

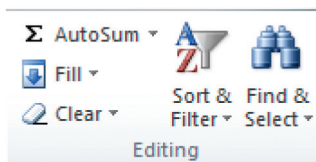


# How to Find (and Replace) What You're Looking For

By Nate Moore, CPA, MBA, CMPE

If you still haven't found what you're looking for in your Microsoft Excel® spreadsheet, you've found the right place. Finding and replacing text and numbers in Excel 2007 and 2010 is easy. Here's how to do it.

FIGURE 1



## FIND

Start by clicking the **Find & Select** button on the right side of the **Home** tab (See **Figure 1**) and choose either

**Find** or **Replace**. Either choice will bring up the **Find and Replace** window which has a tab for **Find** and a tab for **Replace**. We'll start with **Find**, which lets you find text and / or numbers. In the **Find what** box, simply enter the text or numbers to search for.

Clicking **Find Next** will find the next occurrence of what you're searching for. **Find All** finds all occurrences and presents the list in a table in the **Find and Replace** window, as shown in **Figure 2**. You can click the headings in the table to sort the list. For example, clicking **Value** will sort the values in the list from A-Z.

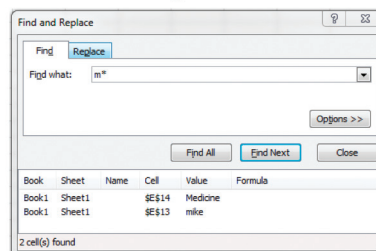
## WILDCARD CHARACTERS

Excel allows you to use an asterisk (\*) and a question mark (?) as wildcard characters. Use the asterisk when you want to find one or more characters. M\* will find medicine and Mike. M\*I will find medical and metal. The question mark finds one character. For example, T?m will find Tom and Tim, but it won't find team.

## REPLACE

You can replace what you've searched for with a different value. For example, if Dr. Smith changes her name to Dr. Brown, click on the **Replace** tab. Enter Dr. Smith in the **Find what** box and Dr. Brown in the **Replace with** box. Don't enter

FIGURE 2



quotation marks around either Dr. Smith or Dr. Brown. You can click **Replace** to replace each instance of Dr. Smith with Dr. Brown one at a time, or click **Replace All** to

replace all instances of Dr. Smith at once.

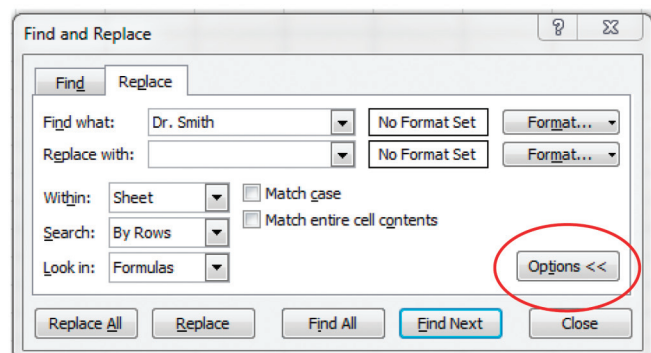
You can replace punctuation as well. To remove the period after Dr. in Dr. Smith's name, enter Dr. Smith in the **Find what** box and Dr Smith in the **Replace with** box. To replace Dr. Smith with a blank cell, simply leave the **Replace with** box empty.

## OPTIONS

Clicking the **Options>>** button (**Figure 3**) brings up several options to help refine or customize your search. The options are similar for both the **Find** and **Replace** tabs.

**Within** allows you to search either in the current sheet or in the entire workbook. What if you want to replace Dr. Smith in one part of your spreadsheet, but want to leave Dr. Smith in a different part of your spreadsheet? The trick is to highlight the area you want to search first, before clicking **Find & Select**. If you have an area highlighted before searching, Excel only

FIGURE 3



(continued on page 50)



(How to Find (and Replace) What You're Looking For continued)

looks in the highlighted area. On the other hand, if Excel can't find what you're searching for and you know it's in the spreadsheet, make sure you didn't inadvertently highlight an area to search before clicking **Find & Select**.

The **Search** drop-down box controls whether Excel searches row-by-row or column-by-column. The **Look in** drop-down box differs between the **Find** tab and the **Replace** tab. On the **Find** tab, you can look in a cell's **Formulas**, **Values**, or in a cell's **Comments**. **Formulas** might be something like =SUM(C25:D25). **Values** are the results of the formulas, like the number 12. If you want to find all of the cells with SUM as part of the formula, choose **Look in Formulas**. If you're looking for all cells with a 12, choose **Look in Values**. **Comments** are a way for users to enter notes about a given cell. To insert a comment in a cell, right-click the cell and choose **Insert Comment**. To find comments in cells, choose **Look in Comments**. The **Replace** tab only allows you to choose **Look in Formulas**.

By default, Excel's **Find** feature is not case-sensitive. Looking for HBMA will return HBMA, Hbma, and hbma. To make your search case-sensitive, check the **Match case** box. By default, when you search for the word Billing Excel will also find Billing, Billing Manager, and Billing Department. To only find Billing, check the **Match entire cell contents** box.

## FIND BASED ON FORMATTING

Excel will allow you to search for cells based on the cell format, the way the cell is displayed. For example, you can ask Excel to search for Dr. Jones, but only if Dr. Jones is in red font. To search

based on cell formatting, click the **Format...** button. You can choose **Format...** again from the drop-down list to choose exactly the format to look for, but you might find it easier to select **Choose Format From Cell...** instead. Excel will turn the cursor into a plus sign and a medicine dropper. Simply click on a cell with the formatting you want to find, and Excel will use that formatting to search. Be aware that Excel saves the formatting option you defined, so if you do another search, Excel will continue to look for cells formatted the way you originally defined. To clear the formatting options, click the drop-down arrow next to the **Format...** button and choose **Clear Find Format**.

## Conclusion

Busy HBMA members can spend a lot of time analyzing data in spreadsheets. Using Excel's **Find and Replace** window efficiently can help you spend less time manipulating your data and more time acting on it. For more tips and tricks on using Excel in a medical setting, watch free Excel Videos at kelapro.com.

Having trouble with an Excel feature? Send suggestions for future *Billing* columns to hbma@kelapro.com. ■

*Nate Moore, CPA, MBA, CMPE speaks, consults, records, and writes about Microsoft Excel and data mining in medical practices throughout the country. His Excel Videos have been viewed over 20,000 times. Nate's latest project is KelaPro, a software program that automatically downloads critical practice data into Excel. Practice managers use KelaPro Pivot to analyze their receivables, collections, billed charges, new patients, reimbursement, and more to better manage their practice's revenue cycle.*



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