



# Tips & Tricks to Improve Your Excel Game

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# About Excel as a Tool: Pros and Cons

## ► Advantages

1. Easy data input
2. Easy data retrieval
3. Mathematical formula easy to use
4. Reliable
5. One location for all data

## ► Disadvantages

1. Data and Growth limitations
2. Difficult to learn – multiple elements
3. Multiple levels of complexity
4. No quick autofill features
5. Errors in calculations (formulas, currencies)

# Why Excel Tips & Tricks?

## SHORTCUTS!

### So What?



Greater Efficiency = Improved  
Productivity



Fewer key strokes (over several  
mouse clicks) is EASIER



Increased speed completes task  
sooner, leaving time for other things



It's cool!

## A Word About Excel SHORTCUTS

Do you have to memorize all  
Excel Shortcuts? **NO**

- There are over 270 shortcuts for 21 or more categories

Should you memorize some  
Excel Shortcuts? **YES**

Which ones?

- That all depends on what you need

# Today's Excel Tips & Tricks

Meant to be pretty basic

List devised from crowd-sourced inquiry of analysts from

- House Fiscal Analysis Department,
- House Research Department
- Legislative Budget Office
- Department of Revenue, Tax Research

Includes categories of ...

# Excel Shortcut CATEGORIES

Workbook  
Navigation/  
Cell Formatting

Row/Column  
Shortcuts

Accessibility

Formulas

## Workbook Navigation/Cell Formatting



Insert Date, Time, Hyperlink



Show Formulas (single cell,  
worksheet)



Color Sheet Tabs, including  
worksheet identifier



Add Header/Footer to all tabs in  
Excel workbook

# Row / Column Shortcuts



Select Row/Column



Delete Row/Column



Move Row/Column



Hide Unused Rows/Columns



# Accessibility

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Sticky Keys?

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Excel to Accessible PDF

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Other Accessibility  
suggestions

Selected  
Formulas

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SUBTOTAL

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VLOOKUP

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GOAL SEEK

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TRACE DEPENDENTS

# SUBTOTAL

- ▶ SUBTOTAL function can be used to quickly analyze datasets without relying on more complex pivot tables.
- ▶ SUBTOTAL calculates the total value of a cell range based on a mathematical function. It allows for 11 different calculation types such as SUM, AVERAGE or COUNT, to get custom totals from a dataset.
- ▶ Allows use of a formula into a range of cells without impacting the overall total formula because it ignores other cells that contain SUBTOTAL formula.
- ▶ Also allows for updates, filtering and excludes hidden values (which SUM does not do)
- ▶ **=SUBTOTAL(function num, ref1, ref2,...)**

# VLOOKUP

- ▶ VLOOKUP allows searches for specific data vertically, across columns
- ▶ Table must be sorted in ascending order
- ▶ **=VLOOKUP(lookup\_value, table\_array, col\_index\_number, [range\_lookup])**
  - lookup\_value: This specifies the value that you want to look up in our data.
  - table\_array: This is the location where the values are present in excel.
  - col\_index\_number: This specifies the column number from where we need to return the value.
  - range\_lookup: This has two options; if the value is set to FALSE, that means we are looking for an exact match. If the value is TRUE, then we are looking for an approximate match.

# Goal Seek

- ▶ Goal Seek – Analysis tool used to determine what's needed to achieve a desired result
  - ▶ The function works backwards, changing variables to produce end goal
  - ▶ Use of Goal Seek will change value in cell. So, make a copy of the data before using this tool
  - ▶ Goal Seek works with only one input value. For multiple values, use Solver
- ▶ Data/What If analysis tool
  - Range(): In this, we need to supply the cell reference. ...
  - Goal: In this argument, we need to enter what is the goal we are trying to achieve.
  - Changing Cell: In this argument, we need to supply by changing which cell value we need to achieve the goal.

# Trace Dependents/Precedents

- ▶ Displays the relationship between cells and formulas. It shows if and where a cell is referred in another cell formula
- ▶ Trace Dependents
  - ▶ For Trace Dependents, select the cell you want to trace and press "Ctrl" + "]"
  - ▶ Show formulas "Ctrl" + "~"
  - ▶ Evaluate formula: Select the cell with the formula you want to evaluate and press "Alt" + "M" + "V"
- ▶ Trace Precedents – same as above except for
  - ▶ Select the desired cell to trace and press "Ctrl" + "["

# Reference only

- ▶ SUBTOTAL <https://www.youtube.com/watch?v=qBpjECxY2io>
- ▶ VLOOKUP v XLOOKUP <https://www.excelcampus.com/functions/vlookup-vs-xlookup/>
- ▶ Trace Dependents <https://www.youtube.com/watch?v=itFoym6NQo>
- ▶ Goal Seek – Data/WhatIF analysis  
<https://www.google.com/search?channel=fen&client=firefox-b-1-d&q=what+is+goal+seek+in+excel#fpstate=ive&vld=cid:9b4fd5c6,vid:2sN0Bp001ks,st:0>

Questions & Comments

THANK YOU!