



## 50 Tips to Master Excel

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Date: 2017-04-08  
[www.howtoexcel.org](http://www.howtoexcel.org)



50 TIPS TO HELP YOU  
SAVE TIME AND  
EFFORT IN YOUR  
WORK!



# How To Excel

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The only conditions?

- You can not charge anyone any monetary amount for it. That will remain my sole right.
- You can not change, edit, or alter the digital format or contents and all links must remain in place as they are.

I hope you enjoy this ebook and that you learn some valuable tips that help you on your way to mastering Excel!

Welcome to the 50 Tips to Master Excel free e-book!

If you're reading this, I'm guessing you're an Excel enthusiast like myself or you work with Excel a lot and want to save time and effort also like myself! Either way, welcome and I hope you enjoy this book.

These are a collection of my favourite time savers and hidden features in Excel and they will go a long way to helping you master Excel and save time and effort in your work.

Cheers!

John MacDougall



Check out my website  
<http://www.howtoexcel.org/> for  
other great Excel tips, tricks  
and tutorials!

| A1 | B | C | D | E | F | G | H | I | J | K |
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# How To Excel

## Keyboard Shortcuts for Quick Navigation

**Ctrl****Tab**

Move between open Excel workbooks.

**Ctrl****Page Down**

Move to the next worksheet in the workbook.

**Ctrl****Page Up**

Move to the previous worksheet in the workbook.

**Ctrl****Arrow**

Move to the left, right, upper or lower most part current data region.

**Ctrl****Home**

Move to the upper left most cell in the worksheet.

**Ctrl****End**

Move to the lower right most used cell in the worksheet.

**Alt****Page Down**

To move one full screen to the right in the worksheet.

**Alt****Page Up**

To move one full screen to the left in the worksheet.

Relying on the mouse to navigate in Excel all the time can be very inefficient. Learning keyboard shortcuts can save you massive amounts of time cumulatively throughout your career using Excel, so it's a good idea and worth the effort of committing these to memory.

The screenshot shows a Microsoft Excel interface. At the top, there's a blue header bar with the title "How To Excel". Below it is the Excel ribbon with tabs A1 through K. In the center-left, a lightbulb icon with a grid pattern is displayed. On the left side, there's a vertical column of row numbers from 1 to 42. The main area contains a list of keyboard shortcuts for navigating between worksheets:

|             |                  |  |
|-------------|------------------|--|
| <b>Ctrl</b> | <b>Tab</b>       | Move between open Excel workbooks.                                     |
| <b>Ctrl</b> | <b>Page Down</b> | Move to the next worksheet in the workbook.                            |
| <b>Ctrl</b> | <b>Page Up</b>   | Move to the previous worksheet in the workbook.                        |
| <b>Ctrl</b> | <b>Arrow</b>     | Move to the left, right, upper or lower most part current data region. |
| <b>Ctrl</b> | <b>Home</b>      | Move to the upper left most cell in the worksheet.                     |
| <b>Ctrl</b> | <b>End</b>       | Move to the lower right most used cell in the worksheet.               |
| <b>Alt</b>  | <b>Page Down</b> | To move one full screen to the right in the worksheet.                 |
| <b>Alt</b>  | <b>Page Up</b>   | To move one full screen to the left in the worksheet.                  |

At the bottom, there are standard Excel navigation buttons like back, forward, and search, along with a "Sheet1" tab and a page number indicator "Page | 5". The status bar at the bottom shows "Ready", "Num Lock", and a zoom level of "100%".



# How To Excel

## Keyboard Shortcuts for Quick Formatting

|      |       |    |                                  |
|------|-------|----|----------------------------------|
| Ctrl | Shift | ~  | Apply general format             |
| Ctrl | Shift | \$ | Apply currency format            |
| Ctrl | Shift | %  | Apply percent format             |
| Ctrl | Shift | ^  | Apply scientific format          |
| Ctrl | Shift | #  | Apply date format                |
| Ctrl | Shift | @  | Apply time format                |
| Ctrl | Shift | !  | Apply number format              |
| Ctrl | 1     |    | Open the Format Cells dialog box |
| Ctrl | B     |    | Apply or remove bold format      |
| Ctrl | I     |    | Apply or remove italic format    |
| Ctrl | U     |    | Apply or remove underline format |
| Ctrl | 5     |    | Apply or remove strike format    |

A1

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Sheet1

Page | 6

Ready Num Lock

100%



# How To Excel

## Keyboard Shortcuts for Quick Cell Selection

Shift

Arrow

Expands the selected range in the direction of the arrow key.

Shift

Spacebar

Selects the entire row(s) of the selected range.

Ctrl

Spacebar

Selects the entire column(s) of the selected range.

F8

Enter extend selection mode. Press F8 again to exit mode.

Shift

F8

Enter add selection mode. Press Shift + F8 again to exit mode.

Ctrl

G

Opens the Go To window to select a range or range name.

Ctrl

A

Selects the entire worksheet.

Ctrl

F

Opens the Find window to search for data.

Ctrl

H

Opens the Find and Replace window to search for and replace data.

Use the **Find** window to search within a single sheet or the entire workbook

- Search within values, formulas or comments for the data you're looking for.
- Search for cells with a certain format (i.e. find all cells with a yellow interior and black border).
- Use wild card values like \* and ? in your searches.
- Match case with text (i.e. search for TEXT instead of text).

Use the **Find and Replace** window to do the same things as the Find window, but then replace data or text with something else.



# How To Excel

## Keyboard Shortcuts for File Menu Commands

Ctrl

N

Create a new blank workbook.

Ctrl

O

Open menu to open a saved workbook.

Ctrl

S

Save the current workbook. Opens Save As if not previously saved.

F12

Opens the Save As menu.

Ctrl

P

Opens the Print menu for the current worksheet.

Ctrl

W

Close the current workbook.

Alt

F4

Close Excel.

Use the **Save As** menu to save your workbooks as different file types with the Save as type drop down menu.

- Save as **Excel Macro-Enabled Workbook** if your file uses VBA.
- Save as **Excel 97-2003 Workbook** if sharing a file with someone using an older version of Excel.
- Save as **Binary Workbook** to reduce file size and reduce file opening and saving times.
- Save as **CSV (Comma Delimited)** for a one sheet value only comma separated list of data.
- Save as **PDF** for a non-editable view (great for sending a dashboard to your boss).

The screenshot shows a Microsoft Excel interface with a green header bar containing the title 'How To Excel' and a lightbulb icon. Below the header is a standard Excel ribbon with tabs A1 through K. The main area displays a grid of cells from A1 to K42. On the left side, there is a vertical column of numbers from 1 to 20, followed by a large green callout box containing the keyboard shortcuts and their descriptions. At the bottom, the status bar shows 'Sheet1', 'Page | 8', and a zoom level of 100%.



# How To Excel

## Undo or Redo Multiple Actions

The screenshot shows a Microsoft Excel spreadsheet with several rows of data. The first few rows contain actions like 'Format Cells' and 'Create Table'. A context menu is open over the data, with the 'Undo 16 Actions' option highlighted. The 'Quick Access Toolbar' at the top has a small down arrow icon next to the Undo and Redo buttons, which is circled in yellow. A large green callout box provides instructions on how to use this feature.

Use the **small down arrow icon** next to the undo and redo commands in the quick access toolbar located in the upper left corner of your workbook.

1. Press the **small down arrow icon** next to the undo or redo command.
2. Select the **actions** to undo or redo from the resulting menu.
3. At the bottom you will see the number of actions you are about to undo or redo.

The undo (left pointing arrow) command and the redo (right pointing arrow) command will only undo or redo one action at a time. You can also use **Ctrl + Z** on your keyboard to undo one action or use **Ctrl + Y** to redo one action at a time.

Ready Num Lock

Sheet1

Page | 9

100%



# How To Excel

## Change a Comment Box Shape and Format

The screenshot shows a Microsoft Excel spreadsheet with a green header bar. The ribbon menu is open, with the 'INSERT' tab highlighted. A callout bubble is pointing to the 'Shapes' icon in the 'Illustrations' section of the ribbon. A red arrow points from a numbered callout '1' (on the mouse cursor over the comment border) to a numbered callout '4' (on the 'Shapes' icon). A mouse cursor is shown clicking on the 'Shapes' icon. A 'Recently Used Shapes' dialog box is open, showing various shapes like lines, stars, and banners. A second callout '3' points to the 'Shapes' icon in the ribbon. A third callout '2' points to the 'Insert' tab in the ribbon.

You can insert a comment into a cell by **right clicking** on a cell and selecting **Insert Comment** from the menu.

To change the shape from the boring rectangle to something more exciting:

1. Hover the mouse over the edge of the comment until you see the cursor change to a 4 way cross with arrows at the ends. **Left click** with the mouse.
2. Go to the **Insert** tab in the ribbon.
3. In the Illustrations section, press the **small Shapes icon**.
4. From the drop down menu **select your new shape** for the comment box.

Change the colour and other formats by **right clicking on the edge** and selecting **Format Comment**.



# Change the Default Number of Sheets in a Workbook

The screenshot shows the Microsoft Excel ribbon with the 'FILE' tab selected (step 1). A callout points to the 'Options' button in the 'FILE' tab's dropdown menu (step 2). The 'Excel Options' dialog box is open, with the 'General' tab selected (step 3). In the 'When creating new workbooks' section, the 'Include this many sheets' input field is highlighted with a red box and a yellow circle containing the number '4'. The 'OK' button at the bottom right of the dialog box is also highlighted with a red box and a yellow circle containing the number '5'.

Change the default number of sheets in a new workbook.

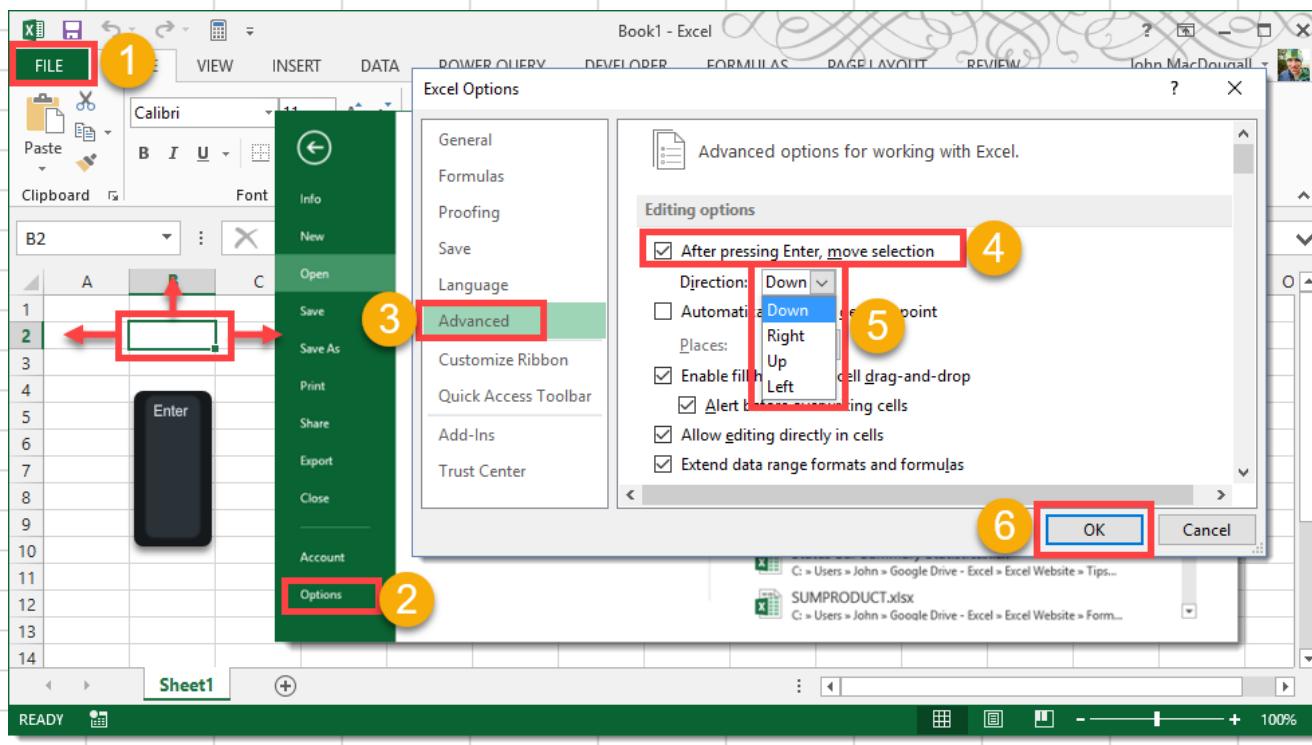
1. Go to the **File** tab.
2. Select **Options** from the menu.
3. Select **General** from the Excel Options window.
4. Change the number of sheets in the **Include this many sheets** field to your preference using the Up or Down arrows.
5. Press the **OK** button.

Next time you open Excel, you'll see this number of sheets. I like to set this to 1 as you can always easily add sheets using the small plus icon to the right of your sheet tabs.



# How To Excel

## Change What Happens When You Press Enter



By default the active cell cursor will move down one cell after pressing Enter. But you can change this! You can also have it go up, left, right or not move at all if you want. I prefer the active cell cursor to stay on the cell I just finished typing in as this makes it easier to copy and paste what you just finished entering.

Change the default setting.

1. Go to the File tab.
2. Select Options from the menu.
3. In the Options window select Advanced.
4. Under the Editing options uncheck the After pressing Enter box if you want the active cell cursor not to move after pressing enter.
5. Select a Direction if you want the active cell cursor to move a direction other than Down after pressing enter.
6. Press the OK button.



# How To Excel

## Get the Unique Items from a List

The screenshot shows a Microsoft Excel spreadsheet with data in columns A, B, and C. The first row contains headers: 'Name', 'Date', and 'Sale Amount'. The data below consists of 15 rows, with the first two rows (Diana Battle and Blythe Henderson) highlighted in green. The 'DATA' tab is selected in the ribbon, and the 'Advanced' button under the 'Sort & Filter' section is highlighted with a red box and a yellow circle labeled '2'. A callout arrow points from this button to the 'Advanced Filter' dialog box, which is also highlighted with a red box and a yellow circle labeled '3'. The 'Advanced Filter' dialog box has several fields and options: 'Action' (radio button selected for 'Copy to another location'), 'List range' (set to 'Sheet1!\$A\$2:\$A\$38'), 'Criteria range' (empty), 'Copy to:' (set to 'Sheet1!\$E\$2'), and a checked 'Unique records only' checkbox. A red box highlights the 'Copy to:' field, and a yellow circle labeled '4' points to the green-highlighted range in column A. A yellow circle labeled '5' points to the 'Copy to:' input field in the dialog. A yellow circle labeled '6' points to the 'Unique records only' checkbox. A yellow circle labeled '7' points to the 'OK' button at the bottom right of the dialog.

|    | Name             | Date       | Sale Amount |
|----|------------------|------------|-------------|
| 1  | Diana Battle     | 2016-01-12 | \$472       |
| 2  | Blythe Henderson | 2016-01-27 | \$265       |
| 3  | Barclay Robles   | 2016-02-04 | \$1,143     |
| 4  | Ella Reid        | 2016-02-07 | \$528       |
| 5  | Rhonda Hoover    | 2016-02-07 | \$235       |
| 6  | Rhonda Hoover    | 2016-02-29 | \$330       |
| 7  | Kelsie Burns     | 2016-03-03 | \$1,481     |
| 8  | Kelsie Burns     | 2016-03-13 | \$996       |
| 9  | Barclay Robles   | 2016-03-20 | \$630       |
| 10 | Felicia Medina   | 2016-04-03 | \$640       |
| 11 | Ella Reid        | 2016-04-04 | \$1,040     |
| 12 | May Norton       | 2016-04-05 | \$1,202     |
| 13 | Barclay Robles   | 2016-04-10 | \$1,206     |
| 14 | May Norton       | 2016-04-24 | \$1,459     |
| 15 |                  |            |             |

Do you have a list of items with duplicate values and you want to quickly get a list of the unique values? Then use [advanced filters](#).

1. Go to the Data tab.
2. Click the Advanced button found under the Sort & Filter section.
3. Select Copy to another location.
4. Select the range of values in the List range input which you'd like to see a unique list from.
5. Select the cell in the Copy to input where you want the values to appear. Make sure there is enough room below this cell as the list starts at this cell and goes down.
6. Make sure the Unique records only box is checked.
7. Press the OK button.

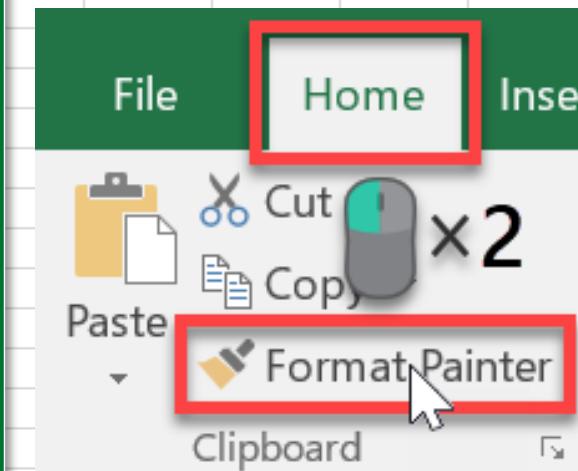


# How To Excel

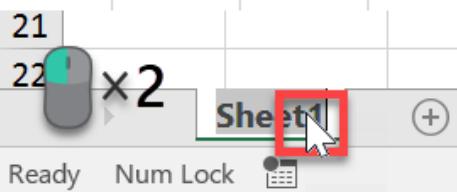
## Unlimited Format Painter With Double Click

**Unlimited Format Painter:** When you click the format painter you will be able to use it once, but if you double click it then you will be able to use it an unlimited number of times until you click the button again to turn it off.

1. **Highlight** the area you would like to copy the format of.
2. Go to the **Home** tab and in the clipboard section double left click the **Format Painter** button.
3. Now single **left click** anywhere you would like to copy the format.



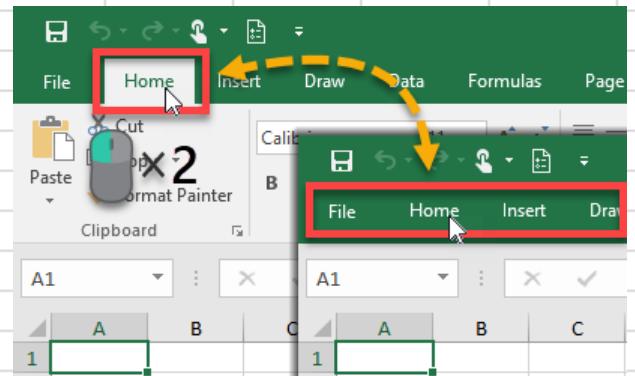
## Easily Rename a Worksheet



**Easily Rename a Sheet:** Place your mouse cursor over the sheet you want to rename and double left click. Now type the name you want to change it to.

## Hide the Ribbon With a Double Click

**Toggle the Ribbon:** Need extra space to view your spreadsheet work area? Double left click any tab on the ribbon to toggle the ribbon on and off.



A1    B C D E F G H I K

1    2    3    4    5    6    7    8    9    10    11    12    13    14    15    16    17    18    19    20    21    22    23    24    25    26    27    28    29    30    31    32    33    34    35    36    37    38    39    40    41    42    43

Ready Num Lock

Sheet1

Page | 14 | 100%



# How To Excel

## Show Pivot Table Data

**Show Pivot Table Data:** This trick will quickly let you see the data behind a pivot table. Select a cell inside a pivot table and double left click. This will create a new sheet will all the data that makes up the value seen in the pivot table that you clicked on.

The screenshot shows a Microsoft Excel spreadsheet with a Pivot Table in the foreground and a data table in the background. The Pivot Table has 'Row Labels' set to 'Sum of Total Sale Amount'. The data table below it is titled 'Sales' and contains columns for Representative, Location, Region, Customer, Order Date, Item, Quantity, Price, and Amount. A red box highlights the cell for Diane Gonzalez's total sale amount (\$51,004). A cursor with a magnifying glass and a 'x2' icon is positioned over this cell. A dashed yellow arrow points from the cell to the data table, which is also enclosed in a red box. The data table shows multiple rows for Diane Gonzalez across different locations and dates.

## Navigate Your Data With a Double Click

**Navigate Your Data:** If you have a large set of data and need to quickly navigate to the end of it you can double left click on any edge of the active cell cursor and you will be taken to the end of your data in that direction.



Your mouse cursor will look like a cross while on the edge of the active cell.

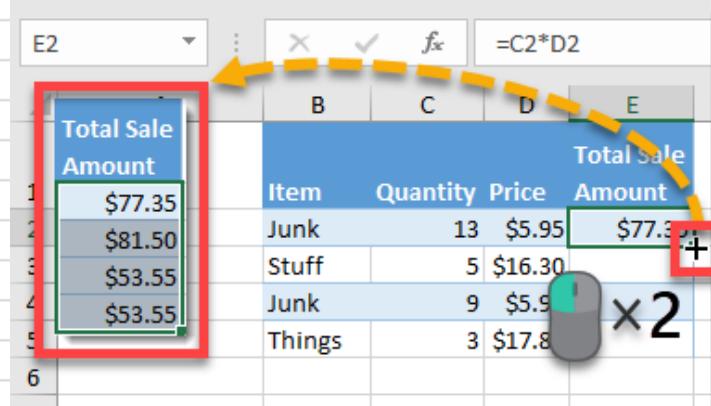
The screenshot shows a Microsoft Excel spreadsheet with a data table in the foreground. The table has columns for Representative, Location, Order Date, Item, and Total Sale Amount. A red box highlights the edge of the cell for the fourth row's Total Sale Amount (\$53.55). A cursor with a magnifying glass and a 'x2' icon is positioned over this edge. A dashed yellow arrow points from the edge to the bottom-right corner of the data table, indicating the direction of navigation.



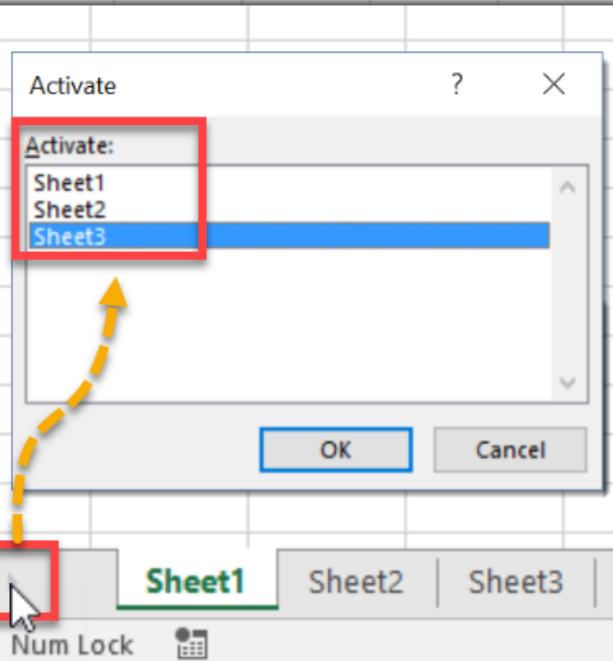
# How To Excel

## Copy a Formula or Data With a Double Click

**Copy Down a Formula or Data:** To easily copy down a formula, place your cursor over the lower right most corner of the active cell. The mouse cursor should turn to a black plus sign  $\dagger$ , now double left click and the formulas will copy down to the end of your data.



## Navigate Through Your Sheets



### Navigate Through Your Sheets:

If you have a lot of sheets in your workbook the best way to navigate to a particular sheet is to right click the arrows in the lower left area of your workbook. This will bring up a window with a list of all the sheets in the workbook and allow you to select one to navigate to.



# How To Excel

## Customise Your Ribbon

A screenshot of the Microsoft Excel ribbon. The 'Home' tab is selected. A context menu is open over the ribbon, with the 'Customize the Ribbon...' option highlighted by a red box. Other options in the menu include 'Group to Quick Access Toolbar', 'Customize Quick Access Toolbar...', 'Show Quick Access Toolbar Below the Ribbon', and 'Collapse the Ribbon'. The status bar at the bottom shows 'A1'.

**Customise Your Ribbon:** Right click anywhere in the ribbon and select **Customize the Ribbon**. You'll be able to add/delete/move groups and tabs and add actions to ribbon that are not otherwise available.

There are a lot of commands you can add that are not available through the default ribbon or a shortcut.

- Try adding a Calculator, Camera or Form

## Current Age Formula

```
=TEXT((NOW()-DoB),"yy ""years"" m ""months and"" d ""days"""")
```

| B                       | C                                    | D |
|-------------------------|--------------------------------------|---|
| Birthdate<br>1980-01-01 | Age<br>37 years 4 months and 14 days |   |

Use this formula to get a person's current age based on their birth date.

```
=TEXT((NOW()-DoB),"yy ""years"" m ""months and"" d ""days"""")
```

- Where DoB is the person's date of birth.
- NOW() is a formula without any arguments that returns the current date. Use a date instead of NOW() in this formula instead to calculate the age at a given date and not just the person's current age.



# How To Excel

## Add, Copy and Rename a Sheet

Hold Ctrl then  
click and drag  
then release a  
sheet to copy it!

### Making a copy of a sheet the hard way:

Right click on the sheet you want to copy, then select Move or Copy, then select the location you want to copy it to, then check the Create a copy box and press OK.

### Making a copy of a sheet the EASY way:

Hold **Ctrl** then **left click and drag** the sheet over and release. You should see a small sheet icon with a plus sign.

### Rename a sheet the EASY way:

**Double left click** on the sheet tab. The sheet name will be highlighted and you can start typing the new name.

### Adding a new sheet the EASY way:

Click on the small circled plus sign icon to the right of your sheet tabs. You can also use the **Shift + F11** keyboard shortcut.

# Add Bullet Points in Your Cells

| Result | Shortcut       |
|--------|----------------|
| •      | <b>Alt + 7</b> |
| □      | <b>Alt + 8</b> |
| ○      | <b>Alt + 9</b> |

There is no way to add bullet points into Excel from the ribbon menu, but you can still add them none the less.

- Using a keyboard with a number pad **Alt + 7**, **Alt + 8** or **Alt + 9**
- Without the number pad engage NumLock beforehand.



# How To Excel

## Enable Status Bar Summary Statistics

The screenshot shows a Microsoft Excel spreadsheet titled "Status Bar Summary Statistics.xlsx". The status bar at the bottom displays summary statistics for the selected range A1:D14. A callout bubble with the text "Right click anywhere in the status bar" points to the status bar. Three numbered steps are overlaid on the image:

1. Right click anywhere in the status bar.
2. Check the items you would like to see.
3. Highlight a range of numbers and the summary statistics for that range will appear in the status bar.

The status bar shows the following data:  
AVERAGE: \$5,890,400 COUNT: 5 NUMERICAL COUNT: 5 MIN: \$89,000 MAX: \$20,150,000 SUM: \$29,452,000

| Name              | Salary        |
|-------------------|---------------|
| Emperor           | \$ 20,150,000 |
| Darth Vader       | \$ 5,576,000  |
| Grand Moff Tarkin | \$ 2,300,000  |
| Admiral Motti     | \$ 1,337,000  |
| General Taggi     | \$ 89,000     |

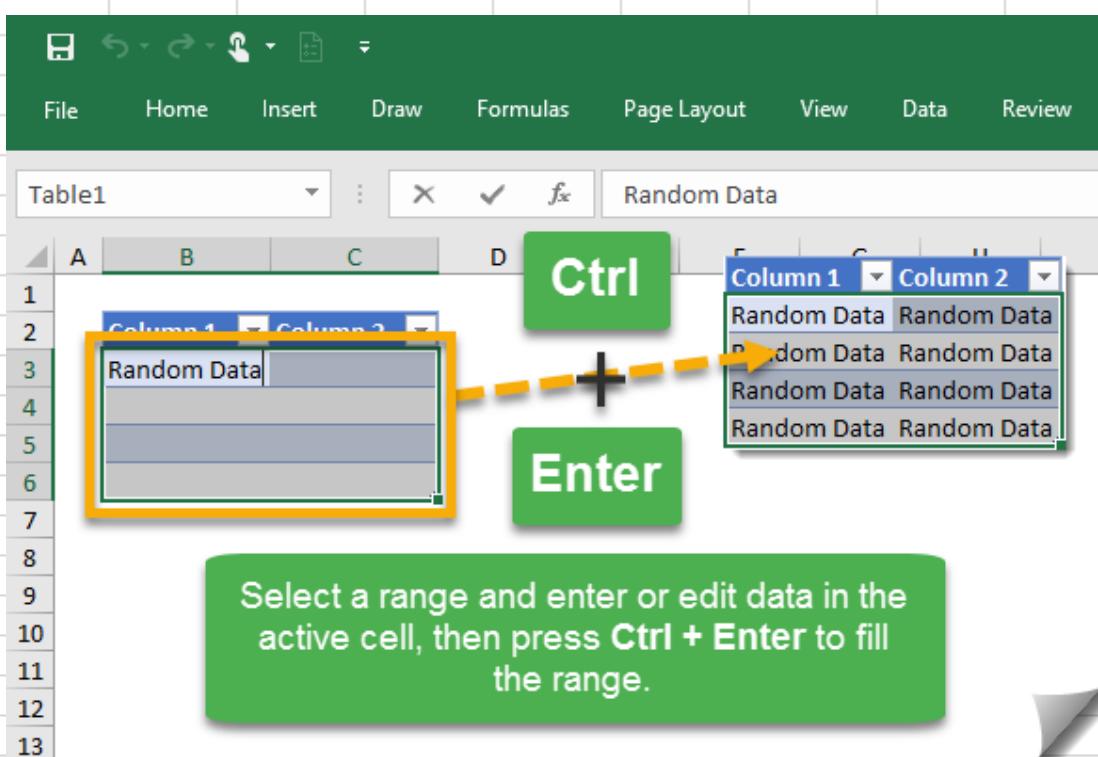
Here's a neat trick that will allow you to see "at-a-glance" summary statistics for any range you highlight in Excel. With this you'll be able to see a calculated average, count, minimum, maximum and sum for any range with numerical values.

1. **Right click** on the status bar.
2. **Check** the items you would like to see.
3. **Highlight a range of numbers** and the summary statistics for that range will appear in the status bar.



# How To Excel

## Fill a Range With Text or Formula



### Fill a range with Ctrl + Enter:

Use this trick to quickly fill a range with the same value or formula. If filling the range with a formula relative references will change accordingly.

1. **Highlight the range** you want to fill.
2. **Type your value or formula** into the active cell in the selected range.
3. Hold **Ctrl** then press **Enter**.
4. Your range will now be filled with the formula / value.

The range you highlight to fill doesn't need to be a continuous range either, you can select disjoint ranges by holding **Ctrl** when selecting the range using your mouse.



# Enter the Current Date and Time in a Cell

Current Date 2017-02-26

Ctrl

;

Current Time 10:52 AM

Ctrl

Shift

;

Use **Ctrl + ;** to enter the current date or **Ctrl + Shift + ;** to enter the current time into a cell!

Use these keyboard shortcuts to enter a hardcoded date or time into a cell.

- Current Date: **Ctrl + ;**
- Current Time: **Ctrl + Shift + ;**

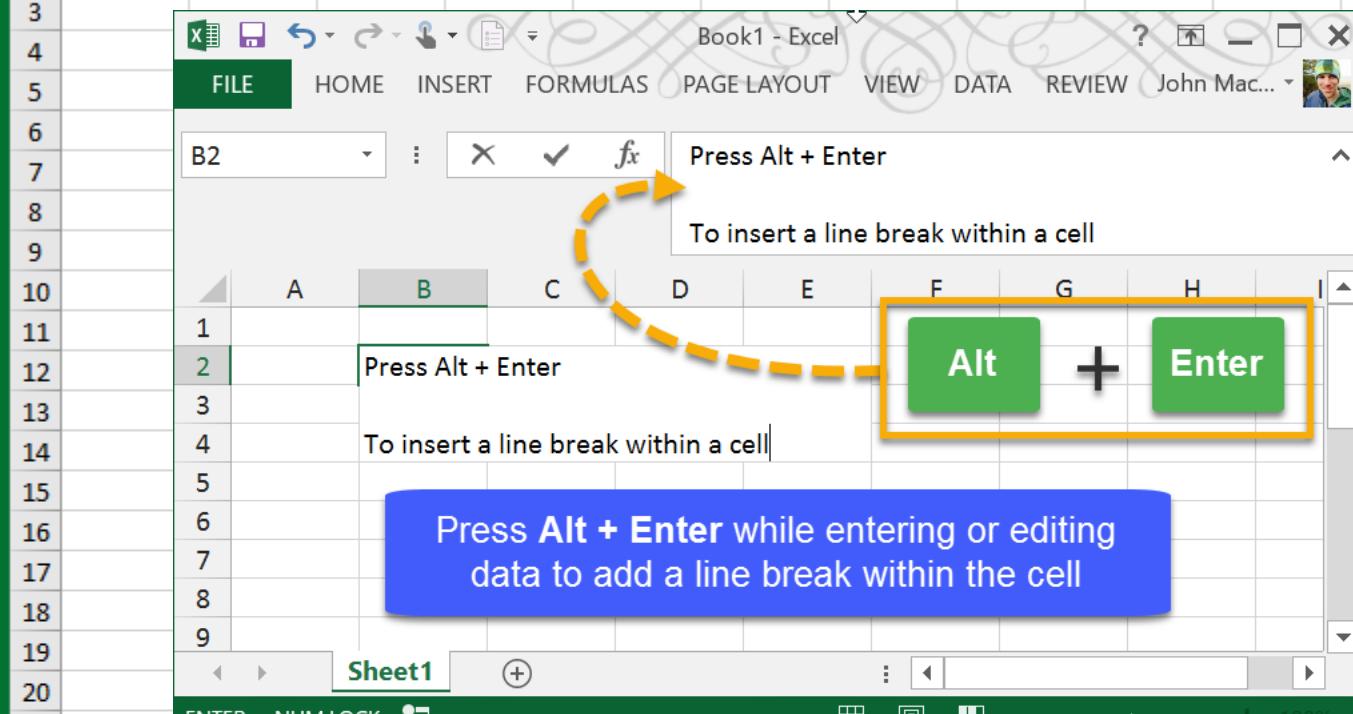
If you want the date or time to update when the date or time changes then use these formulas.

- Current Date: **=TODAY()**
- Current Date and Time: **=NOW()**
- Current Time Only: **=NOW()-INT(NOW())**
  - you will need to format this as a time using the **Format Cells** dialog box  
> Number tab > Time (**Ctrl +1** to open the Format Cells dialog box)



# How To Excel

## Add a Line Break in a Cell



If you want to make a large chunk of text in a cell a bit more readable add in some white space by using **Alt + Enter** to add in line breaks within the cell. This will allow you to format text into a more readable paragraph structure that people are used to seeing.

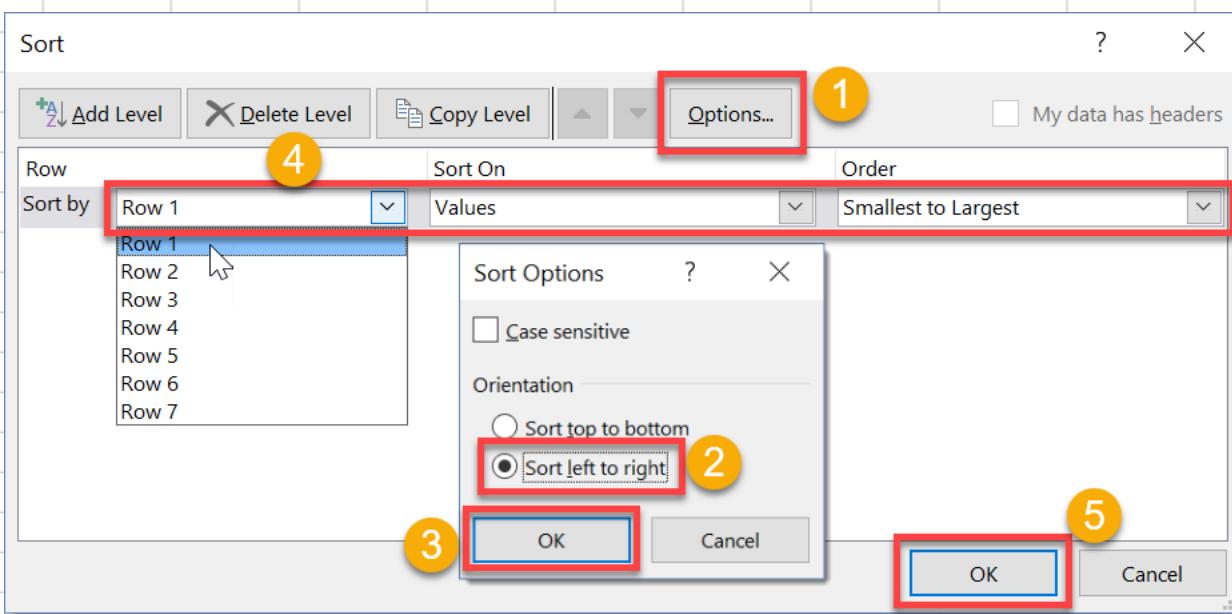
You can also add line breaks in formulas using **CHAR(10)**. Try this example:

- ="First line"&CHAR(10)&"Second line"



# How To Excel

## Sort Your Data from Left to Right



Most of the time your data will go from top to bottom where each data field is in a separate column. However, if your data goes from left to right with each data field in a separate row you can still sort your data! From the Data tab press the Sort button.

1. Press the Options button.
2. Select Sort left to right.
3. Press the OK button.
4. Select your sort options.
5. Press the OK button.

Your data will be sorted left to right!

A1      Sheet1      Page | 23  
Ready    Num Lock    100%



# How To Excel

## Create Multiple Named Cells Based on Labels

The screenshot shows a Microsoft Excel spreadsheet with a table of customer information. The table has columns for Customer ID, First Name, Last Name, City, State, Country, and Post Code. The first row contains labels for these columns. A red box labeled '1' highlights the range B2:I2. A yellow circle labeled '2' points to the 'FORMULAS' tab in the ribbon. A red box labeled '3' highlights the 'Create from Selection' button in the 'Defined Names' section of the ribbon. A yellow circle labeled '4' points to the 'Left column' checkbox in the 'Create Names from Selection' dialog box. A yellow circle labeled '5' points to the 'OK' button in the same dialog box.

Using named ranges for certain key input values in your spreadsheet can make writing formulas easier and make reading and understanding them easier as well. If they're all lined up, Excel will even do the naming work for you so you don't have to name them individually!

Name all your input cells in one go.

1. Select the range of cells to name including their labels in an adjacent row or column.
2. Go to the Formulas tab in the ribbon.
3. Select Create from Selection in the Defined Names section.
4. Check the appropriate box, in this case Left column since our labels are to the left of the input cells we want to name.
5. Press the Ok button.

Named ranges aren't allowed to have spaces and various other characters but Excel will take care of this if your labels have any illegal characters. For example our **First Name** label will have the name defined as **First\_Name**.

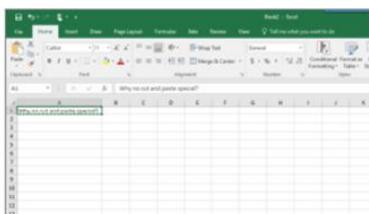
# How To Excel

## Send Feedback to Microsoft

We appreciate your feedback. What did you like?

Cut and paste special might be a good feature to add!

Include screenshot



**Ctrl + Shift + 7**

Include email address

By including your email address, you agree that Microsoft can send you email if we have questions about your feedback.

Your privacy is important to us.

Your feedback is collected by Microsoft and used to improve your experience.

Submit

Does Excel sometimes annoy you? Now you can annoy Excel in return by sending feedback to Microsoft when you have a complaint or a suggestion for adding or improving a feature.

Press **Ctrl + Shift + 7**

Excel will even attach a screen shot if you want to better explain your feedback!

Just don't hold your breath on hearing back about it or seeing your suggestion in the next update!

## Enter Function Argument Placeholders

Type a formula then press **Ctrl + Shift + A** right after the opening bracket to enter argument placeholders

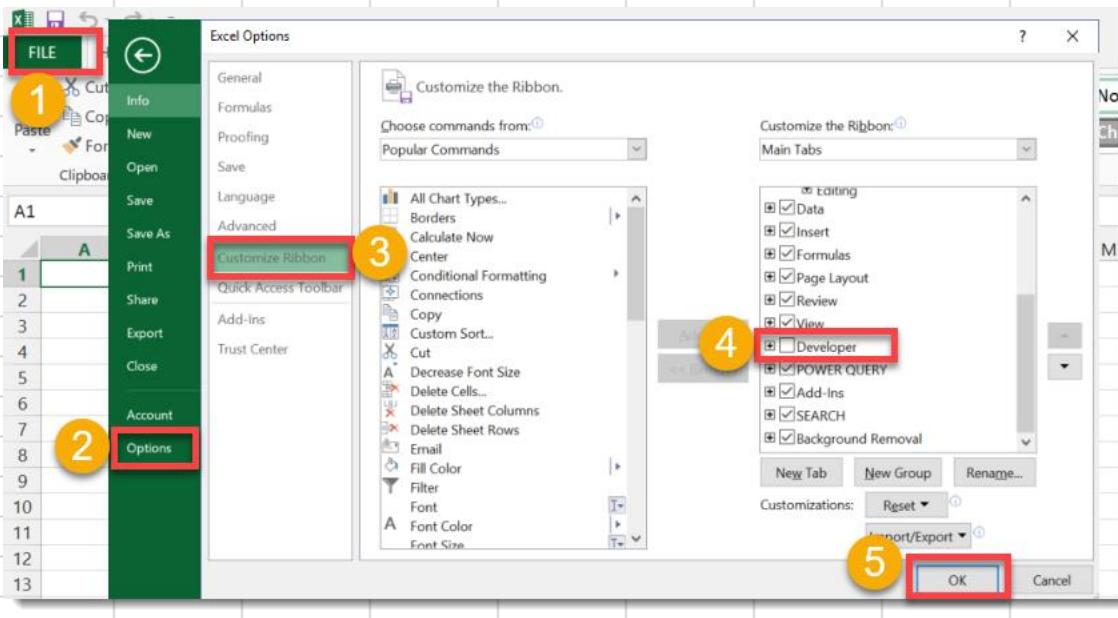
After typing a formula and the opening bracket, press **Ctrl + Shift + A** while still in edit mode and Excel will insert placeholder arguments in the formula. For example, doing this with Vlookup will produce  
**=VLOOKUP(lookup\_value,table\_array,col\_index\_num,range\_lookup)**

**Ctrl + Shift + A**

The screenshot shows the Microsoft Excel interface with the formula bar displaying '=VLOOKUP('. In the cell below, the formula is completed as '=VLOOKUP(lookup\_value,table\_array,col\_index\_num,range\_lookup)'. A yellow callout box with black text points to the formula bar, containing the instruction: 'Type a formula then press Ctrl + Shift + A right after the opening bracket to enter argument placeholders'.



## Enable a Secret Developer Tab in the Ribbon



By default, Excel's Developer tab is hidden and you will need to go into the options to enable it. The Developer tab will allow easy access to various features not otherwise accessible.

- Open the visual basic editor (VBE) from the ribbon.
- Record macros and run macros.
- Add in form controls such as combo boxes, check boxes, radio buttons etc...
- Manage your Excel Add-Ins.

Enable the Developer tab.

1. Go to the File tab.
2. Click on Options.
3. In the *Excel Options* window, click the Customize Ribbon section.
4. Make sure Developer is checked.
5. Press the OK button.



# How To Excel

## Using Vlookup With Wildcards

A screenshot of Microsoft Excel demonstrating the use of wildcards in a VLOOKUP formula. The formula in cell F3 is =VLOOKUP(Lookup&"\*",Data,2,FALSE). The data range is A8:H11, which contains a table of employee names and their IDs. The lookup value 'Alex' is found in the 'Employee' column of the table, resulting in the ID '00002'.

You can use wildcard expressions in your Vlookup formula. For example, if you wanted to lookup Alexander but maybe there's a possibility it will appear as Alex in your data from time to time, then use a formula like =VLOOKUP(Lookup&"\*",Data,2,FALSE). The asterisk in the formula will cause a match for anything starting with Alex in this example.

You can also use a "?" to represent exactly one unknown character. For example, J?n would find either Jen or Jan, which ever was first in the list.

## Entering and Displaying Fractions

A screenshot of Microsoft Excel illustrating how to enter and display fractions. In cell B3, the fraction '0 2/9' is displayed. The formula bar shows '0.222222222222222'. A callout bubble with an arrow points to the formula bar with the text 'Enter a number followed by a space for a fraction format'. The status bar at the bottom of the screen displays 'Fractions!'.

Fractions can be entered by typing a number followed by a space then followed by the fraction.

- To display  $1\frac{1}{6}$  type  $1\ 1/6$  into a cell.
- To display  $\frac{1}{6}$  type  $0\ 1/6$  into a cell.

Note the formula bar will display the decimal value of the fraction.

You can also enter a decimal value into a cell and then format it to display as a fraction. Press Ctrl +1 > Number > Fraction.



# How To Excel

## Using Union and Intersect Operators in Formula

|   | A | B | C | D  | E | F |
|---|---|---|---|----|---|---|
| 1 | 6 | 6 | 1 | 5  | 7 |   |
| 2 | 6 | 5 | 8 | 1  | 7 |   |
| 3 | 7 | 4 | 1 | 9  | 2 |   |
| 4 | 2 | 5 | 7 | 10 | 4 |   |
| 5 | 9 | 9 | 4 | 9  | 9 |   |
| 6 | 7 |   |   |    |   |   |

Most people know how to use the union operator (a comma) in B3:F4 and C2:C6 their formulas. For example, if you wanted to sum the ranges B3:F4 and C2:C6 in this example you would =SUM(B3:F4,C2:C6) and the result will be 76.

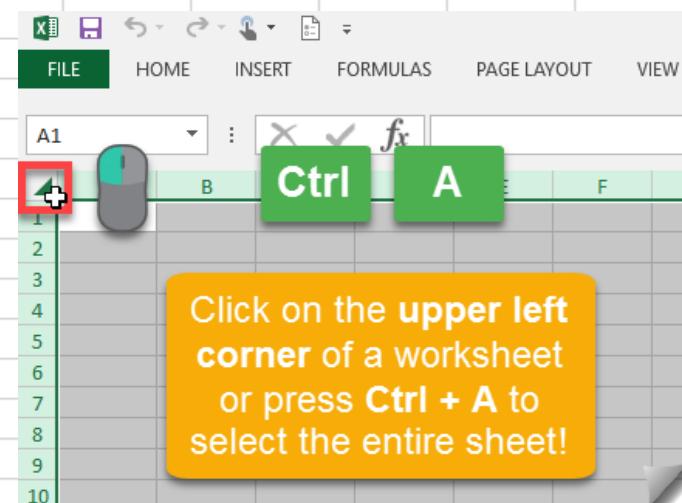
If you wanted to sum the intersection of these two ranges (i.e. only the common cells) then use a space instead of a comma =SUM(B3:F4 C2:C6) and the result will be 9. Same as if you had entered the formula =SUM(C3:C4).

This can be useful when working with dynamic ranges instead of fixed ranges like in this example.

## Select the Entire Worksheet

Select the entire worksheet by either clicking on the **upper left corner** of the sheet or using the **Ctrl + A** shortcut.

You can use this to clear a sheet. Press delete to clear all data or go to **Home** tab > **Editing** section > **Clear** to clear different things like formats or hyperlinks.





# How To Excel

## Reduce Column Width by Using Tilted Headings

Vacation  
Days

January February March April May June

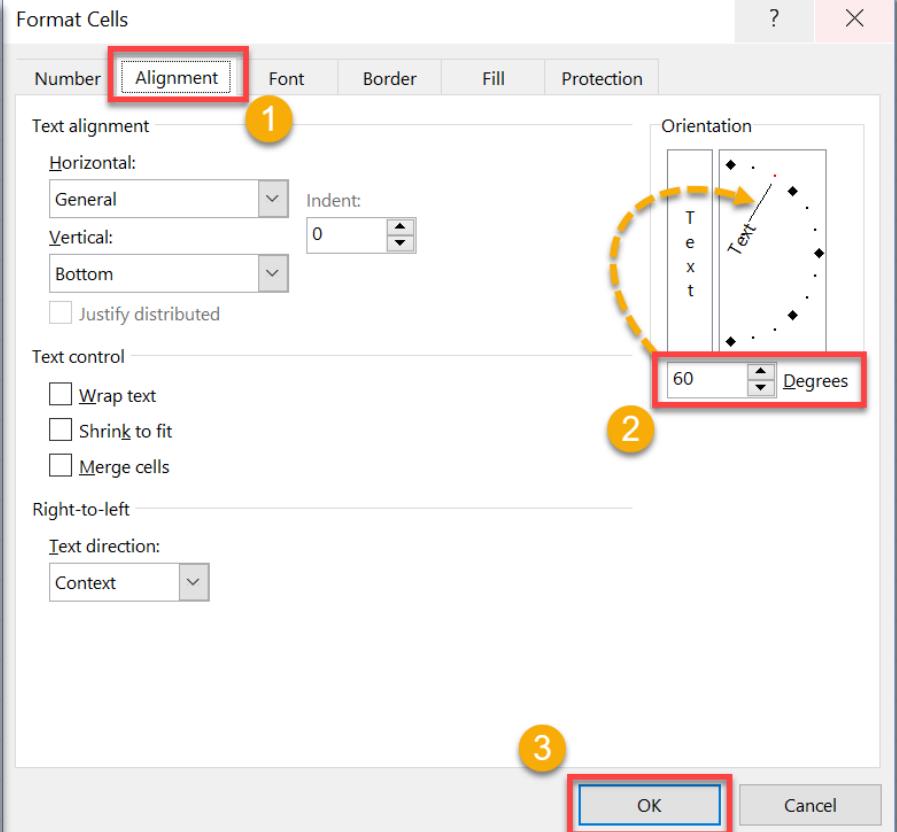
|      |   |   |   |   |   |   |
|------|---|---|---|---|---|---|
| Bob  | 1 | 1 | 1 | 0 | 0 | 1 |
| Jim  | 3 | 2 | 0 | 0 | 0 | 3 |
| Jane | 0 | 1 | 1 | 0 | 0 | 1 |
| Paul | 1 | 1 | 0 | 1 | 0 | 0 |

Save on column width while still being able to view your column headings by tilting the text. Text can be tilted anywhere from 90 to -90 degrees.

Highlight the cells you want to tilt and press **Ctrl + 1** to open the Format Cells dialog box.

1. Go to the **Alignment** tab.
2. Change the orientation either by **dragging the text** or changing the **Degrees**.
3. Press the **OK** button.

You text will now display slanted and you can make your columns less wide while still being able to view the headings.



Sheet1 | Page | 29 | Ready Num Lock



# How To Excel

## Remove Gridlines for a Clean Look

The screenshot shows a Microsoft Excel spreadsheet titled "Book1 - Excel". The ribbon at the top has the "VIEW" tab selected, which is highlighted with a red box. In the "Show" section of the ribbon, there is a checkbox labeled "Gridlines" with a red box around it, indicating it is unchecked. Below the ribbon, there is a table with data for "Sales Person" across three years: 2015 and 2016. A callout bubble with a yellow background and black border points to the "Gridlines" checkbox in the ribbon, containing the text: "Go to the View tab and un-check Gridlines for a clean look in your spreadsheets".

| Sales Person | 2015    | 2016    |
|--------------|---------|---------|
| Jim          | \$958   | \$877   |
| Jane         | \$369   | \$865   |
| Bill         | \$156   | \$849   |
| Total        | \$3,498 | \$4,607 |

Remove gridlines you're your spreadsheets by going to the View tab in the ribbon and then un-checking the Gridlines option in the Show section. This will give your spreadsheet a clean look and is great for sheets you're using to display charts.

## Save Time With Auto Sum

The screenshot shows a Microsoft Excel spreadsheet with data for "Sales Person" across three years: 2015 and 2016. A green box highlights the "Alt" key on a keyboard. A green box also highlights the range of cells from C3 to C5, which contains the values \$958, \$369, and \$156. A green box highlights the cell C6, which contains the value "Total". To the right of these boxes, there is a green button with the text "Alt + =". A callout bubble with a purple background and black border points to the highlighted cells and the "Alt + =" text, containing the text: "Select cells and then press Alt + = to automatically insert a SUM function."

This is one of the best shortcuts you can learn. Just highlight either the place where you want the sum to appear or the range of values you want to sum and press **Alt + =** to automatically insert a **SUM** function.



# How To Excel

## Fill a Range With Ctrl + Enter

Select a range and enter or edit data in the active cell, then press **Ctrl + Enter** to fill the range.

Select a range then start typing your data or formula, when you're finished instead of pressing enter to confirm your data or formula in the usual way use **Ctrl + Enter**. This will fill the entire range with the data or formula.

**Tip:** Use **Ctrl + G > Special > Blanks** to find and fill all blanks in your data!

## Toggle Filters On and Off

Toggle filters on or off with **Ctrl + Shift + L**

With your active cell inside the data, press **Ctrl + Shift + L** to toggle on and off filters. If your active cell is on a filter you can expand it using **Alt + Down Arrow**.



# How To Excel

## Insert Numbers as Text to Retain Leading Zeros

Normally if you enter a number that contains leading zeros, Excel will discard them. You can force Excel to retain the leading zeros by entering the number as text by placing an apostrophe at the start like '0001. The apostrophe will appear in the formula bar but will not be visible in the worksheet area.

The screenshot shows a Microsoft Excel interface. In the formula bar, the cell reference B2 is selected, and the value '0001' is displayed. In the worksheet area, row 2 contains five cells with the values 0001, 0002, 0003, 0004, and 0005 respectively. A callout bubble points to the formula bar with the text: "Type an apostrophe before a number to insert it as text and retain leading zeros".

## Resize Your Formula Bar

The screenshot shows a Microsoft Excel interface with the formula bar expanded. Several interaction points are highlighted with yellow boxes and arrows:

- "Resize horizontally: click and drag" points to the left edge of the formula bar.
- "Resize vertically: click and drag" points to the bottom edge of the formula bar.
- "Quick collapse & expand toggle: click" points to a small square icon in the top right corner of the formula bar.
- A purple callout bubble in the center says: "Resize your formula bar to easily view long formula or data".

You can resize the formula bar vertically or horizontally by clicking and dragging along the horizontal edge or between the name box and formula bar. Use the quick collapse and expand toggle to quickly switch sizes.



# How To Excel

## Keyboard Shortcuts for Moving Within a Range

These shortcuts are only applicable when a range of cells is selected.

**Enter**

Moves the active cell in the range.

**Shift**

**Enter**

Moves the active cell to the previous cell in the range.

**Tab**

Moves the active cell to the right.

**Shift**

**Tab**

Moves the active cell to the left.

**Ctrl**

**Period**

Moves the active cell to the next corner (clockwise).

**Shift**

**Backspace**

Collapse the selected range to just the active cell.

## Auto Adjust Column Width to Fit Data

You can adjust column width or row height by clicking and dragging the edges of a column or row, but you can automatically adjust the height or width to fit the data it contains by double clicking!

Hover your mouse cursor over the column or row borders until it changes to a line with two arrows then double left click.

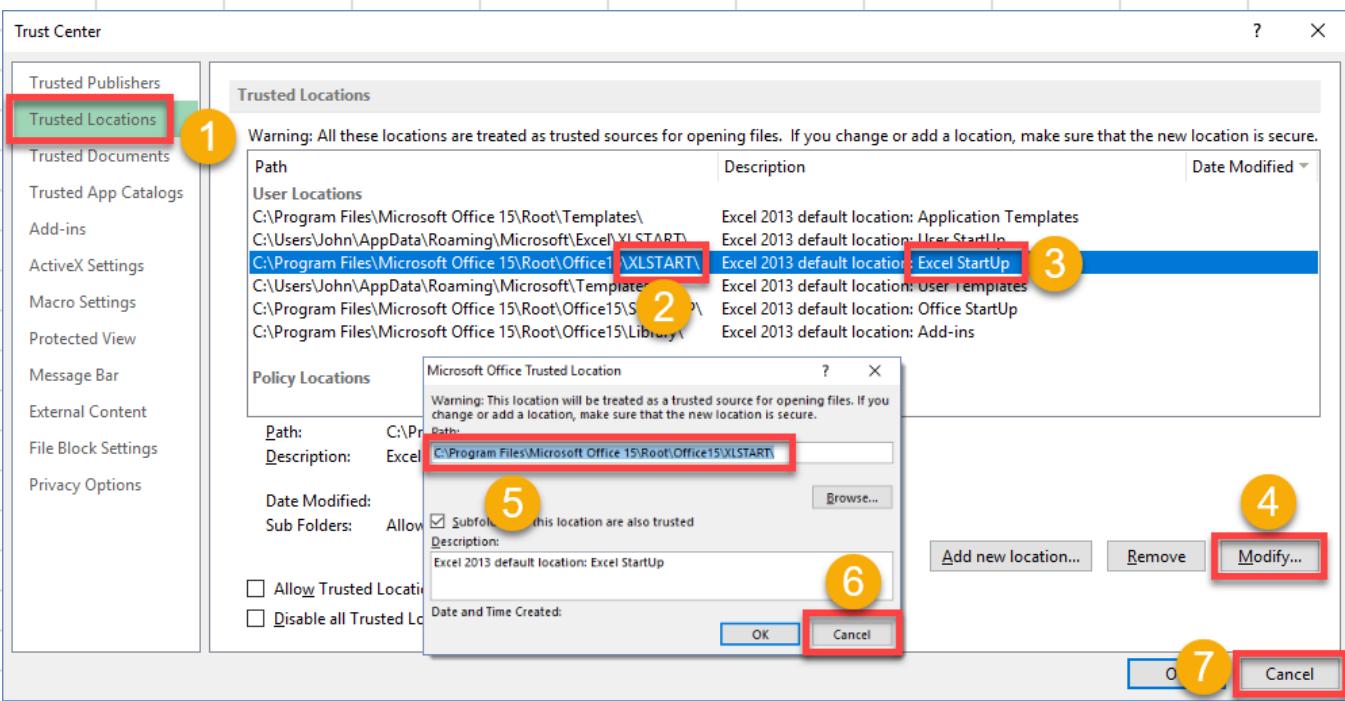
The screenshot shows a Microsoft Excel spreadsheet with the following details:

- Header Bar:** Shows the ribbon tabs: File, Home, Insert, Draw, Formulas, Page Layout, View, Data.
- Cell Selection:** Cell B2 is selected.
- Column Headers:** Columns A, B, C, D are labeled at the top.
- Row Headers:** Rows 1 through 6 are labeled on the left.
- Data:** Column B contains the text "Random Data" in row 2 and "Text that's too long for the column" in rows 3 through 6.
- Mouse Cursor:** A yellow callout box highlights the double-headed arrow icon at the bottom edge of column B, indicating where to double-click to auto-adjust the column width.
- Callout Box Text:** "Double click between columns or rows to automatically fit the column or row to the data it contains."
- Bottom Navigation:** Shows the Sheet1 tab, page number 33, and zoom level 100%.



# How To Excel

## Automatically Open an Excel File on Startup



When installed Excel creates a folder on your computer called XLSTART and any Excel files you save in here will automatically open when you start Excel. To find the location of this folder go to the [File tab](#) in the ribbon > [Options](#) > [Trust Center](#) > [Trust Center Settings](#).

1. Go to **Trusted Locations** in the side menu.
2. Locate the **XLSTART** folder.
3. It will say **Excel StartUp** in the description.
4. Press the **Modify** button.
5. **Copy the folder path** from the pop up.
6. Press the **Cancel** button.
7. Press the **Cancel** button again and close out of the Excel options menu.

Now you can copy this path into your file explorer and save any files you want to open automatically on starting Excel.



# How To Excel

## Hide Text or Data in Your Worksheet

The screenshot shows the 'Format Cells' dialog box in Excel. Step 1 highlights the 'Number' tab. Step 2 highlights the 'Custom' category in the 'Category' list. Step 3 highlights the 'Type:' input field containing three semi-colons (';;;'). Step 4 highlights the 'OK' button. Step 5 points to a cell in the worksheet containing the text 'Hidden Text!', which is visible despite the custom format.

You can hide data in a cell using a custom format. It will not be visible in the worksheet, but will be visible in the formula bar when the active cell cursor is on the cell. Select the cell(s) you want to hide and press Ctrl + 1 to open the **Format Cells** dialog box.

1. Go to the **Number** tab.
2. Select **Custom** from the Category.
3. In the **Type** input put **three semi-colons ;;;**.
4. Press the **OK** button.
5. Now your data will not show on the sheet!

Remember though, the data is still

## Only Switch Between Open Excel Workbooks

**Ctrl** + **Tab**

To quickly switch between only your open Excel files use **Ctrl + Tab**. To switch between other open programs use **Alt + Tab**.



# How To Excel

## Evaluate Formulas

Evaluate single inputs or entire formulas with this trick. Enter edit mode clicking in the formula bar and then highlight the part of the formula you want to evaluate then press **F9**. Press **Enter** to keep the resulting hardcoded value or **Esc** to discard it.

A screenshot of Microsoft Excel demonstrating the F9 keyboard shortcut. The formula bar shows a VLOOKUP formula: =VLOOKUP(E2,Lookup,2,FALSE). A green callout bubble points to the F9 key with the text "F9". A dashed arrow highlights the selection of the range "E2" in the formula. A tooltip box contains the text: "Troubleshoot formulas by using F9 to see the values of referenced cell, ranges or entire formulas."

## Access Advanced Auto Fill Options

A screenshot of Microsoft Excel showing the context menu for advanced auto fill. A right-clicked cell displays a menu with options like Copy Cells, Fill Series, Fill Formatting Only, Fill Without Formatting, Fill Days, Fill Weekdays, Fill Months, Fill Years, Linear Trend, Growth Trend, Flash Fill, and Series... A green callout bubble points to the "Fill Series" option with the text: "Right click and drag the bottom right corner of a cell to access advanced auto fill options." Another green callout bubble points to the "Series..." option with the text: "Access advanced auto fill options like series and flash fill with left click and drag."



# How To Excel

## Freeze Panes to Keep Column Headings in View

The screenshot shows the Microsoft Excel ribbon with the 'View' tab selected. A red box highlights the 'View' tab. Another red box highlights the 'Freeze Panes' button in the 'Window' section of the ribbon. A callout box with a gray border and a blue arrow points from the 'Freeze Panes' button to a detailed description of the feature.

**Freeze Panes**  
Keep rows and columns visible while the rest of the worksheet scrolls (based on current selection).

**Freeze Top Row**  
Keep the top row visible while scrolling through the rest of the worksheet.

**Freeze First Column**  
Keep the first column visible while scrolling through the rest of the worksheet.

Keep your data column headings in view while scrolling through your data with Excel's freeze pane option.

Go to the View tab and select **Freeze Panes** from the Window section.

- **Freeze Panes** will freeze the rows above the active cell and columns to the left of the active cell.
- **Freeze Top Row** will freeze only the top row in place.
- **Freeze First Column** will freeze only the first column in place.

Sheet1 Page | 37



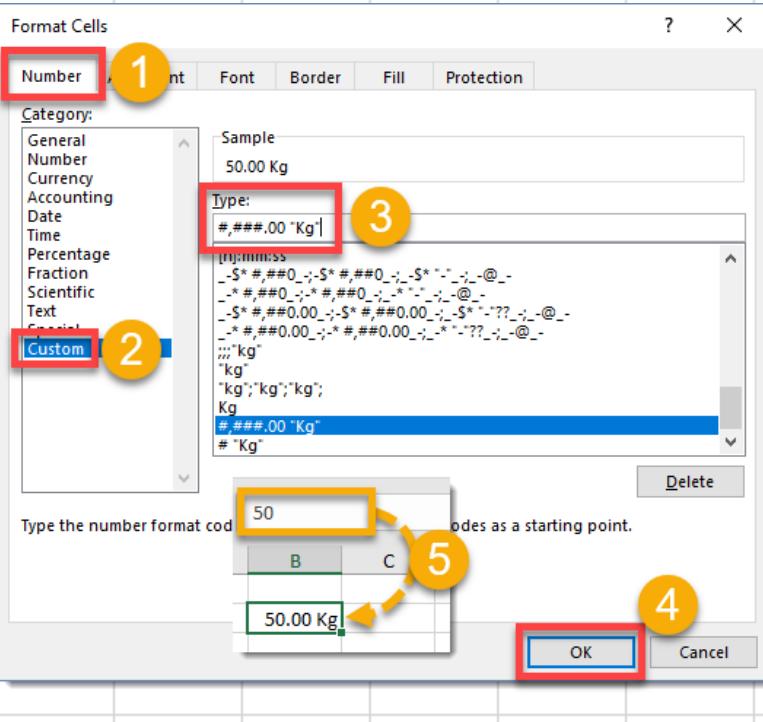
# Toggle Between Formula and Results View

See all the formula on  
a sheet at the same  
time using **Ctrl + ~**

**Ctrl** + ~

Toggle between results and formula view using **Ctrl + ~**

# Display a Number with Text



You can format numbers to display as text using custom formats. If you want to display a unit of measure after your values like Kg or Lbs for Kilograms or Pounds, then change the format.

1. Go to the **Number** tab.
  2. Select **Custom** from the Category.
  3. In the **Type** input put **#,###.00**  
**"Kg"**
  4. Press the **OK** button.
  5. Now your data will show Kg after the number.

This allows you to still do regular numerical calculations with your data because the text isn't part of the data.



# How To Excel

FREE Pivot Table Training



**Microsoft®**  
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## TRAINING SYLLABUS

1. Checklist for proper data structure.
2. Inserting a pivot table and Excel tables.
3. How to use the pivot table fields list.
4. Format numbers and style our pivot tables.
5. Summarize values by count, minimums, maximums, averages etc.
6. Adding slicers and connecting them to multiple pivot tables.
7. Adding and customising pivot charts.

**SIGN UP NOW**

A1

Sheet1

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Ready Num Lock

100%