EXCEL

From Beginner To Expert - A Beginners Guide To Learning The Fundamentals Of Excel, Plus Tricks And Shortcuts

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Excel:

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Introduction

Microsoft Excel is a very powerful program that will allow you the end user to keep track of data in a series of rows and columns. The data in rows and columns can then be manipulated in a variety of different ways. You can sort the information to pull specific data, you can perform specific math functions to get a specific result as well as display this data through graphs, charts and other methods.

When starting with Excel many people may become overwhelmed or discouraged that the program is too complicated to use. This is the reason why I wrote this book. When it comes to Excel there are only a few minor things that you need to know as well as some shortcuts to master in order to get the most out of the program. Once you learn these you will be able to start controlling your data like a pro.

In this book, we are going to explore the basics of Excel, what it can do and why you will want to use it. From there we will give you a slew of helpful shortcuts that you can use to better harness the power of this amazing program.

Chapter 1 – The Basics of Excel

When it comes to Excel it is unlike other programs on the market. For the majority of people reading this book you may be familiar with Microsoft Word which is a word processing program. In Microsoft Word, you are able to write letters, books, and other documents. Another thing that you can do with Word is use tables to easily format data.

With Excel, however, we are working with a totally different animal. With Excel, we are focusing on numbers in in Word we are focusing on words. When it comes to the most common use of Excel we are looking at keeping company data in order. Many people use Excel to create time sheets, balance sheets, lists of employees activities and much more.

Although Excel is used mostly for business purposes it can also be used for personal use. We can keep track of scores of our kid's basketball or other sports. We can use Excel to manage the household finances or just keep track of prices of items at the grocery store.

No matter what you want to or need to use Excel for the program works the same and only cares about manipulating numbers.

Basics of Excel

The main information that you need to know about Excel is that it works on a simple layout of rows and columns. When a row and a column come together they form a cell. This cell is where you as the end user will enter in your data.

Each row is assigned a number. This number starts at 1 and goes to a few hundred thousand. Each column starts with a letter. The first column starts with the letter A and moves all the way down to ZZZ. Where a row and a column intersect forms a cell and it is a combination of the row and column. So where column A intersects with row 1 the cell is called A1.

This information is important since it will allow you to easily navigate and find information in your spreadsheet. This information will also be useful when it comes time to do calculations with formulas.

Formulas are the heart of Excel. Since we are working with data in Excel we need a way to manipulate this data easily. The way that this is performed is by using formulas.

How formulas work is by using the cell information and coordinates. The first thing that you will want to do is locate the cell that you want the results to be shown in. When adding up a column of numbers of example you will want to have the data be located at the bottom of all the cells.

To create a formula you need to start it with an = equals sign. The equal sign tells Excel that the cell is a special cell and that it will be focusing on a formula and not the plain text found inside.

When we look at the basics of a formula we can do many different things. The most common one is to add numbers together. To do this we don't use the word add but rather we use the word product.

Let's say we wanted to add two numbers together. The first number that we want to add is found in cell A1 and the second number would be in cell A2. The result or where we want to have the answer will be found in A3. So how you would do this is go to cell A3 and start the formula.

=sum(a1:a2)

When you start to create this formula you may see a set of blue lines form around the individual cells. This is normal and is an indicator of the specific cells that you are using in your formula.

=sun signifies that you are adding a series of numbers together. The (tells excel that it is looking for the parameters that it will be looking at. The : is the and or through the qualifier. This tells Excel to look at this cell as well as all of the other cells until you reach the last one which is your final number. The) symbol tells Excel that this ends the equation.

Once your equation is completed the resulting answer will appear in the cell A3. From here your spreadsheet is dynamic. What this means is that you can easily just type in numbers into the fields A1 and A2 and whatever the resulting numbers are will be in A3. This allows you to easily manipulate data and reuses the same sheet for whenever you want to add numbers together.

When it comes to using Excel there is so much more that you can do besides adding two numbers or multiple numbers together. Some of the other formulas that you can use are as followed.

- Calculate running total - =SUM(A1:A1)
- Count cells between dates - =COUNTIFS(range,">="&date1,range,"<="&date2)
- Count cells between two numbers - =COUNTIFS(range,">=X",range,"<=Y")
- Count cells equal to - =COUNTIF(range,value)
- Count cells equal to case sensitive - =SUMPRODUCT((--EXACT(value,range,D3)))

Now these are just some examples of formulas that you can use in Excel. What I have given you are probably more advanced than you will be comfortable with just starting out but they do give you a clear indication of the power behind Excel.

When you look at the formulas provided however you will see that they all follow the same pattern. You will want to keep this pattern in the back of your mind when dealing with formulas just in case you get stuck or something just isn't working right.

Navigating Excel

When it comes to navigating Excel it will feel just like navigating other Microsoft applications. When starting out you will be presented with a ribbon bar.

The ribbon bar at the top of the screen will allow you to move to different functions in the application.

The Home Tab

The Home tab will be the first tab that you are presented with. This is a standard tab that will allow you to create charts, insert pictures and do some basic functionality in your document.

The Formula and Data Tabs

The Formulas and Data tabs are probably the two that you will be working in the most with Excel. It is in these tabs you will be doing most of the heavy lifting with Excel. In the formulas tab, you will be presented with all of the base formulas that we discussed earlier. They will be organized into specific subcategories will allow you to easily find the right formula for the right job.

In the data tab you will be able to do things such as remove duplicate records, validate specific conditions in your data, group data together and much more. When you get into the foundation of Excel you will find that you have a lot of power to manipulate and manage your data.

Creating good Excel Habits

When it comes to Excel you need to have good habits when it comes to working with your data. The first thing that you need to do is structure your data's layout in such a way that it is functional. One of the most common things that people do when using Excel is to leave the cell A1 blank.

This allows you the user to easily start your column data at B1 and your row data and A2. With this extra cell-free, it offers a buffer zone between your rows and columns and makes working with your data a little easier.

The next thing that you will want to do is name your sheets. With each file of Excel, you are working with unlimited sheets. These sheets are at the bottom of the page and start with sheet 1 through sheet 3. You can easily add an unlimited number of sheets to an Excel workbook but may want to limit this number to only the needed ones.

To create a new sheet simply click on the icon on the right of the last sheet and a new sheet will be created. To change the name of the sheet simply double click on the tab and when it is selected type in the desired name. Once the

name is completed hit enter and the name will be changed.

To move a sheet simply hold down with the left mouse button and drag it to the left or right. When it is in the position you want, just release the mouse button and the sheet will be positioned.

Inserting Rows and Columns

When working with Excel you will be working with rows and columns. There will be times that you will need to insert data in a location that already has data. To insert a row or a column you want to position yourself on the specific row or column and using the right mouse button choose insert and then choose row or column depending on what you are trying to achieve. Once this is done your new row or column will appear.

To delete a row or column you can do the same thing but select this option from the menu or simply hit the Delete key on your keyboard. You may get a menu asking if you want to confirm your action. Hit yes if this is desired or cancel if not.

Resizing rows and columns

When it comes to the size of cells or rows you may want to resize them for a varied number of reasons. There are many different ways that you can do this. One way is to use the mouse. What you can do is position your mouse cursor between the rows that you want to increase the size on. Then holding down the mouse button drag up and down to increase or decrease the size of the row.

To change the size of the column you can do the same thing as with the rows. The only difference is that you will between the two columns that you want to resize.

Merging Cells

When working with Excel there will be times when you want to keep the size of the columns and rows around the area you are working in their original size. To do this you will want to merge cells together. To merge cells together you will want to select the desired cells with your mouse. The cells will then

be highlighted.

From here you will want to be on the home tab under alignment. There you will see an option that says Merge and center. If you click on the drop-down menu you will get several options. Choose the desired option and then your cells will be merged.

Creating Charts

When working with data, numbers aren't always helpful. On of the great features of Excel is the ability to create charts and graphs. These charts and graphs can give you the ability to show your numbers in a visual way which makes understating very easy.

When you create your charts you have a wide number to choose from. You have pie charts, bar charts, and even line charts. Each chart can easily be manipulated with different colors, legends and more.

To create your chart simply select the desired data that you wish to represented and then click on the chart you want to create from the Insert menu. This will take your data and create your chart. Once your chart is created you can easily drag it to the screen and position it anywhere you want. You can also right mouse click on the chart and save it as an image.

As you can see Excel gives you a lot of options and capabilities. With all of these options and capabilities, you may get confused as to all the steps involved in performing specific actions. This is why Excel has a slew of shortcuts that you can use to perform specific tasks. In the next chapter, we are going to go over a lot of the shortcuts that you can use to help make Excel more functional and faster to use.

Chapter 2 – Learning and Mastering Shortcuts

So far I have given you a basic overview of what Excel can do. In this chapter, we are going to look at shortcuts as well as some tips and tricks that you can use to get the most out of Excel.

When we look at shortcuts we are not looking at getting out of doing something, rather we are looking to make our lives easier. With the development of GUI or Graphical User Interfaces, it has turned into a case of finding a picture, moving the mouse and getting a result. However, there are cases where using the keyboard will get the job done faster.

What is a shortcut?

A shortcut is a combination of keystrokes that are performed to get a specific response. When using a shortcut the same actions that you would do with the mouse in several steps can usually be completed in one.

In Excel, as well as other Microsoft applications you will have a standard set of shortcuts that will perform many of the same actions. With this standardization, you can take what you learn here today in Excel and apply it to other Microsoft applications.

Shortcuts

- Page Up and Page Down – When working in Excel there will come a time when you will have a lot of data to work with. One of the most tedious things that you can do is scroll down and up through your pages. To better help you navigate you can use the Page Up and the Page Down buttons on your keyboard to jump to the different pages of your sheet.

- Alt + Page UP or Alt + Page Down – When we have a lot of columns in our spreadsheets we will want to be able to scroll to the left and right. To do this you will want to use the Alt + Page Up or Alt + Page Down.
- Tab / Shit Tab – These will allow you to navigate between cells on your

sheet. The tab will move you to the right while shift-Tab will move you to the left.

- CTRL + End – this combination of keys will move you to the last cell at the bottom of your workbook. This is great if you have been entering in data and don't remember where you left off.
- CTRL + F or CTRL + H – When working with data you will want to be able to find content quickly. The best way to do this is through the Find and Replace dialog. Typically you would do this under the Home tab in your ribbon bar.

  Depending on exactly what you are looking for will determine which shortcut keys you will use. If you want to find something first then you can use CTRL F. If you know what you want to replace then you can use CTRL-H.
- Shift + F4 – This will repeat the last find process that you just performed.
- CTRL + G – this will bring up the go to the menu. The go to the menu will allow you to jump to a specific area of your document.
- CTRL + Left Arrow – CTRL-Right Arrow – This will allow you to move to cells that have text in them. So, for instance, you have text in cell A1 and the next cell to have text in it will be G1. Instead of using the arrow keys to move to that space just be on that line and use the CTRL and the desired arrow key.
- Shift + Space – Use this shortcut to select the entire row of data
- CTRL + Space – Use this shortcut to select the entire column
- CTRL + Shift-Spacebar – this will select the entire workbook
- CTRL + Shift * - use this to select only the fields that have text in them in your given area.
- CTRL + Page Up or CTRL + Page Down – Use this combination of keys to jump between workbooks.
- CTRL + Shift + O – There will be times when you add comments to your cells. Use this command to jump to these cells.
- CTRL + . The control and the period key will allow you to move

around selected cells. To see this in action highlight a section of cells and watch where the selection jumps to.

- Enter + Shift-Enter – This combination of keys will allow you to move up or down in a column. Hitting Enter will move you down while Shift and Enter will move you up. Or you can do this with the arrow keys.
- CTR + Z – This combination of keys will allow you to undo the last action that you completed.
- CTRL + X – This shortcut is a standard one throughout all of Microsoft's applications. This will allow you to cut whatever data you have selected and move it to the clipboard.
- CTRL + V – This shortcut is a standard one throughout all of Microsoft's applications. This will allow you to take whatever information is found in the clipboard and paste it into Excel.
- CTRL + C – This shortcut is standard throughout all of Microsoft's applications. It will allow you to copy data that is found in the selected cells.
- CTRL + Alt + V – this will bring up the Paste Special dialog box if content is present in the clipboard. This is a standard function in all of Microsoft's applications.
- CTRL + ; - When you are in the cell you can use this shortcut to enter the current date.
- CTRL + Shift : - This shortcut will insert the current time into the cell.
- CTRL + T – This will create a table. This is useful if you want to format a series of cells at once. To use this select a grouping of the cell and then use the CTRL-T key.
- CTRL + D – This shortcut is the Fill down command. To use this you will want to have data in a single cell. This data can be a formula as well. Once you have this data in the cell select that cell and all the other desired cells to be filled. Once this is done use the shortcut to fill in the data.
- CTRL + R - Use this command to fill the content from the left to the right.

- CTRL + ‘ - the CTRL and the apostrophe will fill the cells formulas down.
- Ctrl+L - This shortcut will allow you to create a table. Tables are great since they can easily be formatted with different colors as well as made easier to find and manipulate data.
- Ctrl+Shift+[+] This command will bring up the insert row and column menu. From this menu, you will be able to insert a row or a column into your spreadsheet.
- Ctrl+Shift+[+ with row / column selected This shortcut will allow you to insert a row or a column into your spreadsheet. You will want to have selected the specific row or column location before using this command to place the new row or column in the specific location.
- Shift+F2 This shortcut will allow you to create or edit a cell comment. A cell comment will allow you to remember specific information about the contents of a particular cell.
- Shift+f10, then m – When you have comments in your cells and you no longer need them you will be able to use this shortcut to remove the comments.
- Alt+F1 - You will want to have a section of data selected before doing this task. Once your data is selected it will be placed into a chart.
- Ctrl+K – This shortcut will allow you to Insert a hyperlink into your spreadsheet. Hyperlinks are great if you are wanting to send someone to a specific web page or even to additional content within the existing document.
- Ctrl+Shift+$ - Excel is great with numbers and one of the most common numbers you will be using in Excel is money. You can use this shortcut to easily apply the Currency format with two decimal places.
- Ctrl+Shift+~ When working with numbers you will more than likely want to use numbers without any type of formatting. To do this use this shortcut to apply the General number format to the cells.
- Ctrl+Shift+% - When working with percentages you will want to use this shortcut to apply the Percentage format with no decimal

places.

- Ctrl+Shift+# - Dates and times are also very important to many of the spreadsheets that you will create. To apply the Date format with the day, month, and year to the cells you will want to use the following shortcut.
- Ctrl+Shift+@ - More detailed information in regards to your time may be needed in your cells. To apply the Time format with the hour and minute as well as indicate A.M. or P.M. in your cells you will want to use this shortcut combination.
- Ctrl+Shift+! You will want to use this shortcut to apply the Number format with two decimal places. You will also get the thousands separator if your numbers reach four decimal places. If you wish the number to be negative just add the minus sign (-).
- Ctrl+Shift+^ Use this shortcut to apply the Scientific number format with two decimal places.

Tips and Tricks

Now that we have gone through a lot of shortcuts it is time to give you some cool tips and tricks that you can use to get the most out of your Excel spreadsheet.

Tip #1 – Opening multiple files

When it comes to working with Excel as well as other Microsoft programs you may need to work with more than one file at a time. In the past, you would have to select and open each file one at a time.

With the new advancements in Windows, you can now select all of the files you want to open and then when selected hit the enter key. This will open all of the files at once allowing you to edit them.

Tip #2 – Creating additional shortcuts.

When it comes to Excel there is no shortage of shortcuts that you can have.

Using the keyboard, however, may get a little annoying for some and trying to remember all fo these shortcuts that I have talked about so far in the book may get confusing.

So, what you can do is add additional shortcuts to the ribbon bar. To do this you will want to go to File->Options->Quick Access Toolbar. From the dialog that is now presented you can add the desired shortcuts that you want to use or will use most often.

Tip #3 – Transposing data

When working with data there may come a time when you want to take what was typed in a row and put it into a column or take what is in a column and put it in a row. To do this you will need to use the transpose function in Paste. To do this select the text you want to transpose and copy it to the clipboard. You want to copy it because you don't want to lose your data from cutting it.

Then right mouse clicks and goes to paste. There you will see an option that says "Transposes". Click on this option and your column is now a row or your row is not a column.

Tip #4 – Combining the data from multiple cells into a new cell

When working with Excel you will want to take data that is present in one or multiple cells and combine them into one cell. This can easily be done with a simple & modifier in your formula. In your spreadsheet I want you to enter the following information into these specific cells.

A1 – John

A2 – Smith

Now in cell A3 I want you to type the following formula =A1 & A2

The results you will get will be JohnSmith. To get a space between the two words you will want to place a space after each word in their respective cells. So, if you are doing this and you are getting spacing issues this will be the reason.

Tip #5 – Allowing 0 to be at the start of your numbers

This is a problem that I have had in the past and it is really annoying. When working with some numbers such as ID numbers or SKU numbers that start with a 0 Excel will usually drop the zeros at the front of the numbers. So instead of reading 00073e4332 it would just be 73e4332 which isn't accurate. To fix this problem you will want to put a single quote in front of the zeroes. So it would look like this '00073e4332.

Tip #6 – 3D Sum

The 3D sum function will allow you to add up data that is found in multiple sheets in a single workbook. So, for example, you have five workbooks and in each workbook, you are keeping similar data. With the 3D Sum function, you can gather up information from all the sheets and place them on one.

One of the best examples for this is to have a weekly calendar or events. For this example, it will be the money that you spend on entertainment for a two month period. So to start with you want to create nine sheets. Each sheet will be named week 1, week 2, week 3 and so on. The last sheet will be named total.

On each sheet you want to have the name of the days at the top of the columns so on B1 you would have Sunday, C1 would be Monday and so on.

In the rows sections, you want to have the name of the items you want to track so in A2 you would have Dinner. In A3 you will have Movies. You can have as many as you want it is just an example.

Now, you want to enter in the amount of money that you spend on each item for each day. Repeat this process over the seven week period. Once this is done go onto the last sheet.

When you are on the last sheet you will want to find the location where you want the information to be displayed. For this example, you will have the top of the columns headers with Week 1, Week 2 and so on. For the rows, you will have the items that you have spent the money on. Dinner, movies etc.

In the desired cells where you want to have the information displayed, you will use the formula below but replace the specific cells with your specific cells.

Sum=(‘week1:week7!A1)

Now where A1 is you want to place the desired cell you want your results in. Now when you hit enter all of the data in these cells will be calculated and a new result generated.

This is a great way to work with multiple sheets and data. This is a more advanced feature but it shows you that you can work with multiple sheets and pull in specific data from these sheets and display them. This will be great for creating time sheets, balance sheets and so much more. The limits are only in your mind.

Conclusion

In this book, we took a quick look at Microsoft Excel. If you have never used the program before now you will have a better understanding of what Excel is and what you can do with it. From this point forward it will be up to you to go out there and start playing with it and seeing what it will do for you and your needs.

When it comes to using Excel it will focus on the numbers. If you have a lot of numbers to deal with then Excel is the only program you want to handle it.

Top points to remember

Point #1 – Remember that Excel works with columns and rows. Once you understand what column and row you are working with you can easily start to manipulate data.

Point #2 – Data is manipulated with formulas. All formulas start with the = sign. If you are working with other data then don't use this symbol.

Point #3 – Create standard workflows. It is important that you work with a standard workflow. If you try to jam all of your data into sloppy looking rows and columns you may get confused. Use formatting and other visual attributes to make your spreadsheets look clean and readable.

Finally, I want to thank you for taking this time to read this book. I hope that what you have learned will give you some insight into moving forward with Excel. Take your time to really play with all of the options and see what they will do. And if you like this book please leave an honest review.

Thank you for reading and as always, to your success!