

# ESSENTIAL EXCEL<sup>®</sup> TIPS

**Tips All New  
Users Must Know**

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# Getting Started in Excel

The Excel logo, featuring a green square with a white 'X' and a white grid pattern to its right.

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# Let's start with a story....

**M**iles Lannis spent the first fifteen years of his career working in sales. He loved the art of it: connecting with people, learning who they were and what makes them tick. Closing the sale was made him feel alive.

Over the years, his success as a salesperson helped him move up in his company. Then, about ten years into his career, he moved to a new company with a higher commission rate. His ability to connect with people transferred as well and he soon became the top salesperson at his new company.

He achieved such a high rate of sales success that he soon became a sales manager with three people reporting to him. Within three years he became the best sales manager in the company. Then, the company COO told him that he would replace the Sales Director after she retired. The new job came with a much higher salary, more benefits, a new parking space...and sales reporting duties...using their Excel Spreadsheets.

Miles was a great salesperson, excellent manager and a good company man. But he never used Excel professionally before. It just was not a part of his duties. Now, after fifteen years of working hard, doing well and moving up, he faced a new challenge.

And the learning curve wasn't a small one. He struggled to perform simple tasks in updating sales figures, reconciling the actual sales numbers with projections and creating models for future projections. He often felt embarrassed and had to ask the new hire, a twenty-two year old, in IT for help. Often, he would find himself spending hours trying to Google his problem or search through the myriad of YouTube videos that offered help...but never seemed to address his specific problem.

One time...he was trying to update the commission calculator with this quarter's sales and accidentally deleted all of the stored formulas in the table. His boss gave him an earful for that.

Slowly but surely, Miles picked up what he needed to with Excel. He got help from colleagues, attended a few webinars and remembered whatever tips he came across. But he faced issues here and there.

It got to the point that just opening the Excel spreadsheet became a moment of dread. Miles often said to himself, "what I would have given to have all the things in Excel I need to know taught to me at the very beginning."

Miles's story is not unique. Excel is a versatile and vitally important tool in business – but professionals young and old, established and just starting out, struggle with it. It was with this struggle in mind that this free guide, Excel Essentials for New Users was created.

## Entry and Editing Shortcuts

In this section, you will discover how to enter data, move through the spreadsheet and discover the most used formulas in Excel.

The Excel spreadsheet grid is where data gets stored and displayed. You can double-click on the cell to be able to enter and edit data.

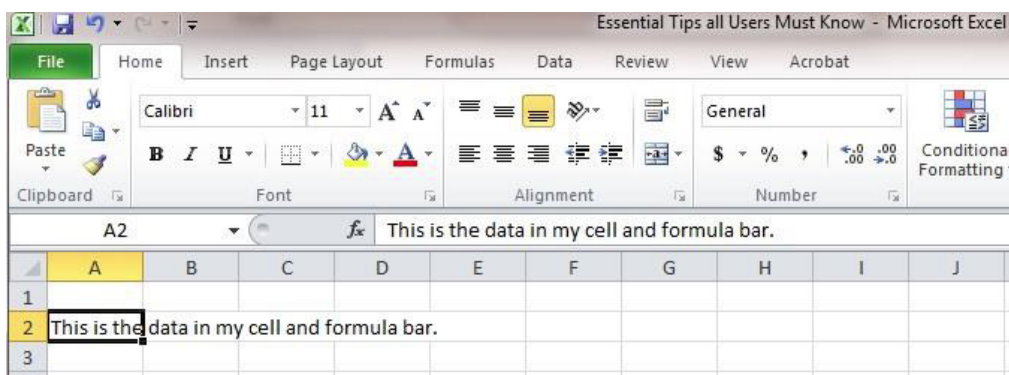
Or, you can use the Formula Bar at the top of the spreadsheet.

So, let's get started with entering data.

**Pro Tip:** You can also enter data by just clicking on the cell BUT if you want to EDIT data, you will need to double click or click into the formula bar. A single click on the cell will replace any existing data with the new keystrokes or pasted information.

## A.) Basic Entry and Editing Shortcuts

- As you enter data in Excel, the data appears in the cell and in the formula bar at the top of the worksheet.

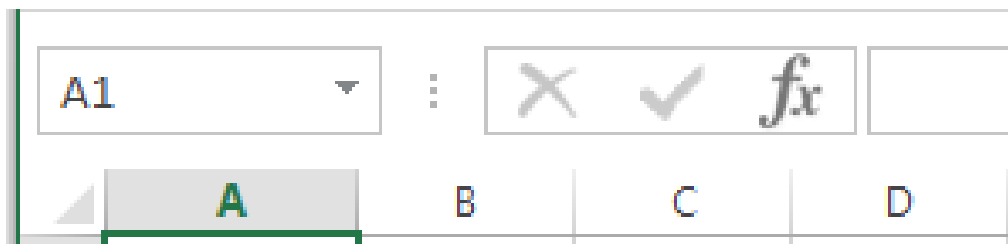


- Type and press Tab to move to the right, cell to cell, across columns
- Shift+Tab to move to the left.
- Type and enter to move down, cell to cell, across rows.
- Shift+Enter to move up.
- Press Tab or Enter to complete any cell's entry or editing.
- Press Ctrl+Enter to complete any cell's entry or editing and stay in the same cell.
- Cells are referred to by their cell name, such as A1, column name first followed by row number.
- Text is left justified.
- Numbers are right justified
- Numeric labels, such as year labels, need to be formatted as text so they are not accidentally calculated into a formula

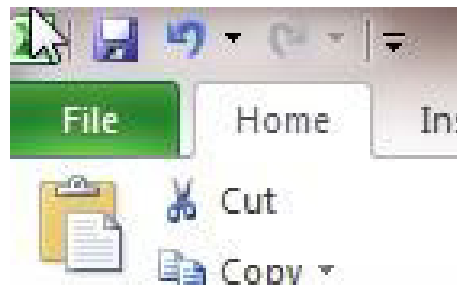
## B.) Basic Editing

- Edit in the cell or in the formula bar at the top of the worksheet.
- **F2 positions the cursor in the cell to edit. Home key moves the cursor to the front of the cell (left).**

### Name Box / Cancel / Enter / Insert Formula



- To replace cell contents, click on the cell and type over the top of the existing data.
- Until you press Enter or Tab, you can click the Cancel button to revert to the previous contents.
- Undo and Redo buttons may be used as a secondary recovery technique.



- To clear contents of a cell or a range of cells, select the cell or range, click Home tab > Edit group > Clear. Clear All clears both contents and formatting from a cell.
- The Delete key clears only content of a cell but leaves formatting.

# Navigation and Selection Shortcuts

Once you are familiar with how to enter and edit data, you will want to be able to move around the spreadsheet with ease and select the information you need.

## A.) Navigation

- Special keys: Home / End, Page Up / Page Down
- Ctrl+Home / Ctrl+End
- Ctrl+Arrow keys ↓ ↑ ← →
- Name Box / Cancel / Enter / Insert Formula
- Go To: Ctrl+G, F5, Name Box (Cell, Defined Name)

## B.) Selection Shortcut Techniques

| Data Selected                                  | Selection Methods                                  |
|--|--|
| Range of data                                  | Shift+click  |
| Immediate range                                | Ctrl+A with cursor in the range                    |
| Nonadjacent Data                               | Ctrl+click and drag                                |
| Entire Column / Row<br>Data only in Column/Row | Click on column / row heading.<br>Shift+Ctrl+arrow |
| Entire Document                                | Ctrl+A<br>Click in upper left corner.              |



## C.) Mouse Indicator Shortcuts

- White plus – Center of the cell – Select/highlight
- Black plus – Lower right corner of the cell – Autofill
- ✓ **Double-click on down fill handle for instant Fill Down**
- Four-Pointed Navigator Arrow – Border of the cell – Move
- ✓ **Ctrl+Drag to move a copy**
- Black Arrow Down or Right – In Column or Row Heading – Select Column or Row
- Double arrow – On Column or Row Heading Line – Resize Column or Row.
- **Double-click on any header line for AutoFit**

Once you get used to using the Spreadsheet grid, you will want to increase your efficiency. To that end, we provide some the tips and techniques to save you time while you work.

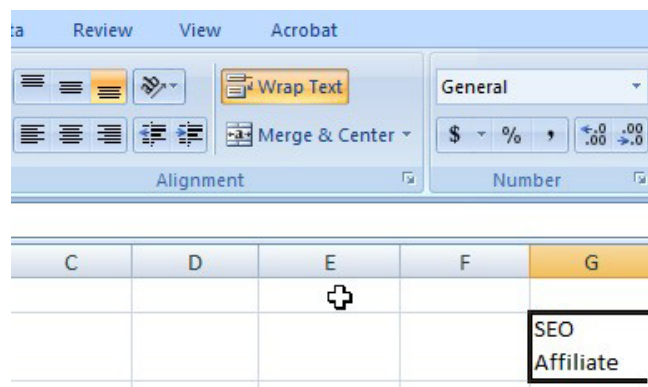
# The Must Know Keyboard Shortcuts

Now that you're flying around in Excel, you might find going back to click on different items to be a waste of time. Luckily, there are keyboard shortcuts to performing many of the tasks you will need.

## Keyboard Shortcut 1: Writing Multiple Lines in the Same Cell

You will notice that Excel default is to have all data on one line within the cell. But, let's say you want to enter an address into a single cell. How do you create multiple lines for the Name, Address and City, State, Zip lines?

- While you are typing into the cell and you are ready to move to the second line that that cell just press:
  - ✓ Alt+Enter
  - ✓ And the new line will start.
- There is also a button in the ribbon that allows you to select a cell, or multiple cells, and split the text into multiple lines
- This is called "Wrap Text" and is located on the "Alignment" Tab of the Home Ribbon:



## Keyboard Shortcut 2: Quickly Move Through Your Worksheets

Many workbooks contain multiple worksheets and moving through them can be annoying and time consuming.

- But there are keyboard shortcuts that will cut down the process!
- To move one worksheet to the right press
  - ✓ Ctrl+Page Down
- To move one worksheet to the left press
  - ✓ Ctrl+Page Up
- If you have multiple excel files open you can press
  - ✓ Alt+Tab to move between them

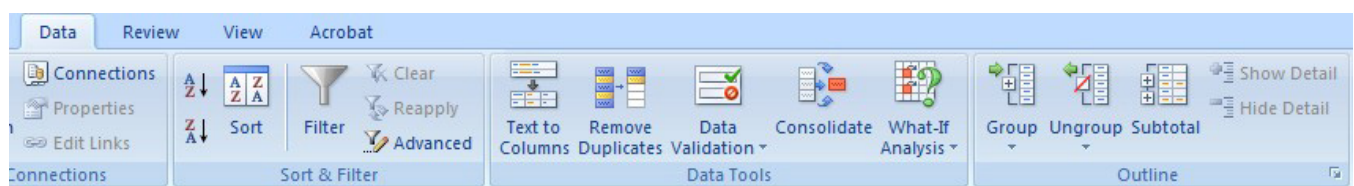
## Keyboard Shortcut 3: Group/Ungroup Data and Freeze Panes

Often we are stuck working with huge charts or the chart we are using contains old data that is not relevant anymore but that cannot be deleted or we need to show different lines depending on who we present the data to.

There are 2 functions in Excel that will help you group and ungroup data so that you can hide it or show it as you please.

How do we group and ungroup data fast?

There are 2 buttons in the data tab in your ribbon that are placed at the right end.



Now all you need to do is select the rows you want to hide/show and click “group” or “ungroup”. This is the end result:

| Month                         | Jan-13   |
|-------------------------------|----------|
| SEO                           | 0        |
| Affiliate                     | 0        |
| Inbound(social, blog)/Repeats | 4        |
| Certificates                  | 1        |
| <b>Tot Regs</b>               | <b>4</b> |

Other times you may have a chart with so many rows that while you scroll down you lose the first line with the column names. A quick fix will allow you to save time and work faster while analyzing data.

In your ribbon, in the “view” tab, there is the “Freeze Panes” button. At this point you want to select the row that is underneath the one you want to actually freeze and click “Freeze Panes”. There are also other 2 options with different functions

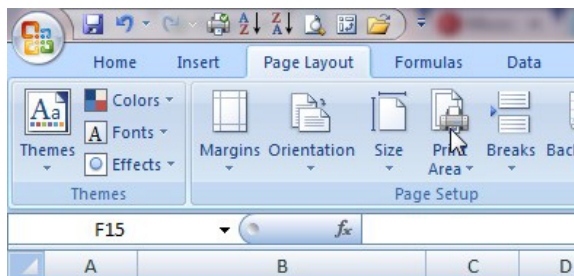
| Month                         | Jan-13   | Feb-13   | Mar-13    | Apr-13    | May-13    | Jun-13    | Jul-13    | Aug-13    | Sep-13    | Oct-13    | Tot        |
|-------------------------------|----------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|
| Inbound(social, blog)/Repeats | 4        | 6        | 8         | 10        | 11        | 12        | 14        | 16        | 17        | 20        | 118        |
| Certificates                  | 1        | 1        | 1         | 1         | 1         | 1         | 1         | 1         | 1         | 1         | 11         |
| <b>Tot Regs</b>               | <b>4</b> | <b>7</b> | <b>11</b> | <b>16</b> | <b>20</b> | <b>24</b> | <b>30</b> | <b>35</b> | <b>39</b> | <b>46</b> | <b>232</b> |

### Keyboard Shortcut 4: Print a Specific Area:

Too often we are stuck working with gigantic **Excel spreadsheets**, and printing a specific area is not always possible without some cut and paste and extra work.

For this reason **Excel**, to **save** you **time** and headaches, has a specific button that let you choose the area you need to print.

This button is located in your **ribbon**, in the page layout tab, and it's called "Print Area":



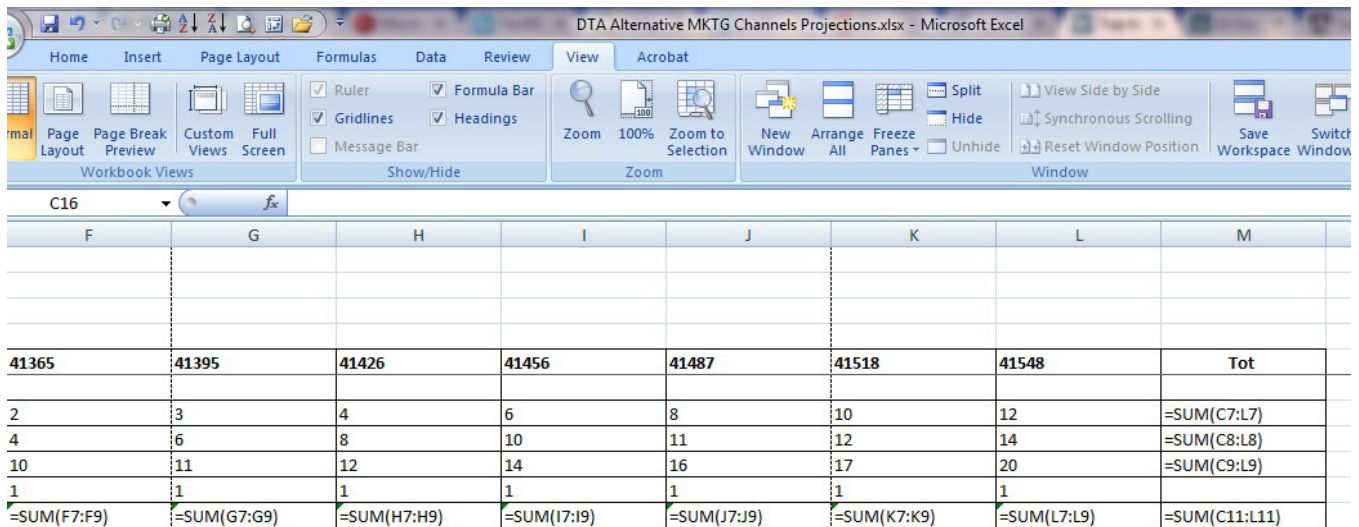
Before you click on the button, select with the mouse the cells you need to print and then click "Print Area"->"Select Print Area" and you will be able to print only one chart, maybe only a few columns and so on.

### Keyboard Shortcut 5: Display All the Formulas in the Spreadsheet:

A single shortcuts lets you switch between Excel's normal display, which shows the results of the formulas in the spreadsheet, and a display mode that shows all the actual formulas in your spreadsheet.

The keystroke is Ctrl + `

(The grave accent key is located on the top left of the keyboard next to the 1 key, in the US it's the Tilde key); press it once, and Excel displays formulas instead of results. Press it again, and the results appear again.



# 15 Secrets to Efficiency

## 1. Using the Mouse Wheel for zooming in and out:

With **Ctrl** key held down, roll the mouse wheel to zoom in or out at 15% increments from as low as 10% or as high as 400%

## 2. Quickly Jump for One Open Workbook to another Open Workbook:

Ctrl + Tab or Ctrl + F6

## 3. Get back to the first cell in your spreadsheet:

Ctrl+Home

## 4. Quickly jump the end of your spreadsheet:

Ctrl+End

## 5. To select only visible cells within a selected range:

1. Press F5
2. Click Special
3. Click Visible cells only, then OK or press Alt + Semicolon

**Pro Tip:** If you want to copy a range of cells that contains hidden rows or columns, but you don't want to copy any of the hidden data, use this feature just after selecting the range

## 6. To select non-contiguous ranges to highlight unconnected ranges:

1. Select a range
2. Release the left mouse button
3. With the Ctrl key held down, select another range
4. Repeat Steps 3 and 4 as needed

## 7. To make the same entry in many cells at once:

1. Select the cells,
2. Type the entry
3. Press Ctrl+Enter

If you type a formula or function, it will be entered, relatively, into all of the selected cells; values and text will be entered, as typed, into all of the selected cells.

## 8. To enter the current date in a cell:

Ctrl + Semicolon

## 9. To enter the current time in a cell:

Ctrl + Shift + Semicolon



## 10. To save a keystroke when entering dates in this decade

Enter dates like 12/13/08 as 12/13/8 and dates like 5/9/09 as 5/9/8

**Pro Tip:** years entered as 00 through 29 are automatically entered as 21st century dates; years 30-99 are automatically entered as 20th century dates. To avoid confusion, type 4-digit years, as in 12/13/1929.

## 11. The best way to move a range of cells

Unless you need to move a range of cells across many rows or columns, use this method for fast moving:

1. Select the cells you want to move
2. Point to any edge (but not the fill handle in the lower right corner) of the selected cells; the cell pointer becomes an arrow
3. Click and drag to the destination

## 12. To select all cells in the current worksheet containing formulas:

1. Select a single cell
2. Press F5
3. Click Special
4. Click Formulas, then OK

**Tip:** While these cells are highlighted, apply a color background to remind yourself which cells have formulas.

**13. To increase all cells in a range by the same amount without a formula:**

1. Enter the incremental amount into an empty cell
2. Click the Copy button
3. Select the cells to be changed
4. Right-click the selected cells and click Paste Special
5. Click the Add button and click OK

**14. To start a numerical series of successive numbers with one cell entry**

1. Enter the starting number in the first cell
2. With the Ctrl key held down, drag the fill handle in the direction of the series

**15. To quickly insert columns or rows**

1. Right-click the column letter (just to the right of where you want the column), or Click the row number (just below where you want the new row)
2. Select Insert from the short-cut menu.

Using Excel in the workplace can be a challenge, but it can also open new doors to understanding your business. In addition, great Excel users have an extra tool to help advance their career.

We hope you enjoyed this free guide,  
and don't forget to check out other  
free resources and great  
training programs at:

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