October 23, 2013

Making the Most of MS Excel
Agenda

• Increasing Your Navigation Speed
  • Hot Keys (Keyboard Shortcuts)
• Using Pivot Tables in MS Excel to Analyze Large Data Sets
• Cleaning up Data in MS Excel
  • Formatting Basics
  • Using Conditional Formatting
  • Helpful Functions:
    • =Trim(), =Concatenate(), =Left(), =Right()
    • =VLOOKUP(), =HLOOKUP()
• Demonstration of Functions
Increasing Your Navigation Speed

• Break Out of Your Comfort Zone
  • Explore Unfamiliar Commands
  • Make the Most of Your Keyboard
  • Avoid Multi-Step Processes Where Possible

• Leverage HotKeys For Frequently Used Functions
  • Navigate Windows With Ease (Alt+Tab)
  • Perform Routine Tasks Faster (Copy, Cut, Paste, etc)
  • Become More Efficient at What You Already Do

• Utilize the Right Mouse Button
  • Quickly Access Valuable Functions
HotKeys. What Are Those?

A HotKey is a finite set of one or more keys that invoke a software operation when triggered by a user. HotKeys are essentially shortcuts for:

1. Commonly Used Functions
2. Sheet Navigation
3. Formatting
The Right Mouse Button

- Quickly Access Valuable Functions
  - Formatting Toolbar
  - Cut, Copy, Paste, Paste Special, etc.
  - Insert, Delete
  - Insert Comment / Review
Understanding Pivot Tables

A **Pivot Table** is an analysis tool used to summarize a flat data set into layered information using the process of rotation (i.e. pivoting).

Pivot Tables can be helpful for leveraging transactional data to create on-the-go ad hoc reporting (i.e. summarizing a sales journal spreadsheet by region by month).

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<tr>
<th>Row Labels</th>
<th>Central NY</th>
<th>Northeastern NY</th>
<th>Southern Tier NY</th>
<th>Western NY</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
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<td>$6,700.00</td>
<td>$12,800.00</td>
<td>$1,200.00</td>
<td>$5,000.00</td>
<td>$25,700.00</td>
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<tr>
<td>February</td>
<td>$5,500.00</td>
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<td>$5,650.00</td>
<td>$4,550.00</td>
<td>$24,100.00</td>
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<tr>
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<tr>
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<tr>
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<tr>
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<td>$21,500.00</td>
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<tr>
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<tr>
<td>Grand Total</td>
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<td>$37,100.00</td>
<td>$89,800.00</td>
<td>$255,380.00</td>
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</tbody>
</table>
Cleaning Up Data in MS Excel

- Formatting Basics
  - Paragraph Toolbar
  - Font Toolbar
  - Format Painter
  - Page Break Preview
  - Freeze Panes

- Filtering
  - Sort Data (Largest to Smallest, Smallest to Largest, By Color)
  - Applying Filters for Rules (if Greater Than, Equal to, etc)

- Conditional Formatting
  - Highlight Duplicate Values
  - Identify Values Per Criteria (Greater Than / Less Than, etc)
  - Color Scales (applies grades of color to cells based on values)
  - Identify top/bottom 10%

- Text to Columns
Helpful Functions

• =Trim( )
  • Removes all spaces from a text string except for single spaces between words.

• =Concatenate( )
  • Joins several text strings into one text string

• =Left( ), =Right( )
  • Returns a defined number of characters from the left/right side of a cell.

• =VLOOKUP( )
  • Find me a value from a column.

• =HLOOKUP( )
  • Find me a value from a row.
Break Out of Your Comfort Zone

• Explore Unfamiliar Commands
  • Most Users Only Use a Small Handful of Available Commands
  • Whether Expert or Novice, There is Always Something to Learn

• Make the Most of Your Keyboard
  • Use HotKeys to Save Time
  • Improve Ability to Navigate Using Arrow Keys
  • Navigate Faster By Holding Down the Ctrl Key
  • Highlight Data While Navigating By Holding Down the Shift Key

• Avoid Multi-Step Processes Where Possible
  • Most Functions Can Be Executed Multiple Ways (Right Click, Hot Key, Navigation Ribbon, etc)
  • Do You Find Yourself Using a Function Often and Repetitively?
  • Is a HotKey Available? Have You Made a Habit of Using it?