

# *Excel Essentials*

## *Level 2*

*2007 / 2010 / 2013 / 2016*



*Soul Canyon Training & Development*  
*[www.soulcanyon.com](http://www.soulcanyon.com) / [rob@soulcanyon.com](mailto:rob@soulcanyon.com)*

## Shortcuts, Tips & Tricks

---

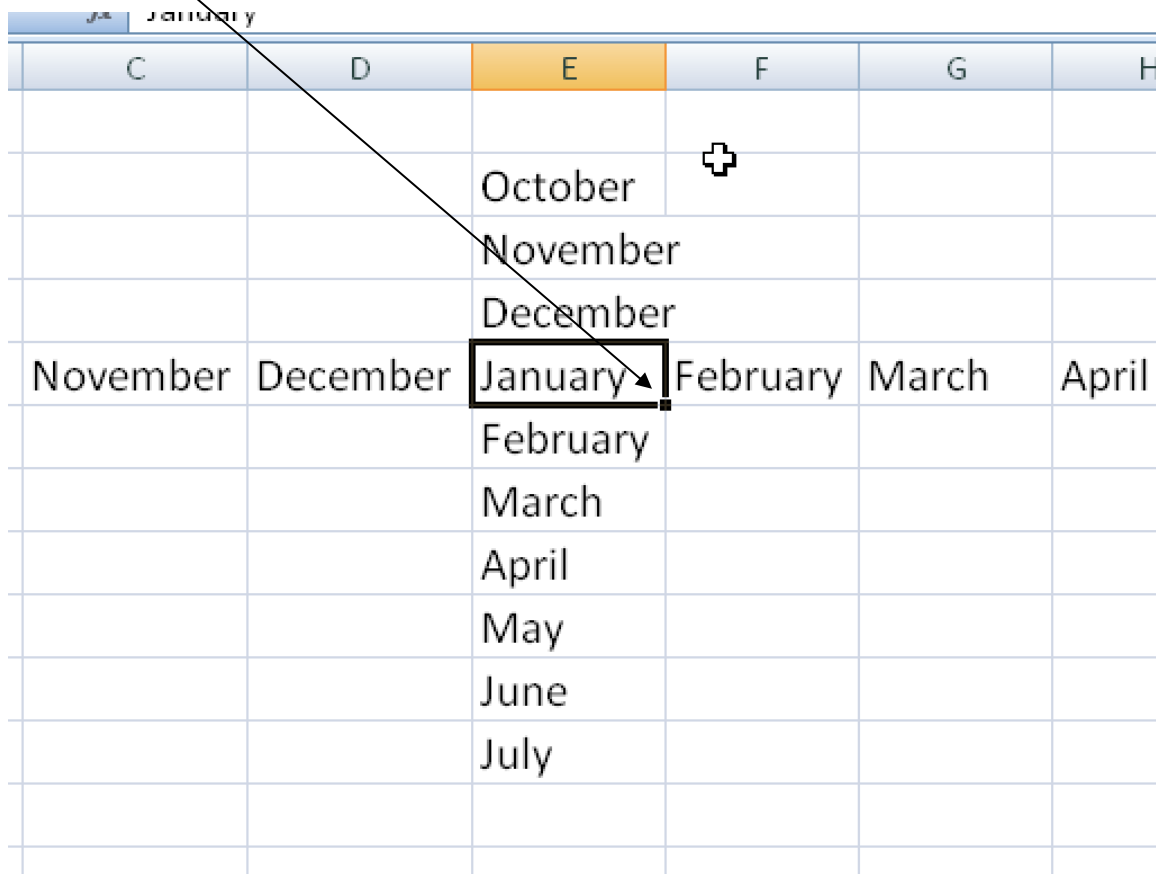
What it does	How to do it
Navigate to a worksheet	Right click on worksheet tab arrows.
Move the QAT	Right click on the QAT and select SHOW THE QAT BELOW THE RIBBON
Add Ribbon Commands to the QAT	Right click on the COMMAND BUTTON and select ADD TO THE QAT
Add Non Ribbon Commands to the QAT	Right click on the QAT and select CUSTOMIZE the QAT. Select Command Category, Find Command and select ADD.
Delete Commands from the QAT	Right click on the QAT button and select DELTE FROM THE QAT
Make a chart	Click in the database and press F11.
Zoom	CTRL + Mouse Roller
Forced Wrap (New line in cell)	ALT + Enter
Select Visible Cells	ALT + ;
Show Formulas	CTRL + ~
Select all cells in an array	CTRL + A
AUTOSUM	ALT + =
Absolute Reference	Click next to the cell reference and press F4
Change the cursor direction after ENTER	Office Button or FILE Ribbon Tab --> Options -> Advanced --> After Pressing Enter Move Selection ....
Copy	CTRL + C
Paste	Enter (Once) or CTRL + V (Multiple)
Paste Special	CTRL + ALT + V
Cut (Move)	CTRL + V
Undo (Freak Out)	CTRL + Z
Resize row to specific size	Click on bottom boundary of row in header, click and drag down or up to size
Resize row to wide enough for widest entry	Double click on bottom boundary of row in header
Resize column to specific size	Click on right boundary of column in header, click and drag down or up to size
Resize Row to wide enough for widest entry	Double click on right boundary of row in header
Resize multiple rows or columns	Click and drag or hold CTRL while clicking on rows or columns in header, then resize by dragging or double clicking on boundary on one select row or column in header.

## 33 Essential Keyboard Shortcuts

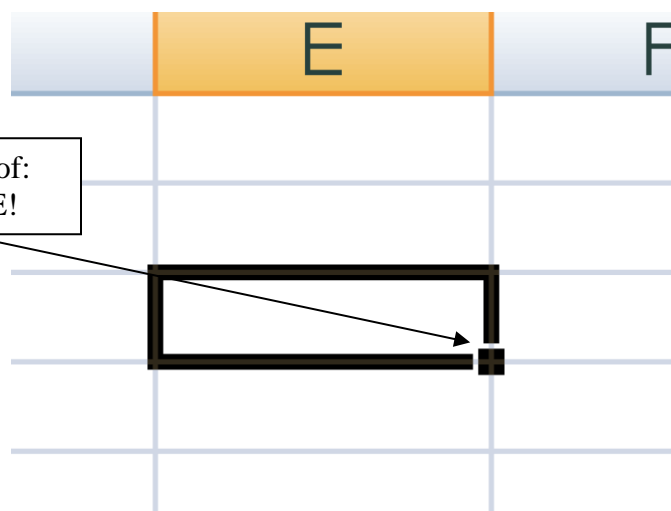
<b><i>Keyboard Shortcut</i></b>	<b><i>What it does</i></b>
CTRL + Scroll	Zoom
CTRL + Enter	Keep cursor in current cell
CTRL + X	Cut
CTRL + C	Copy
CTRL + V	Paste
CTRL + Z	Undo
CTRL + Y	Redo
CTRL + ALT + V	Paste Special
CTRL + N	Open New File
CTRL + S	Save & Replace
F12	Save As
ALT + =	Autosum
CTRL + B	Bold
CTRL + U	Underline
ALT + Enter	Forced Wrap
F11	Quick Chart
CTRL + ;	Current Date
CTRL + SHFT + ;	Current Time
CTRL + 1	Format Cells
CTRL + A	Select All Data
CTRL + ~	Show Formulas
ALT + ;	Select Visible Cells
CTRL + i	Italicize
CTRL + SHFT + L	Autofilter
CTRL + R	Copy contents RIGHT
CTRL + D	Copy contents DOWN
CTRL + F	Find
CTRL + H	Find & Replace
F7	Spell Check
F4	Insert Absolute Reference (\$)
CTRL + P	Print
CTRL + K	Insert Hyperlink
F5	Go to

# Autofill Handle

Input into Excel can be time consuming, but you have a friend in the Autofill Handle.



January					
C	D	E	F	G	H
		October			
		November			
		December			
November	December	January	February	March	April
		February			
		March			
		April			
		May			
		June			
		July			



Remember The Power of:  
AUTOFILL HANDLE!

## Autofill Handle – Custom Lists

---

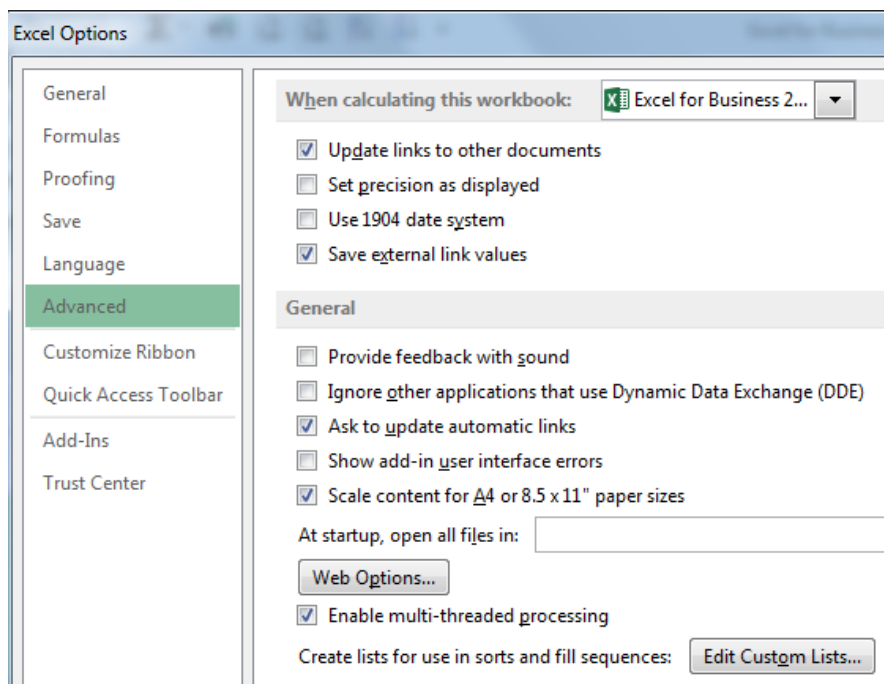
Do you have lists that you have to re-create often? You either have to remember them or find something to copy and paste them from?

You need Custom Autofill Lists:

First, highlight the list you want to turn into a Custom List:

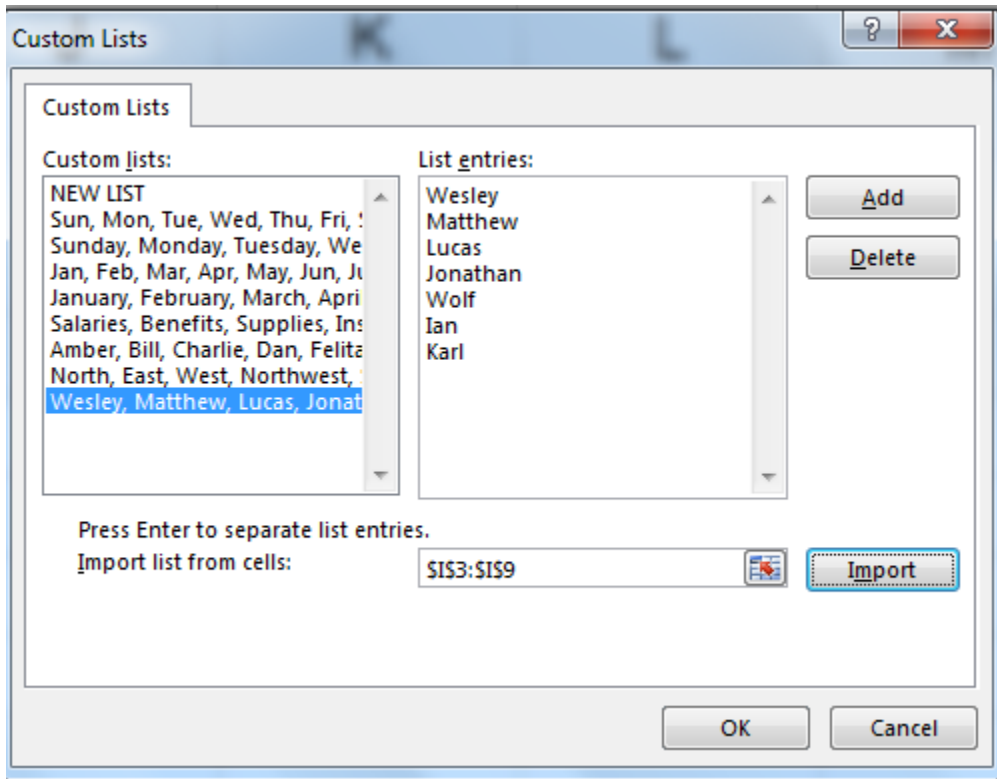
G	H	I	
		Wesley	
		Matthew	
		Lucas	
		Jonathan	
		Wolf	
		Ian	
		Karl	

Next, go to File → Options → Advanced → Edit Custom Lists



## Autofill Handle – Custom Lists

Next, select Import and the list will be added. Had the list not been highlighted before you went to Excel Options, you could click into the Import box, return to the worksheet and highlight the list.

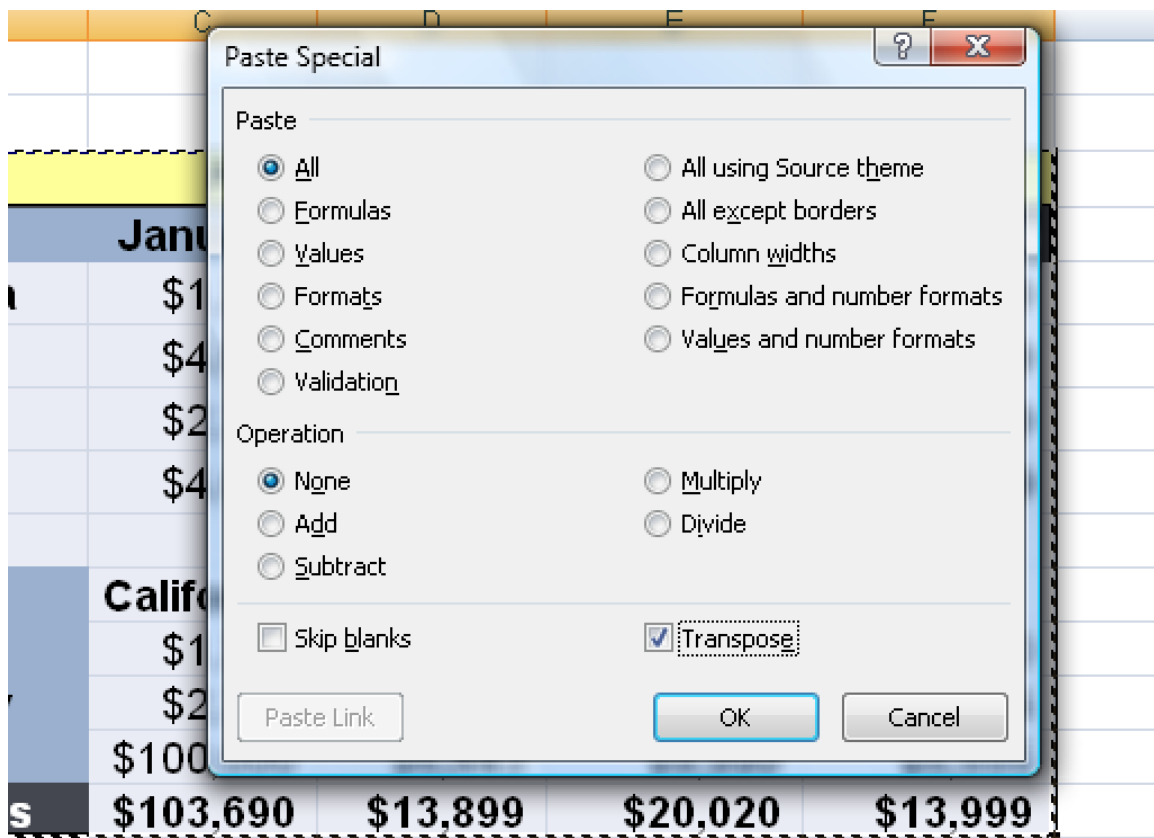


To modify an existing list, return to Custom Lists, select the list and modify the entries in the List Entries box.

## Paste Special

Have you ever been building a spreadsheet, then realized the rows should be the columns and the columns should be the rows?

First Quarter Sales				
	January	February	March	Total Sales
California	\$1,345	\$2,345	\$100,000	\$103,690
Florida	\$4,000	\$3,456	\$6,443	\$13,899
Georgia	\$2,356	\$7,665	\$9,999	\$20,020
Indiana	\$4,000	\$4,444	\$5,555	\$13,999
January February March	California	Florida	Georgia	Indiana
	\$1,345	\$4,000	\$2,356	\$4,000
	\$2,345	\$3,456	\$7,665	\$4,444
	\$100,000	\$6,443	\$9,999	\$5,555
Total Sales	\$103,690	\$13,899	\$20,020	\$13,999



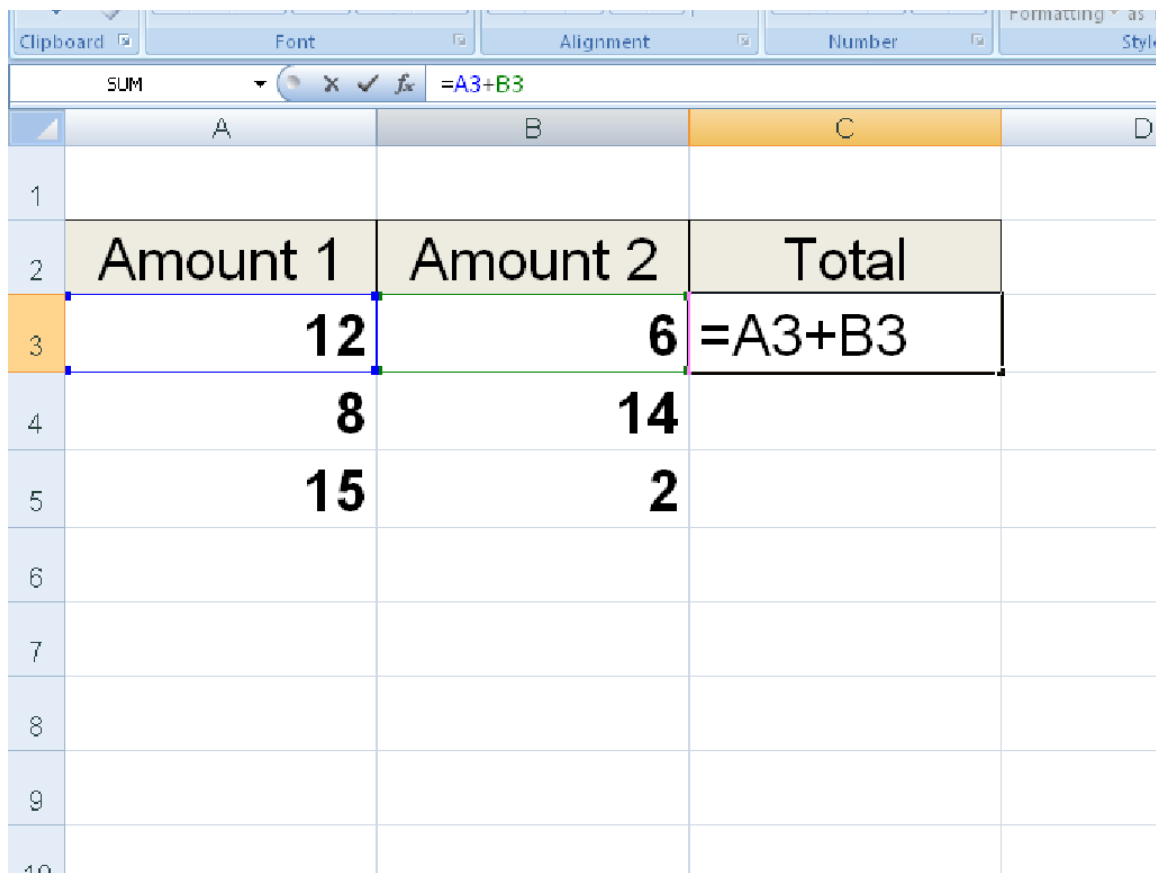
## Basic Formulas -- Review

---

Order of Operations for Excel Formulas:

<u>P</u> arentheses	<u>P</u> lease
<u>E</u> xponents	<u>E</u> xcuse
<u>M</u> ultiplication & <u>D</u> ivision	<u>M</u> y <u>D</u> ear
<u>A</u> ddition & <u>S</u> ubtraction	<u>A</u> unt <u>S</u> ally

Every Formula or Function starts with an “=” sign:



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D
1				
2	Amount 1	Amount 2	Total	
3	12	6	=A3+B3	
4	8	14		
5	15	2		
6				
7				
8				
9				
10				

The formula bar at the top shows the formula being entered in cell C3: `=A3+B3`.

**Relative referencing** – Excel will automatically shift the column letter and/or the row number to as the formula is copied.



## Absolute Referencing -- Review

---

Sometimes relative referencing will shift the cells that you don't want shifted.

<b>Tax Multiplier</b>	8.25%	
<b>Price</b>	<b>Shipping &amp; Handling</b>	<b>Total</b>
\$12.00	\$2.00	
\$15.00	\$3.00	
\$18.00	\$4.00	
\$25.00	\$5.00	

**Absolute Referencing** – Override relative referencing and “lock” the column and or row by putting the “\$” in front of each part of the reference you would like to lock:

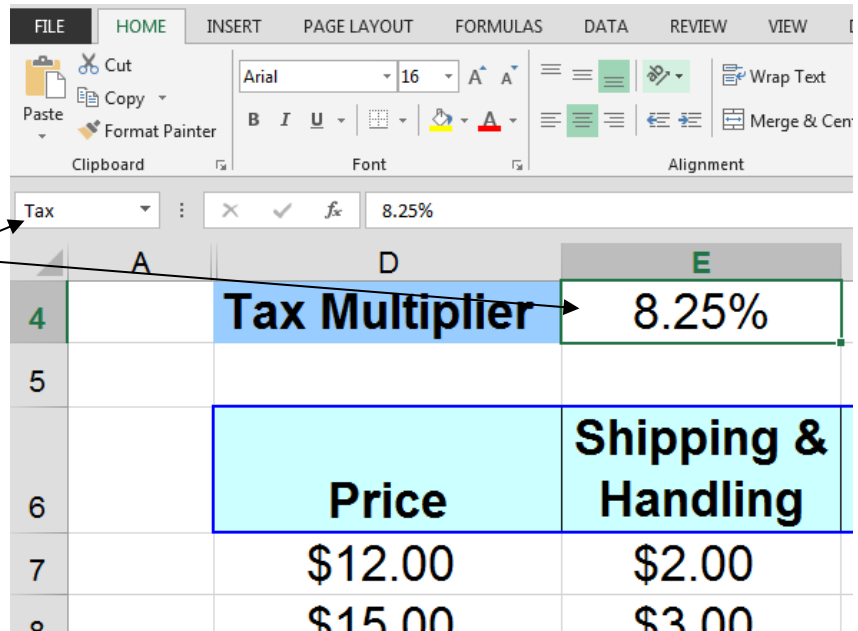
\$E\$4 – locks both ; E\$4 locks the row; \$E4 locks the column

**F4** will toggle you through the 4 options (None, Column, Row, Column+Row)

## Range Names

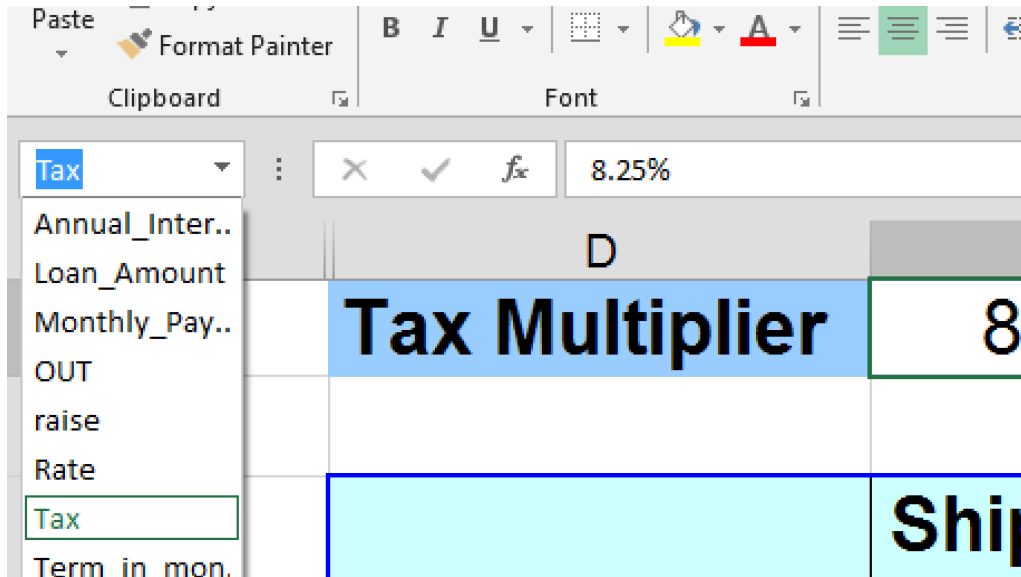
Use Range Names to simplify formulas.

E4 has been named "Tax" by selecting the cell, then clicking in the Name Box, typing "Tax" and pressing enter.



	A	D	E
4		Tax Multiplier	8.25%
5			
6		Price	Shipping & Handling
7		\$12.00	\$2.00
8		\$15.00	\$3.00

Also – range names come in handy for navigation.



	D	E
4	Tax Multiplier	8
5		Shi

To go to a cell that has a range name, click on the Name Box drop down arrow, select the range name and Excel will take you there.

# Formula Auditing

Formula Auditing makes analyzing and correcting formulas visual and much easier.

D	E	F	G
<b>Tax Multiplier</b>	8.25%		
<b>Price</b>	<b>Shipping &amp; Handling</b>	<b>Total</b>	
\$12.00	\$2.00	\$14.99	
\$15.00	\$3.00	\$19.24	
\$18.00	\$4.00	\$23.49	
\$25.00	\$5.00	\$32.06	

**Trace Precedents** – Draws lines back from the cell to all of the cells that are involved in the calculation of that cell amount.

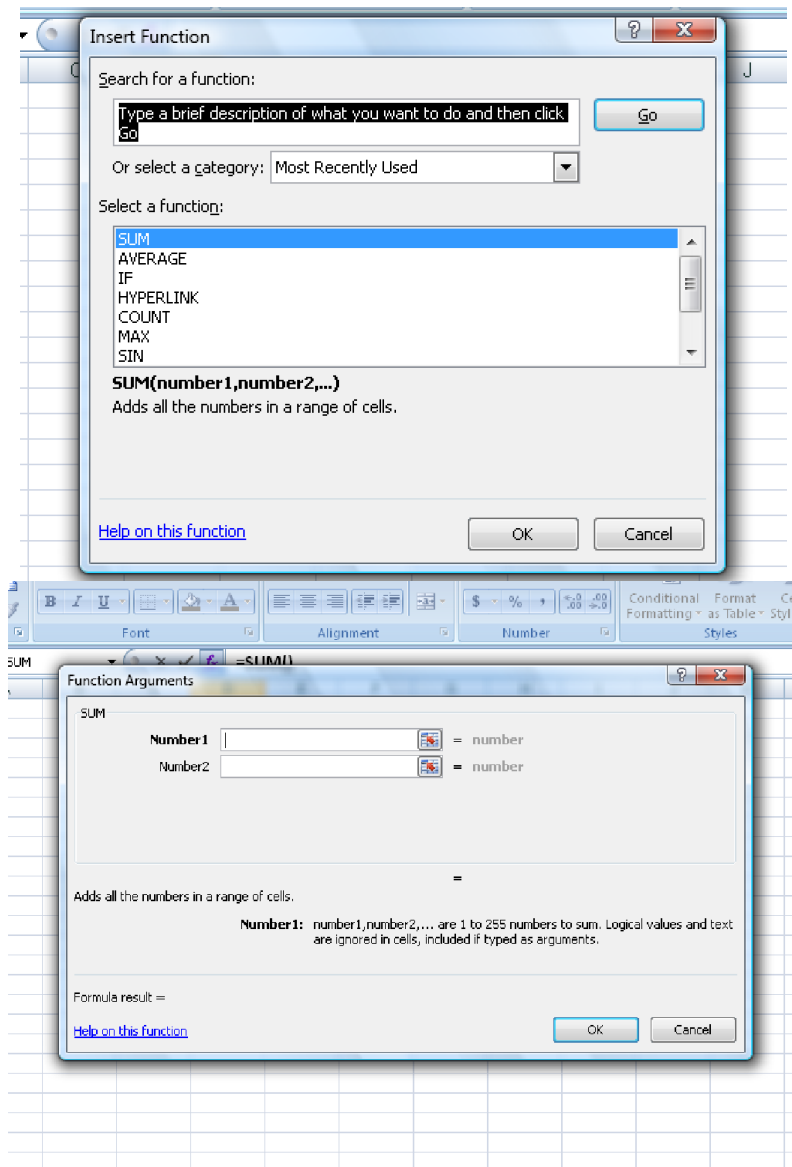
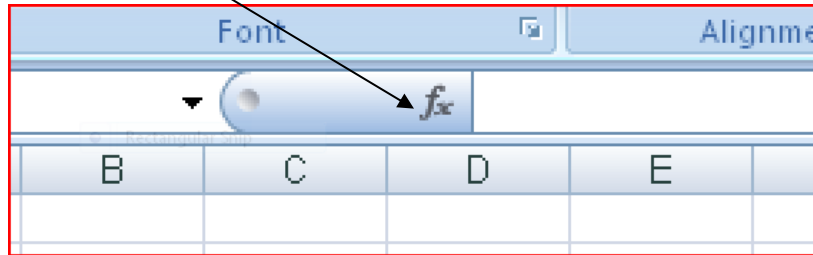
**Trace Dependents** – Draws lines from the cell to the cells that include the highlighted cell in their respective formulas.

**Remove Arrows** – Erases any Precedent or Dependent arrows

## Functions – Insert Function

Functions are special forms of formulas – shortcuts – for performing certain mathematical operations.

Excel's “Doorway” to all of the 350 functions is the **Fx** button next to the Formula Bar.



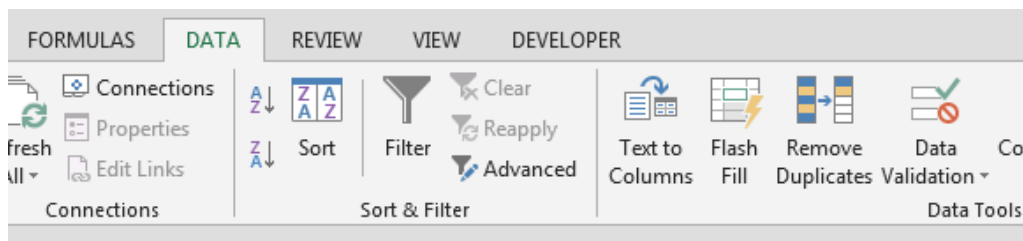
# Functions - Text

Finding, using and manipulating chunks of text is a powerful feature of Excel.

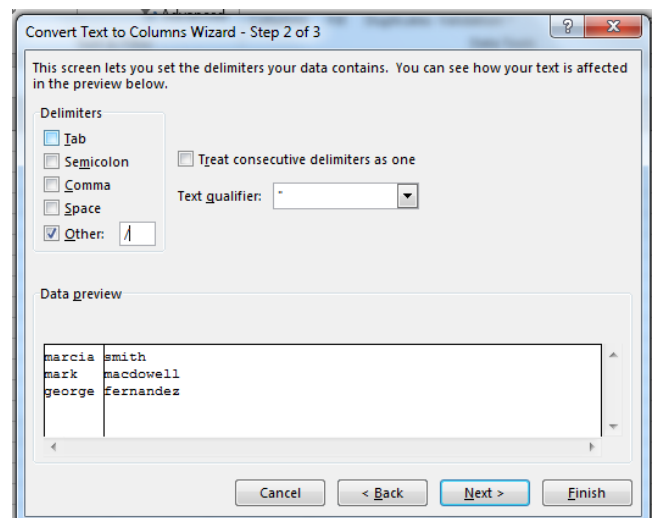
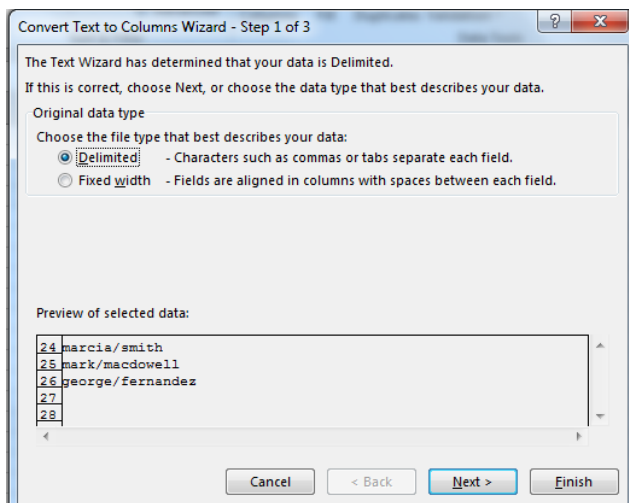
A3			
A	B	C	D
		First Name	Last Name
		tyrone	anderson
		james	bruce
		stuart	klein
		brad	turner
		catherine	forest
		mechell	clese
		elizabeth	ridenhauer
		william	martin
		kate	jones
		ellen	spinnaker
		will	mullen
		jim	kirney
		ty	simmons
		michelle	campbell
		elise	wilson

=proper  
=upper  
=lower

Sometimes you need to break data up into separate columns:

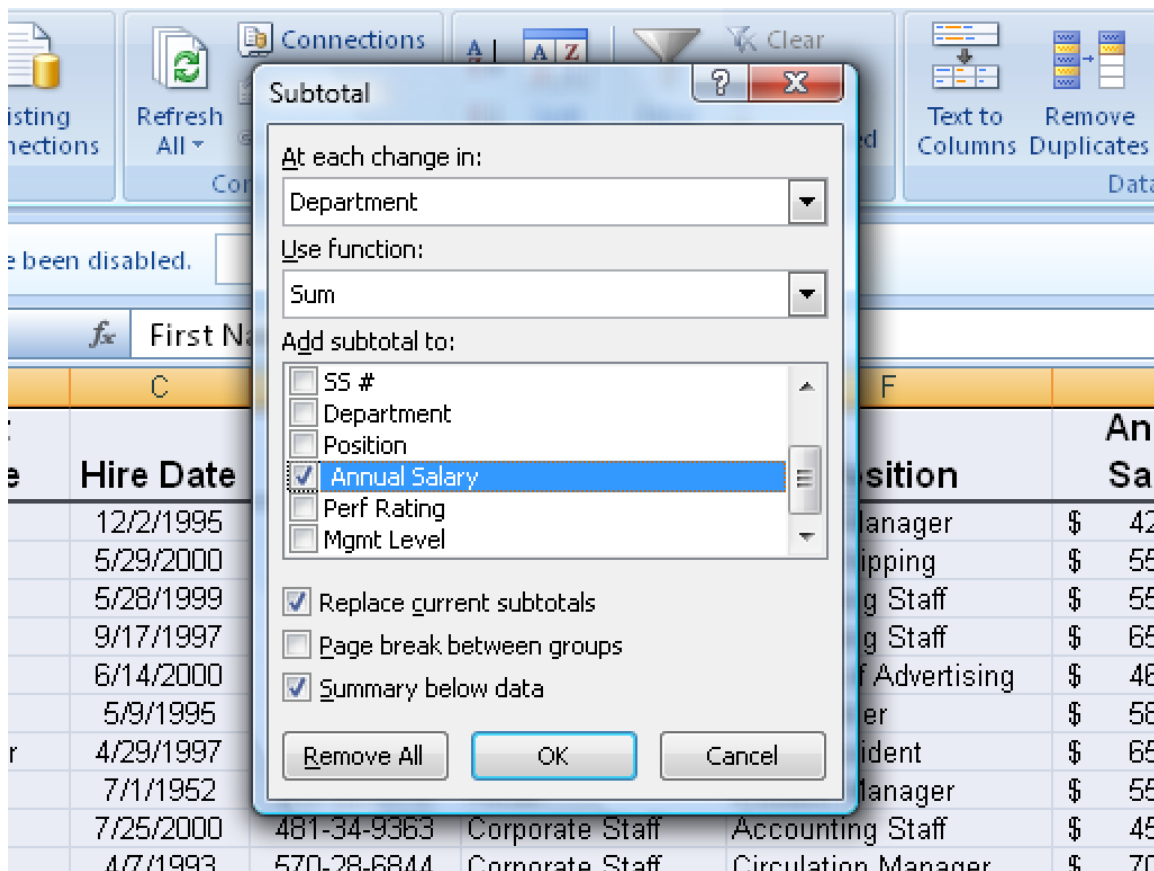
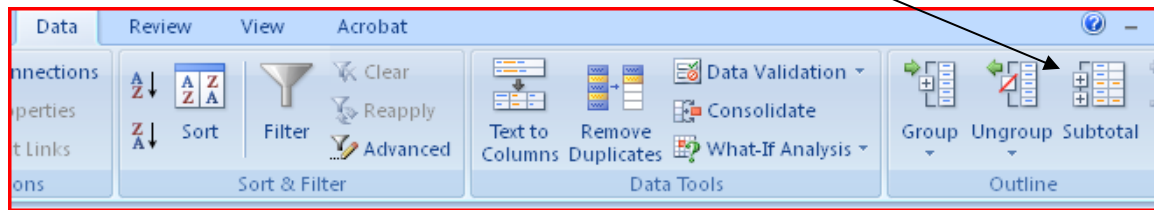


C	D	E	F	G	H
marcia/smith					
mark/macdowell					
george/fernandez					



## Data - Subtotals

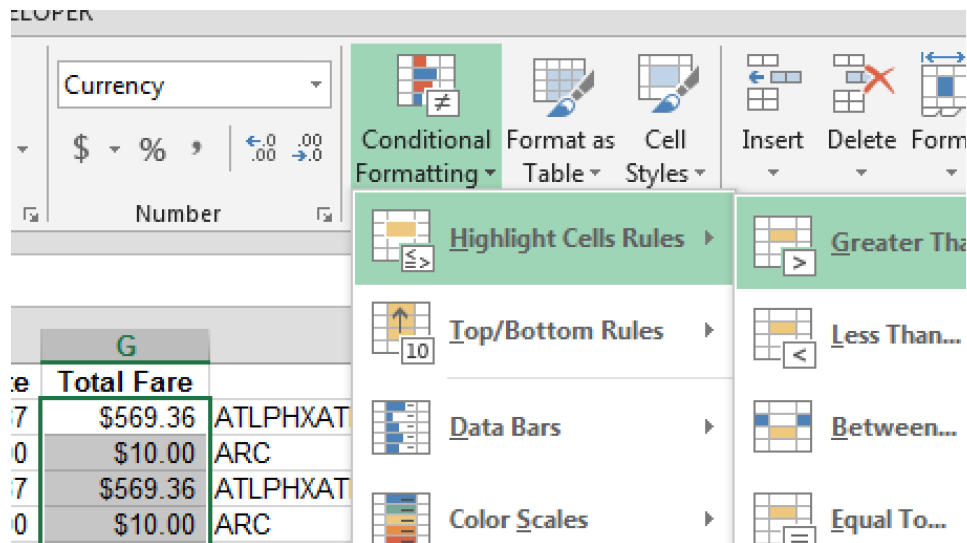
Excel will automatically subtotal areas you specify.



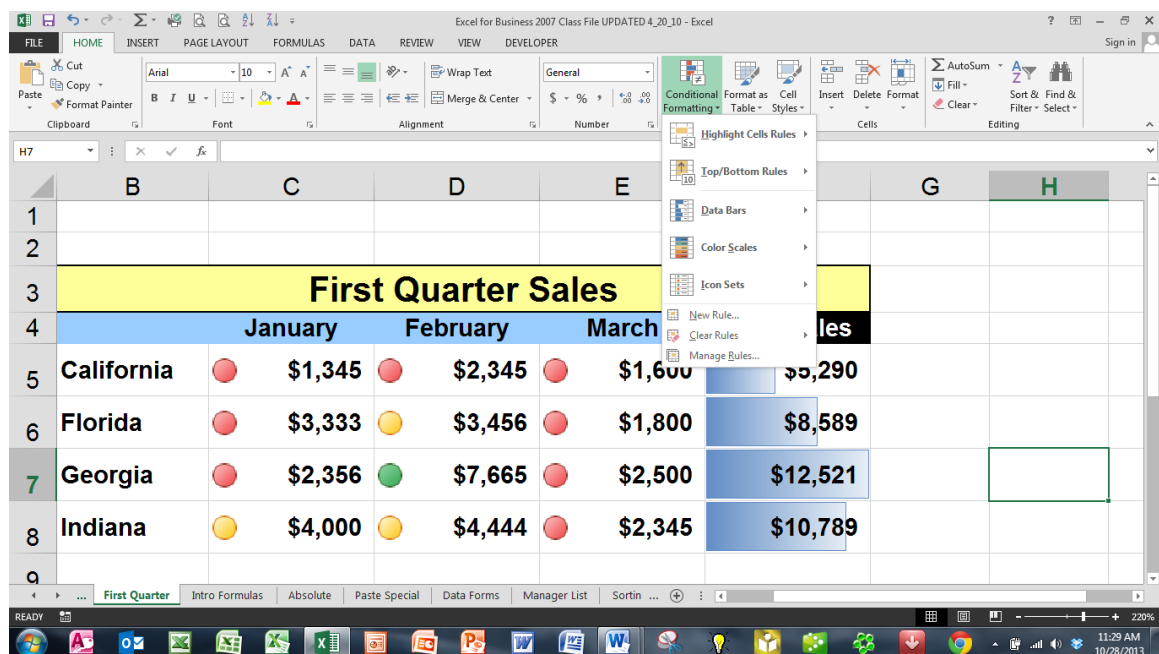
# Conditional Formatting

Formatting certain cells based on conditions is a great way to have Excel automatically highlight areas of the Worksheet that need attention.

Select the cells to format. From the HOME Ribbon Tab, select Conditional Formatting.



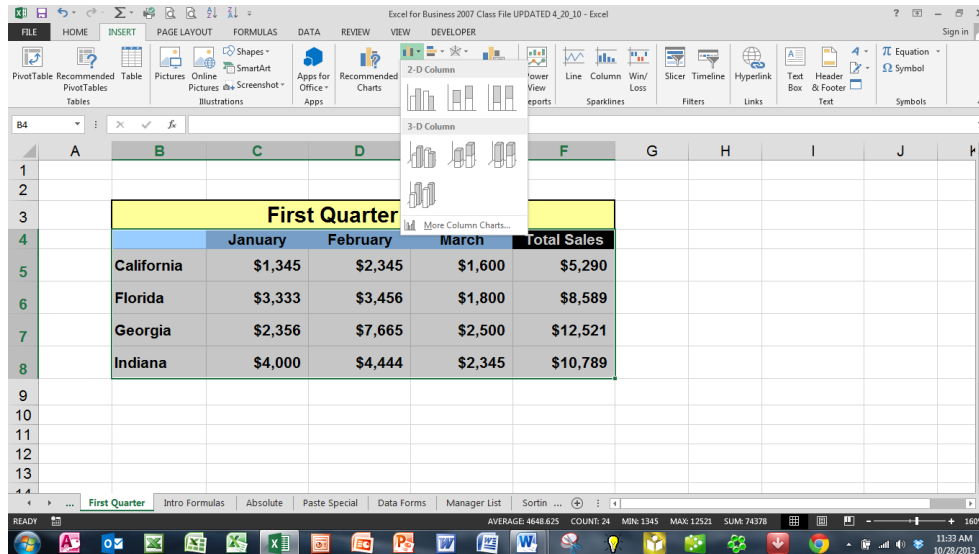
Conditional Formatting has many features, including Data Bars and Icon Sets to help you call attention to key information that needs action.



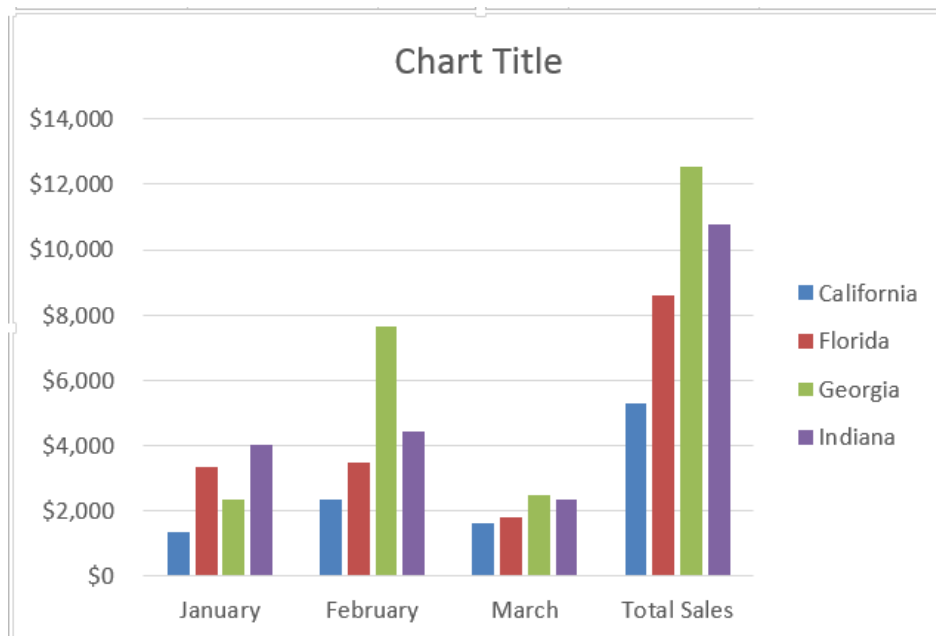
# Charts

Charts can be a great way to communicate key information – the RIGHT PICTURE is worth a thousand words!

To create a chart, highlight the information you want to chart, then select INSERT, pick a chart type, then a chart subtype and your chart will appear!



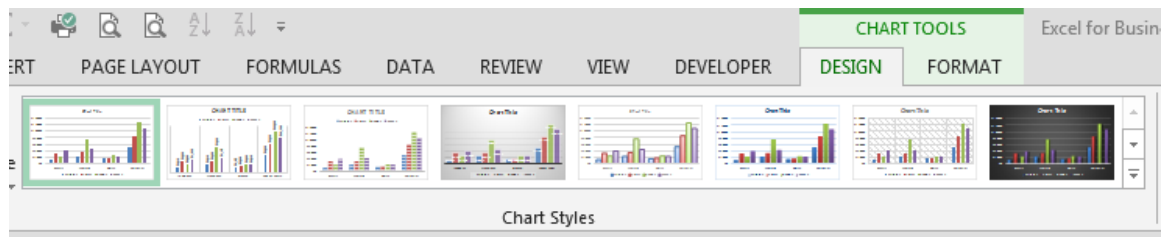
Reposition the chart by grabbing the edge and moving it to your desired location.



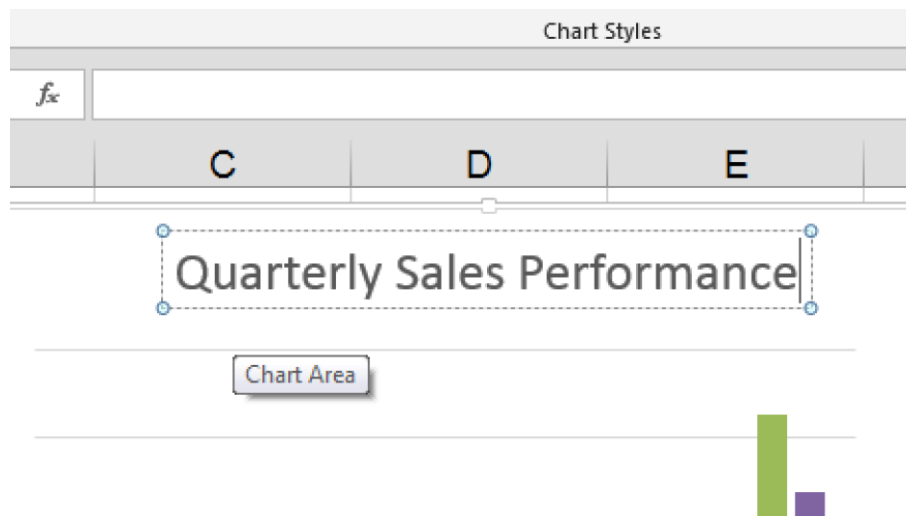


# Charts

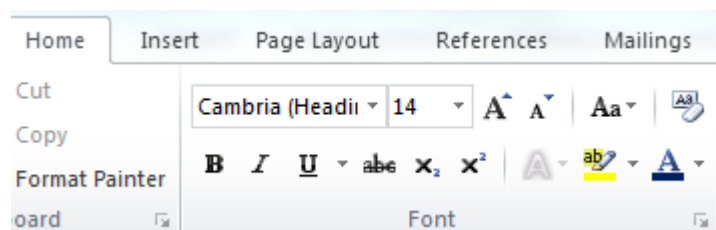
Once you have your chart, you can quickly make it presentation worthy by selecting a chart style:



Next, give the chart a title:



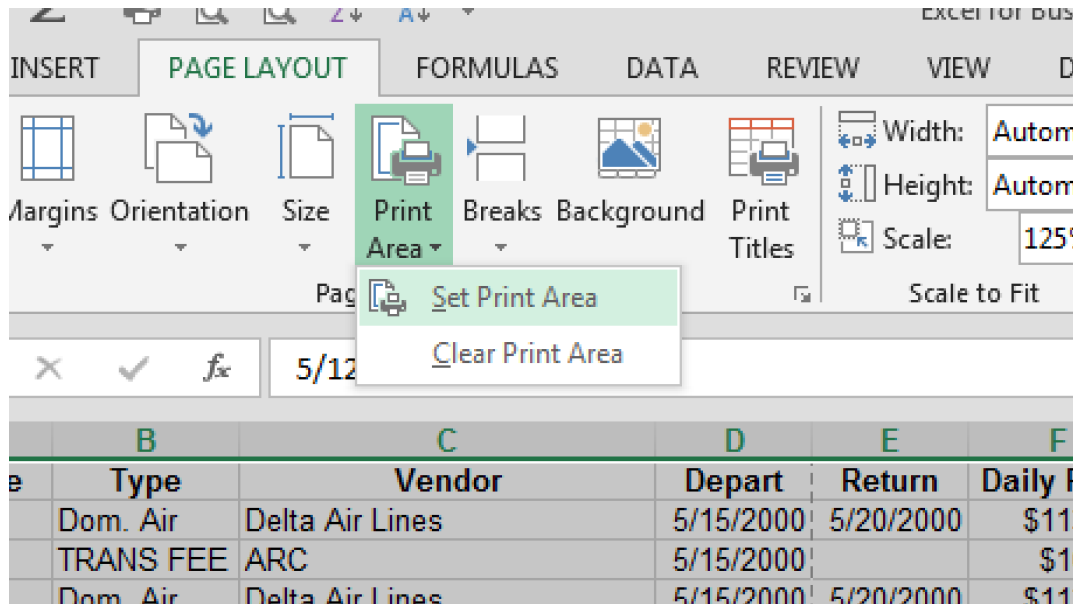
Finally, click on the title, vertical axis, horizontal axis and legend and increase/decrease the font size of each of these components.



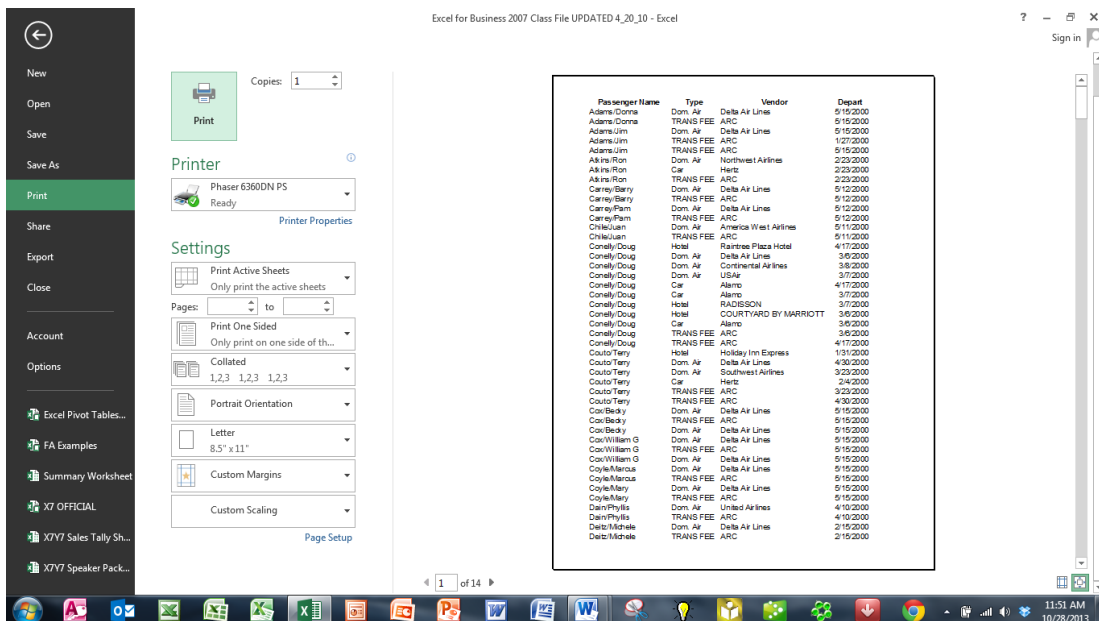
# Printing

Are you tired of struggling with getting something to print just right? Have you ever been personally responsible for slaughtering a forest – just by hitting print?

Start by selecting the Print Area. Use click and drag or CTRL + A to select the area that you'd like to print, then choose Set Print Area from the Page Layout Tab:



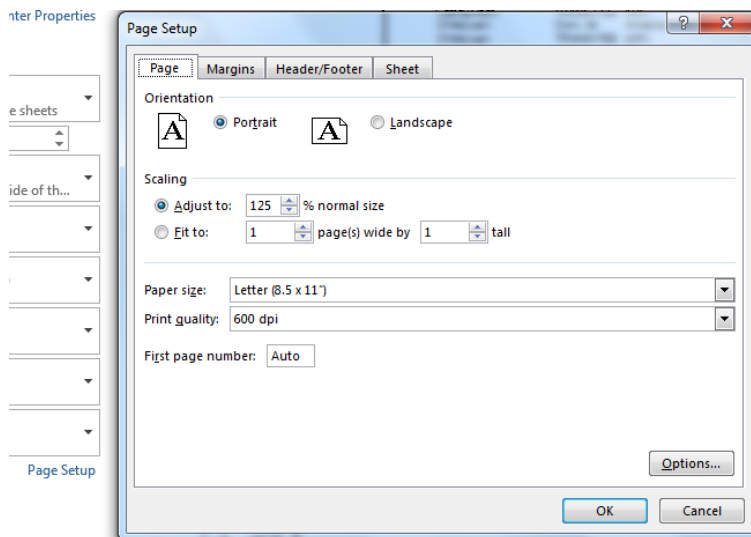
Next, select the Print Preview Icon from your QAT



# Printing – Page Setup

Once you have set the Print Area and have a look at what you are dealing with you can work through the steps of Page Setup. You have many options for doing this, but I like to use the Page Setup Dialogue Box.

Control Page Orientation and Scaling from the Page tab:



You have the options of working with Margins on the Margins Tab, but I prefer to “Show Margins”, then drag them where I want them. Find the Show Margins button in the lower right corner of the Print Preview Screen.

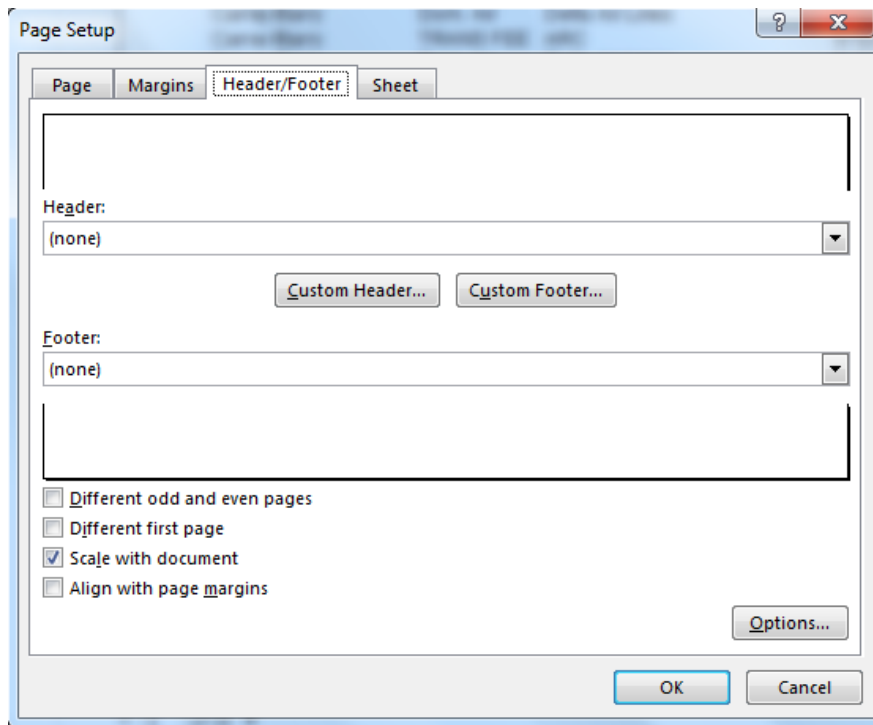


Passenger Name	Type	Vendor	Depart	Return	Daily Rate
Adams/Donna	Dom. Air	Delta Air Lines	5/15/2000	5/20/2000	\$113.87
Adams/Donna	TRANS FEE	ARC	5/15/2000		\$10.00
Adams/Jim	Dom. Air	Delta Air Lines	5/15/2000	5/20/2000	\$113.87
Adams/Jim	TRANS FEE	ARC	1/27/2000		\$10.00
Adams/Jim	TRANS FEE	ARC	5/15/2000		\$10.00
Atkins/Ron	Dom. Air	Northwest Airlines	2/23/2000	2/24/2000	\$522.00
Atkins/Ron	Car	Hertz	2/23/2000	2/24/2000	\$82.00
Atkins/Ron	TRANS FEE	ARC	2/23/2000		\$10.00
Carrey/Barry	Dom. Air	Delta Air Lines	5/12/2000	5/19/2000	\$78.85
Carrey/Barry	TRANS FEE	ARC	5/12/2000		\$10.00
Carrey/Pam	Dom. Air	Delta Air Lines	5/12/2000	5/19/2000	\$78.85
Carrey/Pam	TRANS FEE	ARC	5/12/2000		\$10.00
Chile/Juan	Dom. Air	America West Airlines	5/11/2000	5/18/2000	\$53.21
Chile/Juan	TRANS FEE	ARC	5/11/2000		\$10.00
Conelly/Doug	Hotel	Raintree Plaza Hotel	4/17/2000	4/20/2000	\$152.00
Conelly/Doug	Dom. Air	Delta Air Lines	3/6/2000	3/6/2000	\$253.00
Conelly/Doug	Dom. Air	Continental Airlines	3/8/2000	3/8/2000	\$166.50
Conelly/Doug	Dom. Air	USAir	3/7/2000	3/7/2000	\$148.50
Conelly/Doug	Car	Alamo	4/17/2000	4/20/2000	\$48.39
Conelly/Doug	Car	Alamo	3/7/2000	3/8/2000	\$88.00
Conelly/Doug	Hotel	RADISSON	3/7/2000	3/8/2000	\$79.00
Conelly/Doug	Hotel	COURTYARD BY MARRIOTT	3/6/2000	3/7/2000	\$75.00
Conelly/Doug	Car	Alamo	3/6/2000	3/7/2000	\$51.00
Conelly/Doug	TRANS FEE	ARC	3/6/2000		\$10.00
Conelly/Doug	TRANS FEE	ARC	4/17/2000		\$10.00
Couto/Terry	Hotel	Holiday Inn Express	1/31/2000	2/14/2000	\$109.00
Couto/Terry	Dom. Air	Delta Air Lines	4/30/2000	5/2/2000	\$282.00
Couto/Terry	Dom. Air	Southwest Airlines	3/23/2000		\$194.00
Couto/Terry	Car	Hertz	2/4/2000	2/7/2000	\$38.39
Couto/Terry	TRANS FEE	ARC	3/23/2000		\$10.00
Couto/Terry	TRANS FEE	ARC	4/30/2000		\$10.00
Cox/Becky	Dom. Air	Delta Air Lines	5/15/2000	5/19/2000	\$105.92
Cox/Becky	TRANS FEE	ARC	5/15/2000		\$10.00

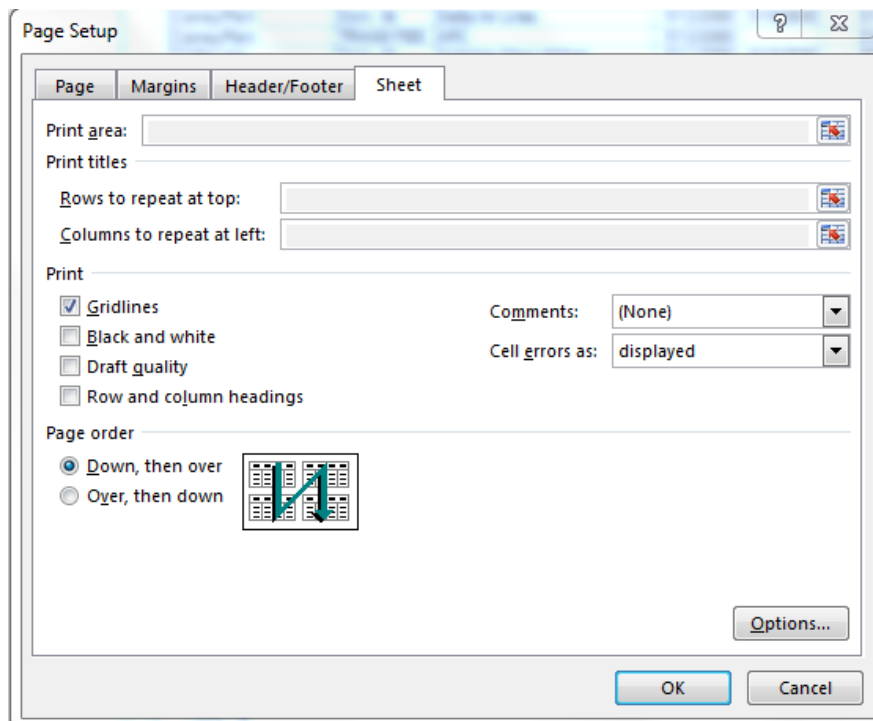
## Printing – Page Setup

---

Put a title on each page and key information on the bottom of each page with the Header/Footer Page Setup Tab:



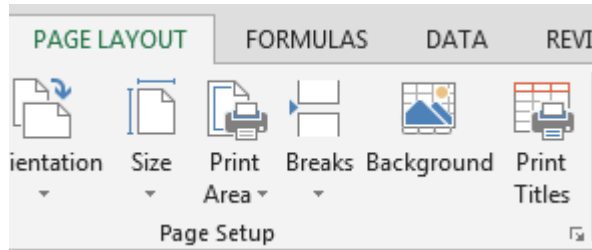
The Sheet Tab will help you with Grid Lines and other options to make your printout more readable:



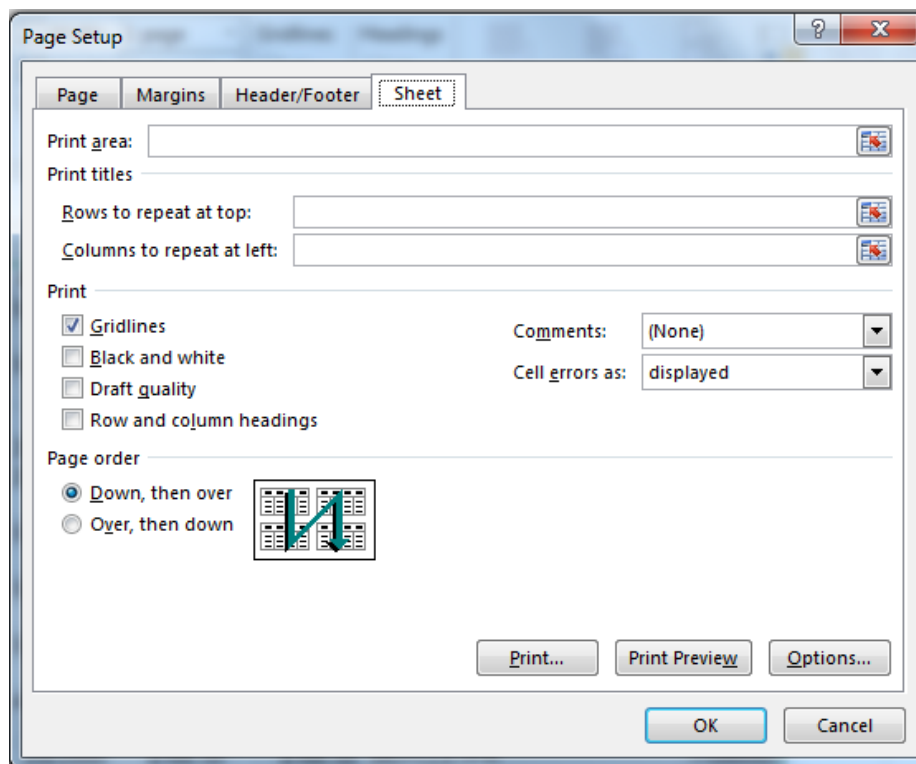
## Printing – Page Setup

---

To repeat a header row at the top of every page, you must select “Rows to Repeat at the Top from PAGE LAYOUT → PRINT TITLES:



Click in the Rows to repeat at top box, then select rows in the header area of the main worksheet to repeat at the top of each page. Columns to repeat at left can also be selected.



## Notes

---

## Your Action Plan

---

If you are going to retain any of these new skills you've learned here today, you need to do it in a SMART way:

Specific

Measureable

Achievable

Realistic

Time bound

Write down 2 or 3 things you've learned today that you would like to practice and apply:

- 1.
- 2.
- 3.

Write down a time during the day when you can take 5 or 10 minutes to practice these skills:

Finally, write down the date that is 30 days from today \_\_\_\_\_  
Put this date in your calendar as a reminder.

Word it: ***Reflect on my Excel Workshop Goals.***

When that reminder pops up, write down ONLY THE THINGS THAT ACTUALLY STUCK AND THAT YOU ARE USING from the workshop. Pat yourself on the back. Set another 30 day goal.

Congratulations! This is how learning really happens.

# Soul Canyon Training & Development Programs

---

Located in beautiful Grants Pass, Oregon but serving clients throughout North America, Soul Canyon offers over 50 program titles that can be customized to fit any group or budget.

## **Our most popular programs:**

Adapting & Connecting For Greater Success  
Colorful Stress Management  
Colorful Communications  
Colorful Conflict Resolution  
Dealing with Difficult People  
Creative Problem Solving Skills  
What's Your Mission? – What's Your Vision?  
Setting and Achieving Meaningful Goals  
Leadership Essentials  
Using The Law of Attraction  
Manifest Your Dreams  
Competency Based Interviewing  
Microsoft Excel – Basic to Advanced  
Microsoft PowerPoint – Basic to Advanced  
Financially Speaking – Keys to Unlocking the Language of Business  
Custom Workshops



We can also help you put together proactive Personal, Team and Organizational Development Plans so you can make the most of your training investment.

Please give us a call and we'll get together and explore how we can help you.

Rob & Mary Hambleton  
Soul Canyon Training & Development  
168 Oakmont Drive  
Grants Pass, Oregon 97526  
(541) 218-7601



## Meet Rob Hambleton

---

Rob Hambleton graduated from the University of Utah with his MBA in 1984. From 1984 to 2001 Rob worked for Ford Motor, Eastman Kodak and Dell Computer in the areas of manufacturing, product design, logistics and sales & marketing primarily in the capacity of Finance Director and later in the role of Project Manager.

In 2001, Rob left Dell to start his own training, coaching and consulting business – ***Soul Canyon Training & Development, LLC*** -- in Austin, Texas. In 2002, Rob moved his business to Oregon to be closer to family and work on a project to start an organic farmers' cooperative in the Applegate Valley – a project that became Siskiyou Sustainable Cooperative, which is still in operation today.

In 2003, Rob took on the role of Project Manager for the Williams Education Coalition – a rural community development project as well as functioning as the KAIROS Business Manager from 2004 to 2006.

In addition to Soul Canyon Training Programs, Rob currently teaches over 50 Fred Pryor/Career Track seminar titles including Excel, PowerPoint, Finance, Communication, Leadership and Personal Development topics.

Rob is the author of ***“Financially Speaking – Keys to Unlocking the Language of Business”*** available on Amazon or as a DVD Training Program. Rob and Mary Hambleton are co-creators of ***“Colorful Connections – Adaptive Skills for Interpersonal Synergy”*** and ***“Managing Stress and Mastering Change”*** which are also available as DVD Training Programs.

Ask Rob or visit [www.soulcanyon.com](http://www.soulcanyon.com) for more information.

