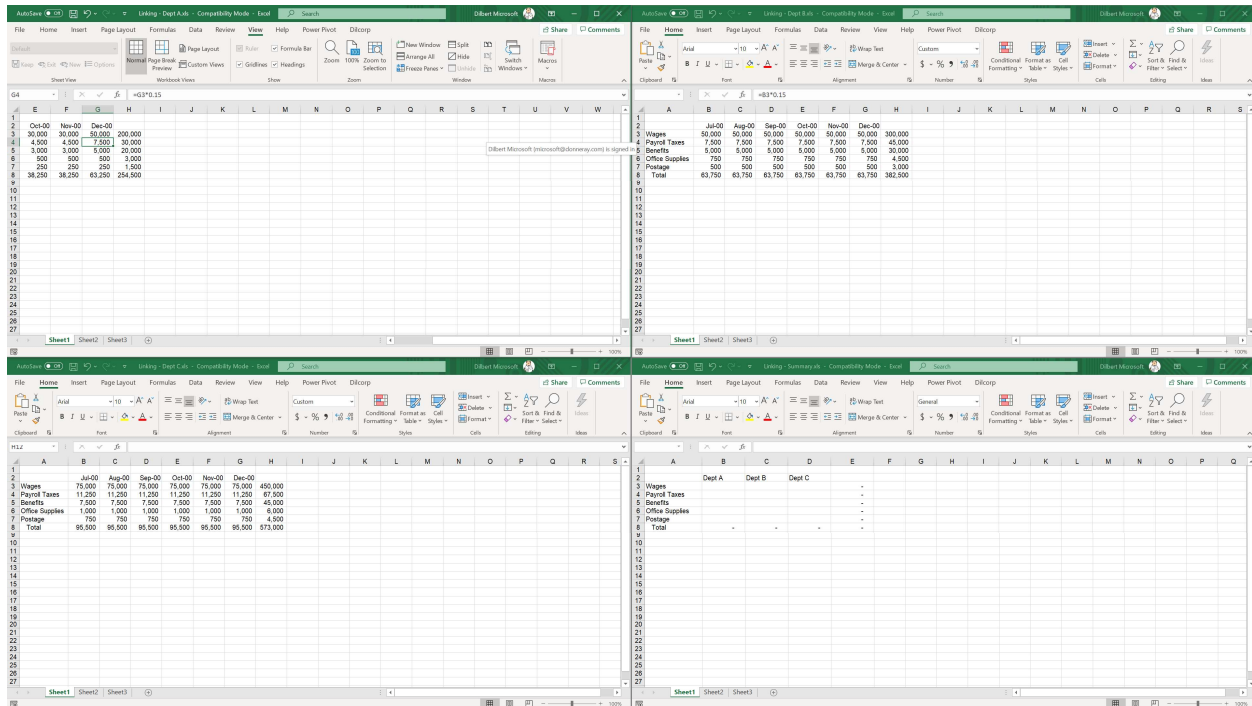


Linking

Workbooks

This is used when there is more than one workbook involved and the information needs to be linking into another spreadsheet. For example, if 3 different departments have budget information and you need to create a budget from all 3.

>OPEN>LINKING – SUMMARY, LINKING – DEPT A, LINKING – DEPT B, LINKING – DEPT C



Sheets – Same way!

This is a great way to hide your calculations on a sheet and then just show the answer on the presentation sheet. You can even hide the tab where the calculations are being held.

How about databases?

You can even link to queries in databases.

File Home Insert Page Layout Formulas **Data** Review View Help Po

Get From From From Table/ Recent Existing Refresh Queries & Connections
Data Text/CSV Web Range Sources Connections All Properties
Edit Links

Stocks

From File >

From Database >

- From SQL Server Database
- From Microsoft Access Database
- From Analysis Services
- From SQL Server Analysis Services Database (Import)

Combine Queries >

Launch Power Query Editor...

Data Source Settings...

Query Options

=Sheet2!\$D\$5

34

51

Navigator

Search:

Select multiple items

Display Options ▾

- Category Sales for 1995
- Current Product List
- Invoices
- Order Details Extended
- Order Subtotals
- Product Sales for 1995
- Products Above Average Price
- Quarterly Orders
- Sales by Category
- Ten Most Expensive Products
- Customers
- Employees
- Order Details
- Orders
- Products
- Shippers
- Suppliers

Customers

CustomerID	CompanyName	ContactName	ContactTi
ALFKI	Alfreds Futterkiste	Maria Anders	Sales I
ANATR	Ana Trujillo Emparedados y helados	Ana Trujillo	Owne
ANTON	Antonio Moreno Taquería	Antonio Moreno	Owne
AROUT	Around the Horn	Thomas Hardy	Order
BERGS	Berglunds snabbköp	Christina Berglund	Order
BLAUS	Blauer See Delikatessen	Hanna Moos	Sales I
BLONP	Blondel père et fils	Frédérique Citeaux	Marke
BOLID	Bólido Comidas preparadas	Martín Sommer	Owne
BONAP	Bon app'	Laurence Lebihan	Owne
BOTTM	Bottom-Dollar Markets	Elizabeth Lincoln	Accou
BSBEV	B's Beverages	Victoria Ashworth	Sales I
CACTU	Cactus Comidas para llevar	Patricio Simpson	Sales I
CENTC	Centro comercial Moctezuma	Francisco Chang	Marke
CHOPS	Chop-suey Chinese	Yang Wang	Owne
COMMI	Comércio Mineiro	Pedro Afonso	Sales I
CONSH	Consolidated Holdings	Elizabeth Brown	Sales I
DRACD	Drachenblut Delikatessen	Sven Ottlieb	Order
DUMON	Du monde entier	Janine Labrune	Owne
EASTC	Eastern Connection	Ann Devon	Sales I
ERNSH	Ernst Handel	Roland Mendel	Sales I
FAMIA	Familia Arquibaldo	Aria Cruz	Marke
FISSA	FISSA Fabrica Inter. Salchichas S.A.	Diego Roel	Accou
FOLIG	Folies gourmandes	Martine Rancé	Assist

Select Related Tables

Load ▾ Transform Data Cancel

Websites

Let's grab the historical data for Microsoft over the last 100 days.

1. Go to finance.yahoo.com
2. Put in MSFT for symbol
3. Select Historical Data

Go back to Excel and select the Data Tab and select "From Web". Now, take the URL we are on from Yahoo and place it in the URL Location:

From Web

Basic Advanced

URL

<https://finance.yahoo.com/quote/MSFT/history?p=MSFT>

OK

Cancel

It looks like Table 2 is the table that contains the data we are looking for!

Navigator

Select multiple items

Display Options ▾

https://finance.yahoo.com/quote/MSFT/histor...

Document

Table 0

Table 1

Table 2

Table 3

Table View Web View

Table 2

Date	Open	High	Low	Close*
8/11/2020	207.15	207.65	203.77	207.00
8/10/2020	211.67	211.88	206.35	208.25
8/7/2020	214.85	215.70	210.93	212.48
8/6/2020	212.34	216.37	211.55	216.35
8/5/2020	214.90	215.00	211.57	212.94
8/4/2020	214.17	214.77	210.31	213.29
8/3/2020	211.52	217.64	210.44	216.54
7/31/2020	204.40	205.10	199.01	205.01
7/30/2020	201.00	204.46	199.57	203.90
7/29/2020	202.50	204.65	202.01	204.06
7/28/2020	203.61	204.70	201.74	202.02
7/27/2020	201.47	203.97	200.86	203.85
7/24/2020	200.42	202.86	197.51	201.30
7/23/2020	207.19	210.92	202.15	202.54
7/22/2020	209.20	212.30	208.39	211.75
7/21/2020	213.66	213.94	208.03	208.75
7/20/2020	205.00	212.30	203.01	211.60
7/17/2020	204.47	205.04	201.39	202.88
7/16/2020	205.40	205.70	202.31	203.92
7/15/2020	209.56	211.33	205.03	208.04
7/14/2020	206.13	208.85	202.03	208.35

Load ▾

Transform Data

Cancel