Excel Tips and Tricks

Ward and Arrington – MAIR 2015
The University of Mississippi

Situation 1: I want to control the wrapping of the text, even when I change the cell width.

    Solution: CHAR(10) – according to support.office.com, the CHAR function returns the character specified by a number. In this particular situation, we can use CHAR(10) to get a certain formatting of words within a cell. Note: the wrap function must be enabled. There are other variations of CHAR by using a different number with CHAR.
    Basic Formula:
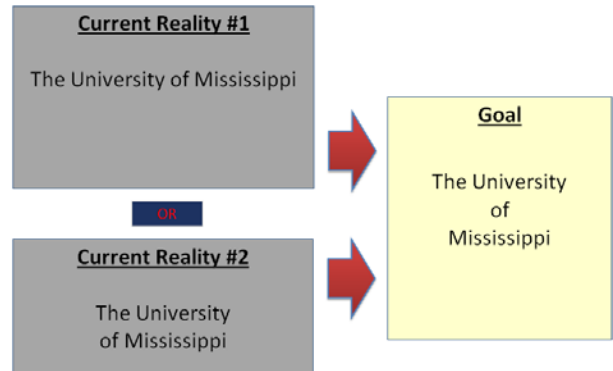="[desired text]"&CHAR(10)&"[desired text]"

Figure 1 - Desired Formatting of "The University of Mississippi"

Figure 2 - Expanded

Figure 3 - Collapsed

Situation 2: I have rows or columns that I want people to be able to either hide or unhide in a predetermined way.
    Solution: Grouping Function – in conjunction with the subtotal function, you can create summary rows or columns and then hide or reveal the detail data for each group.
    Shortcuts:
Shift+alt+right – group items (rows or columns)
Shift+alt+left – ungroup items (rows or columns)
Note: Once items are grouped you can use the "1" and "2" within the axis to collapse/expand items quickly. Also the "+" and " – " buttons allows the user to collapse or expand the data.

Situation 3: I have formulas in my cells and I do not want to have to click on it every time in order to see it.
    Solution: Ctrl + ~ - toggles between the formulas you are using and the result for quick debug.

Situation 4: I want to select the entire Excel sheet.
    Solution: Click on the connecting axis box as shown in Figure 4 and it selects the entire sheet.

Situation 5: I made a mistake and want to undo it. No wait, I want to keep it!
    Solution: Undo button at the top left corner will undo most actions. The Redo button is right next to it.
    Shortcuts:
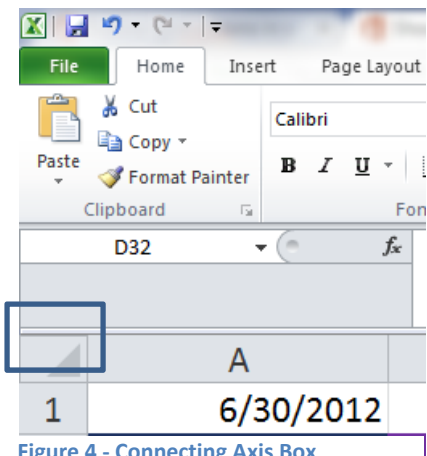Ctrl + Z – undo
Ctrl + Y – redo

Figure 4 - Connecting Axis Box

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Situation 6: I want to copy parts of data by referring to the original cell rather than copy/pasting.

      Solutions: LEFT - Returns a string containing a specified number of characters from the left side of a string. RIGHT - Returns the last character or characters in a text string, based on the number of characters you specify.

      Basic Formulas:
=LEFT([desired cell or data], [desired number of digits])
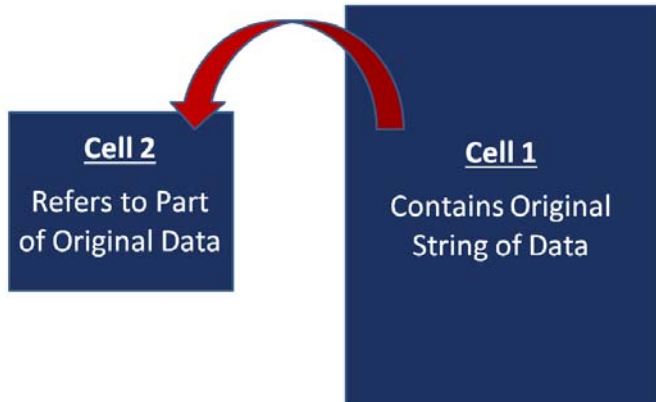=RIGHT([desired cell or data], [desired number of digits])

Figure 5 - LEFT and RIGHT Application

Without TRIM

~Zora Neale Hurston

*Left-aligned

Situation 7: I want to get rid of the extra spaces in a cell.

      Solution: TRIM - removes spaces from text except for single spaces between words. Use TRIM on text that you have received from another application that may have irregular spacing.

      Basic Formula: =TRIM([desired cell or data])

With TRIM

~Zora Neale Hurston

*Left-aligned

Figure 6 - TRIM Application

Situation 8: I want to know how long a data string is.

      Solution: LEN - returns the number of characters in a text string.

      Basic Formula: =LEN([desired cell or data])

Situation 9: I want to manipulate and work with data from multiple worksheets without affecting the original data.

  Solution: 3D Reference – a convenient way to pull data from the same cell or range on multiple sheets. This is convenient when referring to several worksheets that follow the same pattern and contain the same type of data.

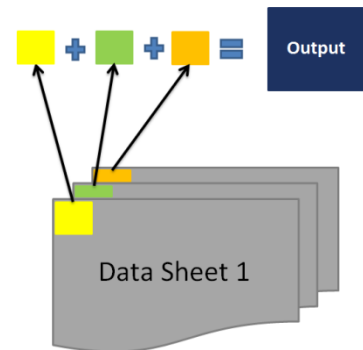   ***Basic Formula:*** =[desired function](Sheet1:Sheet2![desired cell])

Figure 7 - 3D Reference Conceptualization

Situation 10: I am doing the same command and it takes so many keystrokes every time.

  Solution: F4 – repeats the last command or action, if possible. When a cell reference or range is selected in a formula, F4 cycles through the various combinations of absolute and relative references.

      Examples: A2 is an absolute reference to cell A2. $A2 is a relative reference to a cell in the A column. A$2 is a relative reference to a cell in the 2nd row.

Situation 11: My original data is just numbers, but I want it displayed in a certain way without altering the data.

Solution: TEXT – The TEXT function converts a numeric value to text and lets you specify the display formatting by using special format strings. This function is useful in situations where you want to display numbers in a more readable format by displaying the $ symbol , a certain number of decimal places, lining up the decimals, etc. See support.office.com for more about the special format strings.

Situation 12: I want to get data from another location and bring it into my original table by using an identifier.

Solution: VLOOKUP or HLOOKUP - Searches for a value in the top row of a table or an array of values, and then returns a value in the same column from a row you specify in the table or array. Use HLOOKUP when your comparison values are located in a row across the top of a table of data, and you want to look down a specified number of rows. Use VLOOKUP when your comparison values are located in a column to the left of the data you want to find.
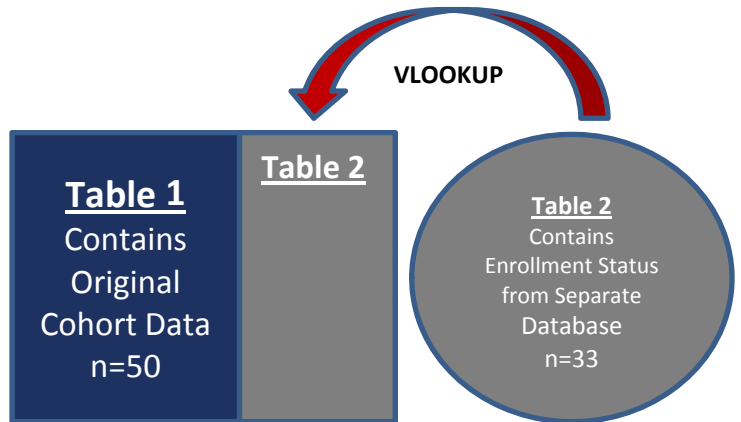
VLOOKUP

Table 1
Contains Original Cohort Data
n=50

Table 2

Table 2
Contains Enrollment Status from Separate Database
n=33

Figure 8 - VLOOKUP Conceptualization

Basic Formulas:

=VLOOKUP(lookup_value, table_array, col_index_num, [range_lookup])
=HLOOKUP(lookup_value,table_array,row_index_num, [range_lookup])

Situation 13: I want to know if there is an error in a formula.

Solution: IFERROR – it will return a value or phrase that you specify, whether that be 'error' or 'You Got it Wrong, Johnny!' if a formula evaluates to an error. Otherwise, it gives the result of the formula.

Basic Formula:

=IFERROR(value,value_if_error)

Situation 14: I want to find a piece of information, but I have to know what column and what row to look at in the data.

Solution: MATCH – helps identify which column and which row of information based on the original input. INDEX returns the information at the intersection that MATCH found. Compare INDEX/MATCH with VLOOKUP/HLOOKUP here.

MATCH/ INDEX

REFERENCE TABLE

ACT Scores

HS GPA

Probabilities of Success

INPUT
ACT Score:
_____
HS GPA:

OUTPUT
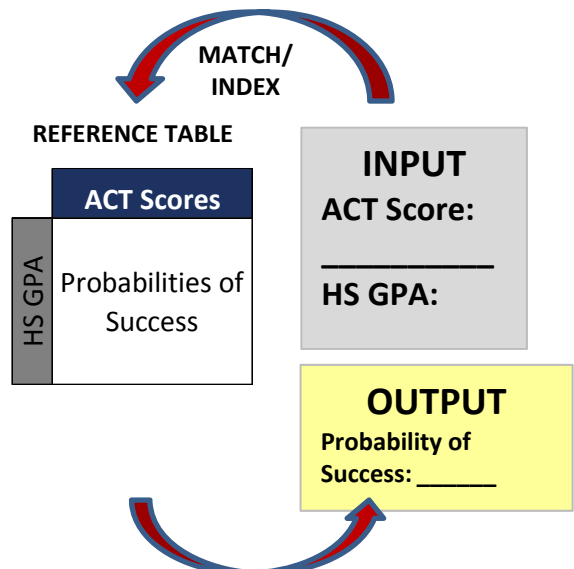Probability of Success: _____

Figure 9 – MATCH/INDEX Conceptualization

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Awesome Other Stuff:

Formatting (Setting formatting defaults in Excel) - https://support.office.com/en-ZA/article/set-the-default-format-options-for-datasheets-efcc3738-2c99-4fa5-ab74-c87d9302bf58

GOAL SEEK - https://support.office.com/en-ZA/article/Use-Goal-Seek-to-find-a-result-by-adjusting-an-input-value-ef3495fe-9ddc-4249-89b4-0e24406b7fcb

Grouping Function in Pivot Table - https://support.office.com/en-ZA/article/group-or-ungroup-data-in-a-pivottable-report-c9d1ddd0-6580-47d1-82bc-c84a5a340725

IF - https://support.office.com/en-ZA/article/if-function-69aed7c9-4e8a-4755-a9bc-aa8bbff73be2

ROUND and **ROUNDOWN** - https://support.office.com/en-ZA/article/round-function-ad7c07c0-bbac-48a0-afb9-d51f47d9ffde

VALUE - https://support.office.com/en-ZA/article/value-function-fd94fddd-e3ef-483b-8575-c7a3d01ff831

References/Links:

3D Reference - https://support.office.com/en-ZA/article/create-a-3-d-reference-to-the-same-cell-range-on-multiple-worksheets-6a9cc847-547f-40e0-924a-b2ed54cc79a2 or http://www.excel-easy.com/examples/3d-reference.html

CHAR and CHAR(10) - https://support.office.com/en-nz/article/CHAR-function-b378dfda-4173-4731-9d91-81c10013d8bf

Ctrl+` - https://support.office.com/en-NZ/article/show-and-print-formulas-65a29965-b1b1-40db-9cb7-4fd051da3a5c

F4 and other shortcut and function keys – https://support.office.com/en-us/article/Excel-shortcut-and-function-keys-1798d9d5-842a-42b8-9c99-9b7213f0040f

Grouping data - https://support.office.com/en-in/article/Outline-group-data-in-a-worksheet-08ce98c4-0063-4d42-8ac7-8278c49e9aff

HLOOKUP - https://support.office.com/en-za/article/HLOOKUP-function-f3f3b210-5dd6-4b58-9c83-b9db2c306d6a?ui=en-US&rs=en-ZA&ad=ZA

IFERROR - https://support.office.com/en-ZA/article/iferror-function-1660eb2d-4087-4ed4-a6f9-c8e040a1d0f7

INDEX - https://support.office.com/en-ZA/article/index-function-0ee99cef-a811-4762-8cfb-a222dd31368a

LEFT - https://support.office.com/en-ZA/article/left-function-d5897bf6-91f5-4bf8-853a-b63d7de09681

LEN - https://support.office.com/en-US/article/LEN-LENB-functions-4dec9627-a03c-4a2b-9b97-2751f4046f10

MATCH - https://support.office.com/en-ZA/article/match-function-bc9d55b1-2e79-4a70-adda-c1dbec6aa7e5

RIGHT - https://support.office.com/en-ZA/article/right-rightb-functions-240267ee-9afa-4639-a02b-f19e1786cf2f

TRIM - https://support.office.com/en-US/article/trim-function-4052ab9f-d319-44d4-97d6-7151b5b33405

VLOOKUP - https://support.office.com/en-ZA/article/vlookup-function-adceda66-30de-4f26-923b-7257939faa65

INDEX/MATCH vs VLOOKUP/HLOOKUP - https://support.office.com/en-ZA/article/look-up-values-with-vlookup-index-or-match-68297403-7c3c-4150-9e3c-4d348188976b