

7 Time-Saving Excel® Tips For Beginners

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7 Time-Saving Excel Tips for Beginners



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Let's start with a story...

Susan McCullers dreads the end of the workday. It's not that she doesn't want the day to end – no, she looks forward to returning to her family. It's that once the executive she supports has finished the day, she has to complete the day's log – and that feels like it never ends.

She types over 80 wpm, but when she's in front of Excel, she feels like she's pecking at each key. It's inefficient, tedious and frustrating. And that's on a good day!

Today isn't one of those days. Her boss has asked her to collect sales information as well, and the numbers seem to swim before her eyes. Everyone's already gone home, the office lights have automatically turned off twice, and she's still squinting at the screen trying to get her data in order.

The new sales info needs to go in a new spreadsheet and has so much data, she just opens it up into a new workbook. It seems so time-intensive! Why do so many people use this program? After hours of frustration (and three calls from her family), she finally throws the completed files in an email to her boss and heads home.

The next day, she comes in to a fresh email from her boss with all these notes. He wants it all in one workbook, he wants certain data here and other data there, and he wants a new row to account for new information that came in overnight.

Susan honestly wants to shout, but she doesn't. She briefly considers deleting the email – "I lost it in spam." Finally, she decides she'll do some research. There has to be a better way!

There is, and she finds it. It takes her hours of research and a couple of questions to the folks in finance that use Excel all the time, but she collects several pages worth of notes. Now she's almost looking forward to that evening, when she can start trying these interesting shortcuts and strategies.

And she's right – that evening, she finishes in no time. She's got those notes right up on her desk, right next to her computer, but before too long she's zooming through spreadsheets with ease – she doesn't even need to check. If only she'd learned this stuff earlier! If only she'd had training.

It's astounding how much difference it makes. She gets home right after work ends every night. Her boss comments that she seems more chipper in the mornings – and then adds another spreadsheet to her workload.

She nods and smiles. "I can handle that."

Let's look over her shoulder and see what she learned.

1. How to Use Auto Fill

The auto-fill tool allows Susan to fill in a sequence of numbers without typing in each one. She selects the cell and put her cursor in the corner so it turns into a plus sign. Then, holding down the left mouse button, she drags the cursor down over all applicable cells.

Let's use this example of Susan filling in the day's meeting logs. Instead of individually typing out each hour of the day, she can use Auto Fill:

She clicks the plus sign in the lower right corner of the cell:

	A	B	C
1	Date	Time	Who With
2	1/13/2016	9:00 AM	Susan
3	1/13/2016		John
4	1/13/2016		Roberta
5	1/13/2016		Mike
6	1/13/2016		Taylor
7	1/13/2016		

Drags it down and when she lets go of the button...

	A	B	C
1	Date	Time	Who With
2	1/13/2016	9:00 AM	Susan
3	1/13/2016		John
4	1/13/2016		Roberta
5	1/13/2016		Mike
6	1/13/2016		Taylor
7	1/13/2016		

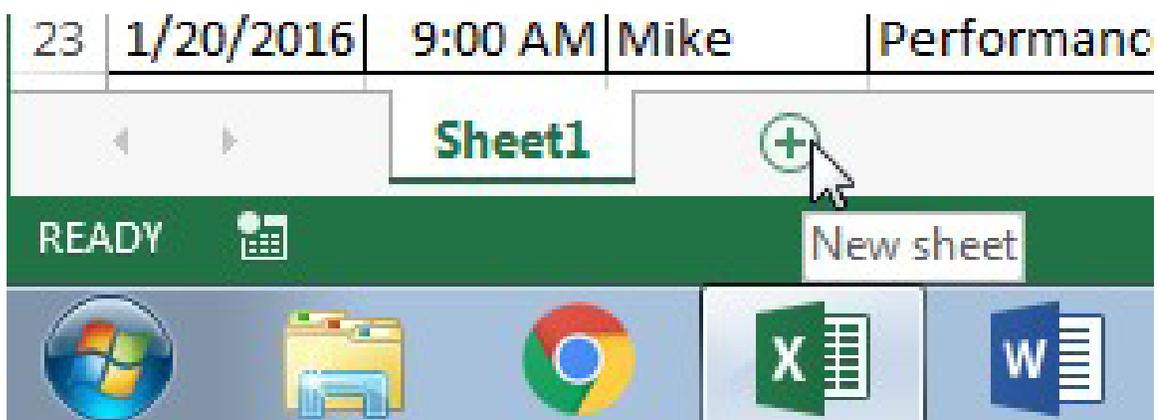
It fills in automatically! This saves her the trouble of typing them all in one by one

She can also do this for a series of dates if she has a daily recurring meeting to note.

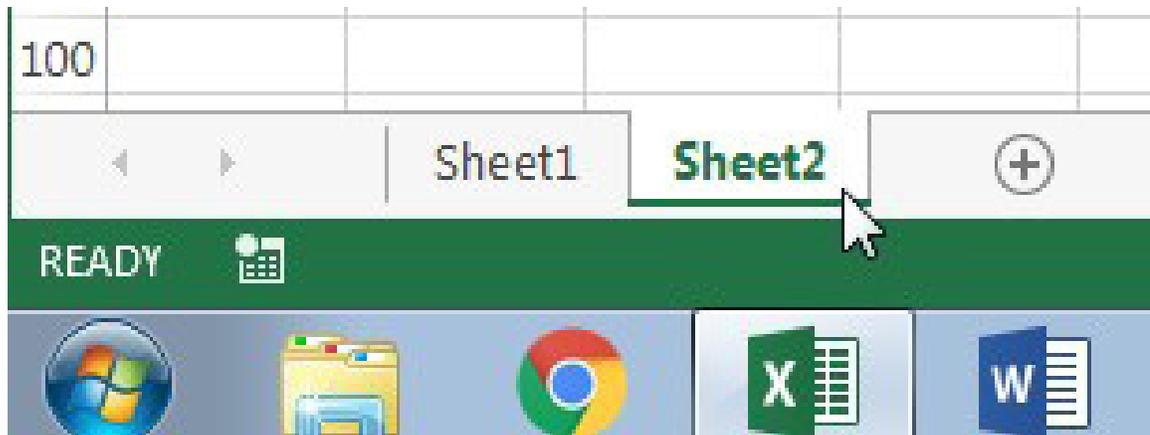
17	1/14/2016	9:00 AM	17	1/14/2016	9:00 AM
18		9:00 AM	18	1/15/2016	9:00 AM
19		9:00 AM	19	1/16/2016	9:00 AM
20		9:00 AM	20	1/17/2016	9:00 AM
21		9:00 AM	21	1/18/2016	9:00 AM
22		1/18/2016	22		

2. Insert a New Worksheet

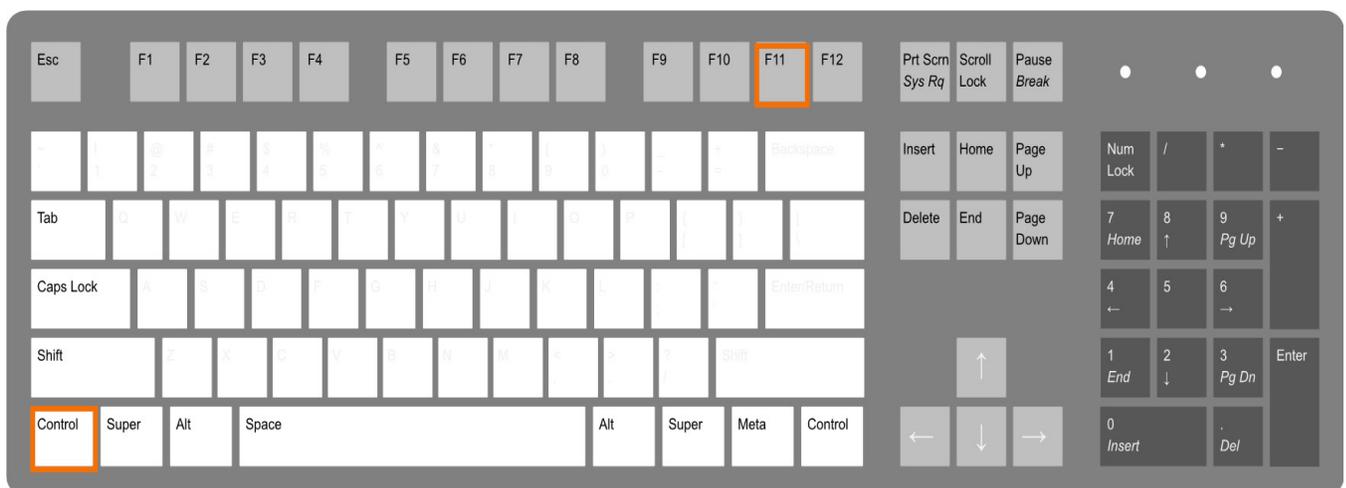
Remember how Susan was frustrated because her boss wanted her to include all info in the same workbook? Well, she was over-looking a tiny button on the bottom left of her screen.



When she clicks, Excel adds another sheet like a tab in an internet browser.



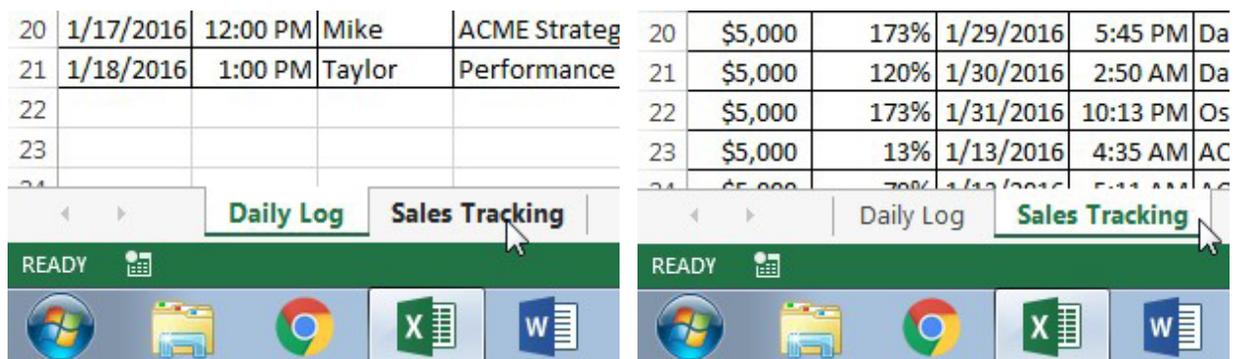
In fact, she doesn't even have to touch that button to add the second sheet – if she held CTRL and pressed F11 at the top of her keyboard, she could add another sheet without moving her mouse.



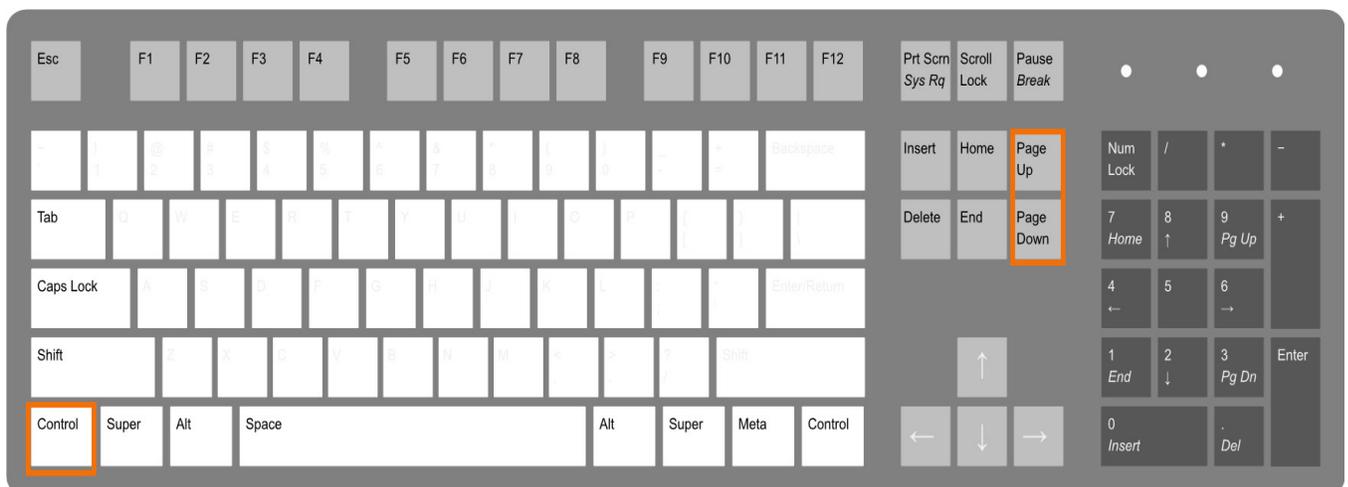
(via Wikimedia) https://upload.wikimedia.org/wikipedia/commons/3/37/ANSI_Keyboard_Layout_Diagram_with_Form_Factor.svg

3. Switching Worksheets

To switch worksheets, she can always click back and forth between the names at the bottom, but that can be annoying to move the mouse down there, find the sheet, and move the mouse back to where she wants to go.



Instead of spending that time, she just holds CTRL and presses Page Down (PgDn) to go to the right, and CTRL + Page Up (PgUp) to go to the left. On many keyboards, those keys can be found where highlighted below.



Now she's switching between worksheets like a pro!

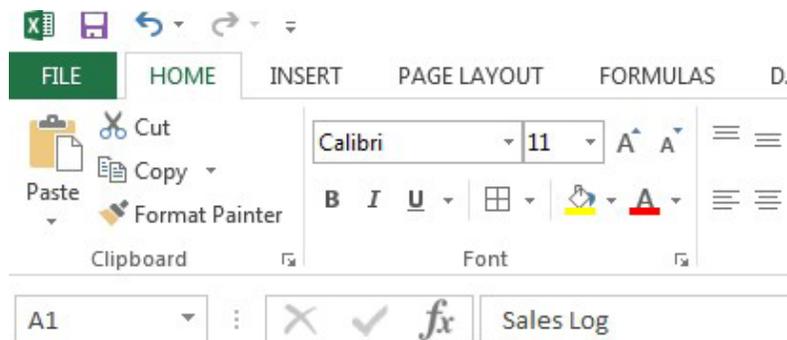
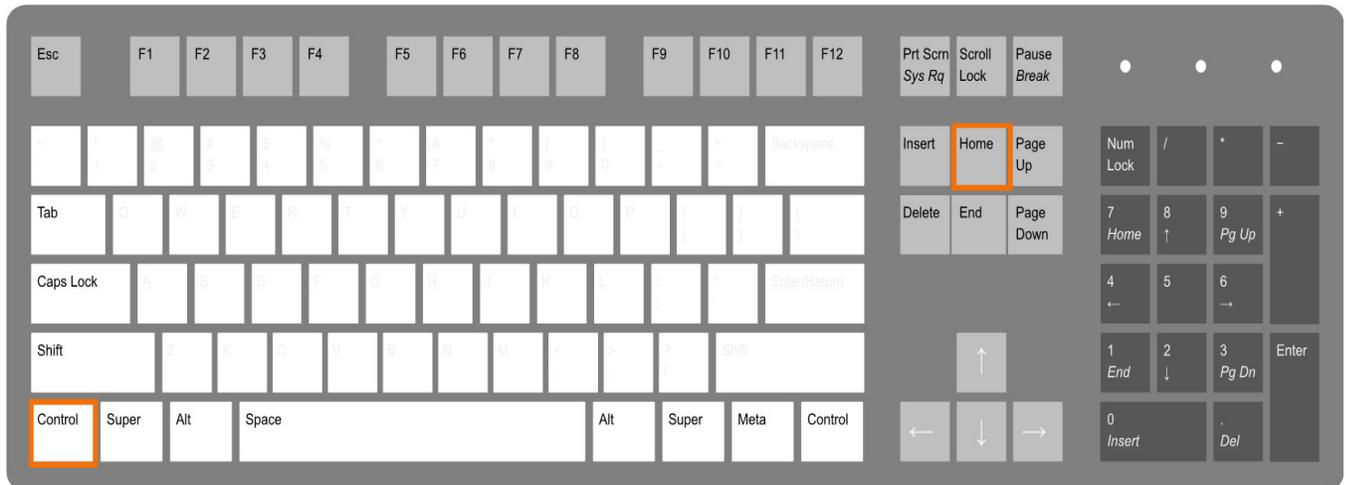
4. Navigating Data Ranges

That sales tracking sheet is huge, and she hates having to scroll up and down as well as left and right when she knows where she's trying to go. Luckily, there are keyboard shortcuts to navigate within sheets as well.

The screenshot shows an Excel spreadsheet titled 'Sales Log' with a split view for January and February. The columns are: Date, Time, Customer, Sales-Person, Income, Sales Total, Goal, and % to Goal. The data is organized into two panes, one for January and one for February, with each row representing a sales entry.

January								February							
Date	Time	Customer	Sales-Person	Income	Sales Total	Goal	% to Goal	Date	Time	Customer	Sales-Person	Income	Sales Total	Goal	% to Goal
1/1/2016	11:04 AM	ACE Chemical	John	\$ 274.53	\$ 9,461.80	\$5,000	189%	2/1/2016	10:12 PM	ACE Chemical	John	\$ 593.84	\$ 10,312.10	\$5,000	206%
1/2/2016	7:46 PM	ACME Corporation	Roberta	\$ 525.51	\$ 7,544.83	\$5,000	151%	2/2/2016	5:15 PM	ACME Corporation	Roberta	\$ 792.99	\$ 3,134.40	\$5,000	63%
1/3/2016	8:00 PM	Queen Consolidated	Mike	\$ 769.97	\$ 10,709.76	\$5,000	214%	2/3/2016	6:19 AM	Queen Consolidated	Mike	\$ 183.85	\$ 7,162.66	\$5,000	143%
1/4/2016	12:37 PM	STAR Labs	Taylor	\$ 618.52	\$ 1,206.82	\$5,000	24%	2/4/2016	12:52 PM	STAR Labs	Taylor	\$ 898.62	\$ 3,701.34	\$5,000	74%
1/5/2016	2:02 AM	Arkham Hospital	Bobbi	\$ 888.29	\$ 2,826.44	\$5,000	57%	2/5/2016	5:17 AM	Arkham Hospital	Bobbi	\$ 328.29	\$ 3,823.02	\$5,000	76%
1/6/2016	3:54 AM	Daily Planet	Joanna	\$ 410.70	\$ 6,619.79	\$5,000	132%	2/6/2016	9:24 AM	Daily Planet	Joanna	\$ 305.65	\$ 916.60	\$5,000	18%
1/7/2016	11:27 PM	Daily Global	Angel	\$ 770.05	\$ 1,059.89	\$5,000	21%	2/7/2016	9:32 PM	Daily Global	Angel	\$ 761.30	\$ 3,831.53	\$5,000	77%
1/8/2016	6:35 PM	Oscorp	Courtney	\$ 665.86	\$ 10,616.99	\$5,000	212%	2/8/2016	12:30 PM	Oscorp	Courtney	\$ 251.46	\$ 4,998.52	\$5,000	100%
1/9/2016	11:17 PM	Advanced Idea Mechanics	John	\$ 99.39	\$ 9,561.19	\$5,000	191%	2/9/2016	2:53 AM	Advanced Idea Mechanics	John	\$ 994.50	\$ 11,306.61	\$5,000	226%
1/10/2016	11:35 AM	Wayne Enterprises	Roberta	\$ 111.72	\$ 7,656.55	\$5,000	153%	2/10/2016	1:19 PM	Wayne Enterprises	Roberta	\$ 484.97	\$ 3,619.36	\$5,000	72%
1/11/2016	1:17 PM	Stark Industries	Mike	\$ 69.14	\$ 10,778.90	\$5,000	216%	2/11/2016	5:36 AM	Stark Industries	Mike	\$ 311.34	\$ 7,473.99	\$5,000	149%
1/12/2016	4:33 PM	CyberDyne Systems	Taylor	\$ 964.91	\$ 2,171.73	\$5,000	43%	2/12/2016	2:16 AM	CyberDyne Systems	Taylor	\$ 254.78	\$ 3,956.12	\$5,000	79%
1/13/2016	8:35 PM	ACE Chemical	Taylor	\$ 756.29	\$ 3,582.73	\$5,000	72%	2/13/2016	7:53 PM	ACE Chemical	Taylor	\$ 625.99	\$ 4,449.01	\$5,000	89%
1/14/2016	6:08 AM	ACME Corporation	Bobbi	\$ 227.48	\$ 6,847.27	\$5,000	137%	2/14/2016	3:11 PM	ACME Corporation	Bobbi	\$ 513.98	\$ 1,430.58	\$5,000	29%
1/15/2016	8:48 AM	Queen Consolidated	Joanna	\$ 640.72	\$ 1,700.61	\$5,000	34%	2/15/2016	3:49 AM	Queen Consolidated	Joanna	\$ 662.02	\$ 4,493.55	\$5,000	90%
1/16/2016	8:23 PM	STAR Labs	Angel	\$ 446.61	\$ 11,063.60	\$5,000	221%	2/16/2016	11:34 AM	STAR Labs	Angel	\$ 669.03	\$ 5,867.55	\$5,000	117%
1/17/2016	6:25 PM	Arkham Hospital	Angel	\$ 345.17	\$ 9,906.36	\$5,000	198%	2/17/2016	9:31 PM	Arkham Hospital	Angel	\$ 386.79	\$ 11,693.40	\$5,000	234%
1/18/2016	7:22 PM	Daily Planet	John	\$ 723.59	\$ 10,284.78	\$5,000	206%	2/18/2016	6:28 AM	Daily Planet	John	\$ 928.40	\$ 12,235.01	\$5,000	245%
1/19/2016	8:22 PM	Daily Global	Roberta	\$ 946.71	\$ 8,603.25	\$5,000	172%	2/19/2016	7:14 PM	Daily Global	Roberta	\$ 317.38	\$ 3,936.74	\$5,000	79%
1/20/2016	7:59 AM	Oscorp	Mike	\$ 854.56	\$ 11,633.45	\$5,000	233%	2/20/2016	3:29 PM	Oscorp	Mike	\$ 459.04	\$ 7,933.04	\$5,000	159%

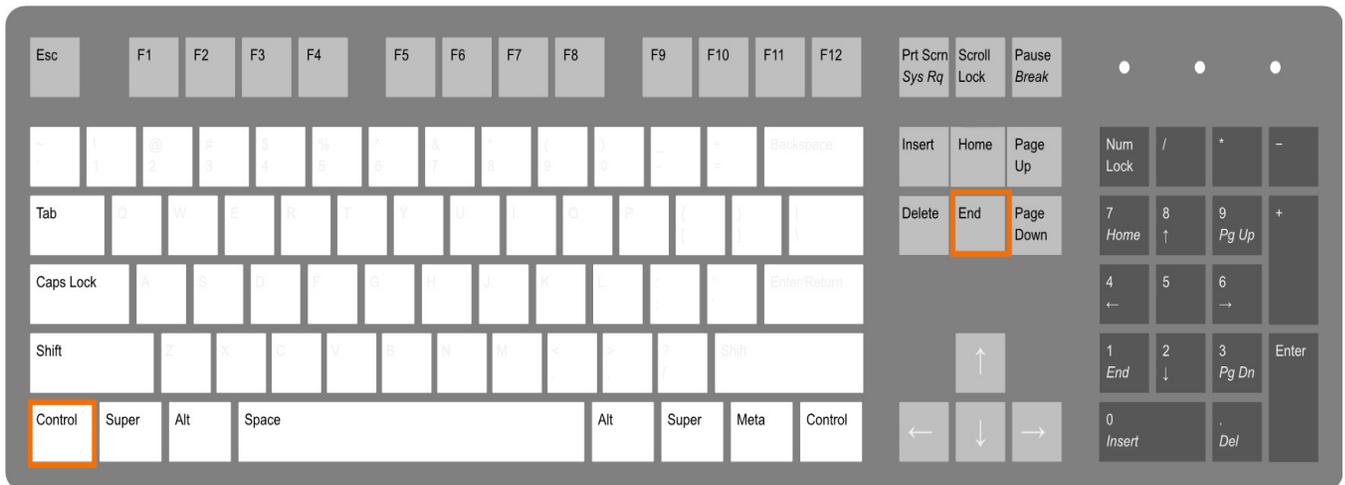
That's a lot of data! To get to the beginning, she holds CTRL and presses HOME. That jumps her straight to the first filled cell.



CTRL + HOME
to jump to
first cell

	A	B	C	D
1	Sales Log			
2	January			
3	Date	Time	Customer	Sales-Person
4	1/1/2016	11:04 AM	ACE Chemical	John
5	1/2/2016	7:46 PM	ACME Corporation	Roberta
6	1/3/2016	8:00 PM	Queen Consolidated	Mike
7	1/4/2016	12:37 PM	STAR Labs	Taylor
8	1/5/2016	2:02 AM	Arkham Hospital	Bobbi
9	1/6/2016	3:54 AM	Daily Planet	Joanna
10	1/7/2016	11:27 PM	Daily Global	Angel
11	1/8/2016	6:35 PM	Oscorp	Courtney

That will always take her to the first filled cell, no matter where she is in the worksheet. If she wants to go to the end, she uses CTRL + END.



Mike	\$ 139.40	\$ 8,637.42	\$5,000	173%
John	\$ 825.82	\$ 8,245.62	\$5,000	165%
John	\$ 745.62	\$ 4,358.14	\$5,000	87%
Roberta	\$ 540.97	\$ 9,654.71	\$5,000	193%
Mike	\$ 668.00	\$ 1,620.57	\$5,000	32%
Taylor	\$ 719.55	\$ 6,517.71	\$5,000	130%
Bobbi	\$ 9.84	\$ 1,450.94	\$5,000	29%
Joanna	\$ 181.09	\$ 5,477.00	\$5,000	110%
Angel	\$ 368.45	\$ 3,548.24	\$5,000	71%
Courtney	\$ 887.33	\$ 6,058.23	\$5,000	121%
John	\$ 816.18	\$ 5,174.32	\$5,000	103%
Roberta	\$ 260.58	\$ 9,915.29	\$5,000	198%

CTRL + END
to jump to
last cell

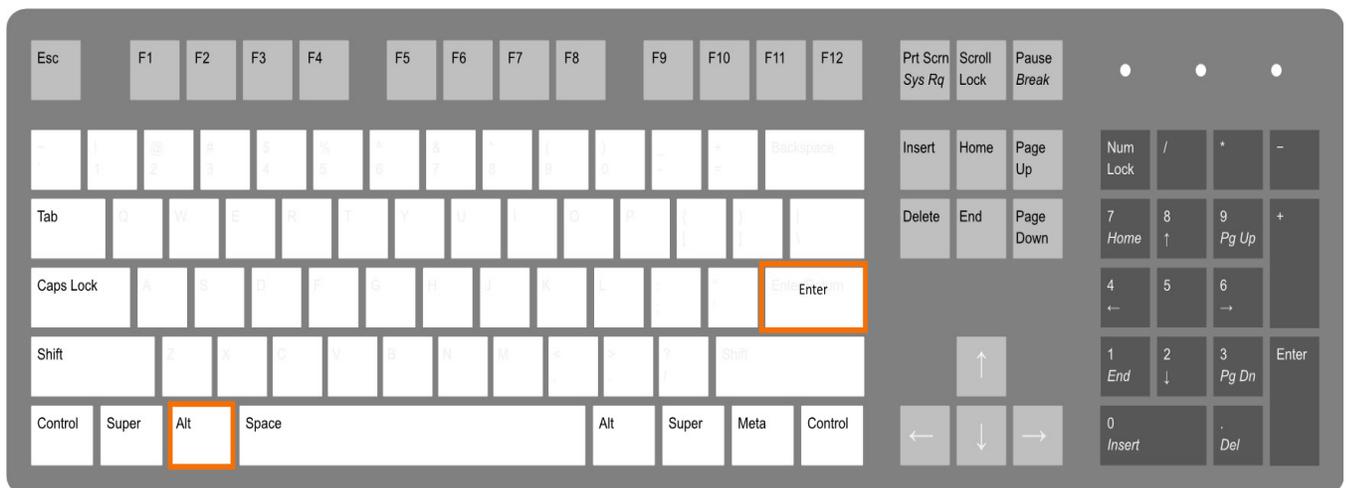
5. Create a Multi-Line Entry

Every time Susan tried to fill out a cell for when her boss was meeting multiple people, she kept accidentally leaving the cell when she really wanted each name on its own line within the cell.

This shortcut can make this pretty easy. Susan starts by double-clicking within the cell so she can edit the text.

22	1/19/2016	2:00 PM	John	New Project Planning	Y
----	-----------	---------	------	----------------------	---

Then she holds ALT and presses ENTER.



22	1/19/2016	2:00 PM	John	New Project Planning	Y
23					

She can do this as much as she likes to fill in all names.

22	1/19/2016	2:00 PM	John	New Project Planning	Y
23			Taylor		
24			Roberta		

When she finishes, a regular ENTER gives her big line with all the names!

22	1/19/2016	2:00 PM	John Taylor Roberta	New Project Planning	Y
----	-----------	---------	---------------------------	----------------------	---

That looks much better than what she had to do before.

6. The Best Way to Move a Range of Cells

When working on the sales tracking sheet, Susan accidentally started March right under February, while her boss prefers a new column for each month.

She selects the cells she wants to move all in one group

3/30/2016	1:17 PM	Advanced Idea Mechanics	John	\$ 995.17	\$ 2,290.04	\$5,000	46%
3/31/2016	5:52 PM	Wayne Enterprises	Roberta	\$ 410.43	\$ 8,513.75	\$5,000	170%
4/1/2016	7:14 PM	ACE Chemical	John	\$ 683.40	\$ 10,196.57	\$5,000	204%
4/2/2016	7:01 AM	ACME Corporation	Roberta	\$ 442.61	\$ 7,265.27	\$5,000	145%
4/3/2016	7:43 AM	Queen Consolidated	Mike	\$ 721.47	\$ 7,713.93	\$5,000	154%

Then, as you can see above, she hovers her cursor right over the edge so that it turns into arrows. Note that she's not hovering over the lower right corner, which is exclusively for auto-fill functions.

She then drags her cursor so the green box outlines the place she wants the data to land.

April							
Date	Time	Customer	Sales-Pers	Income	Sales Total	Goal	% to Goal

AB4:AI6

When she lets go, all her data is in the right place.

April							
Date	Time	Customer	Sales-Pers	Income	Sales Total	Goal	% to Goal
4/1/2016	7:14 PM	ACE Chem	John	\$ 683.40	#####	\$5,000	204%
4/2/2016	7:01 AM	ACME Cor	Roberta	\$ 442.61	#####	\$5,000	145%
4/3/2016	7:43 AM	Queen Co	Mike	\$ 721.47	#####	\$5,000	154%

This is the quickest way to move cells short distances. If she's trying to move across sheets, however, she just selects the data again, and presses CTRL + X ("Cut"). This puts a dotted line around the selected area.

April							
Date	Time	Customer	Sales-Pers	Income	Sales Total	Goal	% to Goal
4/1/2016	7:14 PM	ACE Chem	John	\$ 683.40	\$ 10,196.57	\$5,000	204%
4/2/2016	7:01 AM	ACME Cor	Roberta	\$ 442.61	\$ 7,265.27	\$5,000	145%
4/3/2016	7:43 AM	Queen Co	Mike	\$ 721.47	\$ 7,713.93	\$5,000	154%

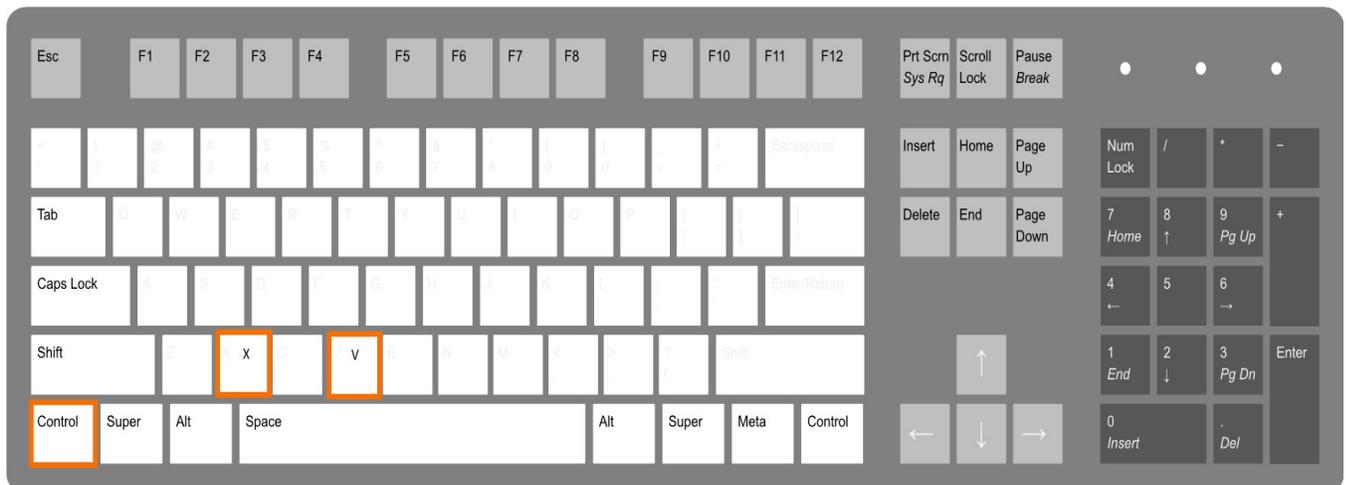
Then she selects the first cell of the area she'd like to put the data...



And presses CTRL + V (“Paste”)

4/1/2016	7:14 PM	ACE Chem	John	\$ 683.40	\$ 10,196.57	\$5,000	204%
4/2/2016	7:01 AM	ACME Cor	Roberta	\$ 442.61	\$ 7,265.27	\$5,000	145%
4/3/2016	7:43 AM	Queen Co	Mike	\$ 721.47	\$ 7,713.93	\$5,000	154%

She found those keys on her keyboard as highlighted below:



7. Quickly Insert and Delete Rows & Columns

When she was looking over her work, Susan realized she forgot an important column in the sales tracking sheet – and that column needed to be between ‘Sales Total’ and ‘Goal’. She knows how to move those things over to make room, but there’s a way to insert without that trouble.

She right clicks the column letter, just to the right of where she wants the new column.

	J	K	L	M	N	O	P	Q	R
February									
Date	Time	Customer	Sales-Pers	Income	Sales Total	Goal			
2/1/2016	1:28 AM	ACE Chemical	John	\$ 300.33	\$ 4,963.80	\$5,			
2/2/2016	6:34 PM	ACME Corporation	Roberta	\$ 493.36	\$ 4,463.45	\$5,			
2/3/2016	9:15 AM	Queen Consolidated	Mike	\$ 596.83	\$ 7,476.73	\$5,			
2/4/2016	3:50 AM	STAR Labs	Taylor	\$ 47.38	\$ 170.61	\$5,			
2/5/2016	2:38 PM	Arkham Hospital	Bobbi	\$ 743.20	\$ 3,959.78	\$5,			
2/6/2016	10:52 PM	Daily Planet	Joanna	\$ 799.31	\$ 4,647.30	\$5,			
2/7/2016	11:41 AM	Daily Global	Angel	\$ 658.55	\$ 3,532.64	\$5,			
2/8/2016	6:35 AM	Oscorp	Courtney	\$ 183.19	\$ 5,970.84	\$5,			
2/9/2016	1:00 AM	Advanced Idea Mechanics	John	\$ 263.71	\$ 5,227.51	\$5,			
2/10/2016	3:25 AM	Wayne Enterprises	Roberta	\$ 474.69	\$ 4,938.14	\$5,			
2/11/2016	8:47 PM	Stark Industries	Mike	\$ 798.31	\$ 8,275.04	\$5,			
2/12/2016	11:07 PM	CyberDyne Systems	Taylor	\$ 567.54	\$ 738.15	\$5,			

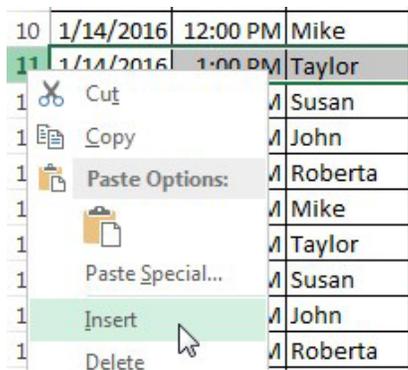


A context menu is displayed over column P. The menu items are: Cut, Copy, Paste Options, Paste Special..., Insert (highlighted with a mouse cursor), Delete, Clear Contents, Format Cells..., Column Width..., Hide, and Unhide.

When she clicks Insert a new column appears!

	J	K	L	M	N	O	P	Q
February								
Date	Time	Customer	Sales-Pers	Income	Sales Total		Goal	
2/1/2016	1:28 AM	ACE Chemical	John	\$ 300.33	\$ 4,963.80		\$5,000	
2/2/2016	6:34 PM	ACME Corporation	Roberta	\$ 493.36	\$ 4,463.45		\$5,000	
2/3/2016	9:15 AM	Queen Consolidated	Mike	\$ 596.83	\$ 7,476.73		\$5,000	
2/4/2016	3:50 AM	STAR Labs	Taylor	\$ 47.38	\$ 170.61		\$5,000	
2/5/2016	2:38 PM	Arkham Hospital	Bobbi	\$ 743.20	\$ 3,959.78		\$5,000	
2/6/2016	10:52 PM	Daily Planet	Joanna	\$ 799.31	\$ 4,647.30		\$5,000	
2/7/2016	11:41 AM	Daily Global	Angel	\$ 658.55	\$ 3,532.64		\$5,000	
2/8/2016	6:35 AM	Oscorp	Courtney	\$ 183.19	\$ 5,970.84		\$5,000	
2/9/2016	1:00 AM	Advanced Idea Mechanics	John	\$ 263.71	\$ 5,227.51		\$5,000	
2/10/2016	3:25 AM	Wayne Enterprises	Roberta	\$ 474.69	\$ 4,938.14		\$5,000	

Now she just has to name the column and add her data. She can do the same thing if she wants to add a row – for instance, if she wants to insert a meeting in the middle of the day. She just right clicks under where she wants the new row to appear...



And clicks 'Insert'!

10	1/14/2016	12:00 PM	Mike
11			
12	1/14/2016	1:00 PM	Taylor
13	1/14/2016	9:00 AM	Susan
14	1/14/2016	10:00 AM	John

Excel can be frustrating, and the learning curve can be steep – but it can be conquered.

Susan's got a better view of her daily duties, and has since become invaluable to her boss – and more available to her family.

Some of these strategies save seconds, and that time can add up fast, especially when you're frustrated!

Before long you'll be navigating Excel like a pro.

We hope you enjoyed this free guide,
and don't forget to check out other
free resources and great
training programs at:

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