



- Tips
- Tricks
- How To

So That's How You Do That!

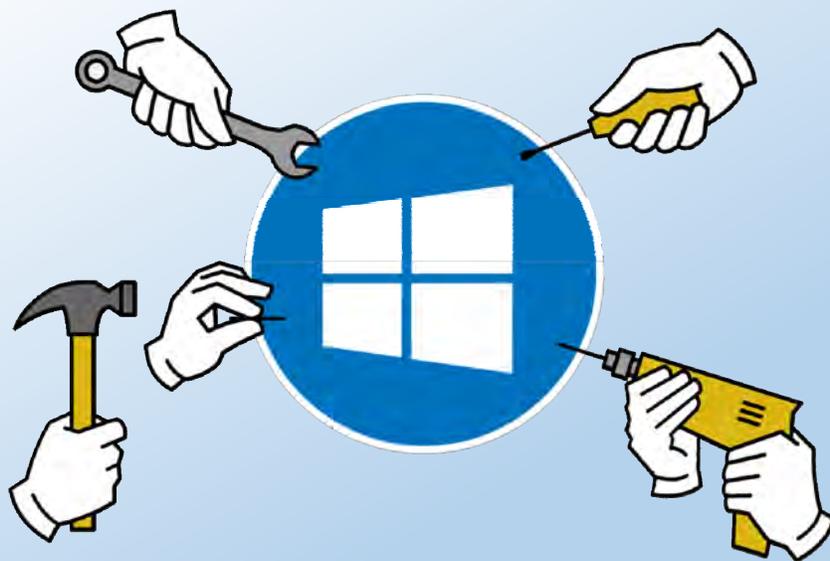
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What we will discuss today

- Windows 10
- Office 2016 vs Office 2013
- Excel Tips and Tricks

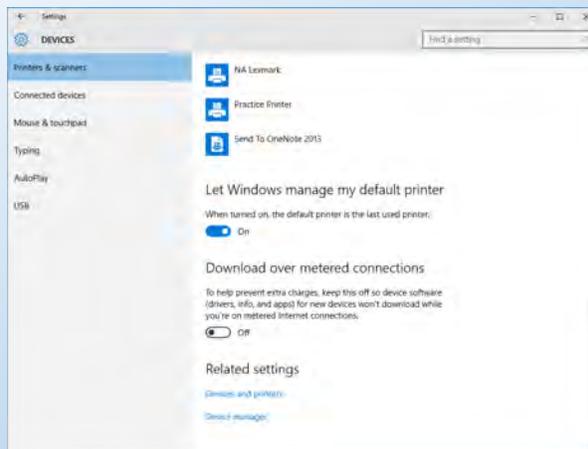


Tweaking Windows 10



Windows 10 keeps changing my default printer?!?!?

Under Settings/Devices turn off “Let Windows manage my default printer”



Note: In a domain environment fresh Win 10 installations will revert back after a restart to having this turned on. Upgrades to Windows 10 do not. This should be fixed in a future build.

Windows 10 Shortcut Keys

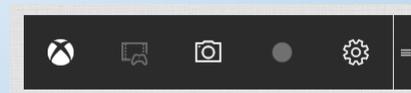
- Win Key + X (same as right-click Start Menu)
- Win Key + I – Settings
- Win Key + Q – Ask Cortana a question
- Win Key + E – Opens Windows Explorer
- Win Key + R – Run Box
- Win Key + T – Shows Aero Peek of items on Task Bar
- Win Key + A – Action Center (see those notifications)
- Win Key + S – Search
- Win Key + D – Go to Desktop
- Win Key + G – Game Bar*
- Win Key + H – Take a Screen Shot of active window to share
- Win Key + L – Locks Workstation
- Win Key + M – Minimizes everything
- Win Key + , - Peeks at desktop, goes back to application when you let off of Win Key
- Win Key + 1, 2, 3...etc. – Opens applications pinned to that number on the Task Bar
- Win Key + Tab – shows applications on the screen they are on vs Alt + Tab shows applications all together
- Win Key + Arrow – Snaps window the direction of the arrow you press
- Win Key + Ctrl + D – Create new virtual desktop

Game Bar (Win Key + G)

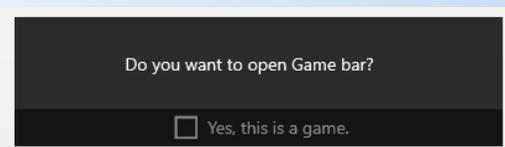
The Game Bar allows you to capture a Picture or Video of content in Windows 10. The Content is saved here:

C:\users\%username%\Videos\Captures

C:\users\%username%\Photos\Captures



In a Windows 10 application window you may be prompted if you want to Open the Game Bar. Click Yes and you will have access to the controls.



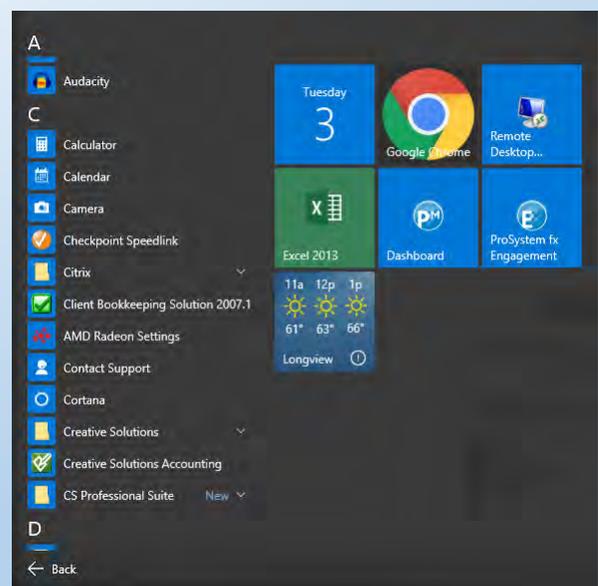
Game Bar Video Recording Requirements

your PC needs to have one of these video cards:

1. AMD: AMD Radeon HD 7000 series, HD 7000M series, HD 8000 series, HD 8000M series, R9 series, and R7 series.
2. NVIDIA: GeForce 600 series or later, GeForce 800M series or later, Quadro Kxxx series or later.

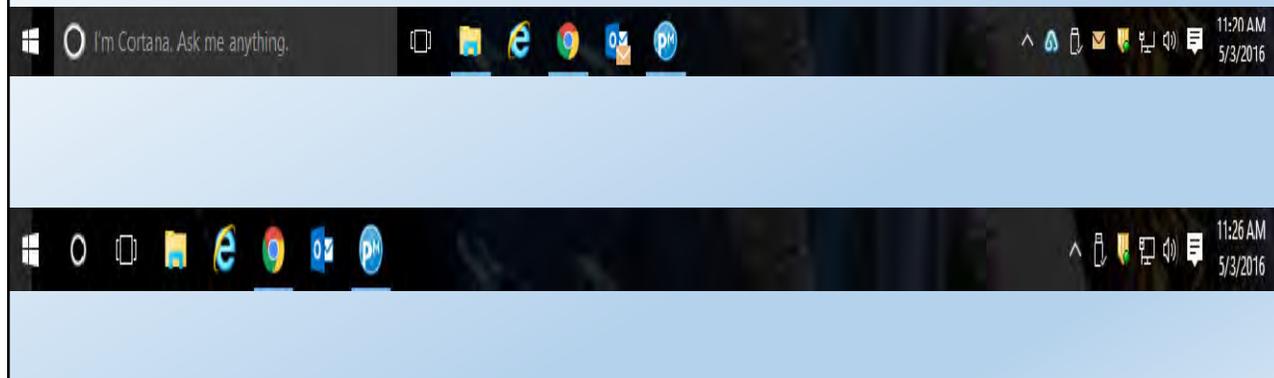
Clean up the Start Menu

If you want a clean single column Star Menu just unpin all the items from the Star Menu and pull the column over from the right to the left to make a one column Start Menu again.



Clean up the Task Bar

By right-clicking the Task Bar you have the ability to clean up the items that appear there, such as removing the “Cortana/Search” Bar.



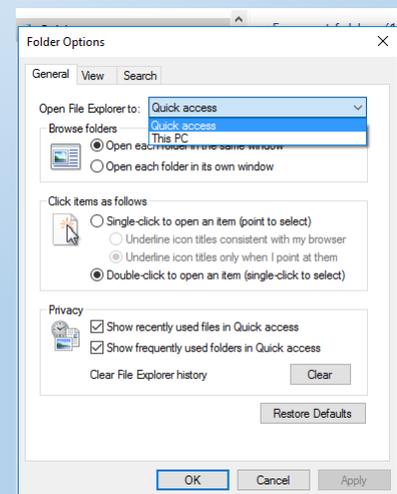
Turn On/Off Quick Access in Windows Explorer

Quick Access shows you previously accessed folders and files for “Quicker” access to historical documents/directories.

This can be turned on/off from the View, Folder Options in Windows Explorer

Click **View, Options, Change folder and search options**

Under General Tab change “Open File Explorer to:” from Quick Access to This PC....or vice versa if you want to go from PC View to Quick Access view



Excel Tricks/Shortcuts

- Generate Unique Value in a Column with Advanced Filter
- Input restriction with Data Validation
- Transpose – Copy, Paste (T) Transpose
 - Column Data to Row Data, Row Data to Column Data
- Hide Data Thoroughly on Print Out
- Tweak Auto Correct for Complicated Terms
- Shortcut Keys to quickly format values
- Convert data to a table to get more edit features
- Forget VLOOKUP, INDEX MATCH is all the rage
- Pivot Tables/Graphs (Creating and Working With)
- Slicers

Excel Shortcuts

- Ctrl+Shift+! – Two Decimal Points
- Ctrl+Shift+\$ - Adds a Dollar Sign
- Ctrl+Shift+% - Adds a % sign
- Ctrl+Pg Up/Pg Down – move among worksheets
- Ctrl+G – Enter Cell you want to jump to
- Ctrl+End – Jump to last cell
- Ctrl+Home – Jump to first cell



EXCEL TRICKS
Or: How I learned to stop worrying and love Excel

See Accompanying Handout **Excel Tricks.pdf** for detailed steps

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EXCEL TRICKS

Or: How I learned to stop worrying and love Excel

Some Items that may help along the way

This document contains some of my favorites as well as other users favorite Excel Tricks. Some you may have seen or even use already. Hopefully there will be some that will help you moving forward.

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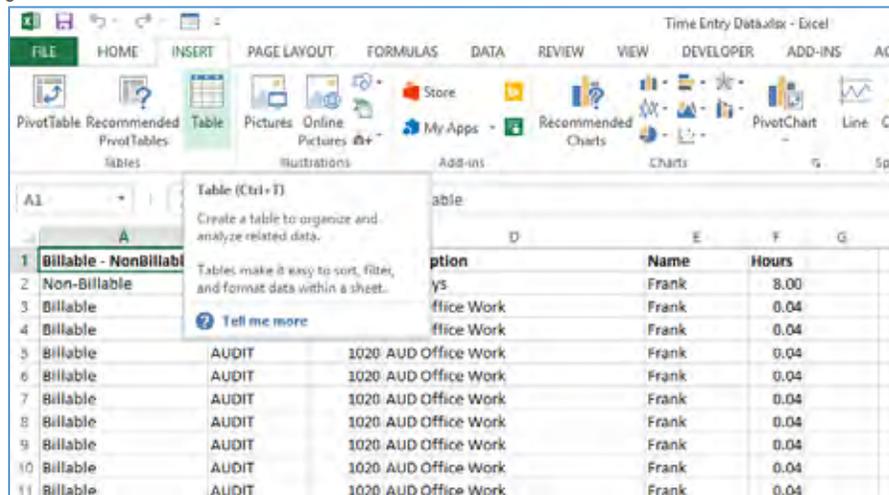
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Creating PivotTables and PivotCharts from Data

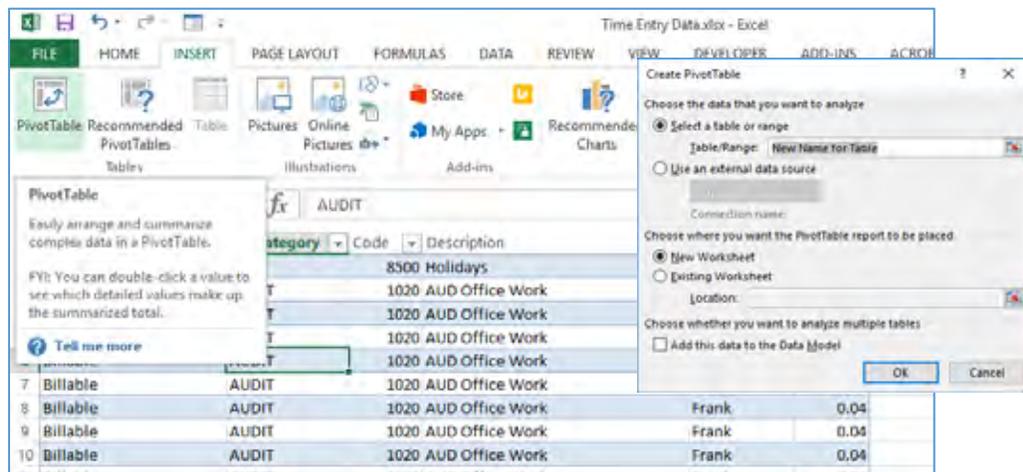
Creating Pivot Tables has become so much easier as Office advanced from 2010 to Office 2013 and 2016 we continue to see that same ease. To create a Pivot Table of your data you can either select the amount of data you wish to use or create a table from it. For the following example we are going to create a table out of our data, it makes it easier to keep up with data if you have multiple selections in one Pivot Table.

1. Creating the Table

- a. First select a cell in your data. You do not have to select all your data. Then choose **Insert-> Table**



- b. Now your data is a Table that you can now create a Pivot Table from. While having a cell selected in the table choose **Insert-> Table**. You will receive a prompt to create the PivotTable from the Table.



c. Now that your Pivot Table has been created you will manipulate it by adding your data to the Fields (Column, Row, Values, and Filter). You can also further adjust the display as well as other settings. These are located under the **PivotTableTools** ribbon when a Pivot Table is selected.

Adjusting the Display

These are accessed from **PivotTableTools-> Design**

1. The overall layout can be pre chosen by many of the layouts Excel already provides under **Pivot Table Styles**

Code	Turn of Hours	Description	Adhikana	Amar	Balazara	Buthang	Chamathra	Chark	Dale	Olana	Doovity	Frank	Jor	Kinle	Levley	U
7	Billable	AUD Audit Report Delivery	2.00								4.00	2.50				
8		AUD Typing and Misc		0.40				16.70			1.00	23.00			0.00	
9		AUD Workpaper Review													0.00	
10	Billable Total		2.00	0.40				16.70	5.20		5.00	26.50			0.00	
11	Non Billable	Building Papers and Issues													31.50	
12		Client Communications													0.40	
13		Client Transitions													17.50	
14		Firm Accounting		5.00											1.50	
15		Human Resources													1.50	
16		Personal Scheduling													0.50	
17		Reading Professional Materials	1.50	1.00	1.30	10.80					0.50				0.50	
18		Supplies Procurement	0.20	0.40											0.50	
19	Non Billable Total		0.20	1.80	0.50	1.30	10.80	0.50			48.30	0.50			39.80	
20	Grand Total		0.20	1.80	0.50	1.30	11.00	0.50	16.70	5.20	48.30	5.50	26.10		40.80	

2. You also have selections under **PivotTable Style Options** to choose layout items as well, such as Banded Rows/Columns

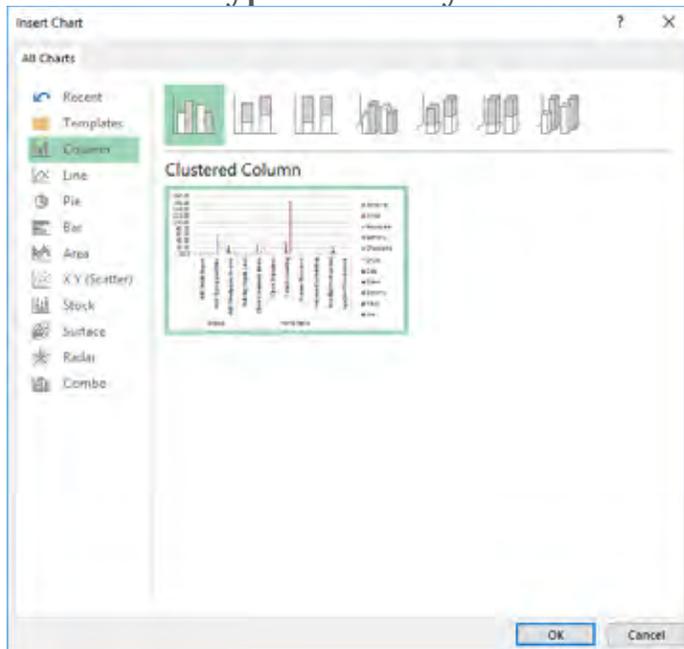
Code	Turn of Hours	Description	Adhikana	Amar	Balazara	Buthang	Chamathra	Chark	Dale	Olana	Doovity	Frank	Jor	Kinle	Levley	U
7	Billable	AUD Audit Report Delivery	2.00								4.00	2.50				
8		AUD Typing and Misc		0.40				16.70			1.00	23.00			0.00	
9		AUD Workpaper Review													0.00	
10	Billable Total		2.00	0.40				16.70	5.20		5.00	26.50			0.00	
11	Non Billable	Building Papers and Issues													31.50	
12		Client Communications													0.40	
13		Client Transitions													17.50	
14		Firm Accounting		5.00											1.50	
15		Human Resources													1.50	
16		Personal Scheduling													0.50	
17		Reading Professional Materials	1.50	1.00	1.30	10.80					0.50				0.50	
18		Supplies Procurement	0.20	0.40											0.50	
19	Non Billable Total		0.20	1.80	0.50	1.30	10.80	0.50			48.30	0.50			39.80	
20	Grand Total		0.20	1.80	0.50	1.30	11.00	0.50	16.70	5.20	48.30	5.50	26.10		40.80	

Creating PivotCharts

You can create PivotCharts just as you do with Pivot Tables. For this example we are going to create a chart that accompanies our already existing PivotTable. You would choose **PivotTableTools->Analyze -> PivotChart**.

With our PivotTable selected we choose **PivotTableTools->Analyze -> PivotChart**.

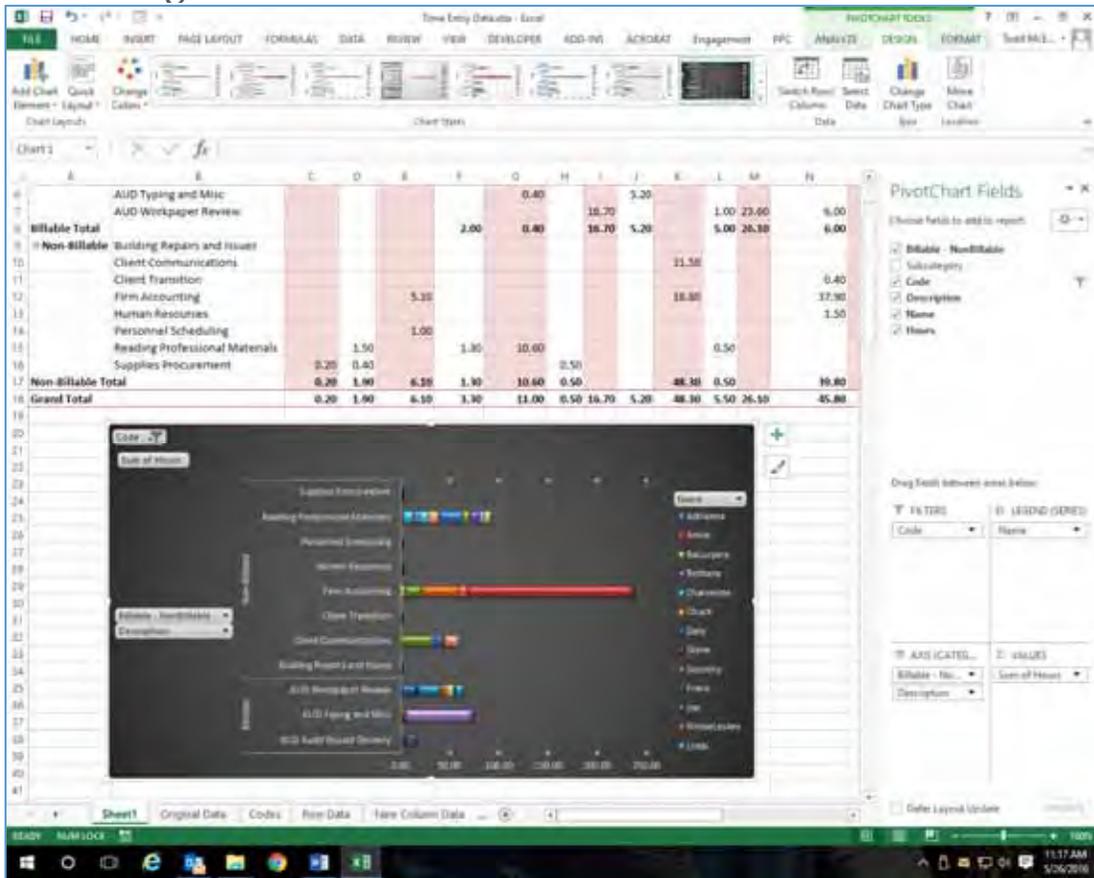
1. Choose the Type of Chart you want to use



2. Place your chart in your work.



- Now that your Chart is placed in your work you can resize it manually by selecting it and dragging the sides to shrink or expand. This will manipulate the data present as well and you may want to play with this to get best representation of your data.
- You will notice that Field List on the right side has changed to reflect Axis and Legend versus Rows and Columns.
- All Editing for the Chart is done under **PivotTableTools**

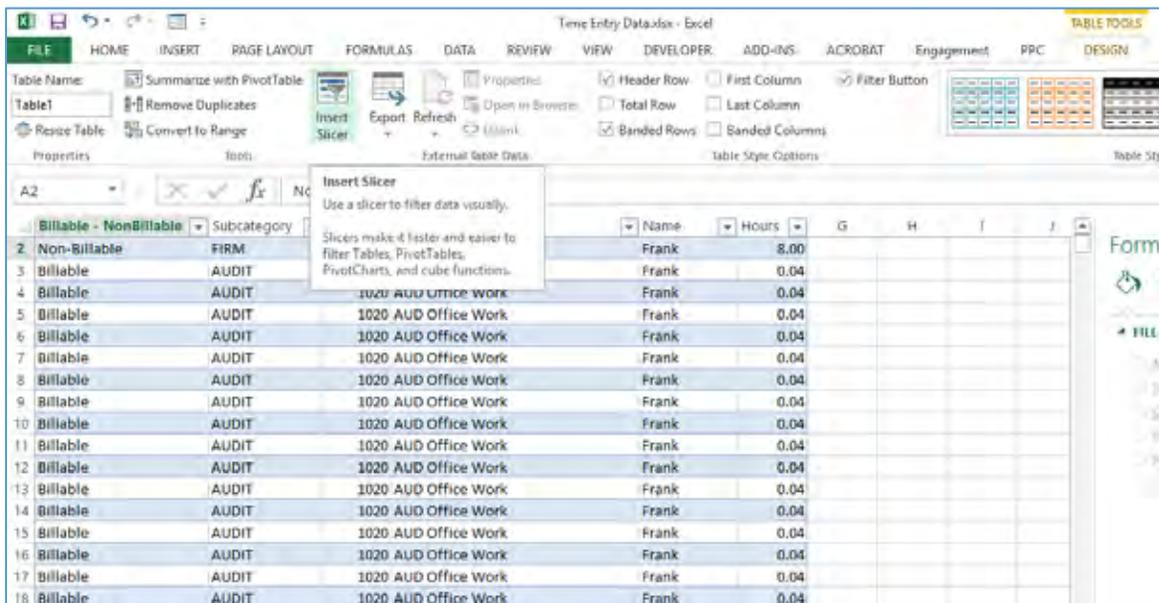


Using Slicers

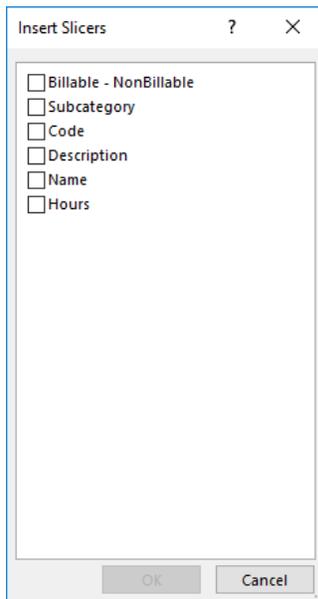
Slicers are a neat way to filter data with a selection on the screen versus having to go to the menu each time.

In order to use Slicers you will need your data in a table format, so just like we did with the Pivot Table earlier you will select a cell in your data and then choose **Insert-> Table**.

1. Now that your data is in a Table select a cell in the Table and choose **Table Tools-> Design-> Insert Slicers**



2. Now you will choose the columns from the table you want to place as Slicers to manipulate your data.



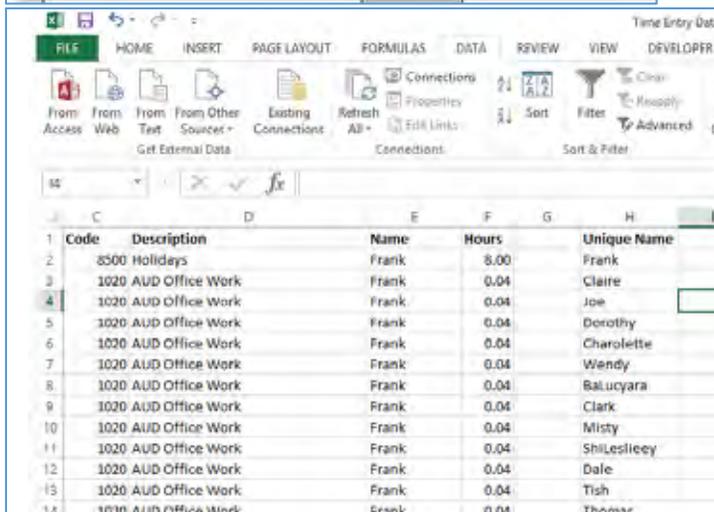
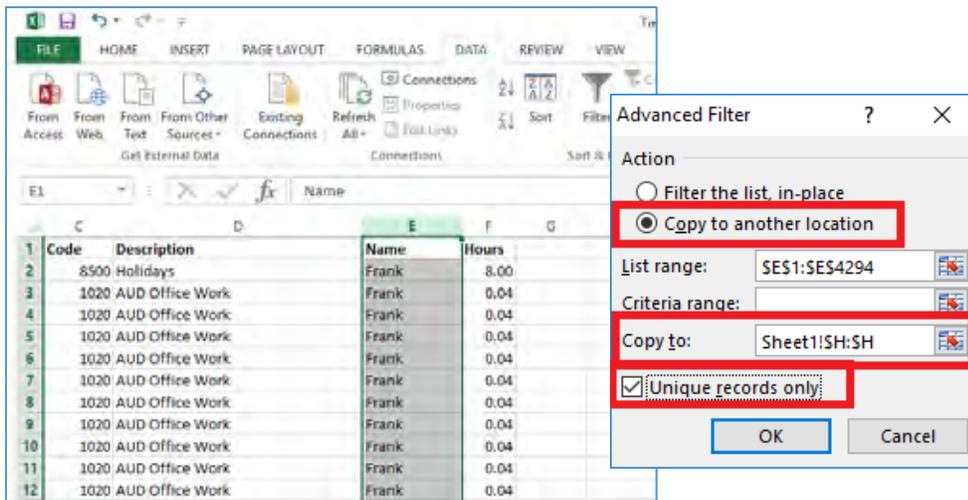
- Now you will place the Slicers on the sheet where you want them. To filter the data simply select the items you want to filter with. You can also use Ctrl+select as well as Shift+select to select multiple ones.

The screenshot shows an Excel spreadsheet with a table of data. A slicer is placed over the 'Name' column, and the 'Format Slicer' task pane is open on the right. The slicer is currently set to 'Adrianna'. The task pane shows options for 'POSITION AND LAYOUT' (Size, Scale) and 'PROPERTIES' (Move and size with cells, etc.).

ID	Category	Subcategory	Code	Description	Name	Hours
2617	Billable	PAY	2480	Payroll Tax Return Preparation	Adrianna	1.90
2618	Billable	PAYPR	4000	Payroll Preparation	Adrianna	0.50
2620	Billable	PAY	2480	Payroll Tax Return Preparation	Adrianna	1.30
2621	Billable	COMP4	1604	COMP April Writeup Services	Adrianna	0.10
2624	Billable		1099	2510 1099 Preparation	Adrianna	1.30
2625	Billable	W-2	2500	W-2 Preparation	Adrianna	0.30
2627	Billable		1099	2510 1099 Preparation	Adrianna	1.10
2628	Billable	PAY	2480	Payroll Tax Return Preparation	Adrianna	3.20
2630	Billable	COP12	1612	COMP December Writeup Services	Adrianna	0.50
2633	Billable		1099	2510 1099 Preparation	Adrianna	0.20
2634	Billable	COP12	1612	COMP December Writeup Services	Adrianna	1.10
2636	Billable	W-2	2500	W-2 Preparation	Adrianna	1.70
2637	Billable		1040	2000 1040 Return Preparation	Adrianna	0.10
2638	Billable	W-2	2500	W-2 Preparation	Adrianna	1.70
2640	Billable	COP12	1612	COMP December Writeup Services	Adrianna	1.90
2641	Billable		1099	2510 1099 Preparation	Adrianna	0.60
2642	Billable		1099	2510 1099 Preparation	Adrianna	0.60
2644	Billable	COP12	1612	COMP December Writeup Services	Adrianna	6.30
2645	Billable	COP11	1611	COMP November Writeup Services	Adrianna	4.50
2646	Billable	COP12	1612	COMP December Writeup Services	Adrianna	1.00
2648	Billable	COP12	1612	COMP December Writeup Services	Adrianna	2.00
2651	Billable	COP12	1612	COMP December Writeup Services	Adrianna	0.10
2651	Billable	COP12	1612	COMP December Writeup Services	Adrianna	4.90
2654	Billable	PAYPR	4000	Payroll Preparation	Adrianna	0.50
2655	Billable	COP12	1612	COMP December Writeup Services	Adrianna	0.50
2656	Billable	PAYPR	4000	Payroll Preparation	Adrianna	0.50
2658	Billable	COMP4	1604	COMP April Writeup Services	Adrianna	5.00
2659	Billable	COP12	1612	COMP December Writeup Services	Adrianna	1.00
2660	Billable	COMP4	1604	COMP April Writeup Services	Adrianna	3.20
2661	Billable		1120	2040 1120 Return Preparation	Adrianna	1.50
2662	Billable	PAY	2480	Payroll Tax Return Preparation	Adrianna	0.90
2663	Billable	COP12	1612	COMP December Writeup Services	Adrianna	2.40
2665	Billable	COP12	1612	COMP December Writeup Services	Adrianna	1.00
2666	Billable	COMP4	1604	COMP April Writeup Services	Adrianna	2.30
2667	Billable	COP12	1612	COMP December Writeup Services	Adrianna	0.30
2668	Billable	PAY	2480	Payroll Tax Return Preparation	Adrianna	0.40

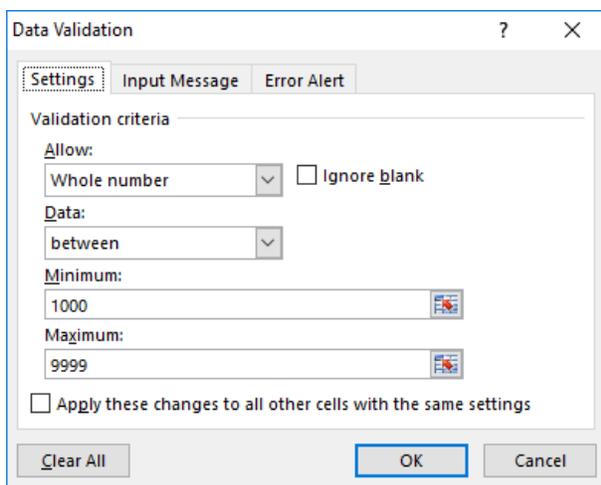
Generate a Unique Value in a Column

Using the Advanced Filter can present more options to getting specific data. Click to choose the column and go to **Data->Advanced**. A pop-up window will show up. As the screenshot shows, click **Copy to another location**. Then specify the target location by typing the value or clicking the area-choosing button. In this example, the unique age can be generated from Column C and show in Column E. Don't forget to choose unique records only, then click OK. The unique value showing in column E can be the contrast of the original data in C, that's the reason why it is recommended to copy to another location.



Input Restriction with Data Validation Function

In order to retain the validity of data, sometimes you need to restrict the input value and offer some tips for further steps. For example, Code in this sheet should be whole numbers between 1000 and 9999. To ensure that data outside of this range isn't entered, go to **Data->Data Validation->Setting**, input the conditions and Input/Error Message to give prompts like, "Please enter a valid code." "Please check your Code and try again!"

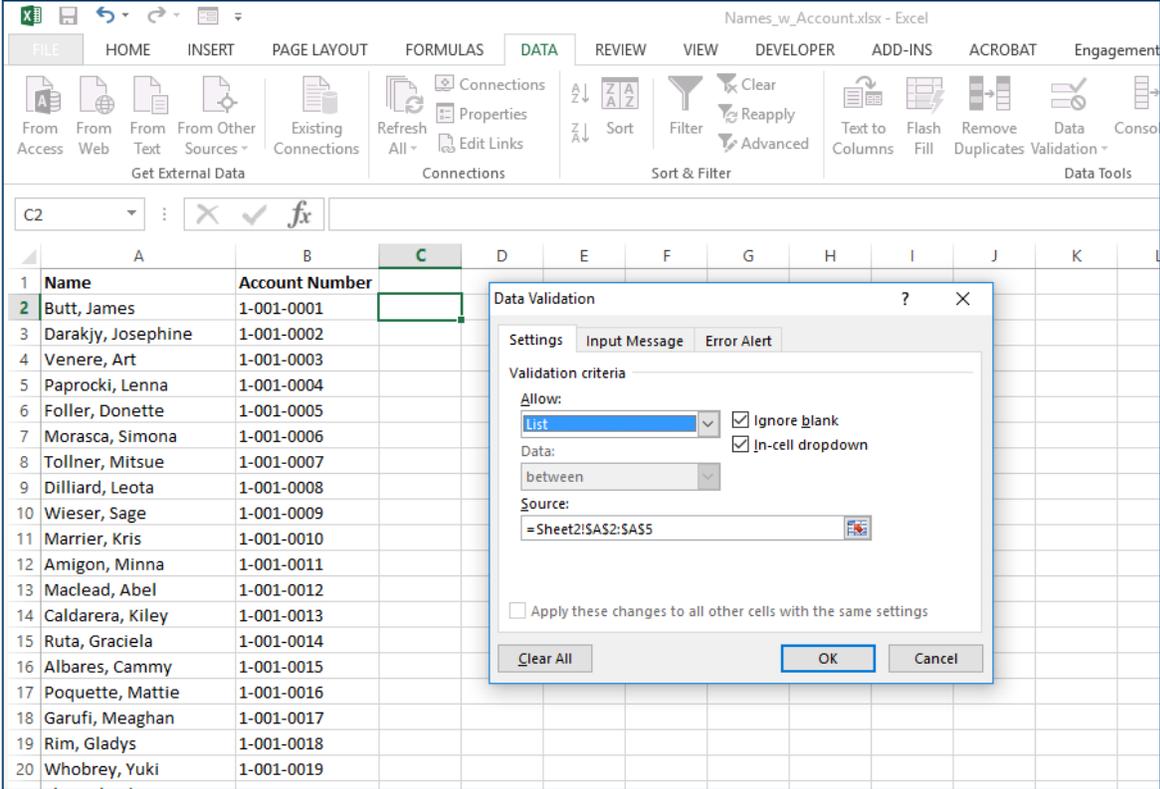


Drop Down Lists to help with validation:

Creating drop-down list and enforcing data entry using drop-down, ensures that data consistency is always maintained in your worksheet. To create a drop-down list:

- Enter the list of items in a range.
- Select the cell that will contain the drop-down list
- Choose **Data -> Data Tools -> Data Validation**.
- In the Data Validation dialog box, click the Settings tab.

- In the Allow drop-down list, select List.
- In the Source box, specify the range that contains the items.
- Make sure that the In-Cell drop-down option is checked and click OK.



Transpose Data from a Row to a Column

You would use this feature if you want to transpose data to get a better display. Here's how: **copy** the area you want to transpose, go to **Home->Paste->Transpose**

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Name	Country	Age	Note			Name	Liza	Linda	David	Susan	Salina	Jim	Jorge
Liza	USA	25	@			Country	USA	USA	CA	CA	CA	Mexico	Mexico
Linda	USA	29	!			Age	25	29	17	24	23	49	29
David	CA	17	?			Note	@	!	?	*	^	\$	#
Susan	CA	24	*										
Salina	CA	23	^										
Jim	Mexico	49	\$										
Jorge	Mexico	29	#										

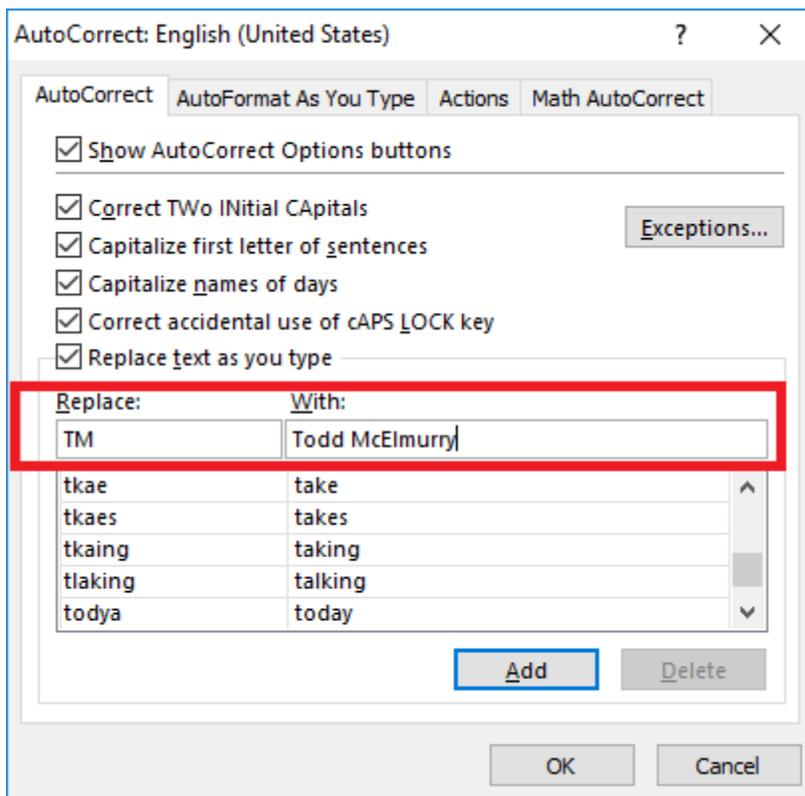
Hide Data Thoroughly

Almost all users know how to hide data by right clicking to select the Hide function, but this can be easily noticed if there is only a little bit of data. The best and easiest way to hide data thoroughly is to use the Format Cells function. Choose the area and go to **Home->Font->Open Format Cells->Number Tab->Custom->Type ;;; -> Click OK**, then all the values in the area will be invisible, and can only be found in the preview area next to the Function button.

A	B	C	D
Name	Country	Age	Note
Liza	USA		@
Linda	USA		!
David	CA		?
Susan	CA		*
Salina	CA		^
Jim	Mexico		\$
Jorge	Mexico		#

Speed up Inputting Complicated Terms with AutoCorrect

If you need to repeat the same value and it is complicated to input, the best way is to use the AutoCorrect function, which will replace your text with the correct text. Take my name, Todd McElmurry, for example, which can be replaced by TM. Therefore, every time I input TM, it can autocorrect to Todd McElmurry. Go to **File->Options->Proofing->AutoCorrect Options** and input **Replace** text **With** correct text in the red rectangular area, as below.



One Click to Get More Status

You know you can see the Average, Count and Sum but you can also Right-Click and see more Options that are available as well.

The screenshot shows an Excel spreadsheet with a table of employee data. The table has columns for Code, Name, Country, and Age. The data is as follows:

Code	Name	Country	Age
1	Liza	USA	25
2	Linda	USA	29
3	David	CA	17
4	Susan	CA	24
5	Salina	CA	23
6	Jim	Mexico	49
7	Jorge	Mexico	29

The 'Customize Status Bar' context menu is open, showing various options. A red arrow points from the bottom-right corner of the selected cell (A7) to the status bar. The status bar displays: Average: 4, Count: 7, Min: 1, Max: 7, Sum: 28.

Double Click to Copy down entire data set

So you have created a formula and need to copy it down an entire data set. You could drag it down, or you could simply double-click the box at the bottom right corner of the cell and it will paste it down the data set.

The screenshot shows an Excel spreadsheet with a table of billable data. The table has columns for Billable - NonBillable, Subcategory, Code, Description, Name, and Hours. The data is as follows:

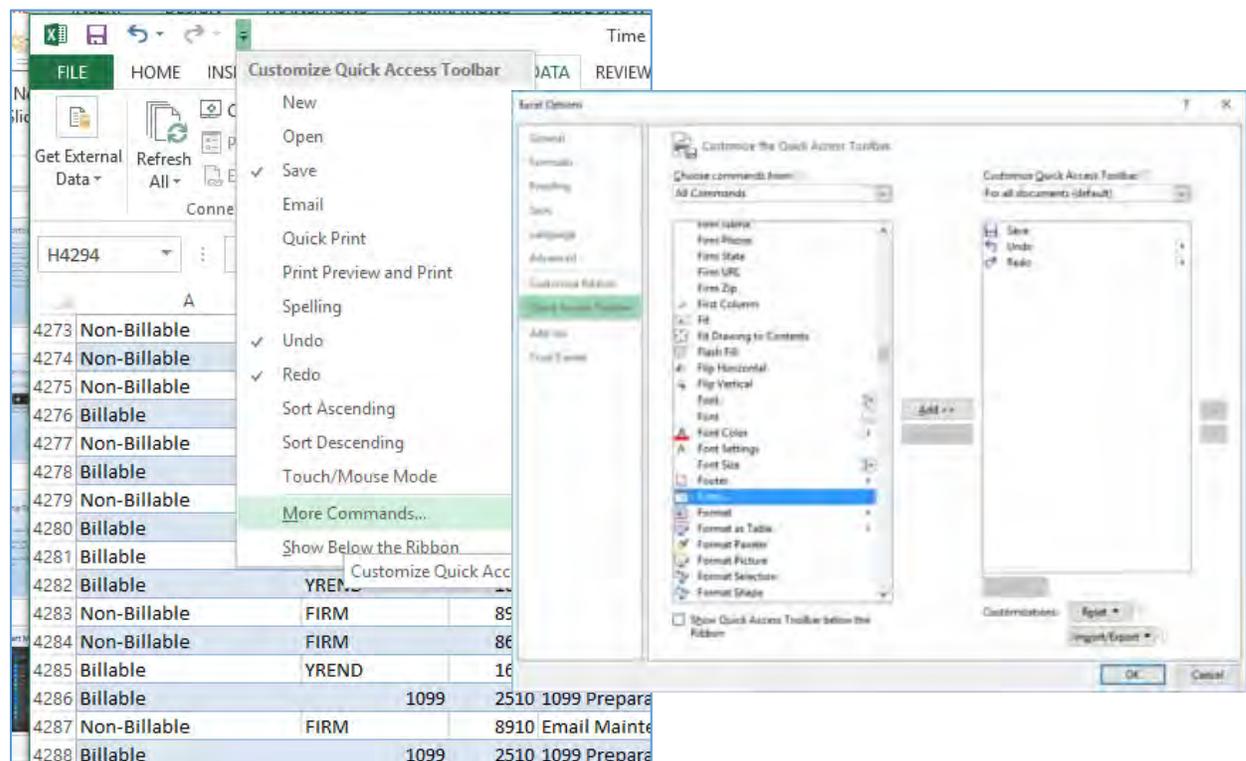
	Billable - NonBillable	Subcategory	Code	Description	Name	Hours	Hours for the year
1	Non-Billable	FIRM	8500	Holidays	Frank	8.00	2920
2	Billable	AUDIT	1020	AUD Office Work	Frank	0.04	
3	Billable	AUDIT	1020	AUD Office Work	Frank	0.04	
4	Billable	AUDIT	1020	AUD Office Work	Frank	0.04	
5	Billable	AUDIT	1020	AUD Office Work	Frank	0.04	
6	Billable	AUDIT	1020	AUD Office Work	Frank	0.04	
7	Billable	AUDIT	1020	AUD Office Work	Frank	0.04	
8	Billable	AUDIT	1020	AUD Office Work	Frank	0.04	
9	Billable	AUDIT	1020	AUD Office Work	Frank	0.04	

The formula bar shows the formula $=F2*365$ in cell G2. The status bar at the bottom shows the formula $=F2*365$.

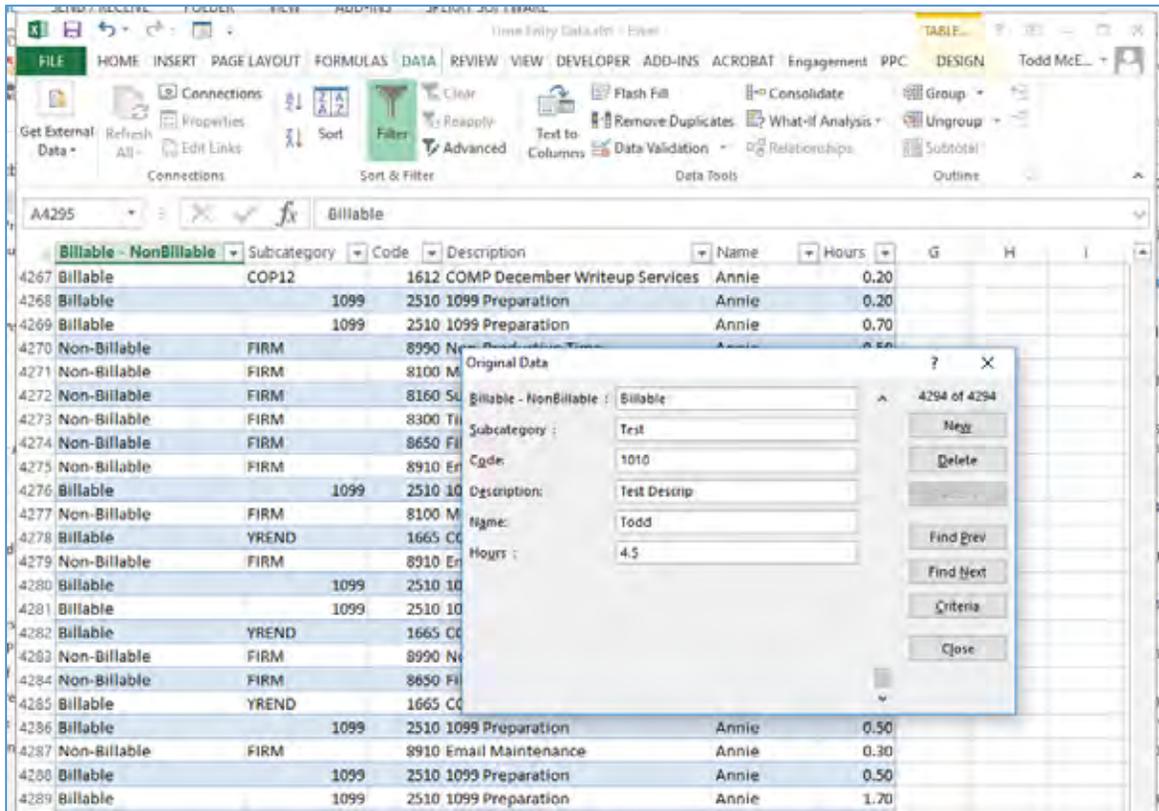
Adding a Data Entry Form to your data

First you are going to want to convert your data from a Range to a Table. After that you will then add Form to your Quick Access Menu by doing the following:

- Click on Customize Quick Access Toolbar (Drop down arrow above Ribbon, top left)
- Select More Commands from the list
- Choose All Commands from the Dropdown
- Select Form in the list of **All Commands**
- Click on **Add** to add it to the Quick Access Toolbar, then click on OK



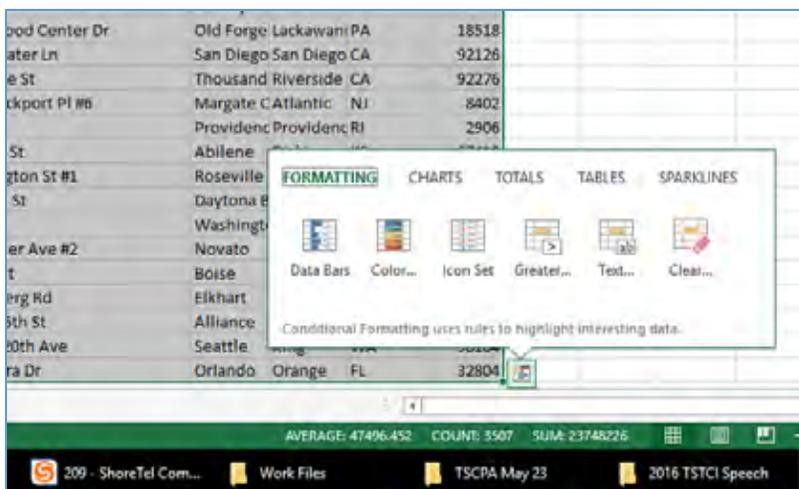
Now that it is added to the Quick Access Tool bar when you want to add data to your Table simply click on the **Form** icon in the **Quick Access Tools** and you will receive a data entry form that you can add and edit data with.



Quickly analyze your data

The new Quick Analysis tool can help both new and experienced users find options for working with selected data. To use it, select the data to analyze, and the Quick Analysis icon appears in the bottom-right corner of the selected data.

Click that icon, and a dialog appears showing a range of tools for analyzing the data, such as Formatting, Charts, Totals, Tables and Sparklines. Click any option, and a series of selectable choices appear; preview those choices by moving your mouse over them. Next, click the option you like to apply it to your data. This feature speeds up the process of formatting, charting and writing formulas.



Index Match vs VLookup/HLookup

VLookup and HLookup are very powerful tools and have been used for a long time to help find and put data together, but they aren't powerful enough. If you really want a powerful lookup tool that will pull data no matter where it is in your existing data then look no further than Index and Match.

VLookup – Looks across Columns from Left to Right.

HLookup – Looks down Rows from Top to Bottom.

INDEX – Looks based on the criteria you specify, not restricted to one direction.

INDEX(array, row_num, [column_num])

MATCH - searches for a specified item in a range of cells, and then returns the relative position of that item in the range.

MATCH(lookup_value, lookup_array, [match_type])

(-1 = Less Than, 0 = Exact Match, 1= Greater Than)

When used together Index and Match allow for a more thorough search through data without having to move the columns or rows around to use VLookup or HLookup.

In the following Example we have two workbooks that we are using INDEX MATCH to locate and pull data from one to the other.

=INDEX (What I want to bring across, MATCH(Compare This, To This, Exact Match)

=INDEX([Names_w_Account.xlsx]Sheet1!\$E:\$E, MATCH(A:A, [Names_w_Account.xlsx]Sheet1!\$A:\$A, 0))

