Excel Tips, shortcuts, and hacks to streamline spreadsheets like a pro

JUNE 17, 2016 | JOE ZAWADA

READING TIME: 11 MINUTES

Microsoft Excel is a great program to do numerical analysis. However, it can be tedious to use. There are many processes and functions that are time consuming to repeat over and over. Learning Excel tips and tricks can vastly improve work efficiency. Read on to discover some essential Excel hacks to make your life easier.

Shortcuts to Navigate More Smoothly

A few key shortcuts can save a great deal of time navigating around Excel.

1. **Move to the last cell in a worksheet**
   Sometimes you need to jump to the last records of data quickly. To do this, use **Control – End** (for a Mac use **Function – Control – Right Arrow**).

2. **Select a range of cells quickly**
   Control – A lets you select a range of cells fast. However, it depends where the cursor is. If the cursor is in a range of data, then Excel will select that range only. If the cursor is in a blank cell, then it selects the entire spreadsheet.

3. **Hide the ribbon**
   The Ribbon at the top of Excel takes up a lot of space. To remove it, click **control** (for a Mac use **Command – Option – R**).

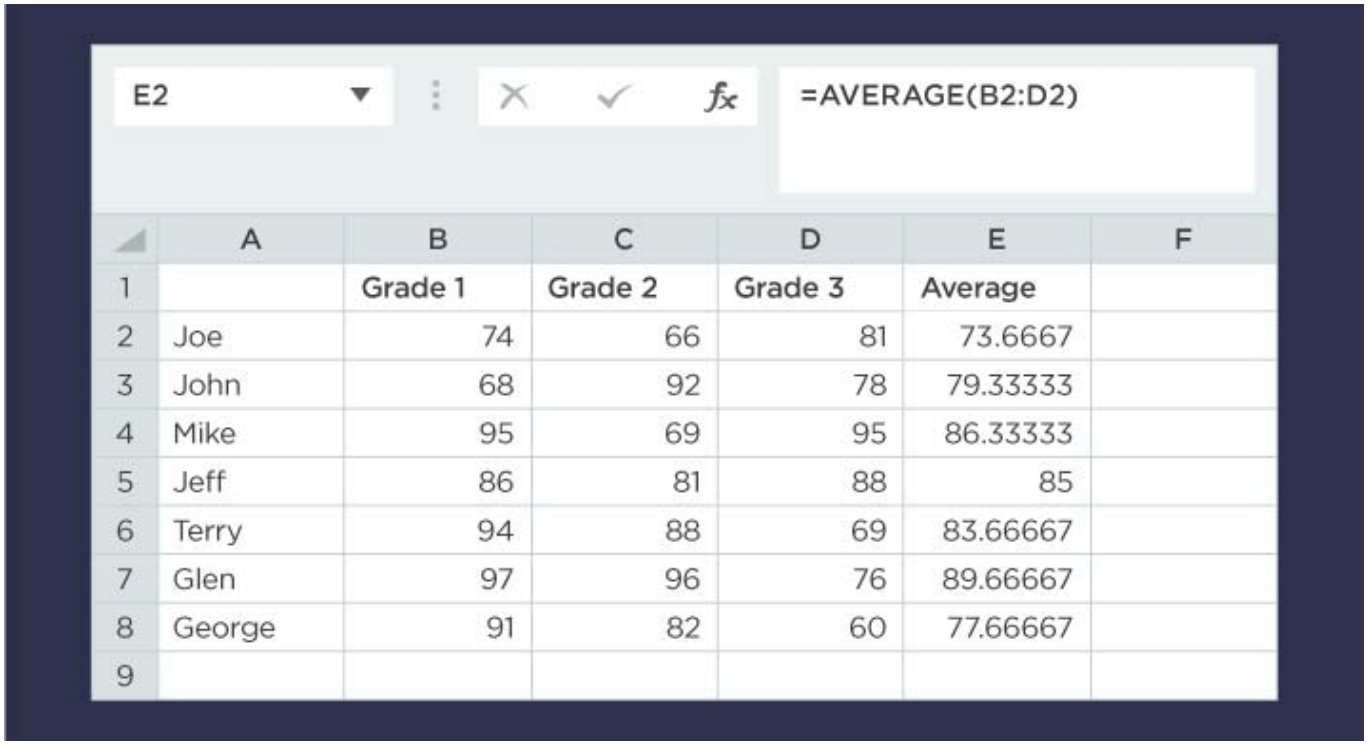
4. **Move from sheet to sheet**
   Move to the next worksheet by pressing **Control – Page down**. Move to the previous sheet with **Control – Page Up.**

5. **Move to the edge of a range of data**
   If you have a large range of data, you can quickly move to the right, left, top, or bottom by pressing the **Control – arrow key of the direction you want to go**.

How to Cut Data Entry Time

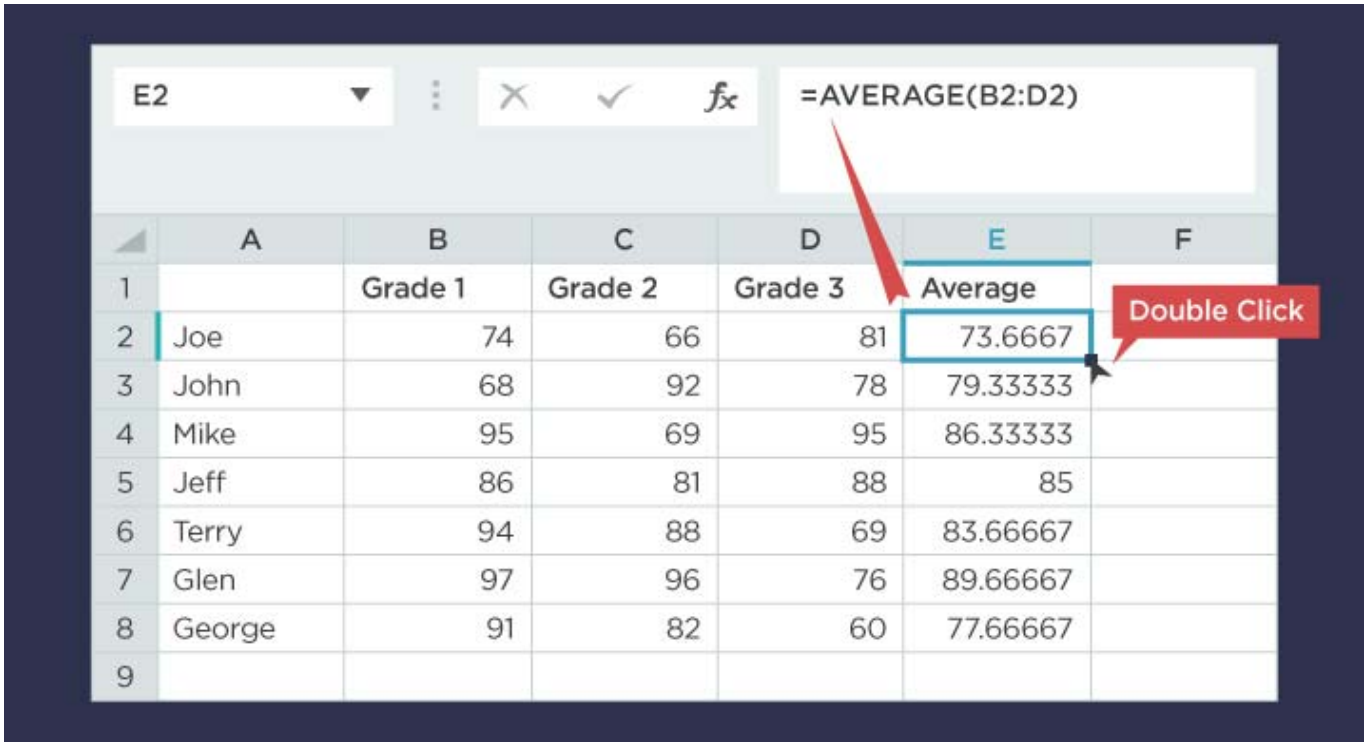
Entering data into Excel is tedious and can require repeating the same process over and over. By cutting time on each entry, you can greatly improve the speed of the entire data entry project. Below are some data entering shortcuts to save time.

1. **Quickly copy your data down a sheet**
   Let's say you entered a group of students' names and grades. In the last column (Col E), you want to figure out the average. So you enter a formula to calculate the average.



	A	B	C	D	E	F
1		Grade 1	Grade 2	Grade 3	Average	
2	Joe	74	66	81	73.6667	
3	John	68	92	78	79.33333	
4	Mike	95	69	95	86.33333	
5	Jeff	86	81	88	85	
6	Terry	94	88	69	83.66667	
7	Glen	97	96	76	89.66667	
8	George	91	82	60	77.66667	
9						

Instead of copying and pasting this all the way down, you can double click the lower right of the cell with the formula, which is cell E2. This repeats the formula for each cell in the column.

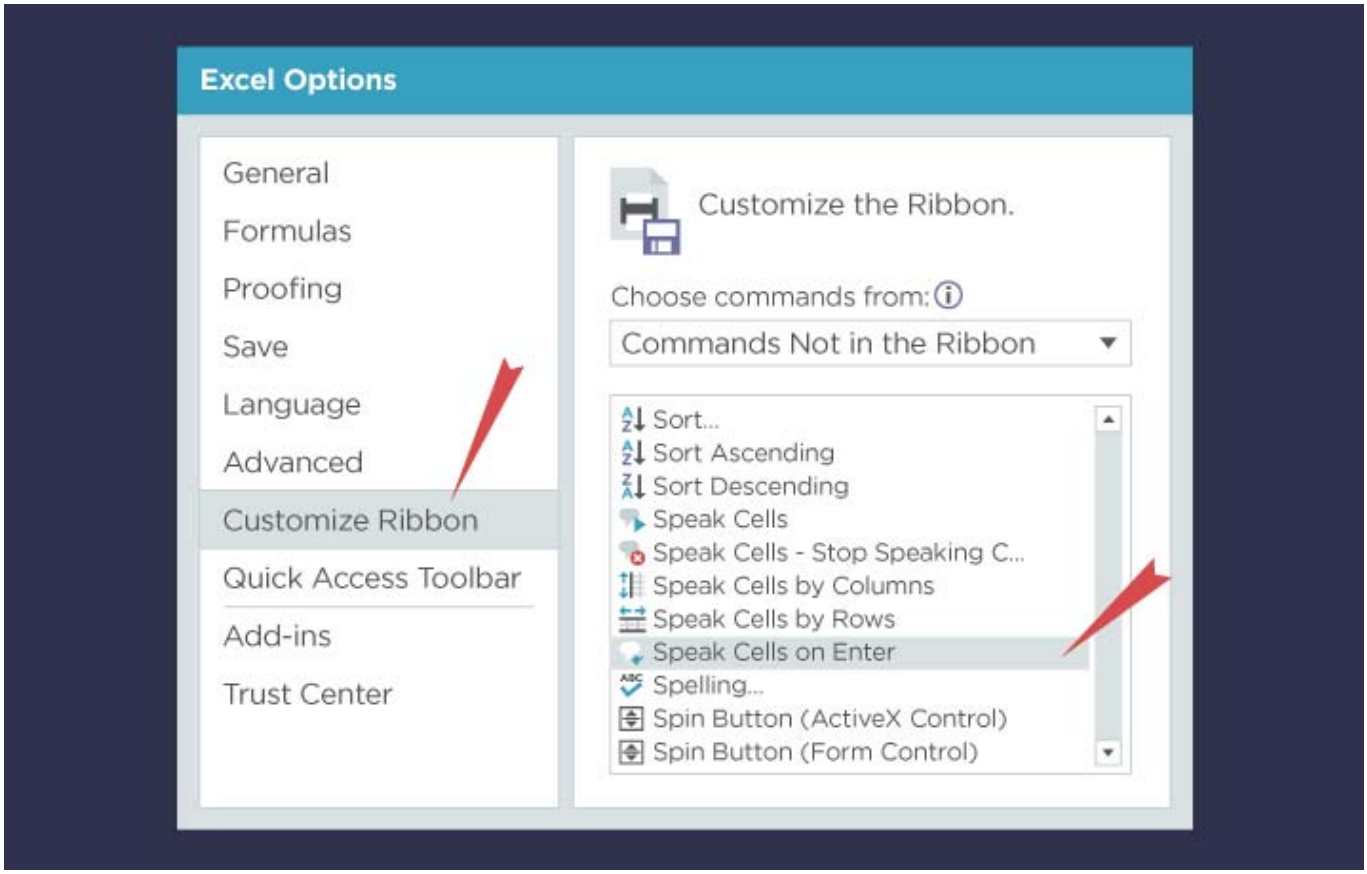


	A	B	C	D	E	F
1		Grade 1	Grade 2	Grade 3	Average	
2	Joe	74	66	81	73.6667	
3	John	68	92	78	79.33333	
4	Mike	95	69	95	86.33333	
5	Jeff	86	81	88	85	
6	Terry	94	88	69	83.66667	
7	Glen	97	96	76	89.66667	
8	George	91	82	60	77.66667	
9						

2. **Get Excel to speak the numbers you type in**

If you struggle to type the right numbers into each cell, ask Excel to speak the numbers after you type them to help prevent errors. Then you can hear exactly what you type without looking at the keyboard. (This is for Windows only.)

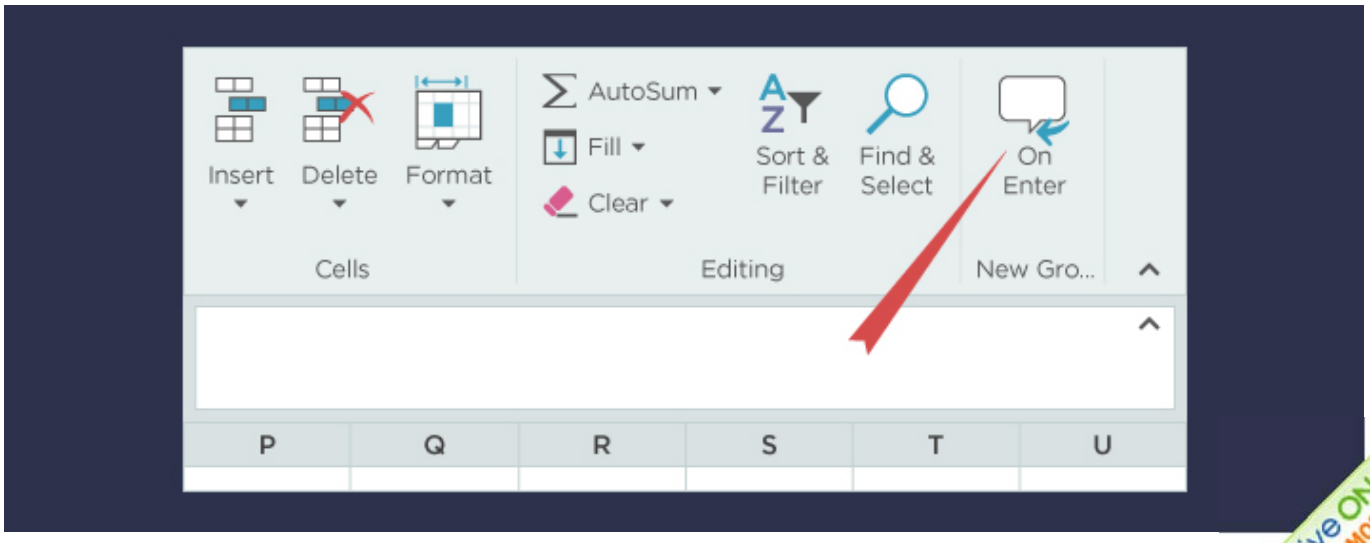
To do this, first you need to add the appropriate button to the toolbar. Go to **File**, **Options**, and then **Customize Ribbon**.



Once there, click the drop-down under **Choose commands from** and select **Commands Not in the Ribbon**

Scroll down to **Speak Cells on Enter** and click **Add** in the middle of the wizard to include this feature in the toolbar. (Add a New Tab to the ribbon first before you add commands to it.)

Once it is added, click on that menu on the ribbon; press the **Speak Cells on Enter** button.

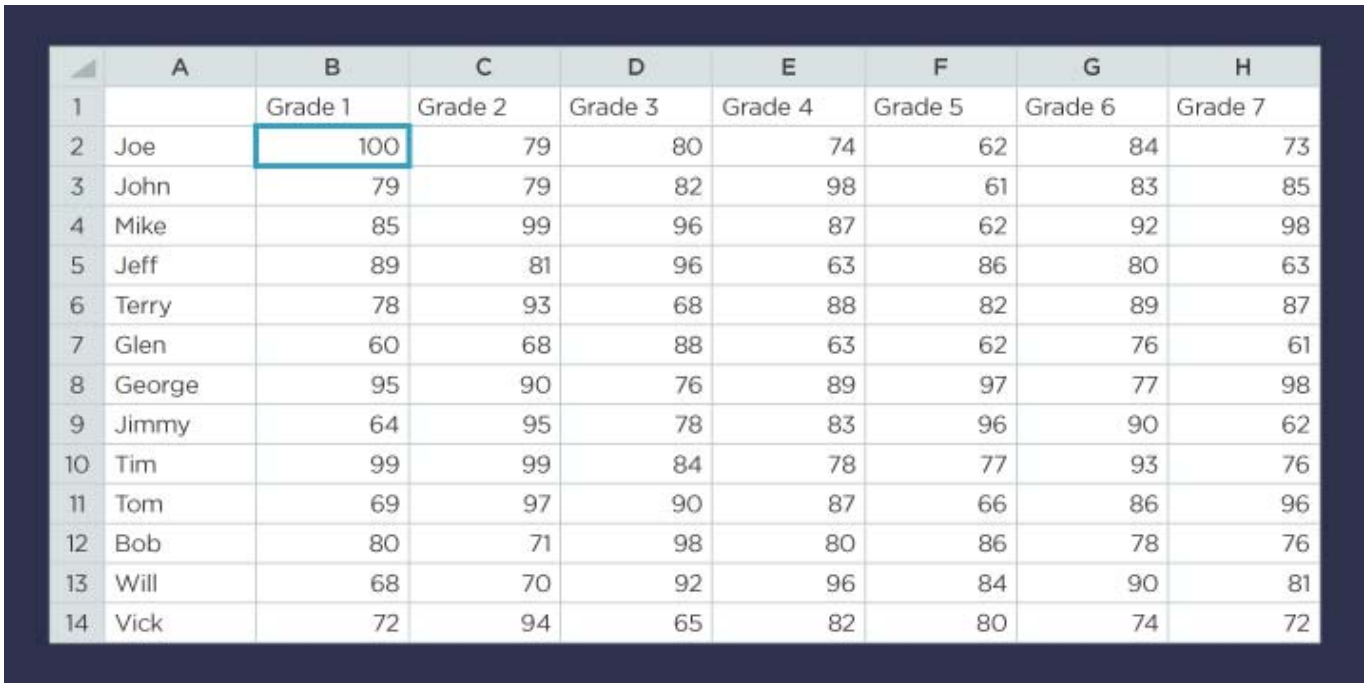


If you want to stop the speaking, then press the button again.

3. **Freeze panes**

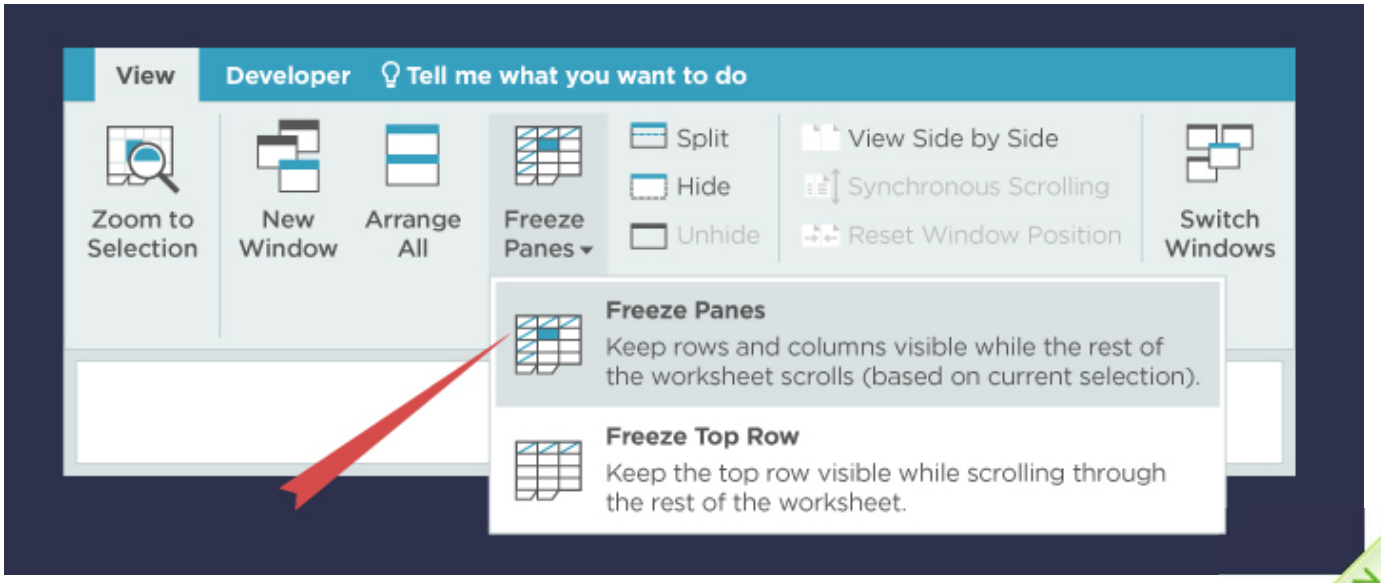
   When you have many columns and rows of data, it can be difficult to remember what each column is once you scroll down. This can lead to data entering errors.

Rather than lose column or row names while scrolling, you can Freeze the Panes. To do this, place the cursor below the column heading and to the right of the names. That would be cell B2.



	A	B	C	D	E	F	G	H
1		Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7
2	Joe	100	79	80	74	62	84	73
3	John	79	79	82	98	61	83	85
4	Mike	85	99	96	87	62	92	98
5	Jeff	89	81	96	63	86	80	63
6	Terry	78	93	68	88	82	89	87
7	Glen	60	68	88	63	62	76	61
8	George	95	90	76	89	97	77	98
9	Jimmy	64	95	78	83	96	90	62
10	Tim	99	99	84	78	77	93	76
11	Tom	69	97	90	87	66	86	96
12	Bob	80	71	98	80	86	78	76
13	Will	68	70	92	96	84	90	81
14	Vick	72	94	65	82	80	74	72

Go to **View** and then **Freeze Panes** and then drop down to **Freeze Panes**.



This will make row and column headings stagnant so you can see them at all times.

	A	G	H	I	J	K	L
1		Grade 6	Grade 7	Grade 8	Grade 9	Grade 10	Grade 11
8	George	77	98	74	64	88	95
9	Jimmy	90	62	71	84	60	82
10	Tim	93	76	68	100	77	67
11	Tom	86	96	91	90	90	82
12	Bob	78	76	84	71	66	98
13	Will	90	81	93	78	69	88
14	Vick	74	72	70	84	63	98
15	Sheila	63	90	70	79	72	67
16	Sally	87	84	67	97	86	80
17	Slim	77	74	96	88	90	60
18	Flip	63	89	87	71	81	92
19	Jack	70	68	61	65	98	71
20	Brad	61	67	72	93	84	90

How to Make Projections

When you have a data group, you may sometimes want to find a trend and predict future values. For example, you may have a small business and have many months of data for expenses. It would be helpful to find a trend to see what the future expenses would be in order to budget appropriately.

You can do this with a function called FORECAST. For example, consider this sample data of expenses:

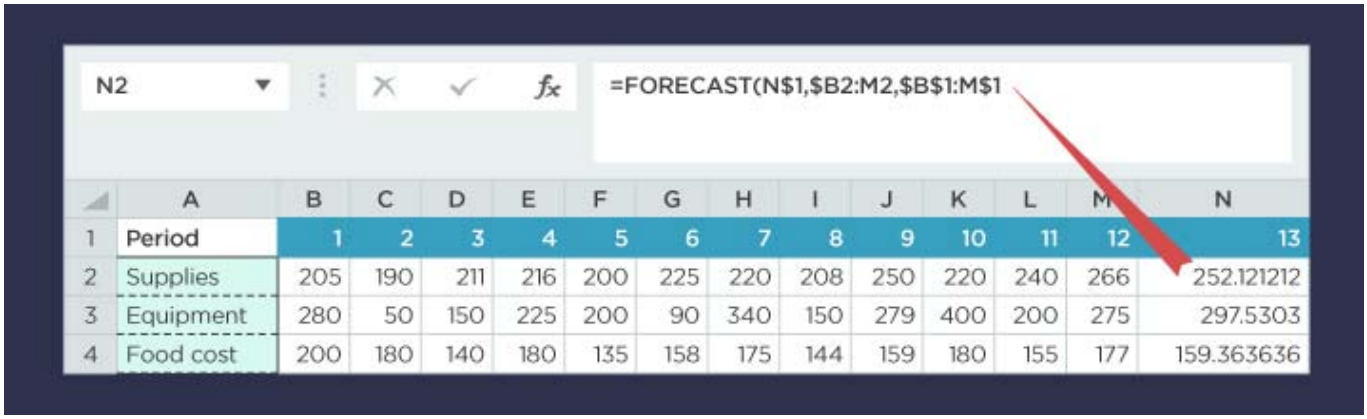
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Period	1	2	3	4	5	6	7	8	9	10	11	12
2	Supplies	205	190	211	216	200	225	220	208	250	220	240	266
3	Equipment	280	50	150	225	200	90	340	150	279	400	200	275
4	Food cost	200	180	140	180	135	158	175	144	159	180	155	177

There are three expenses with period-by-period tracking and 12 months of expenses.

Now let's say you need to budget for future months to see upcoming expenses. One way to do this is to use the FORECAST function, which will look at the trend of the expenses and extrapolate into future numbers.

So you can go to cell N2 and enter in the following formula:

=FORECAST(N$1,$B2:$M2,$B$1:$M$1)



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Period	1	2	3	4	5	6	7	8	9	10	11	12	13
2	Supplies	205	190	211	216	200	225	220	208	250	220	240	266	252.121212
3	Equipment	280	50	150	225	200	90	340	150	279	400	200	275	297.5303
4	Food cost	200	180	140	180	135	158	175	144	159	180	155	177	159.363636

To break down this formula, you need three key components.

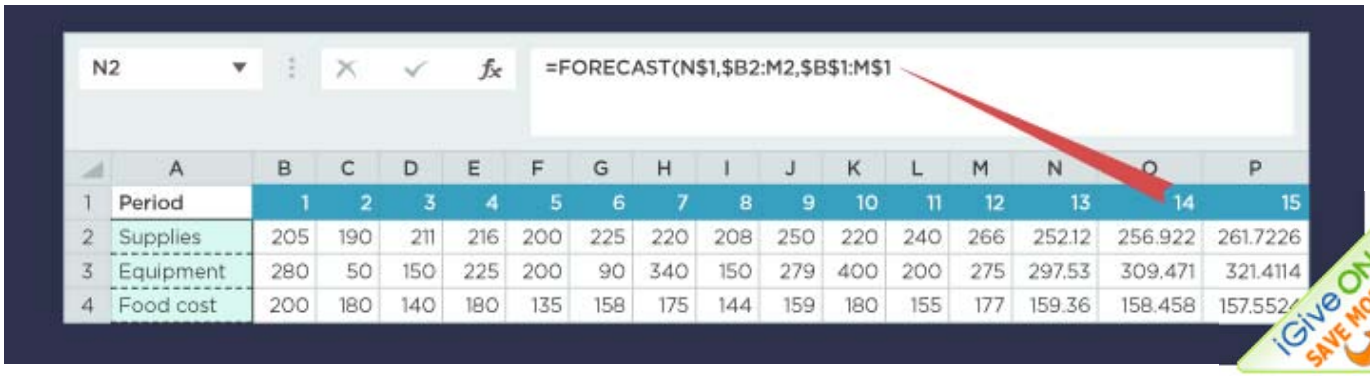
The first part is the current period they are in, which is cell N1. This is period 13. For this formula to work, you need to have the period numbers like they are in row 1. By putting a dollar sign in front of the 1, Excel will always refer to row 1.

The second part is the range of cells that Excel needs to find a trend for. In this case, the range is cells B2 to M2. You need to put a dollar sign in front of the B to anchor it, so when you copy it across, the first column is always B.

The third part of the formula is the range of the periods to look at: cells B1 to M1. Both the second and third parts need to span the same columns. For this, we need to put a dollar sign in front of the B to make it stay there and in front of both 1s (so it's always looking at row 1). You just want to change the M as you copy the formula.

So once you do this, you can copy it down to row 4 and over to the right for period 14 and 15. This will produce a projection of future expenses.

You can see how Supplies and Equipment are trending up, while Food cost shrinks over time.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Period	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
2	Supplies	205	190	211	216	200	225	220	208	250	220	240	266	252.12	256.922	261.7226
3	Equipment	280	50	150	225	200	90	340	150	279	400	200	275	297.53	309.471	321.4114
4	Food cost	200	180	140	180	135	158	175	144	159	180	155	177	159.36	158.458	157.552

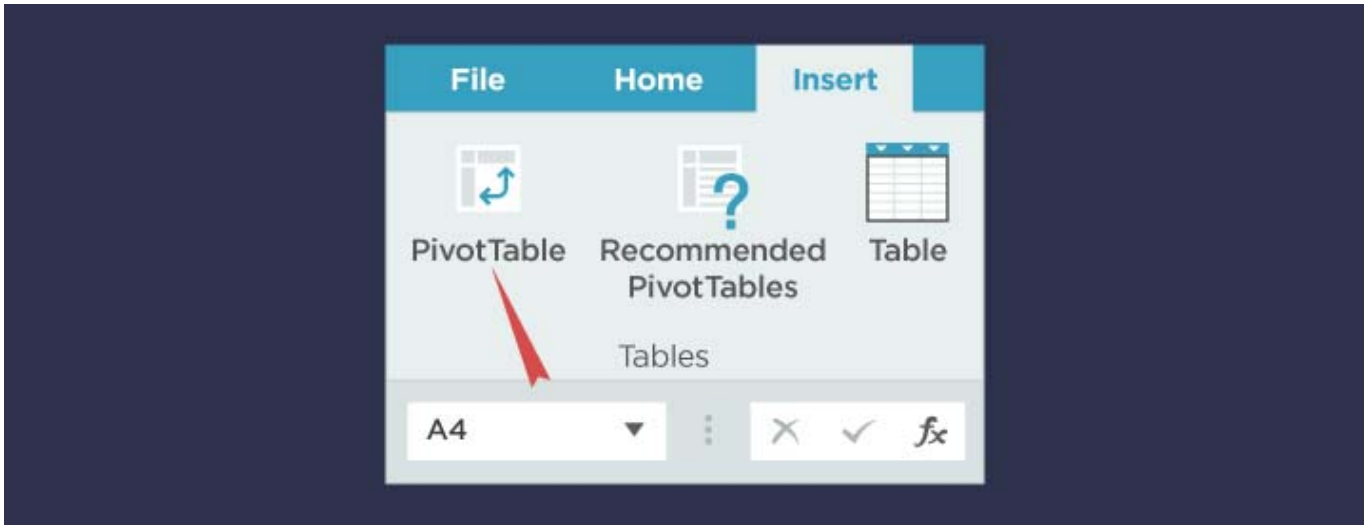
How to Use Tools for Analysis

Sometimes just looking at a large table of numbers isn't enough to decipher what is going on. Excel has many tools to further analyze data.

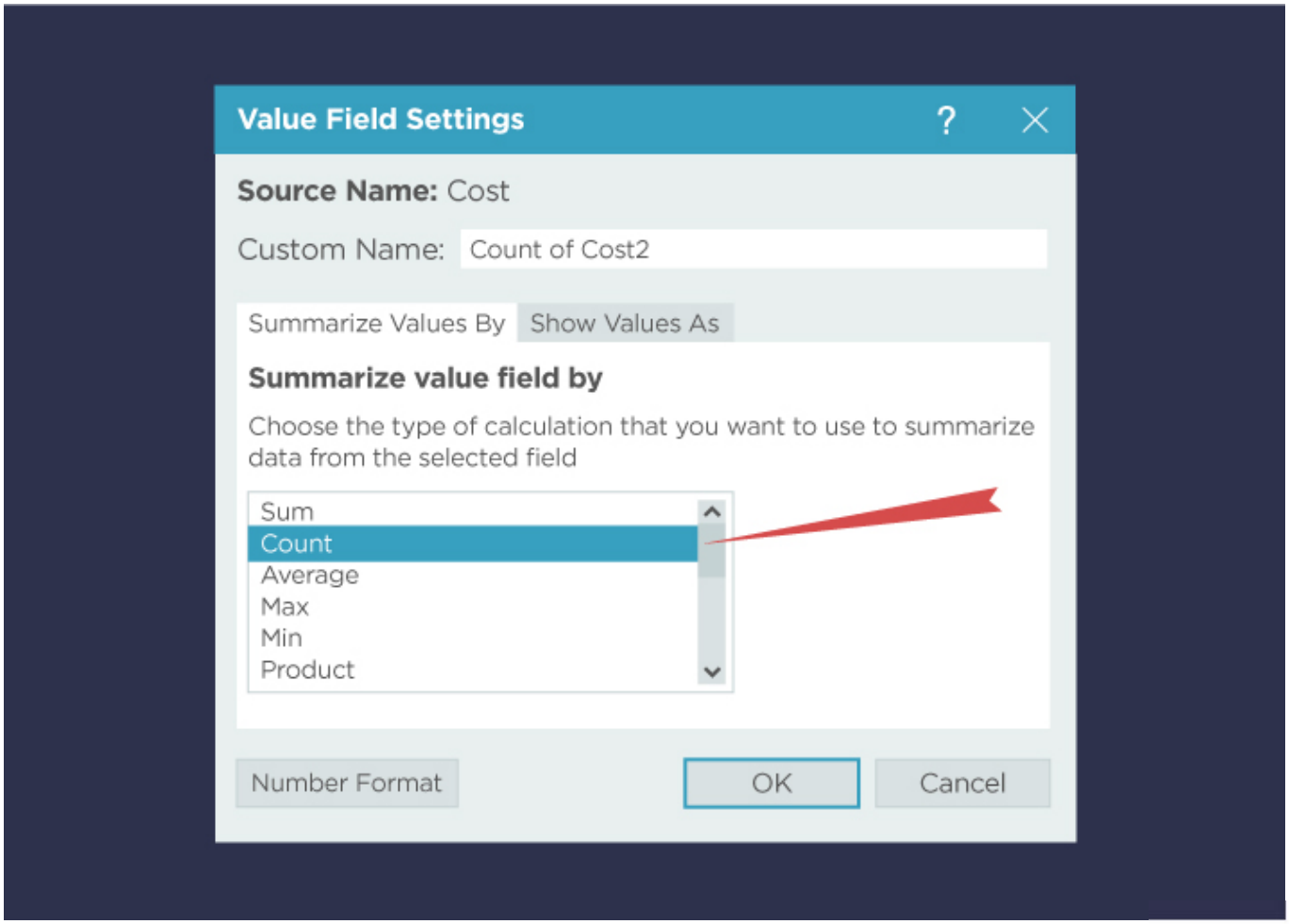
One of the best tools to analyze data in Excel is the Pivot Table. A Pivot Table summarizes a large table of data into a smaller one to see the totals. First, start off with a table of data:

	A	B	C	D
1	**Person buying**	**Item Category**	**Date**	**Cost**
2	Jeff	Equipment	1-Jan	13
3	Jeff	Equipment	1-Jan	11
4	Mike	Misc	1-Jan	83
5	John	Equipment	1-Jan	133
6	Jeff	Misc	1-Jan	61
7	Jerry	Misc	1-Jan	18
8	Mike	Misc	1-Jan	60
9	Jerry	Misc	1-Jan	87
10	Jeff	Travel	1-Jan	147
11	Jerry	Supplies	1-Jan	29
12	Chris	Supplies	2-Jan	24

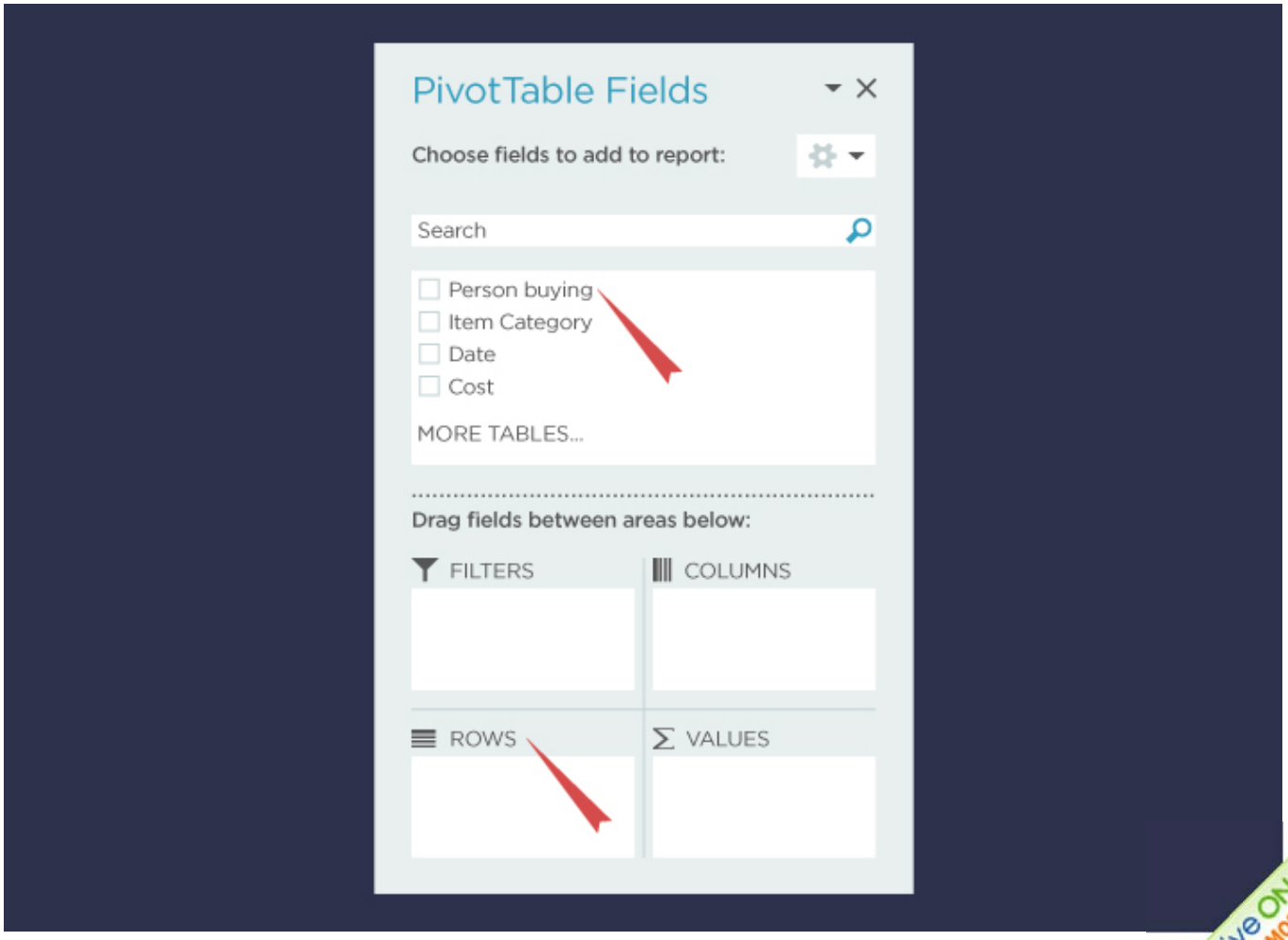
This is a table of purchases by employees and their categories and costs. A Pivot Table allows you to summarize it. To create a Pivot Table, place the cursor anywhere on the table where you'd like to summarize. Then click **Insert** and then **Pivot Table**.



The Pivot Table Wizard will then pop up. The range of the table should be filled in. If not, fill it in manually. Then you can choose to insert an Existing Worksheet or New Worksheet. Here, you'll see a New Worksheet.



Next, you will see a shell of the Pivot Table without data in it:

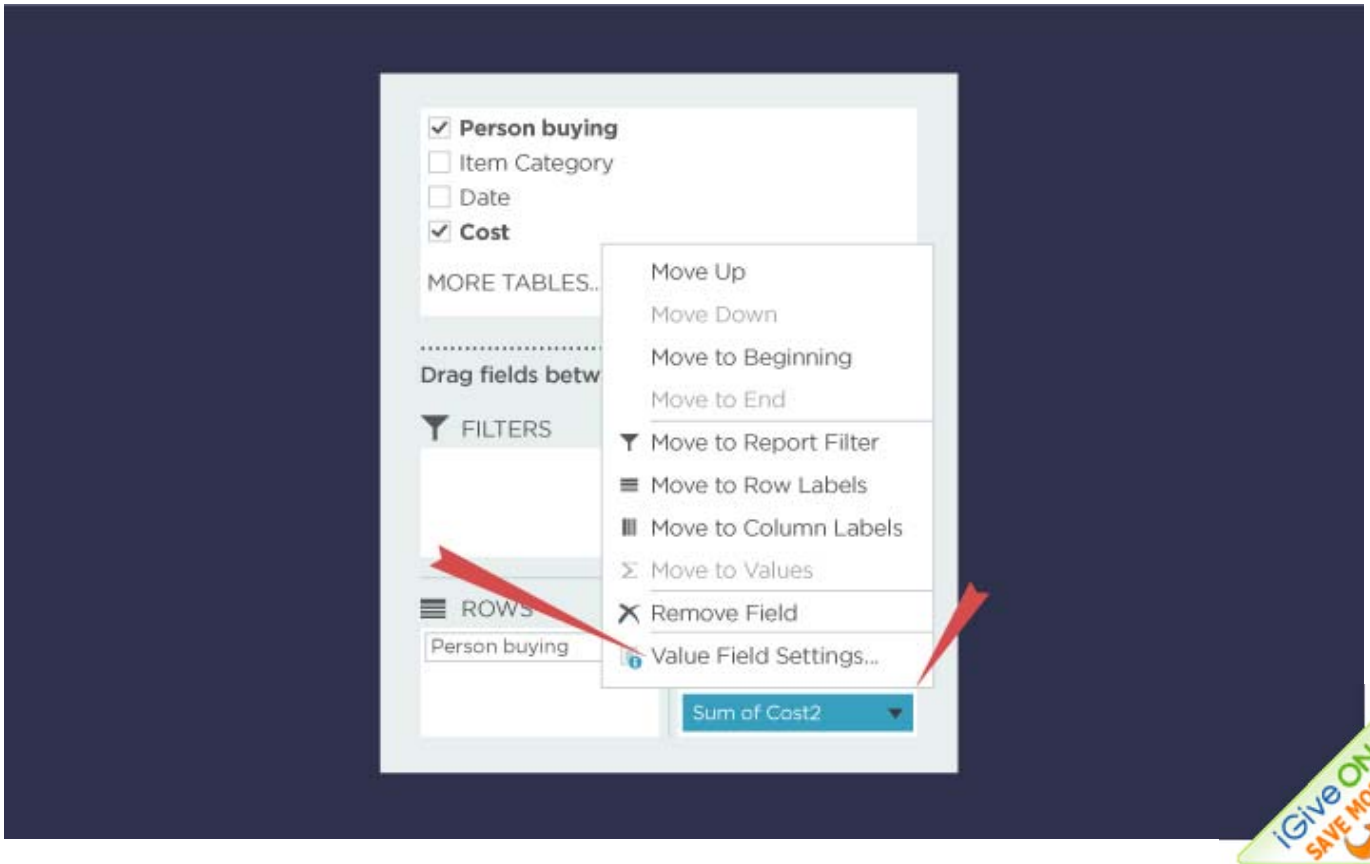


The next step is to build it. To summarize all the purchases by employee, drag **Person Buying** over to ROWS. Then drag **Cost** over to VALUES. The result is a list of how much each person spent.

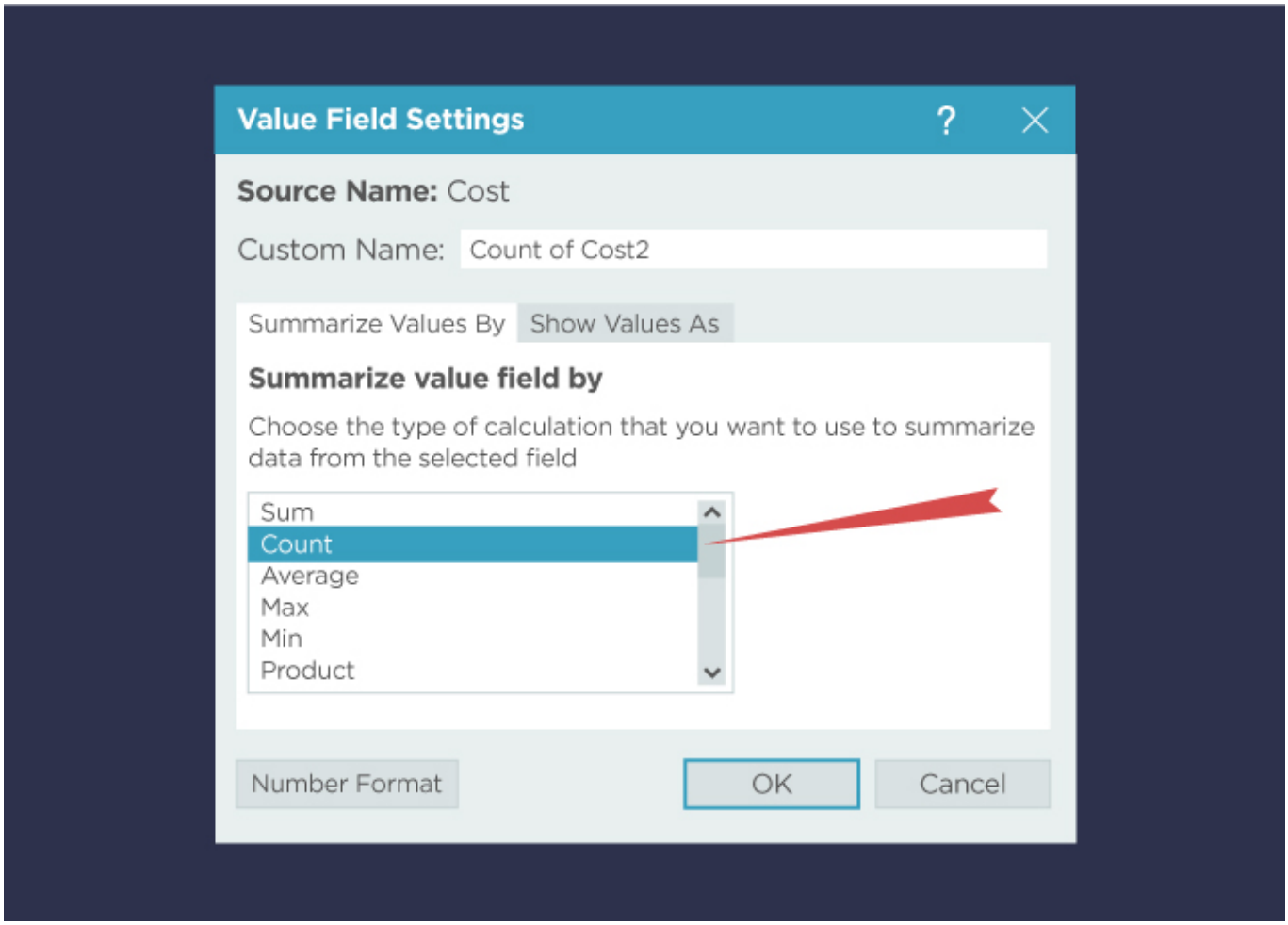
3	Row Labels	Sum of Cost
4	Chris	731
5	Jeff	773
6	Terry	531
7	John	1015
8	Mike	785
9	**Grand Total**	**3835**

What if you want to know how many items they bought? You can drag **Cost** to VALUES again. But once you do, you need to change it from SUM to COUNT in order to count the number of items purchased.

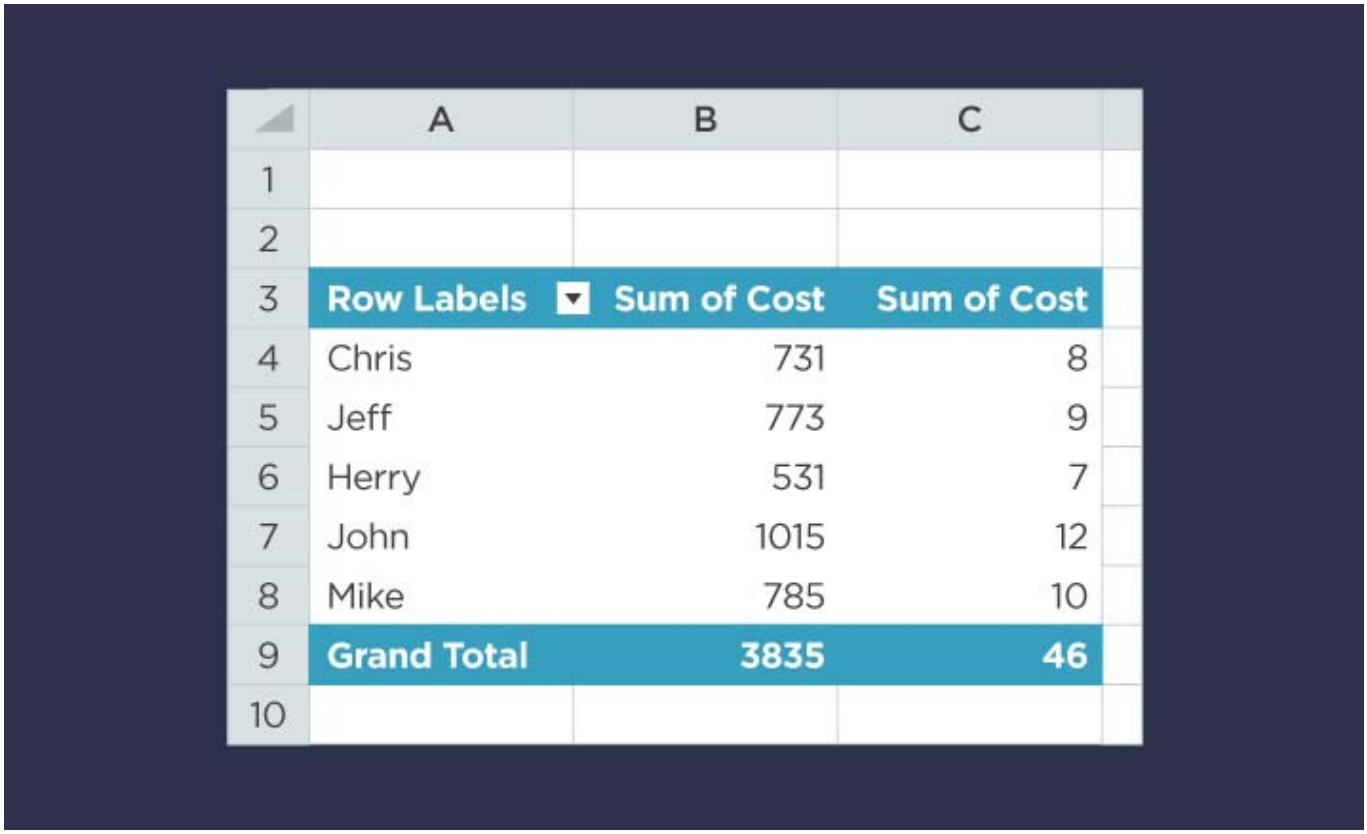
After dragging **Cost** to VALUES, click on the right arrow and go to **Value Field Settings**.



The following wizard will pop up. Change SUM to COUNT.



You will now view a table of employees, costs, and total items purchased.



	A	B	C
1			
2			
3	Row Labels	Sum of Cost	Sum of Cost
4	Chris	731	8
5	Jeff	773	9
6	Herry	531	7
7	John	1015	12
8	Mike	785	10
9	Grand Total	3835	46
10			

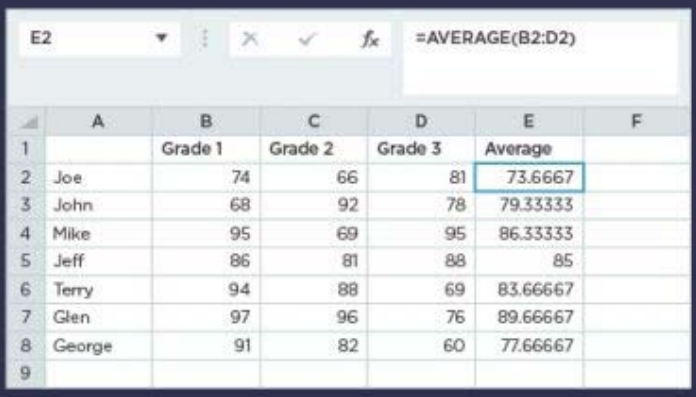
You can also summarize the data in the table by Purchase category. Pivot Tables are very flexible and allow Excel users to expand their analysis.

In Closing

Excel is a great tool to enter and analyze data, but without shortcuts, tips, and tricks, it can be extremely time consuming. Once you learn and execute these tricks, you can greatly improve efficiency and output.

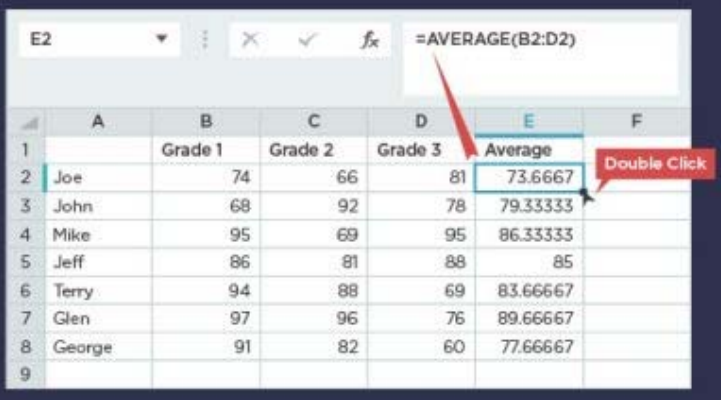
EXCEL TIPS, SHORTCUTS, AND HACKS
to Streamline Spreadsheets Like a Pro

QUICKLY COPY YOUR DATA DOWN A SHEET



	A	B	C	D	E	F
1		Grade 1	Grade 2	Grade 3	Average	
2	Joe	74	66	81	73.6667	
3	John	68	92	78	79.33333	
4	Mike	95	69	95	86.33333	
5	Jeff	86	81	88	85	
6	Terry	94	88	69	83.66667	
7	Glen	97	96	76	89.66667	
8	George	91	82	60	77.66667	
9						

- Say you entered a group of students' names and grades.
- In the last column (Col E), you want to figure out the average, so you enter a formula.

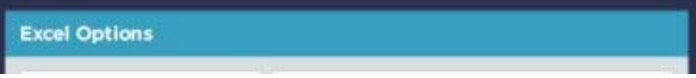


	A	B	C	D	E	F
1		Grade 1	Grade 2	Grade 3	Average	
2	Joe	74	66	81	73.6667	
3	John	68	92	78	79.33333	
4	Mike	95	69	95	86.33333	
5	Jeff	86	81	88	85	
6	Terry	94	88	69	83.66667	
7	Glen	97	96	76	89.66667	
8	George	91	82	60	77.66667	
9						

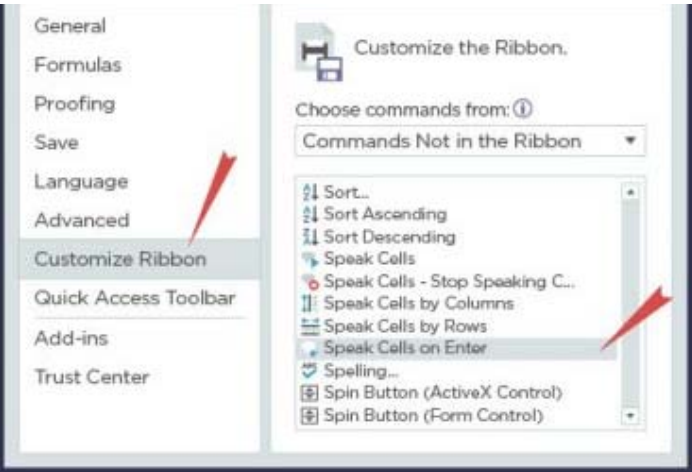
- Instead of copying and pasting this all the way down, you can double click the lower right of the cell with the formula, which is cell E2.
- This repeats the formula for each cell in the column.

GET EXCEL TO SPEAK THE NUMBERS AS YOU TYPE THEM

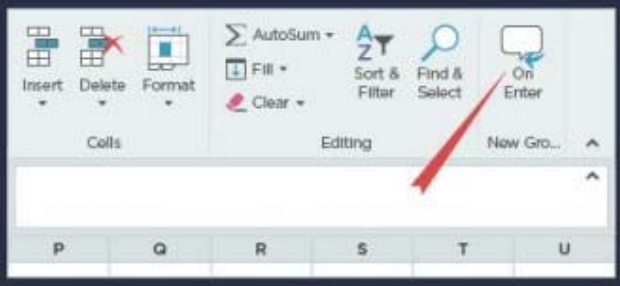
- Prevent errors by asking Excel to speak the numbers after you type them.
- First, add the appropriate button to the toolbar.



- Go to **File**, **Options**, and then **Customize Ribbon**.



- Click the drop down under **Choose commands from** and select **Commands Not in the Ribbon.**
- Scroll down to **Speak Cells on Enter** and click **Add** in the middle of the wizard to include this feature in the toolbar.
  - You will need to add a New group first on the right side to a Menu, so you can add it to it.
- Once it is added, click on that menu on the ribbon; press the **Speak Cells on Enter** button.



- If you want to stop the speaking, then press the button again.

FREEZE PANELS

	A	B	C	D	E	F	G	H
1		Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7
2	Joe	100	79	80	74	62	84	73
3	John	79	79	82	98	61	83	85
4	Mike	85	99	96	87	62	92	98
5	Jeff	89	81	96	63	86	80	63
6	Terry	78	93	68	88	82	89	87
7	Glen	60	68	88	63	62	76	61
8	George	95	90	76	89	97	77	98
9	Jimmy	64	95	78	83	96	90	62
10	Tim	99	99	84	78	77	93	76
11	Tom	69	97	90	87	66	86	96
12	Bob	80	71	98	80	86	78	76
13	Will	68	70	92	96	84	90	81
14	Vick	72	94	65	82	80	74	72

- Instead of losing column or row names during scrolling, you can Freeze the Panes.
- Place the cursor below the column heading and to the right of the names; here, that would be cell B2.

- Go to **View, Freeze Panes,** and then drop down to **Freeze Panes.**

	A	G	H	I	J	K	L
1		Grade 6	Grade 7	Grade 8	Grade 9	Grade 10	Grade 11
8	George	77	98	74	64	88	95
9	Jimmy	90	62	71	84	60	82
10	Tim	93	76	68	100	77	67
11	Tom	86	96	91	90	90	82
12	Bob	78	76	84	71	66	98
13	Will	90	81	93	78	69	88
14	Vick	74	72	70	84	63	98

- This will make row and column headings stagnant so you can see them at all times.

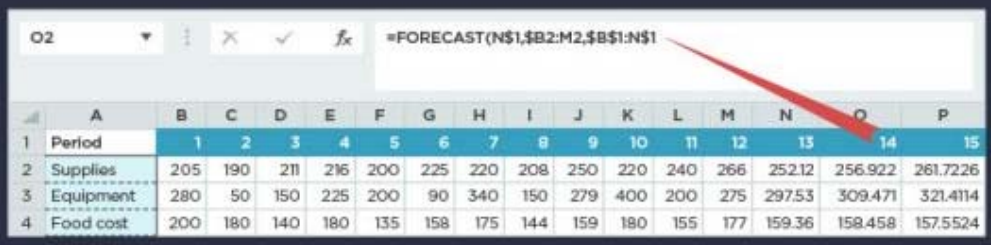
15	Sheila	63	90	70	79	72	67
16	Sally	87	84	67	97	86	80
17	Slim	77	74	96	88	90	60
18	Flip	63	89	87	71	81	92
19	Jack	70	68	61	65	98	71
20	Brad	61	67	72	93	84	90

MAKE PROJECTIONS

- To find a trend and predict future values, use **FORECAST.**
- In this data set, there are three expenses with period-by-period tracking and 12 months of expenses.
- Say you need to budget for future months to see upcoming expenses.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Period	1	2	3	4	5	6	7	8	9	10	11	12
2	Supplies	205	190	211	216	200	225	220	208	250	220	240	266
3	Equipment	280	50	150	225	200	90	340	150	279	400	200	275
4	Food cost	200	180	140	180	135	158	175	144	159	180	155	177

- Go to cell N2 and enter in the following formula:=FORECAST(N$1,$B2:$M2, $B$1:$M$1).



- To break down this formula, you need three key components:
  1. **The current period they are in (c\N1).**
  2. **The range of cells that Excel needs to find a trend for (B2 to M2).**
  3. **The range of the periods to look at (B1 to M1).**
- Copy the formula down to row 4 and over to the right for period 14 and 15 to produce a projection of future expenses.
- This shows how Supplies and Equipment are trending up, while Food cost shrinks over time.

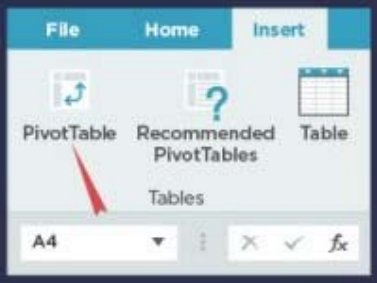
ANALYZE WITH PIVOT TABLES

	A	B	C	D
1	Person buying	Item Category	Date	Cost
2	Jeff	Equipment	1-Jan	13

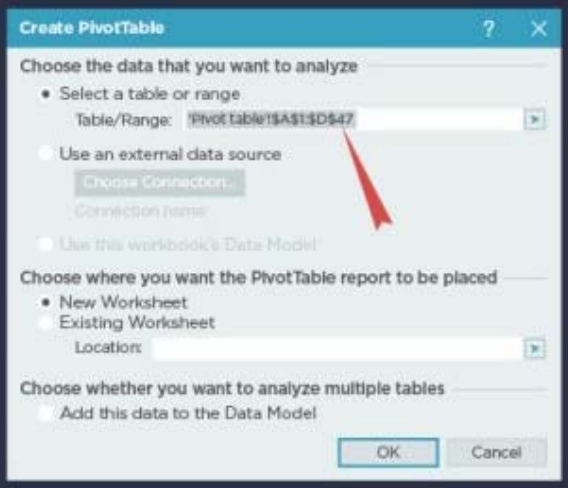
- A Pivot Table summarizes a large table of data into a smaller one to enable you to see the totals.

3	Jeff	Equipment	1-Jan	11
4	Mike	Misc	1-Jan	83
5	John	Equipment	1-Jan	133
6	Jeff	Misc	1-Jan	61
7	Jerry	Misc	1-Jan	18
8	Mike	Misc	1-Jan	60
9	Jerry	Misc	1-Jan	87
10	Jeff	Travel	1-Jan	147
11	Jerry	Supplies	1-Jan	29
12	Chris	Supplies	2-Jan	24

- First, start off with a table of data.
- In this example, you see a list of employee purchases.



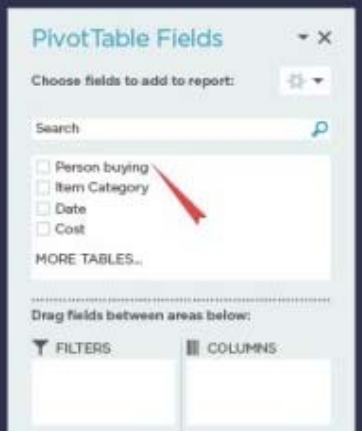
- A Pivot Table allows you to summarize it.
- To create a Pivot Table, place the cursor anywhere on the table where you'd like to summarize, click **Insert** and then **Pivot Table.**

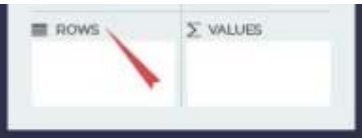


- The Pivot Table Wizard will pop up.
- The range of the table should be filled in; if not, fill it in manually.
- Then you can choose to insert an **Existing Worksheet** or **New Worksheet.**

- Next, you will see a shell of the Pivot Table without data in it.

- To summarize all the purchases by employee, drag **Person Buying** over to **ROWS.**
- Then drag **Cost** over to **VALUES.**
- The result is a list of how much each person spent.

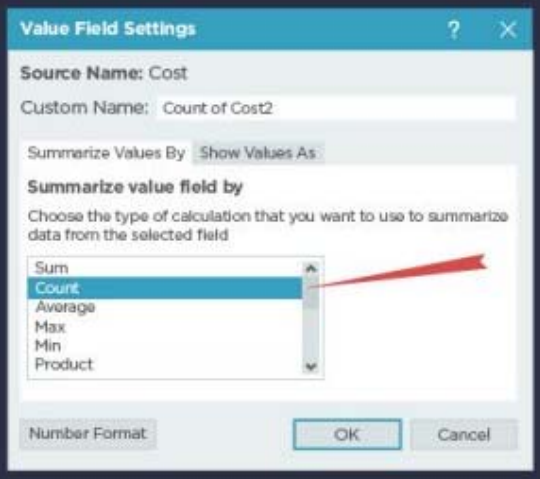




- To find out how many items they bought, drag **Cost** to VALUES again.
- Change **SUM** to **COUNT** in order to count the number of items purchased.

	Row Labels	Sum of Cost
4	Chris	731
5	Jeff	773
6	Terry	531
7	John	1015
8	Mike	785
9	**Grand Total**	**3835**

- After dragging **Cost to VALUES,** click on the right arrow and go to **Value Field Settings.**



- A wizard will pop up.
- Change **SUM** to **COUNT.**

	A	B	C
1			
2			
3	Row Labels	Sum of Cost	Sum of Cost
4	Chris	731	8
5	Jeff	773	9
6	Herry	531	7
7	John	1015	12
8	Mike	785	10
9	**Grand Total**	**3835**	**46**
10			

- You will now view a table of employees, costs, and total items purchased.

A small part of your job is 100% of ours.

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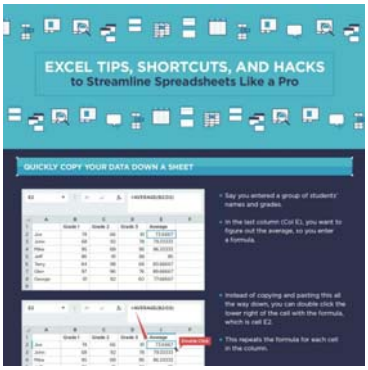

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Joe runs Excelbyjoe.com, where he posts helpful tips, how-tos, tutorials, and explanations for the average user.

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