Excel FAQs

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WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

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Learning Objectives

- Shortcuts

- Viewing Spreadshets

- Identifying Formulas vs. Constants

- Formula Auditing

- Lookup Functions

- Pivot Tables

What are some of the common shortcuts in Excel?

Shortcuts

- Learn the shortcuts available to your version of Excel!
  - Time-saving tips to avoid formulas
- Try to work with the ribbons in the tab
  - Using the Alt key gives you access to all the tabs in the ribbon
- Quick Access toolbar is your friend!
  - Make sure to spend the time to customize your quick access toolbar with the tools you use most to make the quickest adjustments
- Bonus Tip: Try filling with the right click button rather than the left click.

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How can I see which cells are formulas and which are constants?

Formulas Vs. Constants

- Numerous ways to do this:
  - Alt + ~
  - Go To Special
  - Conditional Formatting

How can I see which cells are dependent on the current cell? Or vice-versa?

Formula Auditing

- Trace Precedents to find the sources of the formula in the active cell

- Trace Dependents to identify what cells on the sheet have formulas that depend on the active cell

Data Validation

- Protect what a user can input.

How can I see what is happening on another sheet when I am working in excel?

Viewing information on other tabs

- If you want to view a small number of cells, use a Watch Window

- If you want to view an entire sheet, use a New Window.

Why does my Vlookup return an error when I know there is a correct value?

Lookup Functions

- VLOOKUP – performs a vertical lookup of data organized in columns

- HLOOKUP - performs a horizontal lookup of data organized in rows

Index and Match

- Index – Returns the Value at the xth row and y^{th} value

- Match – Similar to lookup, returns the position of a selected value in a table

Why does my pivot table default to COUNT instead of SUM?

Pivot Tables

- Quickest easiest way to organize large data sets

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Thank you for your time. Please take a card if you have any other questions.

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