

## Excel Fundamentals: Quick Start Guide

### General Guidelines

- Using the keyboard instead of the mouse saves time, makes you more efficient and it is fun!
- Use arrows to navigate the spreadsheet. Add the SHIFT key or SHIFT & CTRL keys to select multiple cells.
- Setup the Quick Access Toolbar (QAT) for common functions with long or awkward keyboard shortcuts.
- Print financial models in landscape, compress margins, center horizontally and select pages individually.

### Excel Options

- General:** Set Font Type, Font Size, User Name & Office Theme. Set to only include one sheet per file.
- Formula:** Use automatic calculations unless there are many Data Tables. Disable iterative calculations unless needed.
- Proofing:** Ignore uppercase words, words with numbers, internet & file addresses. Flag repeated words. Set language.
- Save:** Set to AutoRecover information every 5-10 minutes.
- Accessibility:** Toggle feedback with sound and choose whether to disable start screen.
- Advanced:** Move or not after pressing enter. Disable automatically insert a decimal point. Allow editing directly in cells.
- Customize Ribbon:** Check the Developer tab to show as it can be useful for financial analysis.
- Add-Ins:** Analysis Toolpak is helpful for regression analysis. Macabacus increases productivity & brand compliance.

| Common        | Keystroke            |
|---------------|----------------------|
| Copy          | CTRL C               |
| Paste         | CTRL V               |
| Paste Special | CTRL ALT V or ALT ES |
| Fill Right    | CTRL R               |
| Fill Down     | CTRL D               |
| Undo          | CTRL Z               |
| Redo          | CTRL Y               |
| AutoSum       | ALT =                |

| Formatting             | Keystroke |
|------------------------|-----------|
| Bold                   | CTRL B    |
| Italics                | CTRL I    |
| Format Cells           | CTRL 1    |
| Fill Color             | ALT HH    |
| Font Color             | ALT HFC   |
| Font Size              | ALT HFS   |
| More Borders           | ALT HBM   |
| AutoFit Column Width   | ALT HOI   |
| Conditional Formatting | ALT HL    |

| Function Keys        | Keystroke             |
|----------------------|-----------------------|
| Edit Cell            | F2                    |
| Repeat Last Command  | F4                    |
| Lock Reference       | F4 (From Inside Cell) |
| Spell Check          | F7                    |
| Recalculate Workbook | F9                    |

| Number Formats    | Keystroke    |
|-------------------|--------------|
| Number Format     | CTRL SHIFT 1 |
| Date Format       | CTRL SHIFT 2 |
| Percentage Format | CTRL SHIFT 5 |

| Alignment    | Keystroke |
|--------------|-----------|
| Align Left   | ALT HAL   |
| Align Center | ALT HAC   |
| Align Right  | ALT HAR   |

| Printing           | Keystroke |
|--------------------|-----------|
| Normal View        | ALT WL    |
| Page Break Preview | ALT WI    |
| Page Setup         | ALT PSP   |
| Save As            | ALT FA    |

| Names        | Keystroke         |
|--------------|-------------------|
| Define Name  | ALT MMD           |
| Name Manager | ALT MN or CTRL F3 |

| Navigation              | Keystroke                |
|-------------------------|--------------------------|
| Select Row              | SHIFT Spacebar           |
| Select Column           | CTRL Spacebar            |
| Insert Row              | ALT IR                   |
| Insert Column           | ALT IC                   |
| Zoom Out / In           | CTRL ALT - / =           |
| Switch Between Tabs     | CTRL PG UP / PG DN       |
| Select Multiple Tabs    | CTRL SHIFT PG UP / PG DN |
| Rename Worksheet        | ALT HOR                  |
| Freeze / Unfreeze Panes | ALT WFF                  |

| Grouping               | Keystroke             |
|------------------------|-----------------------|
| Group Rows / Columns   | SHIFT ALT Right Arrow |
| Ungroup Rows / Columns | SHIFT ALT Left Arrow  |
| Expand Grouping        | ALT AJ                |
| Collapse Grouping      | ALT AH                |

| Formula Auditing        | Keystroke |
|-------------------------|-----------|
| Trace Precedents        | ALT MP    |
| Trace Dependents        | ALT MD    |
| Remove Arrows           | ALT MAA   |
| Go to Precedent         | CTRL [    |
| Go to Dependent         | CTRL ]    |
| Return to Previous Cell | F5 ENTER  |

*For Mac users: ALT = Option and CTRL = Command.*