Tips to Increase Excel Productivity

This training document covers a few basic Excel functions, but will mostly focus on intermediate commands that will help you fill, sort, filter, and analyze data with greater ease.

Format Data as a Table

Tables are extremely useful for filtering, sorting, and calculating data.

1. Click the upper left cell in your data array.
2. In the Ribbon, click the Format as Table button in the Styles group under the Home tab.
3. Click the table style that you’d like to apply (this can be changed later in the Design tab).
4. A dialogue will ask you to confirm the data area for the table.  
   - A green marching border will appear around the data.
   - Change this if incorrect.
   - The $ signs indicate Absolute cell references.
5. Make sure to check the My table has Headers box.
6. Click OK.
7. Each of the headers in the table will have a dropdown arrow to easily Sort, Filter, and Search data in a column.
8. If a filter is applied to the column, the header will show a funnel icon:
   - First name
   - Use the check boxes or Clear Filter from “column” option to show filtered data again.
9. Click the **Design** tab to customize the table.
   - *Note: the Table Tools will not be available if any cells outside of the table area are selected.*

10. Change the **Table Style** using different preset styles.
11. Use check boxes to turn on color banding or add a **Total Row**.
12. Use the dropdown arrows in the **Total Row** to select what functions you’d like to apply to each column.

13. Use the **Convert to Range** button in the **Tools** group to change the table back into a standard data array.

**Conditionally Format Cells**

Conditionally Formatting automatically changes the way cells look if the data entered meets certain criteria. This can make it easier to identify when taking some action might be necessary.

1. Select the table or data array where you’d like to apply the formatting.
2. Click the **Conditional Formatting** button (next to Format as Table).
   - Choose a Rule to apply to the cells.
   - *Example: Highlight Cells ➤ Equal To...*
3. In the Equal To dialogue, specify what the data should equal (either with a cell reference or exact text) in order to become highlighted.
   - Also, choose what colors you’d like for the highlighting
   Example: cells equal to the value of E1, an empty cell, then highlight Yellow.

4. If data no longer meets the criteria of the conditional formatting, the cell returns to its default format.
   Example: The cell is no longer empty and therefore no longer yellow.
   - To remove conditional formatting, simply click button and choose one of the options.

Auto Fill

Sometimes you need to copy data or formulas into many cells on a worksheet. Auto Fill makes it easy to click and drag data into adjacent cells, automatically updating cell references relative to the row/column that a formula is copied to.

1. Select a cell that you’d like to copy.
2. Move your pointer over the box in the lower right corner of the cell until you see a crosshair pointer.
3. Click and drag vertically or horizontally to automatically fill down the column/across the row.
   - Data like days of the week, or months of a year will automatically fill as a series.
   - Click the Auto Fill Options box to change how data is filled.
Flash Fill Data

1. To combine data from multiple adjacent columns into one cell, type out an example of the combined data.
2. Select a group of cells in the column starting with the example cell.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>First</td>
<td>Last</td>
<td>Full name</td>
</tr>
<tr>
<td>2</td>
<td>John</td>
<td>Williams</td>
<td>John Williams</td>
</tr>
<tr>
<td>3</td>
<td>Mattew</td>
<td>Mello</td>
<td>Mello, Mattew</td>
</tr>
<tr>
<td>4</td>
<td>Devin</td>
<td>Dabney</td>
<td>Dabney, Devin</td>
</tr>
<tr>
<td>5</td>
<td>John</td>
<td>Lane</td>
<td>Lane, John</td>
</tr>
<tr>
<td>6</td>
<td>Manny</td>
<td>Fernandez</td>
<td>Fernandez, Manny</td>
</tr>
</tbody>
</table>

3. Click the Fill button in the Editing group under the Home tab.
4. Click Flash Fill.

5. The data can be typed in any order you’d like.

- The same result can be achieved using the Concatenate function.
  Example: =Concatenate(A1, B1)

Fill Data from Cells Above

To quickly fill empty cells in a column with data from populated cells above:

1. Select the column containing the empty cells.
2. Click the Find & Select button in the Editing groups under the Home tab.
3. Click Go To Special.
4. In the **Go To Special** dialogue, click the **Blanks** radio.
5. Click **OK**.
6. With empty cells now selected, type the equal sign followed by the reference of the first populated cell into the **Formula Bar**.
   
   **Example:**
   
   ![Image of formula bar]
   
   7. Press **Ctrl + Enter**
8. The empty cells will populate with data.

### Filter Duplicates

Sometimes it is necessary to copy a list of data with only unique entries, like when importing data into Access Tables where duplicates can compromise the integrity of the database.

1. Select the data that contains duplicates.
2. Click the **Data** tab.
3. Click **Advanced** in the **Sort & Filter** group.
4. In the **Advanced Filter** dialogue, select if you’d like to **Filter in-place** or **Copy to another location**.
5. Check the box for **Unique records only**.
6. Click **OK**.
7. The list will update with unique records only.
8. To remove the filter, click the **Filter** button in the **Sort & Filter** group.

If you have any questions or comments regarding the steps outlined in this document, please contact UHD TLS Training Services by calling (713) 221-8200, or by sending an email to **ttlctraining@uhd.edu**.