

## Technology Workshop: Microsoft Excel Tips & Tricks!

July 30, 2015  
Lunch & Learn Webinar



# Welcome!

---

- Thank you for joining us today.
- In today's call we'll talk about **Microsoft Excel Tips and Tricks**. The call will last approximately 20 minutes
- To follow from your office, go to [www.ekaru.com](http://www.ekaru.com) / Go to "What's New" near the bottom of the page. Presentation will open in a browser, click the down arrow in nav bar to advance slides.

# Format

- This is a “listen only” voice call.
  - (For call clarity, cut down on ambient noise, avoid “call on hold music” – a bit tough though, because I can’t hear you!)
- If you have questions, please eMail to [info@ekaru.com](mailto:info@ekaru.com) and we will try to include Q&A at the end of the call – we will be reviewing email live during the call.
- Call 978-692-4200 for help.



# Workshop Mission

---

- Help you get more from the technology you already have.
- Introduce you to new technologies you need to know about.

# Overview

---

- 17 Excel Tips and Tricks:
  - Most examples will be basic.
  - We'll show a few favorite tricks
  - Try to get one new trick you can use!

***Ask Questions: [info@ekaru.com](mailto:info@ekaru.com)***

# Topics

---

- Formatting Cells
- Basic Formulas
- Format as Table
- Insert Spreadsheet into Word
- Graphs
- Export from QuickBooks
- Keyboard Shortcuts



# Excel

---

- Present Data
- “Crunch” Numbers (Do math)

# Sample Spreadsheet

The screenshot shows the Microsoft Excel interface. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, and Review. The Home ribbon is active, showing options for Voltage Encryption, Clipboard (Paste, Copy, Format Painter), and Font (Calibri, 11, Bold, Italic, Underline, Text Color, Background Color). The formula bar displays the formula `=SUMIF(A2:A14, "Monday", C2:C14)` for cell C16. The spreadsheet data is as follows:

	A	B	C	D	E	F
1	<b>Day</b>	<b>Sales Person</b>	<b>Invoice</b>			
2	Monday	Sally	19000			
3	Monday	Sally	8000			
4	Monday	Hazel	22500			
5	Monday	Roger	7500			
6	Tuesday	Tom	14000			
7	Tuesday	Jerry	13000			
8	Wednesday	Tom	9500			
9	Wednesday	Jerry	8200			
10	Thursday	Hazel	5600			
11	Thursday	Sally	18700			
12	Thursday	Sally	9200			
13	Friday	Roger	4500			
14	Friday	Jerry	8600			

# Tip #1: Formatting Cells - Font

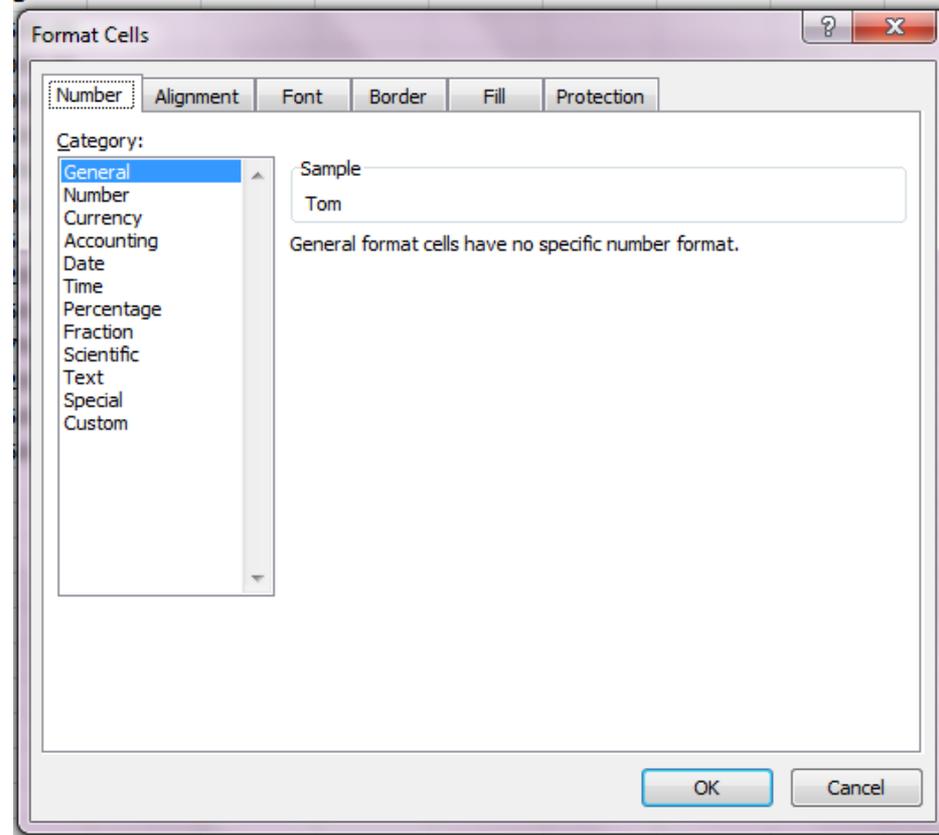
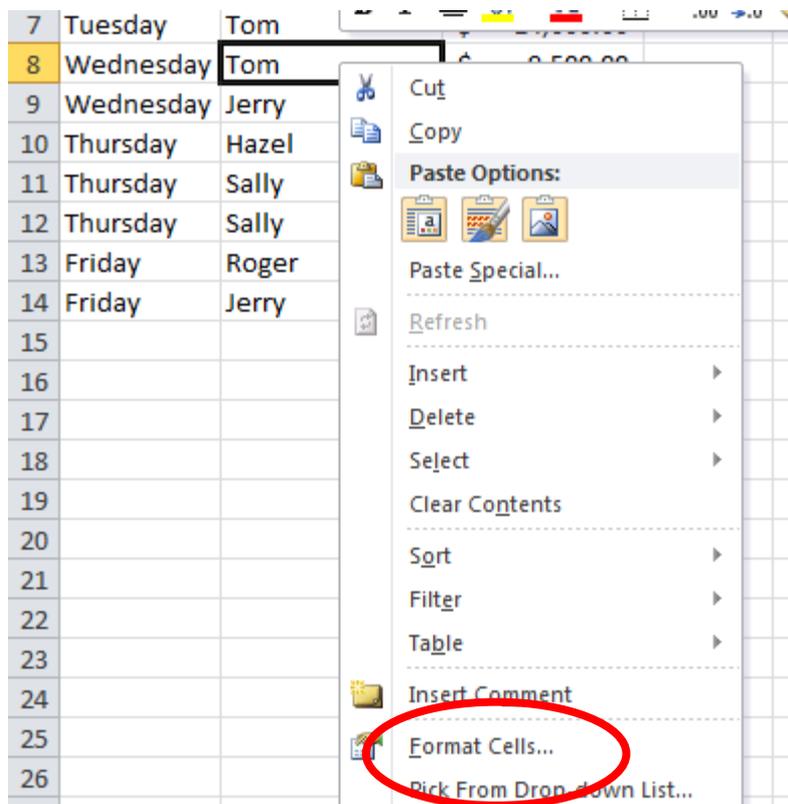
- Highlight Cells
- Select Fonts

The screenshot shows the Microsoft Excel interface. The 'Home' ribbon is active, and the 'Font' group is expanded. The font is set to Calibri, size 11. The 'Bold' button (B) is highlighted, and a tooltip is displayed with the text 'Bold (Ctrl+B)' and 'Make the selected text bold.' Below the ribbon, a table is visible with the following data:

	A	B	
1	Day	Sales Person	INVOICE
2	Monday	Hazel	22500
3	Thursday	Hazel	5600
4	Tuesday	Jerry	13000
5	Wednesday	Jerry	8200
6	Friday	Jerry	8600
7	Monday	Roger	7500
8	Friday	Roger	4500
9	Monday	Sally	19000
10	Monday	Sally	8000
11	Thursday	Sally	18700
12	Thursday	Sally	9200
13	Tuesday	Tom	14000
14	Wednesday	Tom	9500
15			49400
16			

# Tip #2: Formatting Cells - Options

- Right click to format/ "Format Cells":



# Tip #3: Auto-Size Columns

- Double-click between cells to auto-size

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C
1	Day	Sales	Invoice
2	Monday	Hazel	22500
3	Thursday	Hazel	5600
4	Tuesday	Jerry	13000
5	Wednesday	Jerry	8200
6	Friday	Jerry	8600
7	Monday	Roger	7500
8	Friday	Roger	4500
9	Monday	Sally	19000
10	Monday	Sally	8000
11	Thursday	Sally	18700
12	Thursday	Sally	9200
13	Tuesday	Tom	14000
14	Wednesday	Tom	9500
15			49400
16			

# Tip #4: Types of Data

The screenshot shows the Microsoft Excel interface with the Accounting tab selected. The main data table is as follows:

	A	B	C	D	E	F	G	H	I
1	<b>Day</b>	<b>Sales Person</b>	<b>Invoice</b>						
2	Monday	Hazel	\$ 22,500.00						
3	Thursday	Hazel	\$ 5,600.00						
4	Tuesday	Jerry	\$ 13,000.00						
5	Wednesday	Jerry	\$ 8,200.00						
6	Friday	Jerry	\$ 8,600.00						
7	Monday	Roger	\$ 7,500.00						
8	Friday	Roger	\$ 4,500.00						
9	Monday	Sally	\$ 19,000.00						
10	Monday	Sally	\$ 8,000.00						
11	Thursday	Sally	\$ 18,700.00						
12	Thursday	Sally	\$ 9,200.00						
13	Tuesday	Tom	\$ 14,000.00						
14	Wednesday	Tom	\$ 9,500.00						

The Accounting tab dropdown menu is open, showing the following options:

- \$ English (U.S.)
- £ English (U.K.)
- € Euro (€ 123)
- ¥ Chinese (PRC)
- fr. French (Switzerland)
- More Accounting Formats...

# Tip #5: Formula: SUM

- =SUM(C2:C14)
- Provides the total for a range of rows

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F
1	Day	Sales Person	Invoice			
2	Monday	Hazel	22500			
3	Thursday	Hazel	5600			
4	Tuesday	Jerry	13000			
5	Wednesday	Jerry	8200			
6	Friday	Jerry	8600			
7	Monday	Roger	7500			
8	Friday	Roger	4500			
9	Monday	Sally	19000			
10	Monday	Sally	8000			
11	Thursday	Sally	18700			
12	Thursday	Sally	9200			
13	Tuesday	Tom	14000			
14	Wednesday	Tom	9500			
15			=sum(C4:C14)			

The formula bar shows the active cell contains the formula: `=sum(C4:C14)`. A tooltip below the formula bar displays: `SUM(number1, [number2], ...)`.

# Tip #6: SUM (Specific Cells)

- Click on individual cells...

	A	B	C	D
1	Day	Sales Person	Invoice	
2	Monday	Hazel	22500	
3	Thursday	Hazel	5600	
4	Tuesday	Jerry	13000	
5	Wednesday	Jerry	8200	
6	Friday	Jerry	8600	
7	Monday	Roger	7500	
8	Friday	Roger	4500	
9	Monday	Sally	19000	
10	Monday	Sally	8000	
11	Thursday	Sally	18700	
12	Thursday	Sally	9200	
13	Tuesday	Tom	14000	
14	Wednesday	Tom	9500	
15			C2,C5,C11	

# Tip #7: Formula: AVERAGE

	A	B	C	D	E
1	<b>Day</b>	<b>Sales Person</b>	<b>Invoice</b>		
2	Monday	Sally	19000		
3	Monday	Sally	8000		
4	Monday	Hazel	22500		
5	Monday	Roger	7500		
6	Tuesday	Tom	14000		
7	Tuesday	Jerry	13000		
8	Wednesday	Tom	9500		
9	Wednesday	Jerry	8200		
10	Thursday	Hazel	5600		
11	Thursday	Sally	18700		
12	Thursday	Sally	9200		
13	Friday	Roger	4500		
14	Friday	Jerry	8600		
15					
16			11407.69		
17					

# Tip #8: Formulas: SUMIF

- Adds a range of numbers based on a condition.
- =SUMIF(A2:A14, "Monday", C2:C14)

1

2

3

- 1. Range to Evaluate** – Check these cells to see if they meet your criteria
- 2. Criteria** – The condition that must be met for the row to be included in the sum
- 3. Range to Sum** – Add these numbers in this column where the row meets the criteria

# Formula: SUMIF

The screenshot shows the Microsoft Excel interface. The formula bar at the top displays the formula `=SUMIF(A2:A14, "Monday", C2:C14)`, which is circled in red. Below the formula bar, the spreadsheet data is visible:

	A	B	C	D	E	F
1	<b>Day</b>	<b>Sales Person</b>	<b>Invoice</b>			
2	Monday	Sally	19000			
3	Monday	Sally	8000			
4	Monday	Hazel	22500			
5	Monday	Roger	7500			
6	Tuesday	Tom	14000			
7	Tuesday	Jerry	13000			
8	Wednesday	Tom	9500			
9	Wednesday	Jerry	8200			
10	Thursday	Hazel	5600			
11	Thursday	Sally	18700			
12	Thursday	Sally	9200			
13	Friday	Roger	4500			
14	Friday	Jerry	8600			
15						
16			57000			

The result of the formula, 57000, is circled in red in cell C16. To the right of cell C16, the text "Sales for Monday" is displayed.

# Formula: SumIf

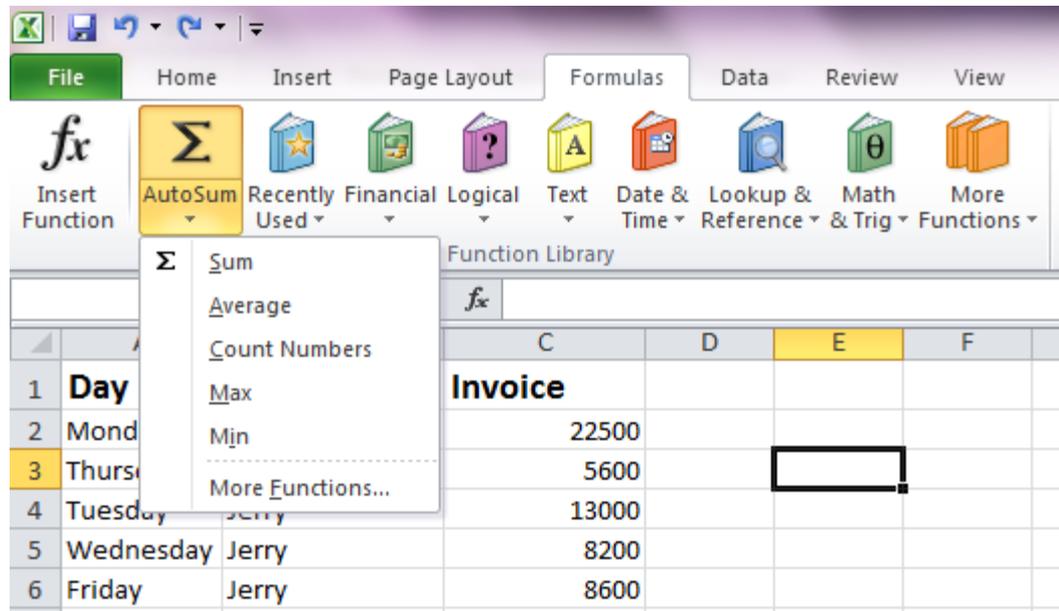
	A	B	C	D	E	F
1	<b>Day</b>	<b>Sales Person</b>	<b>Invoice</b>			
2	Monday	Sally	19000			
3	Monday	Sally	8000			
4	Monday	Hazel	22500			
5	Monday	Roger	7500			
6	Tuesday	Tom	14000			
7	Tuesday	Jerry	13000			
8	Wednesday	Tom	9500			
9	Wednesday	Jerry	8200			
10	Thursday	Hazel	5600			
11	Thursday	Sally	18700			
12	Thursday	Sally	9200			
13	Friday	Roger	4500			
14	Friday	Jerry	8600			
15						
16			54900			
17						

Formula Bar: `=SUMIF(B2:B14, "Sally", C2:C14)`

Result: 54900 (Sales for Sally)

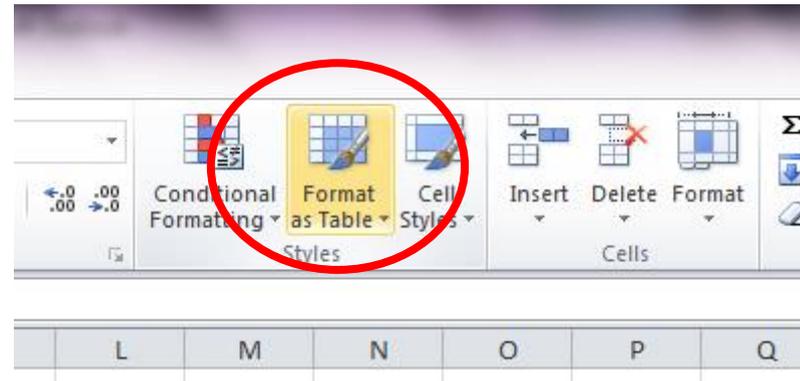
# Tip#9: More Formulas

- Check out the "Formulas" Tab:

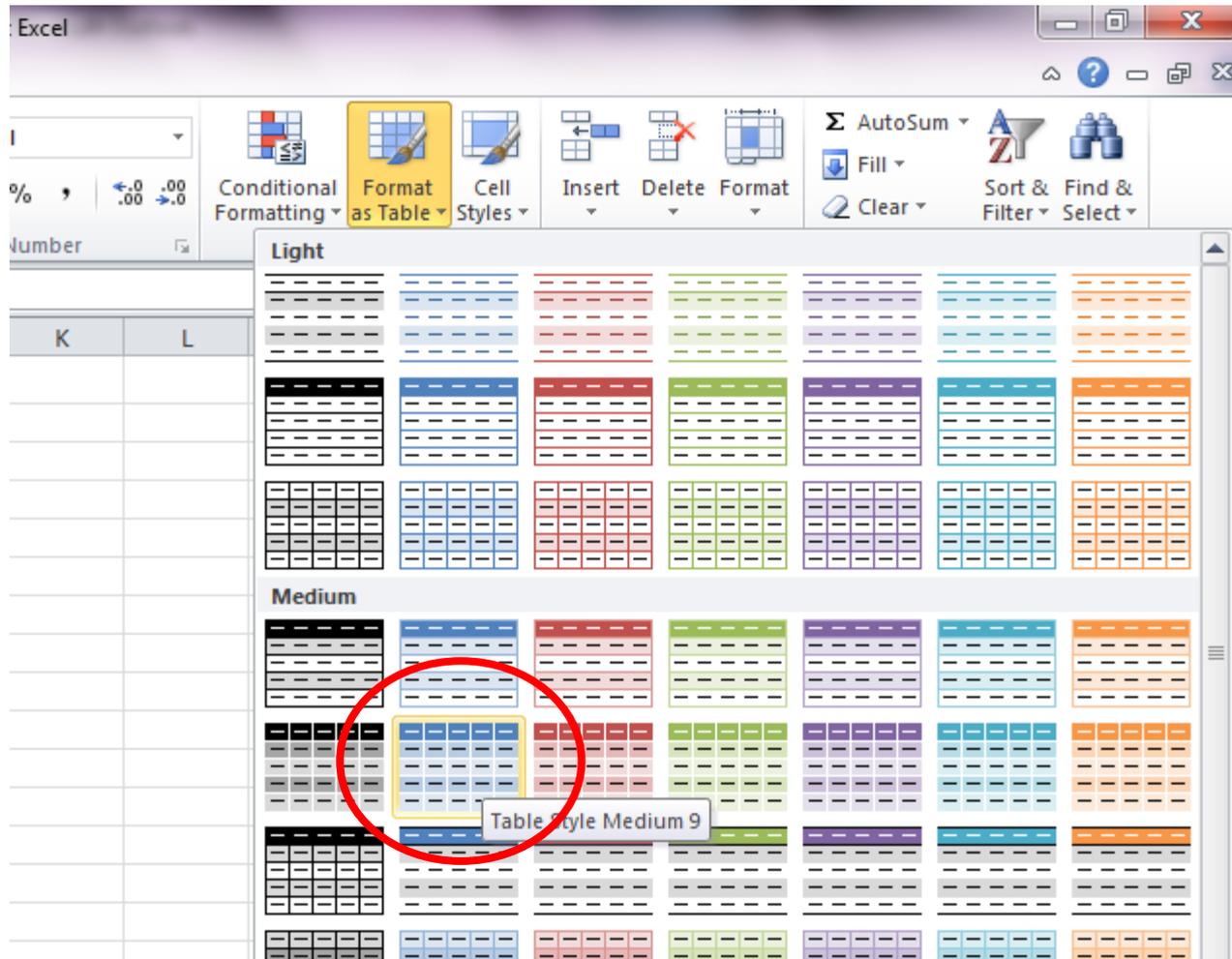


# Tip #10: "Format as Table"

	A	B	C
1	<b>Day</b>	<b>Sales Person</b>	<b>Invoice</b>
2	Monday	Sally	19000
3	Monday	Sally	8000
4	Monday	Hazel	22500
5	Monday	Roger	7500
6	Tuesday	Tom	14000
7	Tuesday	Jerry	13000
8	Wednesday	Tom	9500
9	Wednesday	Jerry	8200
10	Thursday	Hazel	5600
11	Thursday	Sally	18700
12	Thursday	Sally	9200
13	Friday	Roger	4500
14	Friday	Jerry	8600

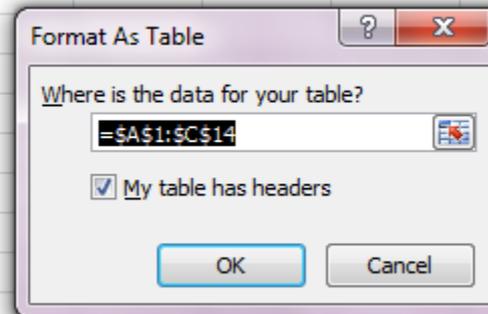


# “Format as Table”



# “Format as Table”

	A	B	C	D	E	F	G	H	I
1	<b>Day</b>	<b>Sales Person</b>	<b>Invoice</b>						
2	Monday	Sally	19000						
3	Monday	Sally	8000						
4	Monday	Hazel	22500						
5	Monday	Roger	7500						
6	Tuesday	Tom	14000						
7	Tuesday	Jerry	13000						
8	Wednesday	Tom	9500						
9	Wednesday	Jerry	8200						
10	Thursday	Hazel	5600						
11	Thursday	Sally	18700						
12	Thursday	Sally	9200						
13	Friday	Roger	4500						
14	Friday	Jerry	8600						
15									
16									
17									
18									
19									
20									

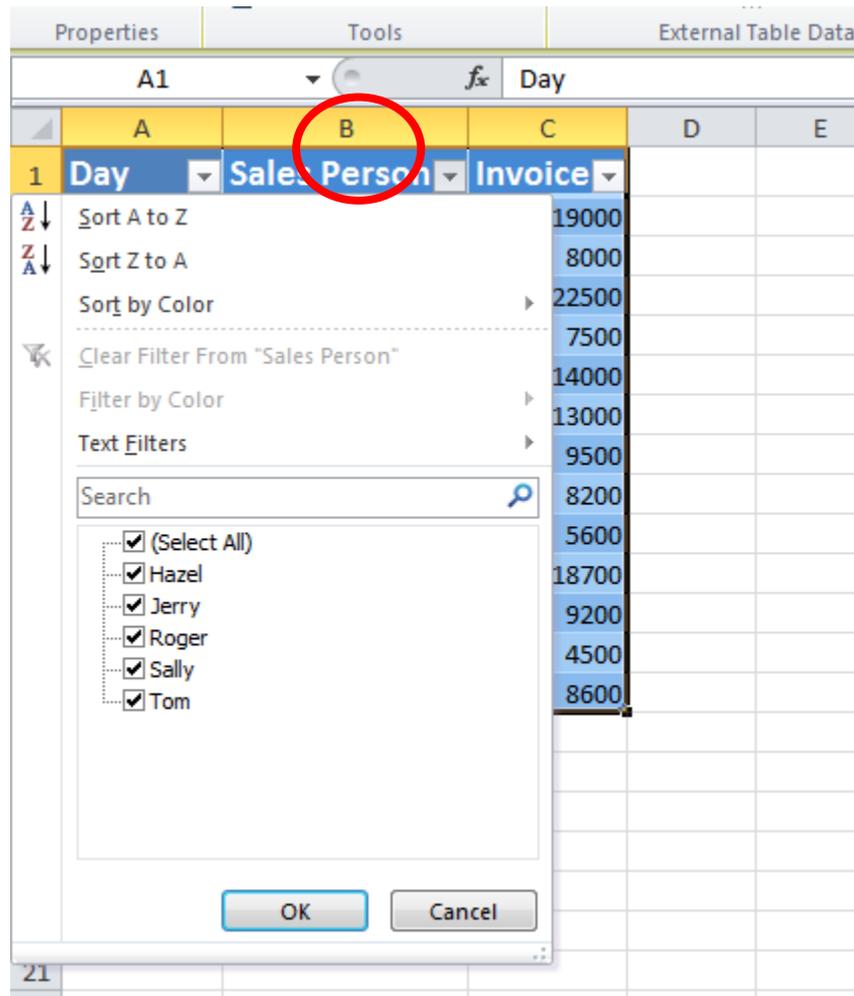


# “Format as Table”

The screenshot shows the Microsoft Excel interface with the 'Format as Table' ribbon selected. The ribbon includes options for 'Table Name' (set to 'Table1'), 'Summarize with PivotTable', 'Remove Duplicates', 'Convert to Range', 'Export', 'Refresh', 'External Table Data', 'Properties', 'Open in Browser', 'Unlink', 'Header Rows', 'Total Rows', and 'Banded Rows'. Below the ribbon, a data table is displayed with columns 'Day', 'Sales Person', and 'Invoice'.

	A	B	C	D	E	F	G
1	Day	Sales Person	Invoice				
2	Monday	Sally	19000				
3	Monday	Sally	8000				
4	Monday	Hazel	22500				
5	Monday	Roger	7500				
6	Tuesday	Tom	14000				
7	Tuesday	Jerry	13000				
8	Wednesday	Tom	9500				
9	Wednesday	Jerry	8200				
10	Thursday	Hazel	5600				
11	Thursday	Sally	18700				
12	Thursday	Sally	9200				
13	Friday	Roger	4500				
14	Friday	Jerry	8600				
15							

# “Format as Table”



# “Format as Table”

The screenshot shows the Microsoft Excel interface with the 'Format as Table' task pane open. The table has the following data:

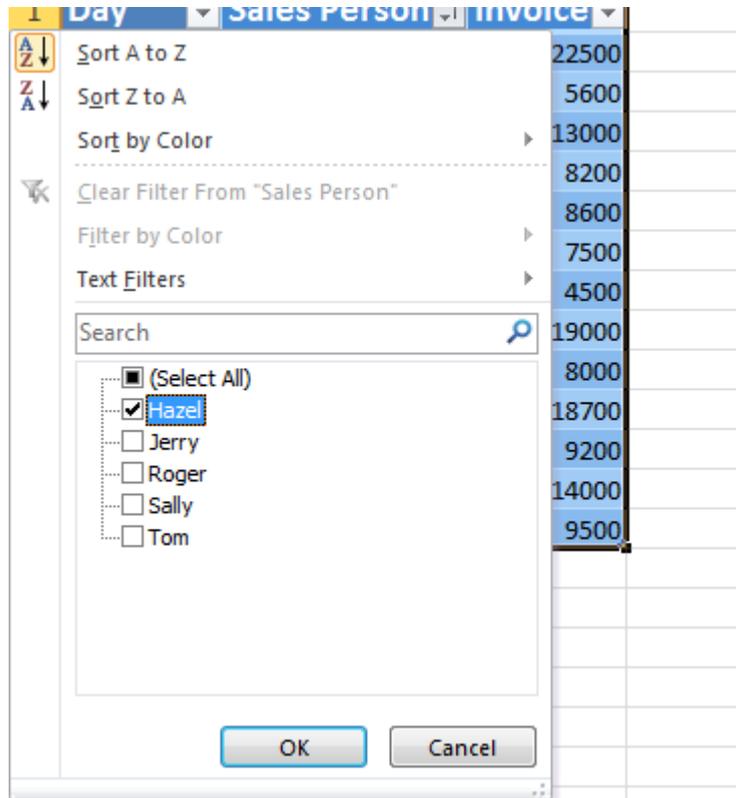
Day	Sales Person	Invoice
Monday	Hazel	22500
Thursday	Hazel	5600
Tuesday	Jerry	13000
Wednesday	Jerry	8200
Friday	Jerry	8600
Monday	Roger	7500
Friday	Roger	4500
Monday	Sally	19000
Monday	Sally	8000
Thursday	Sally	18700
Thursday	Sally	9200
Tuesday	Tom	14000
Wednesday	Tom	9500

**Sort from A to Z**

The Sort & Filter dropdown menu is open, showing the following options:

- Sort A to Z (Selected)
- Sort Z to A
- Sort by Color
- Clear Filter From "Sales Person"

# “Format as Table”



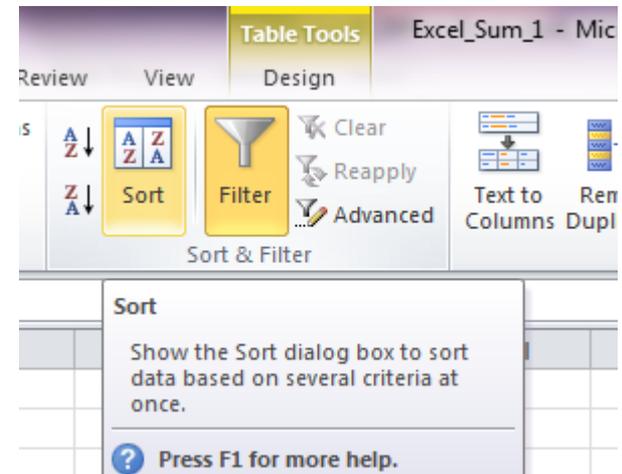
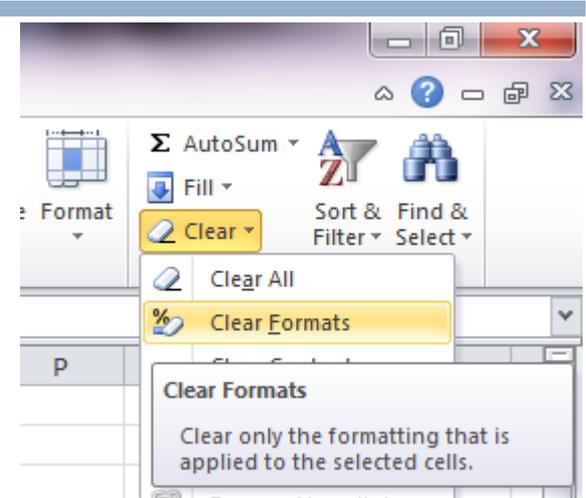
**Filter for one name**

# Turn off “Format as Table”

- What if you want to revert back to a regular spreadsheet?
- Consider two factors:
  - Format
  - Sort
- Turn off Sort
- Turn off formatting

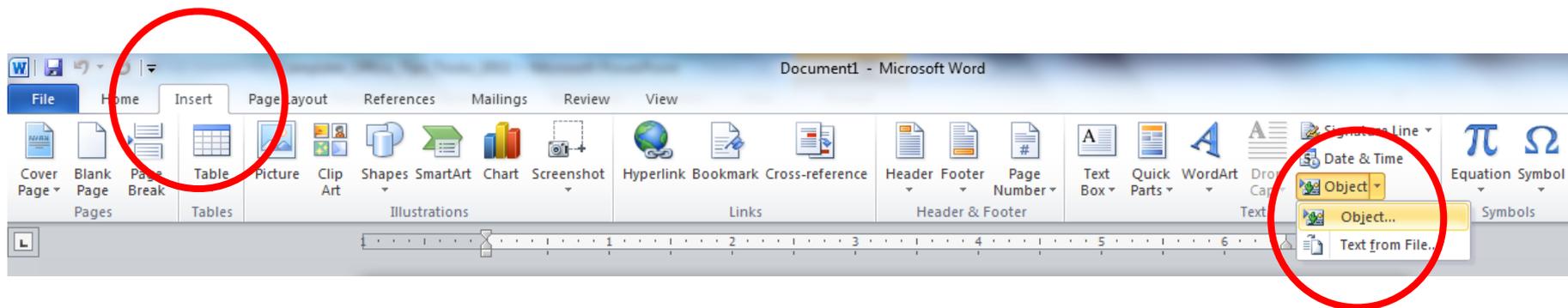
# Turn off "Format as Table"

- Turn off Formatting:
  - Highlight the area and select "Clear" / "Clear Formats" (Home Tab)
  
- Turn off Filtering:
  - Highlight the area, go to the "Data" Tab and click "Filter"



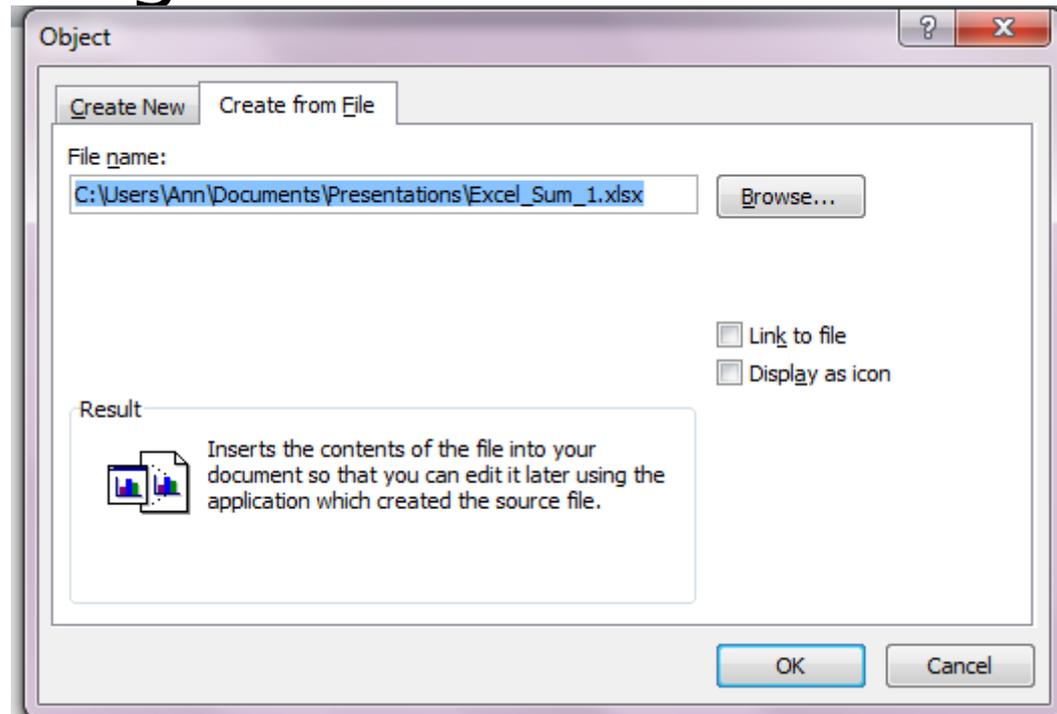
# Tip #12: Excel – Insert Spreadsheet into Word

- Spreadsheet looks like a table
- You can keep doing “math” because its still a spreadsheet
- In WORD, “Insert” tab, choose “Object”



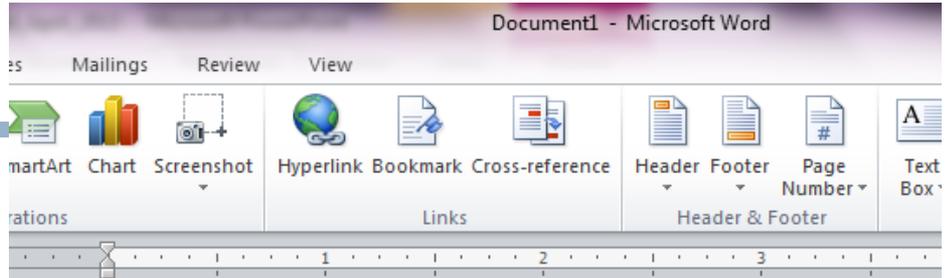
# Excel – Insert Spreadsheet into Word

- Create a new file, or select an existing Excel file.



# Excel in Word:

**Fully functional Excel spreadsheet embedded in Microsoft Word**



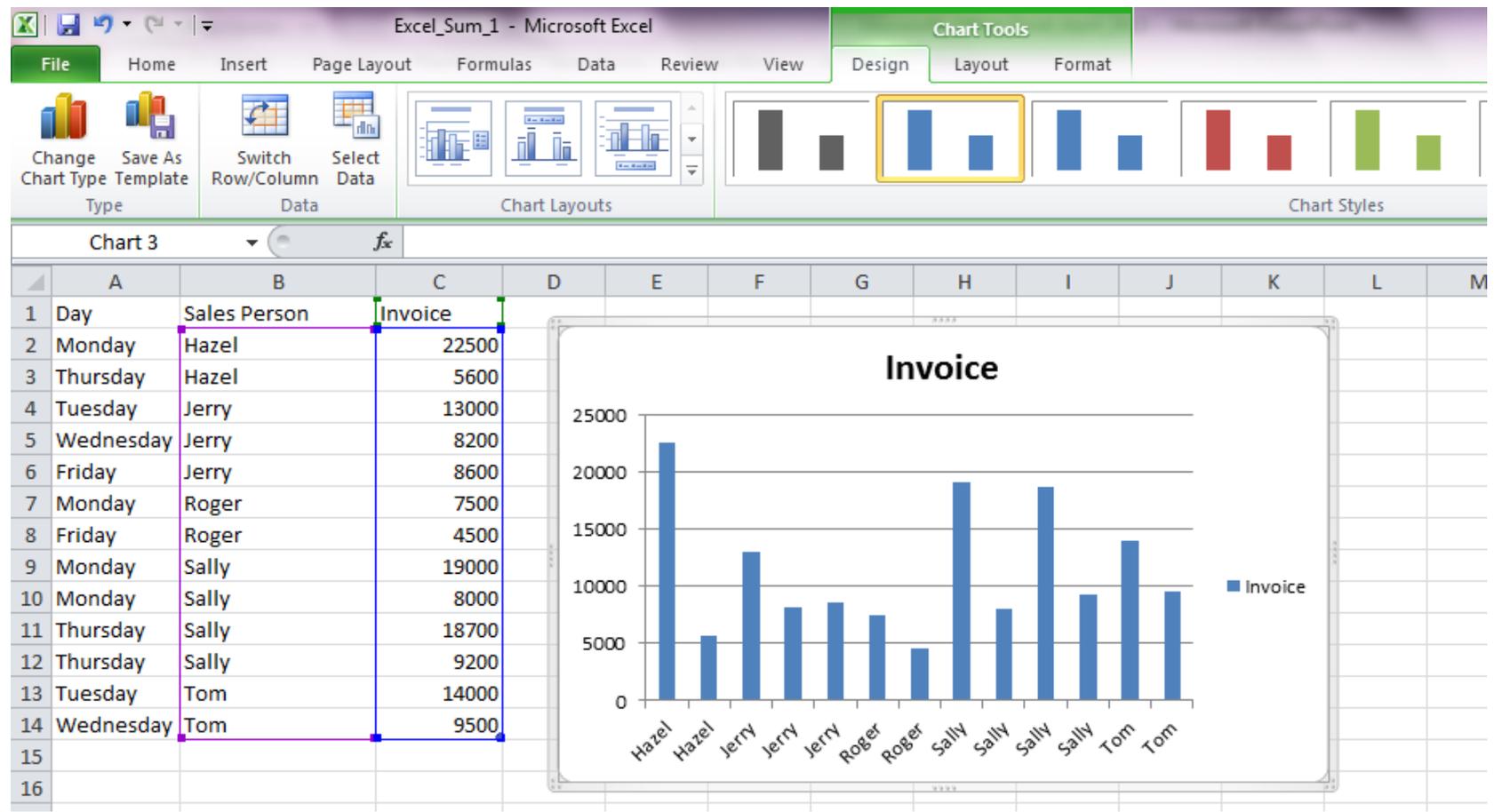
Here are the latest sales figures for the week:

Day	Sales Person	Invoice
Monday	Hazel	22500
Thursday	Hazel	5600
Tuesday	Jerry	13000
Wednesday	Jerry	8200
Friday	Jerry	8600
Monday	Roger	7500
Friday	Roger	4500
Monday	Sally	19000
Monday	Sally	8000
Thursday	Sally	18700
Thursday	Sally	9200
Tuesday	Tom	14000
Wednesday	Tom	9500

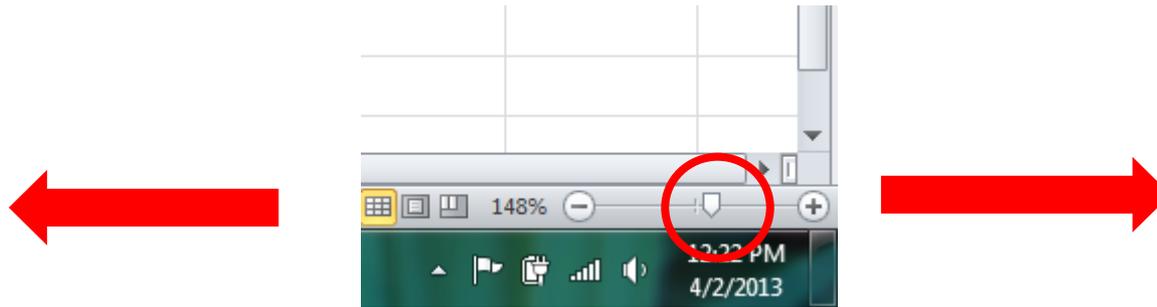
# Tip #13: Creating Graphs

	A	B	C	D	H
1	Day	Sales Person	Invoice		
2	Monday	Hazel	22500		
3	Thursday	Hazel	5600		
4	Tuesday	Jerry	13000		
5	Wednesday	Jerry	8200		
6	Friday	Jerry	8600		
7	Monday	Roger	7500		
8	Friday	Roger	4500		
9	Monday	Sally	19000		
10	Monday	Sally	8000		
11	Thursday	Sally	18700		
12	Thursday	Sally	9200		
13	Tuesday	Tom	14000		
14	Wednesday	Tom	9500		
15					

# Graph



# Tip #14: Zoom In / Zoom Out



# Tip #15: Conditional Formatting

- Highlight data that meets criteria

The screenshot shows an Excel spreadsheet with the following data in column C:

Day	Sales Person	Invoice
Monday	Hazel	22500
Thursday	Hazel	5600
Tuesday	Jerry	13000
Wednesday	Jerry	8200
Friday	Jerry	8600
Monday	Roger	7500
Friday	Roger	4500
Monday	Sally	19000
Monday	Sally	8000
Thursday	Sally	18700
Thursday	Sally	9200
Tuesday	Tom	
Wednesday	Tom	

The 'Greater Than' dialog box is open, showing the criteria '10000' and a list of formatting options. The selected option is 'Green Fill with Dark Green Text'.

# Conditional Formatting

	A	B	C	D
1	<b>Day</b>	<b>Sales Person</b>	<b>Invoice</b>	
2	Monday	Hazel	22500	
3	Thursday	Hazel	5600	
4	Tuesday	Jerry	13000	
5	Wednesday	Jerry	8200	
6	Friday	Jerry	8600	
7	Monday	Roger	7500	
8	Friday	Roger	4500	
9	Monday	Sally	19000	
10	Monday	Sally	8000	
11	Thursday	Sally	18700	
12	Thursday	Sally	9200	
13	Tuesday	Tom	14000	
14	Wednesday	Tom	9500	
15				

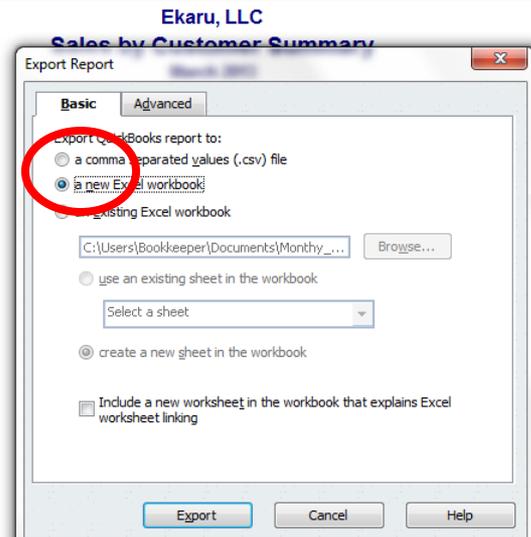
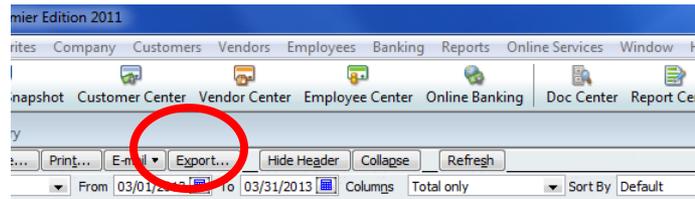
# Tip #16: Freeze Panes

The screenshot shows the Microsoft Excel interface. The 'View' tab is selected in the ribbon, and the 'Freeze Panes' button is highlighted with a red circle. A tooltip for 'Freeze Panes' is displayed, explaining its function. The spreadsheet data is as follows:

	A	B	C	D	E	F	G	H
1	<b>Day</b>	<b>Sales Person</b>	<b>Invoice</b>					
2	Monday	Hazel	22500					
3	Thursday	Hazel	5600					
4	Tuesday	Jerry	13000					
5	Wednesday	Jerry	8200					
6	Friday	Jerry	8600					
7	Monday	Roger	7500					
8	Friday	Roger	4500					
9	Monday	Sally	19000					
10	Monday	Sally	8000					
11	Thursday	Sally	18700					
12	Thursday	Sally	9200					
13	Tuesday	Tom	14000					
14	Wednesday	Tom	9500					

# Tip #17: Excel from Quickbooks

- Any report in Quickbooks can be exported to Excel



# Next Steps...

---

- Choose some data that is useful for running your business.
- Develop a spreadsheet
- Start testing various “tricks”
- Create a “Business Dashboard”

# More Questions?

---

- We love to hear from you! Send us questions/topics for future blog posts or webinars.
- If there are any questions that didn't get answered today, email us at [info@ekaru.com](mailto:info@ekaru.com) or call us at 978-692-4200.

# Thank You!:

For more information:

 [www.ekaru.com](http://www.ekaru.com)  
[www.twitter.com/EkaruIT](http://www.twitter.com/EkaruIT)  
[www.ekaru.com/blog](http://www.ekaru.com/blog)  
 [www.facebook.com/ekaru](http://www.facebook.com/ekaru)  
[www.ekaru.com/news](http://www.ekaru.com/news)

978-692-4200