

Seven Habits of Highly Effective Excel users.

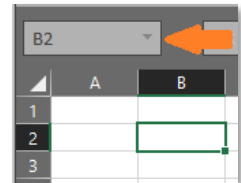
1. Select efficiently
2. Use shortcuts
3. Use Tables
4. Efficiently refer to a cell or range.
5. Follow professional formatting
6. Apply tricks across all of Office programs
7. Get help fast

Select efficiently

In order to apply formatting or formulas to one or more cells, you need to select them quickly.

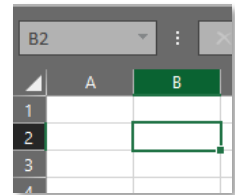
- 1 Click on any one cell. Notice that the green box along the outside of the cell – this signifies it is the “active” cell. Now look at the name box – it holds the address of the active cell.

The address is B2



- 2 Click on a column letter to select the entire column, or click on a row number to select an entire row

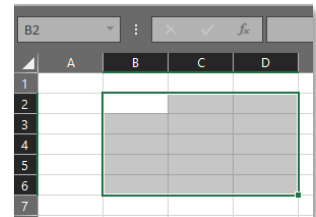
The address is (B:B)



- 3 Click on the first cell. Hold down the **Shift** key. Move your mouse a few cells over and down. Click on the second cell. Release the Shift key. Now you have selected a range of cells

Notice the Active cell's name in the name box and the big green box around all the selected cells.

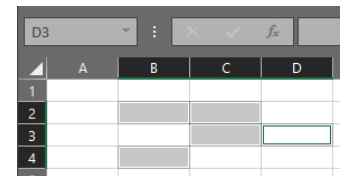
The address is (B2:D6)



- 4 Click on the first cell. Hold down the **Ctrl** key. Click on other non-touching cells. Release the Ctrl key.

Notice the Active cell is the last cell you clicked on. The other clicked cells are in grey.

This does not have a range address.



Use Shortcuts

Keyboard short cuts can quickly navigate you around the sheet without using a mouse, apply formatting to selected cells, and perform file-level operations. You can even create your own shortcuts using VBA.

Shortcuts use “chord” keys, you’ll press two or more keys down at the same time, usually using a Cntl key (bottom corner of keyboard), a Shift key, and sometimes an Alt key or function key. To use a shortcut: select desired cell(s), press and hold Ctrl key while pressing the shortcut key. For example, to make a cell(s) bold, select the cell(s), hold the Ctrl key down and click the “b” key once. Do it again to toggle the bold off. <https://exceljet.net/keyboard-shortcuts> for more ideas.

Ctrl + c	Copy
Ctrl + v	Paste
Ctrl + x	Cut
Ctrl + z	Undo
Ctrl + f	Find
Shift + F4	Find next
Ctrl + a	Select all
Esc	Cancel selection

Ctrl + s	Save
Ctrl + p	Print
Ctrl + d	Fill down
Ctrl + t	Insert table
Alt F1	Create Chart

arrow	Move one cell over
Ctrl + arrow	Move to the edge of data
Ctrl + End	Move to last cell
Ctrl + Home	Move to first cell
Ctrl + 1	Format Cells
Ctrl + Shift + :	Enter current time
Ctrl + Shift + ;	Enter current date
Ctrl + `	Toggle to see formulas
Ctrl + Shift + &	Add border

Use Tables

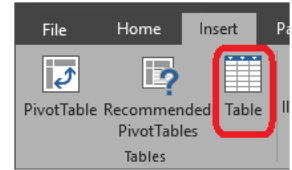
Data analysis using functions, charts, and pivot tables work best when the data is in table format:

- Columns have meaningful and unique names.
- No empty rows
- If a cell formatted as a number, it should only have numbers, not text or empty spaces.
- No subtotals within the data, only totals at the very end.

A **data range** can be referenced by its address, like (A1:C5), or you can define a name for the range to create a Named Range, such as Shipping_Charges. Do this by selecting the field or range (must be contiguous), Formulas > Define Name > Define Name and give the range a unique name.



Even better than a data range is a Table. Select the range. Insert > Table (or Ctrl + t), and in the Create Table dialog box, check the “My table has headers” box. Click ok.



Click on the Table and notice a few things:

- The Table Tools tab has extra options controlling your table. When you click on a cell not in the Table, this tab disappears.
- You can assign a name to the table in the Table Name field.
- The cells are now “zebra-ed” – they have alternating colors
- The column headers have drop-down arrow to sort and / or filter the data
- In the very bottom right hand corner of the table, you’ll see a blue corner bracket. If you type data in a new row or column immediately to the right or below this bracket, the new data is immediately incorporated into the table.
- In the Table Tools tab, here is a Convert to Range option. This will leave the “zebra” colors, but the data will no longer be in a Table.
- Fields in a Table can be referred with **Structured References**.

Efficiently refer to a cell or range.

We use cell addresses in formulas, charts, pivot tables, and many other advanced features. You don't have to master them all right away, but you should be able to identify them.

Relative, Absolute, Mixed

<https://edu.gcfglobal.org/en/excelformulas/relative-and-absolute-cell-references/1/>

Structured (used in Tables) <https://exceljet.net/lessons/introduction-to-structured-references>

Defined name

Defined range

<https://www.ablebits.com/office-addins-blog/2017/07/11/excel-name-named-range-define-use/>

Follow professional formatting

Follow your company's or professions standards:

- Use their specified font and size in charts, data, and reports.
- Use the correct currency sign
- How to format negative numbers
- Some use conditional formatting to identify "data" vs something pulled from another sheet or workbook.
- Apply passwords and hide sheets as appropriate.

Financial analysts vs. other professions

<https://samples-breakingintowallstreet-com.s3.amazonaws.com/BIWS-Excel-Formatting-Best-Practices.pdf>

Formatting	Used for	By...
Blue Font color	Hard-coded / manually entered numbers	Banks and financials
Black Font color	All formulas	Banks and financials
Green Font color	All direct links to cells in other worksheets or workbooks	Banks and financials
Input data	Good for look-ups	

Dollar symbols in the top and/ or bottom rows of a report.

Percentages usually displayed to one decimal place, such as 0.0%, and italicize the number. *10.4%*

Want the decimals to line up in a column.

<https://www.journalofaccountancy.com/issues/2016/sep/excel-accounting-format.html>

Apply tricks across all of Office programs

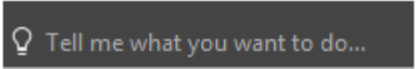
Things you learn in Excel can be applied to Word or PowerPoint. Many of the short cuts, such as copy & paste are used in all Microsoft products, as well as most other computer apps. Other things to consider:

- Online Help feature
- <Right click> mini-menu pop-ups
- Copy / Paste options
- Find / Replace options.

Example: Dark Mode is applied to one Office product and is carried through to the other apps. File > Account > Office Theme: Dark Grey <https://www.howtogeek.com/360470/how-to-enable-dark-mode-in-microsoft-office/>



Get help fast

Excel help	Search for help in the Tell Me box (Alt Q) 
Goodwill Community Foundation - edu.gcfglobal.org	Beginner to intermediate level tutorials in tech (Office, computer basics, etc.), job skills, reading and math. Well-written and excellent examples.
Lynda.com	Must access through the Library's website: Skokielibrary.info → Resources → On-line Training & Tutorials → Lynda.com Online Learning Library Create an account using your Skokie Library Card to access hundreds of tutorials and career path classes to learn about Office, web design, financial reporting.
Exceljet.net	Formulas – especially VLOOKUP and INDEX / MATCH
Chandoo.org	Charts, forum to ask questions
Excel-easy.com	Pivot tables
Contextures.com	Pivot tables
Myonlinetraininghub.com	New and amazing things to do with Excel and Power BI, free and paid webinars.
reddit.com/r/excel/	forum to ask questions
excelcampus.com	Free and paid webinars. Well written blog and videos.
Myexcelonline.com	Free and paid webinars. Best write-up for using Get and Transform.