

Excel Essentials

Level 3

2007 / 2010 / 2013 / 2016



Soul Canyon Training & Development
www.soulcanyon.com / 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

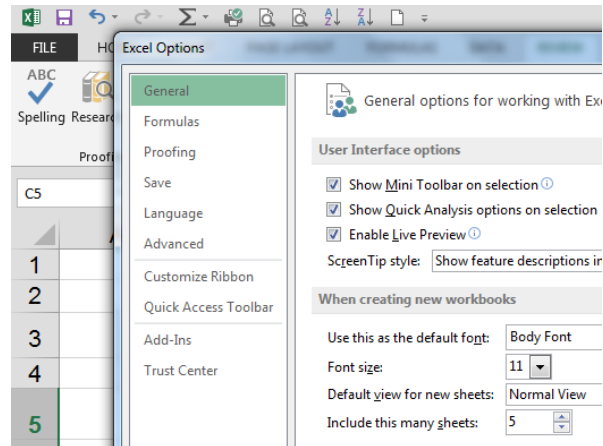
<i>Keyboard Shortcut</i>	<i>What it does</i>
CTRL + Scroll	Zoom
CTRL + Enter	Keep cursor in current cell
CTRL + X	Cut
CTRL + C	Copy
CTRL + V	Paste
CTRL + Z	Undo
CTRL + Y	Redo
CTRL + ALT + V	Paste Special
CTRL + N	Open New File
CTRL + S	Save & Replace
F12	Save As
ALT + =	Autosum
CTRL + B	Bold
CTRL + U	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

Advanced Techniques

When building a workbook from scratch, certain techniques can help make the process go more smoothly.

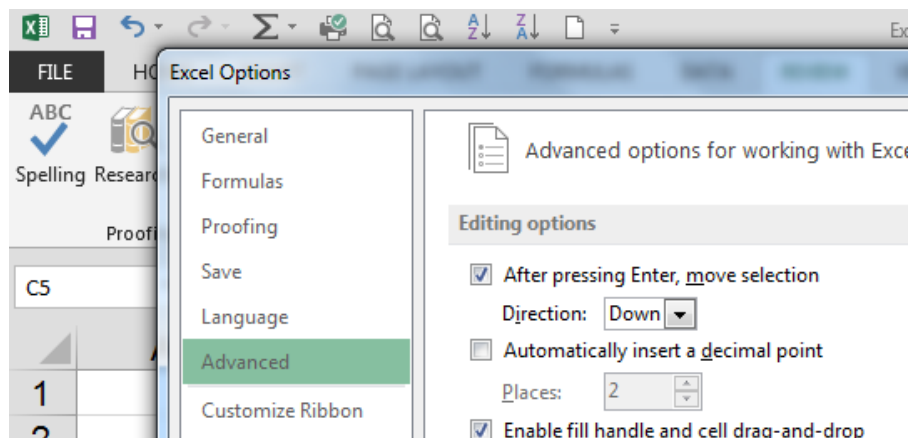
You can control how many sheets you get with a new workbook:

FILE → OPTIONS → GENERAL



You can control the direction the cursor moves when you press enter:

FILE → OPTIONS → ADVANCED

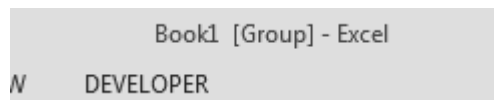
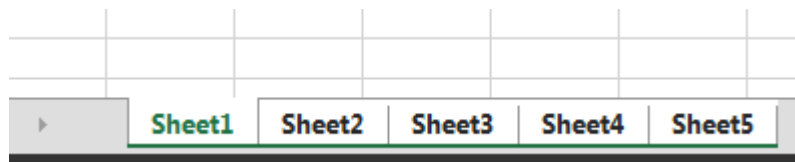


Advanced Techniques – Worksheet Grouping

Sometimes it's helpful to be able to simultaneously put something on several worksheets at once. You can do this by “grouping” the worksheets.

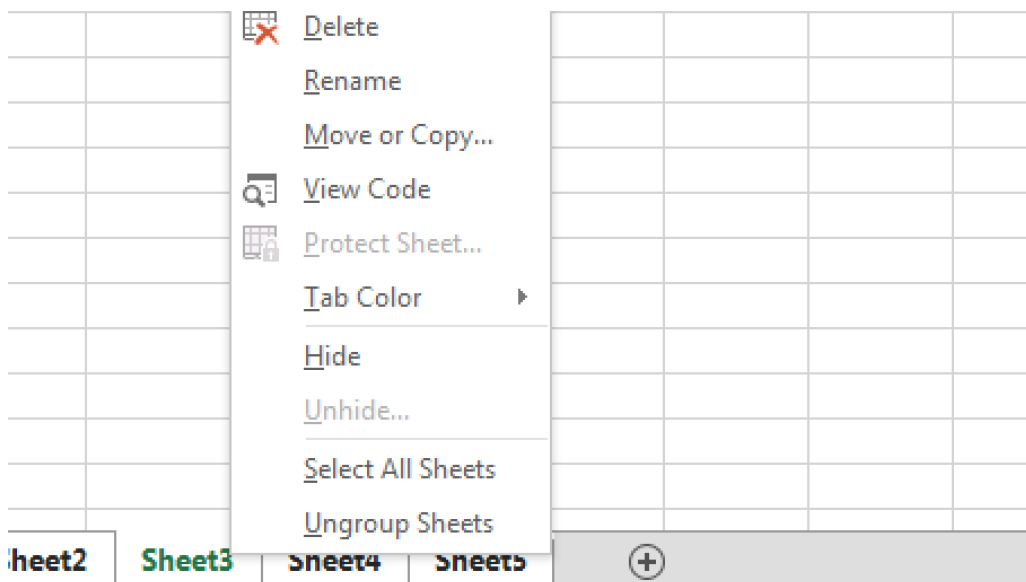
To Group:

- 1) Click on the first sheet
- 2) Hold SHIFT or CTRL
- 3) Click on the last sheet (SHIFT) or other sheets (CTRL)



To Ungroup:

- 1) Right click on a grouped worksheet
- 2) Select Ungroup.



Advanced Techniques – Dates & Times

Dates and Times in Excel are simply formatted numbers. Sometimes it's handy to know the quick ways of entering a date quickly:

	A	B	C
1		Static	Dynamic
2	Current Date		
3			
4	Current Time		

The “number” behind an excel date is called a **DATE VALUE**. The number is part of a sequence that started with January 1, 1900 being the number 1. Each successive day is + 1.

The “number” behind an excel time is called a **TIME VALUE**. Since each 24 period is valued as “1”. Each day starts at midnight with a value of 0 and proceeds through the 24 hour day towards a value of “1” just before midnight on the next day.

Because of this design in excel, dates and times can be used in calculations.

Formulas & Functions – Linking Within Excel

Linking cells, worksheets and workbooks is one way to input new data once and automatically update other cells, formulas or functions.

Cell links in the same worksheet show just the **Cell Location**

First Quarter	
January	
California	\$1,345
Florida	\$3,333
Georgia	\$2,356
Indiana	\$4,000

Note: California =C5
Cell

Links to other worksheets in the same workbook show the **Sheet + Cell**

Note:	
2nd Quarter	
California	\$1,345

=Second Quarter!C5
Worksheet Cell

Links to other workbooks show the **Workbook + Sheet + Cell Location**

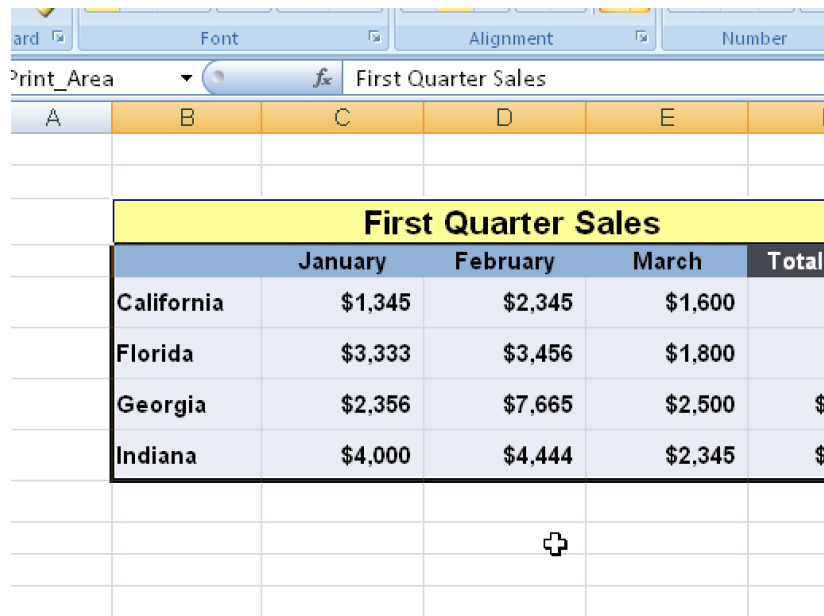
California	\$1,345
------------	---------

=C5
='Second Quarter!C5
='[2009 Marketing Contact List.xls]2009 Contact List!\$J\$15
Workbook Worksheet Cell

Formulas & Functions – Linking To PowerPoint

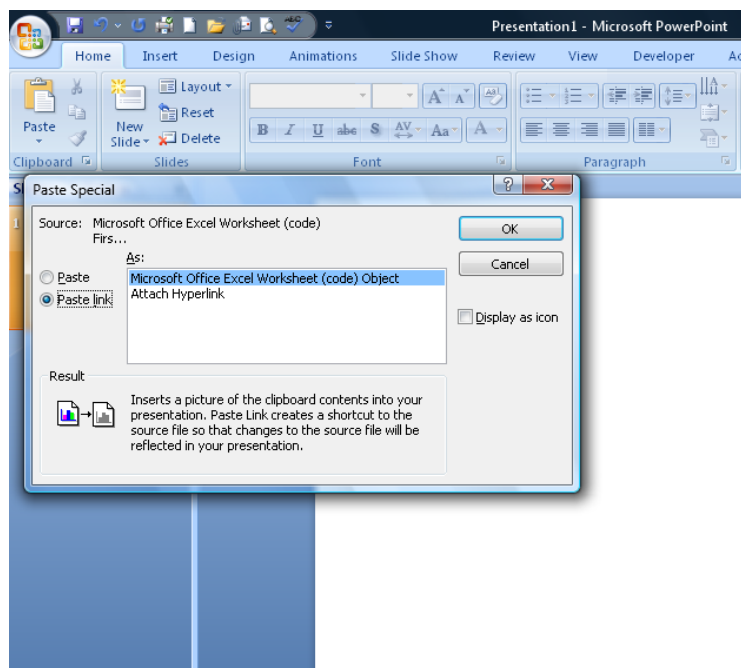
Linking to other applications like PowerPoint is a snap easy.

Highlight the area or chart you want from excel, then
COPY (CTRL +C)



First Quarter Sales				
	January	February	March	Total
California	\$1,345	\$2,345	\$1,600	
Florida	\$3,333	\$3,456	\$1,800	
Georgia	\$2,356	\$7,665	\$2,500	\$
Indiana	\$4,000	\$4,444	\$2,345	\$

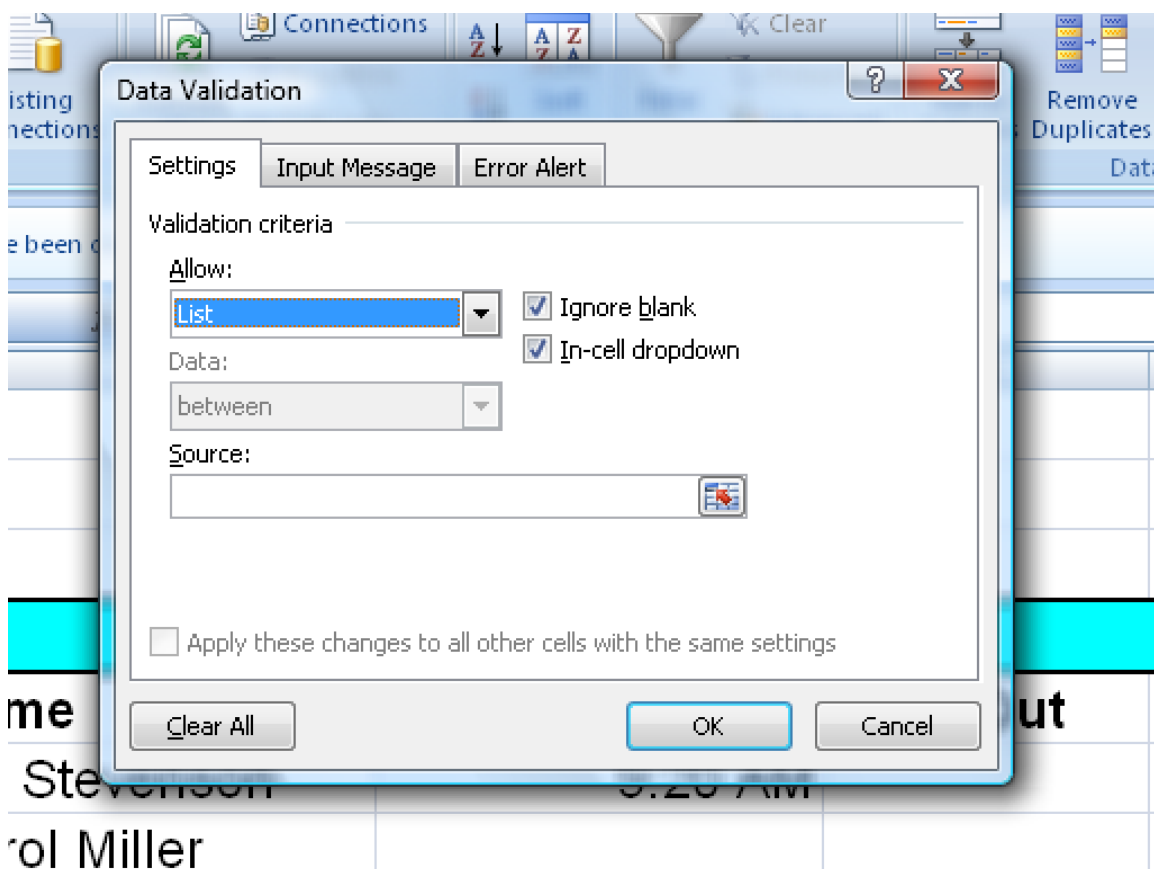
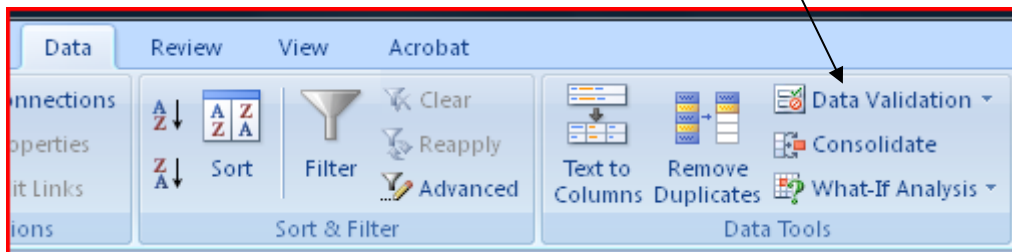
Open up a blank PowerPoint slide and
Edit → Paste Special → Link



Data Validation

Creating your own “pull down” menus for cell entry will make sure that only certain, valid entries make their way in there.

This is a perfect tool to use for data that you will sort, filter or subtotal.



Once Data Validation is in place, use the Data Validation Pulldown to **Circle Invalid Data**

Functions – IF and DATES

As we learned earlier, dates can be used in calculations. This company has a credit term of Net 30 Days, meaning that invoices are due 30 days from the invoice date.

See if you can come up with the formulas for E4 – Invoice Due Date, F4 – Invoice Age and G4 – Number of Days Overdue.

	A	B	C	D	E	F	G
1	Advertising Accounts Receivable						
2	Current Date:						
3	Invoice Number	Invoice Date	Customer Name	Amount	Invoice Due Date	Invoice Age	No. of Days Overdue
4	92334	10/2/2013	Village Reader	334.00			
5	92356	11/6/2013	WHAT	152.99			
6	92362	9/23/2013	Advertising Concepts	468.33			
7	92379	10/20/2013	NYNEX	334.00			
8	92393	9/25/2013	Advertising Concepts	50.00			
9	92407	11/3/2013	Young Upstart	1500.00			
10	92421	8/21/2013	Mass Appeal, Inc.	55.00			

Functions – IF, AND and NESTING

Greater Than	>
Less Than	<
Greater Than or Equal To	>=
Less Than or Equal To	<=
Not Equal To	<>
Is Blank	""

Time Sheet			
Name	Time In	Time Out	Hours Worked
Bill Stevenson	6:45 AM		#####
Carol Miller	6:46 AM	4:35 PM	9:49
Randy Howard		5:00 PM	17:00
Amy Moore	7:00 AM	5:53 PM	10:53
Steve Richards	6:47 AM		#####
Jim Stewart		4:45 PM	16:45
Julie Reynolds	7:15 AM	4:30 PM	9:15

AND Function is a series of logical tests and will return either TRUE or FALSE. AND will return TRUE if ALL of the tests are TRUE.

IF is a function that will perform a logical test then deliver back one result of the logical test is TRUE and another result if the logical test is FALSE.

NESTING is putting one function inside another function.

=IF(AND(.....

Functions -- VLOOKUP

Sometimes you need to find a data record in a large database, then use fields that are part of that record in another worksheet or workbook. VLOOKUP is an excellent way to do this:

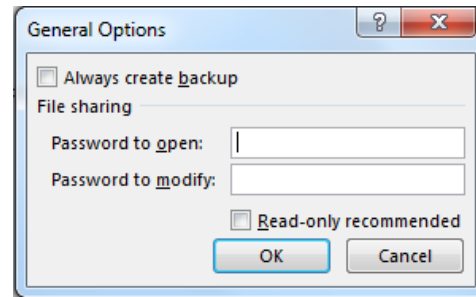
NPV : ✕ ✓ f _x =vlookup(C5,bchart,2)						
	A	B	C	D	E	F
2	Commission Rate	10%				
3						
4	Salesperson	Sales	Quota	Commission	Bonus	Total
5	Jim Bruce	\$6,598.00	\$3,000.00	=vlookup(C5,bchart,2)		
6	Mark Sanders	\$6,059.00	\$4,000.00			
7	Carmen Foster	\$4,895.00	\$5,000.00			
8						
9						
10	Bonus Table					
11	Quota Level	Bonus				
12	\$ 2,000.00	\$ 25.00				
13	\$ 3,000.00	\$ 50.00				
14	\$ 4,000.00	\$ 75.00				
15	\$ 5,000.00	\$ 100.00				
16	\$ 6,000.00	\$ 125.00				

Protecting & Securing Files, Sheets & Cells

Microsoft Excel has several ways to secure data – with or without passwords:

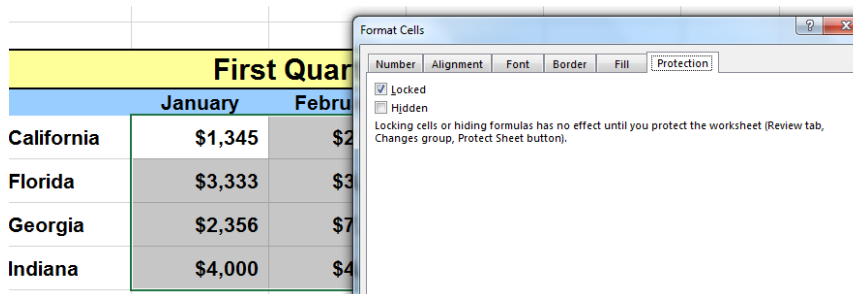
File Level Security:

File → Save As → Tools → General Options:

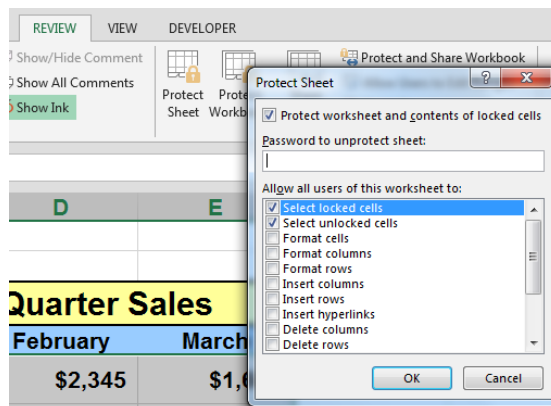


Cell/Sheet Level Security:

- 1) Highlight the “Input” cells (Those you want to remain accessible)
- 2) Format Cells → Protection → Uncheck the locked box



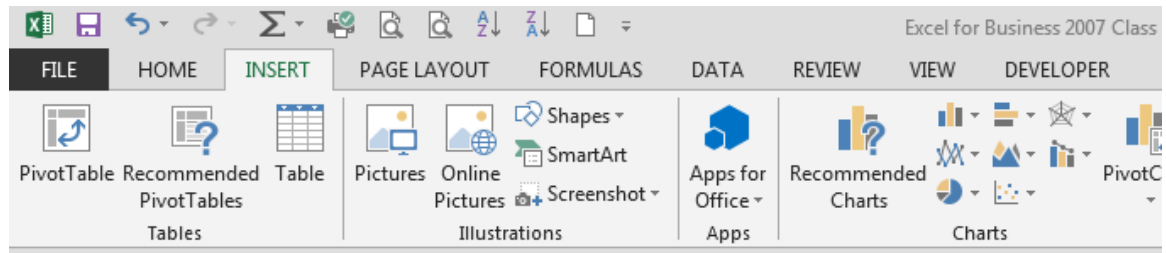
- 3) REVIEW Ribbon Tab → Protect Sheet



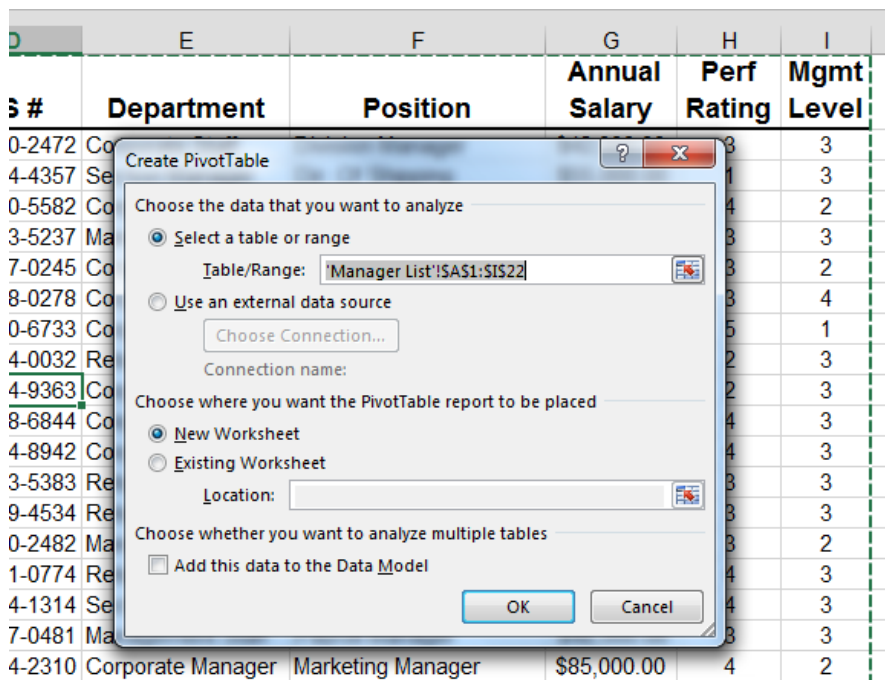
Data -- Pivot Tables

Pivot tables are Excel's ultimate data analysis tool. It's easy to set up a basic pivot table and get specific answers out of a large database.

Start by clicking in your database. From the INSERT RIBBON TAB select Pivot Table on the far left.



	A	B	C	D	E	F
1	First Name	Last Name	Hire Date	SS #	Department	Position
2	tyrone	anderson	12/2/1995	146-90-2472	Corporate Staff	Division Manager
3	james	bruce	5/29/2000	248-94-4357	Section Manager	Dir. Of Shipping
4	stuart	klein	5/28/1999	345-00-5582	Corporate Staff	Accounting Staff
5	brad	turner	9/17/1997	345-03-5237	Management Staff	Accounting Staff
6	catherine	forest	6/14/2000	368-37-0245	Corporate Manager	Director of Advertis
7	mechell	clese	5/9/1995	456-08-0278	Corporate Staff	Copy Writer

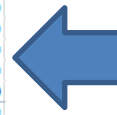


Make sure the scrolling marquee is around your entire base, select New Worksheet and then click OK.

Data -- Pivot Tables

You can now build your Pivot Table by dragging the field names into the “Pivot Table construction area” below. The Pivot Table will start to appear on the left.

Sum of Annual Salary	Column Labels	1	2	3	4	5	Grand Total
Row Labels							
Corporate Manager		42000	46000	85000	113000		286000
Director of Advertising			46000				46000
General Sales Manager		42000					42000
Marketing Manager				85000			85000
Office Manager					48000		48000
Vice President					65000		65000
Corporate Staff		45000	100000	178500			323500
Accounting Staff		45000		55000			100000
Circulation Manager				70000			70000
Copy Writer				58000			58000
Division Manager			42000	53500			95500
Management Staff		55000	155000				210000
Accounting Staff				107000			107000
Payroll Manager				48000			48000
Web Manager		55000					55000
Retail		55500	105000	48000			208500
Product Manager			55500	105000	48000		208500
Section Manager		55000			45000		100000
Dir. Of Shipping		55000					55000
Director of Training					45000		45000
Grand Total		55000	197500	406000	356500	113000	1128000



PivotTable Fields

Choose fields to add to report:

☐ Last Name
☐ Hire Date
☐ SS #
☒ Department
☒ Position
☒ Annual Salary
☒ Perf Rating
☐ Mgmt Level

MORE TABLES...

Drag fields between areas below:

FILTERS

COLUMNS

ROWS

VALUES

Department

Position

Perf Rating

Sum of Annu...

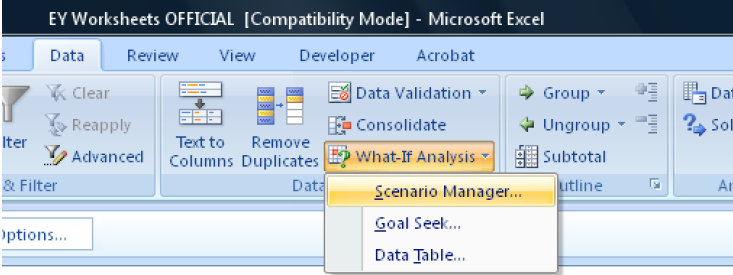
☐ Defer Layout Update

UPDATE

Once the Pivot Table is built, you can filter, sort and select other fields to get the exact information you are looking for.

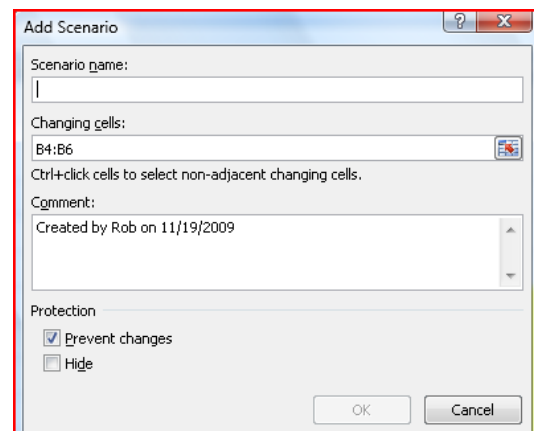
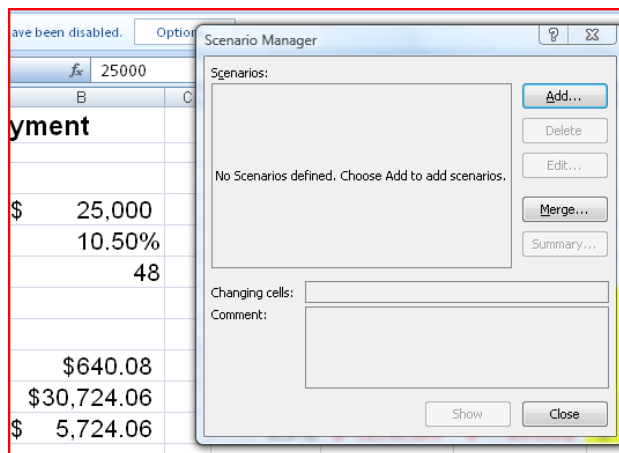
What If? – Scenario Manager

Scenario Manager is a great way to develop a summary for specific sets of variable value assumptions with the results of the assumptions arranged side by side.



EY Worksheets OFFICIAL [Compatibility Mode] - Microsoft Excel

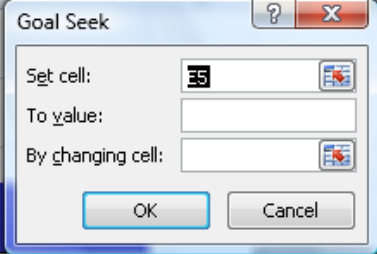
C	D	E	F	G
	\$ 640.08	24	36	48
	6.0%	\$ -1,108.02	\$ 760.55	\$ 587.13
	6.5%	\$ -1,113.66	\$ 766.23	\$ 592.87
	7.0%	\$ -1,119.31	\$ 771.93	\$ 598.66



What If? – Goal Seek

Goal Seek is a great What If tool for changing one variable at a time to hit a specific target.

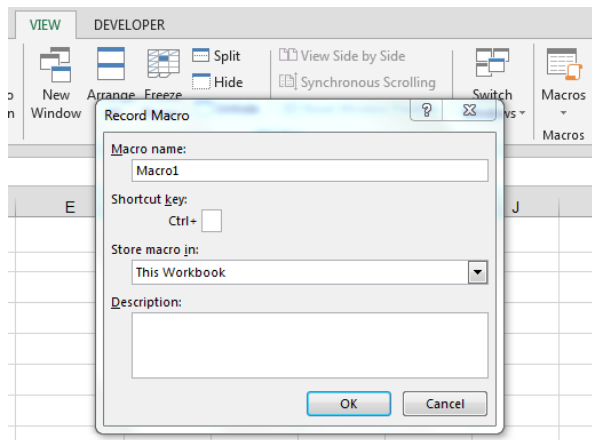
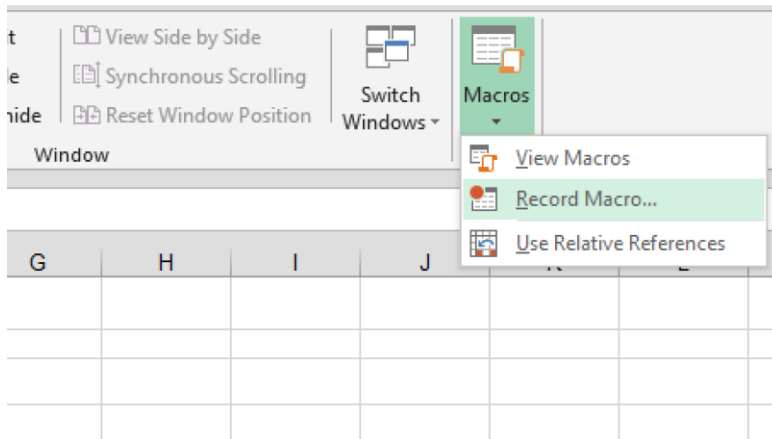
Retirement Planning			
Monthly Investment	\$350.00		
Interest Rate	6%		
Number of Years	15		
Future Value	\$102,295		

The image shows an Excel spreadsheet with a "Retirement Planning" table. A "Goal Seek" dialog box is open, showing the "Set cell:" field with the address \$E\$5, the "To value:" field empty, and the "By changing cell:" field empty. The dialog box has "OK" and "Cancel" buttons. The spreadsheet has columns B, C, D, and E. The table has rows for Monthly Investment, Interest Rate, Number of Years, and Future Value. The Future Value cell is highlighted in black with white text.

Macros

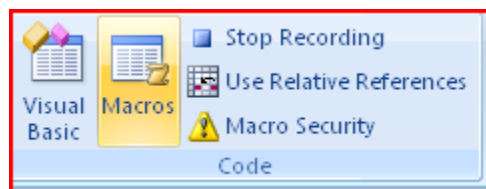
Macros are “mini” programs that can automate keystrokes, commands or functions that you do the same way every time. Writing a Macro is as easy as starting and stopping a Tape Recorder.

Once you are ready to record your keystrokes with the Macro Recorder, from the VIEW RIBBON TAB, select Macros → Record Macro



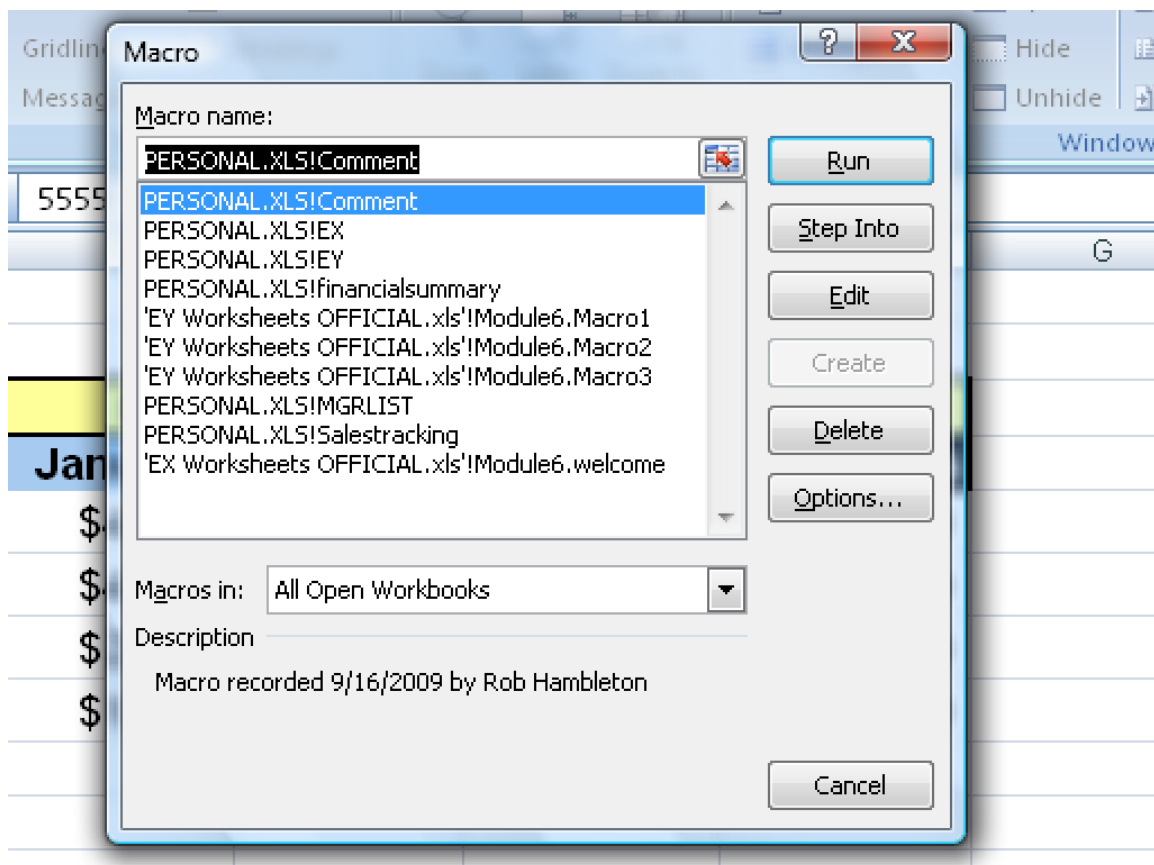
Give the Macro a name and tell Excel where you want to store it. Once you click OK in this dialogue box, you are recording.

When finished, press “Stop Recording”



Macros

To run, edit or delete a macro:



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 for more information.

