

Microsoft Excel 365: Top Tips

Welcome

Microsoft Excel 365 Top Tips

Live Online

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Welcome

- Please unmute your mic and turn your camera on and say hello.
- Please ask questions.
- Tell me once you have finished a practical activity, so we can all move on.

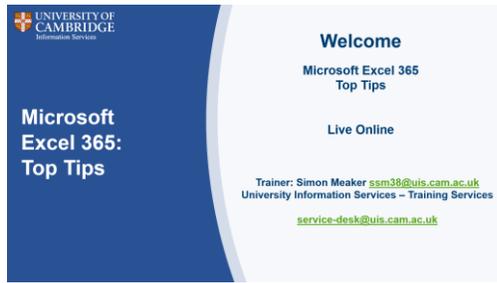
Course Information

Objectives

- Introduce you to Microsoft Excel 365 Top Tips
- Duration
- Delivery Style – demonstrations and practical's

General Information

- Please fill in the Feedback form at the end of the course <http://feedback.training.cam.ac.uk/uis>
- Please ask questions
(This is your course and I want you to get as much as you can out of it)
- If you need assistance with the practical's let me know and we can share desktops



Slides



Files



Learning Paths



General Information

Course Material

Course Information

Related Courses

www.linkedin.com/learning

<https://www.training.cam.ac.uk>

Which version Are you using?

All exercises will work using Excel 365.
(Excel 2016 & 2019 users may have functionality missing)



Thinking of upgrading?

Staff and students can download Office 365 for free
via this [link](#)

Get Office 365 ProPlus
on your personal devices...



All students, and staff from qualifying institutions: download Office 365 ProPlus free on your personal devices to use while you are at Cambridge.
(Your login will expire 30 days after you leave the University.)

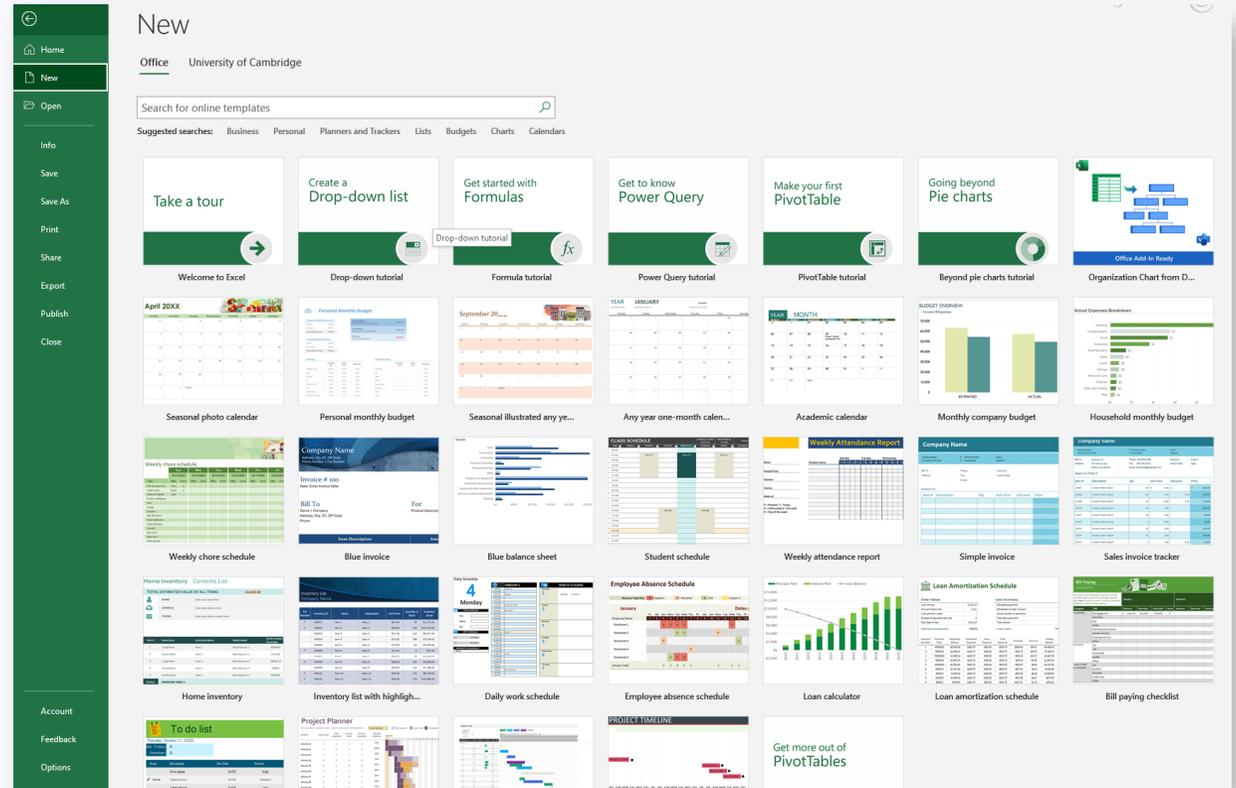
Microsoft Excel 365: Top Tips Course Topics

Course Topics

1. Templates
2. Keyboard Shortcuts
3. Highlight & Remove Duplicates
4. Turn a List into Table
5. Accessibility Checker
6. Flash Fill
7. Transpose Data using Paste Special
8. Convert and other functions
9. Create a Chart Template
10. 'No effort' Pivot Tables
11. New Chart Types
12. Turn Data into Maps
13. Stock & Geographic Data Types
14. The Analyze button
15. Workbook Statistics

Microsoft Outlook 365: Templates

Top Tip 1: Templates Open New File & Choose a Template



Struggling to make your document look professional? Start with a template and customise it to your own design. File, New, then browse or search for a suitable template.

Microsoft Outlook 365: Templates

Practice Choosing a Template

Choose File / New, then browse for a suitable template.

Or search online via <https://templates.office.com/>.

Microsoft Outlook 365: Keyboard Shortcuts

Top Tip 2: Keyboard Shortcuts

File 'Excel 365 Top Tips' using 'Numbers' worksheet

[Ctrl] and ↓	Select A4. [Ctrl] and [down arrow] will select bottom most cell in the data block. Pressing the [right arrow] will select far right cell in the date block. Adding [Shift] will select data.
[Alt][Enter]	Select I5. Click to place cursor inside the formula within the formula bar. [Alt][Enter] will insert a new line.
[Ctrl] and ' [apostrophe]	Select a blank cell beneath one with data. Copies the data from the cell above
[Ctrl] and ; [semicolon] [Ctrl] [Shift] and ; [semicolon]	Select a blank cell and insert the current date. Or include [Shift] to insert the current time. (Stays static – does not update when date or time changes)
Highlight a row or column, then press Ctrl, Shift +	Inserts a row above or a column to the left
F2	Select a cell with data.
Esc to quit the formula	Edits the active cell and positions the insertion point at the end of the cell contents

Microsoft Outlook 365: Keyboard Shortcuts

Practice Keyboard Shortcuts

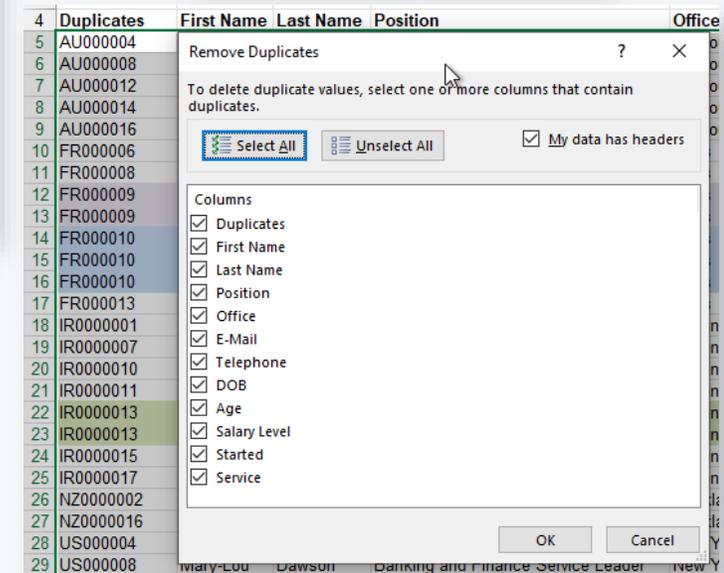
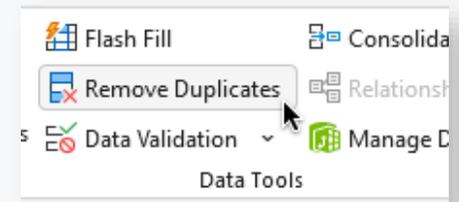
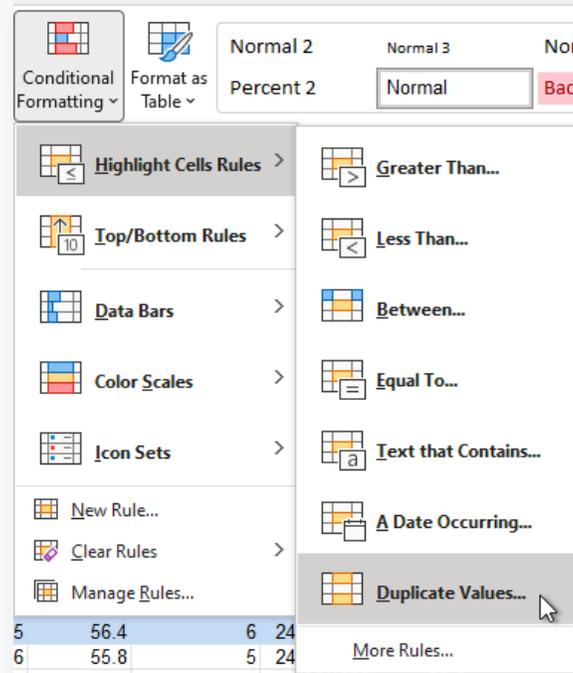
Try out the shortcuts below.

[Ctrl] and ↓	Select A4. [Ctrl] and [down arrow] will select bottom most cell in the data block. Pressing the [right arrow] will select far right cell in the date block. Adding [Shift] will select data.
[Alt][Enter]	Select I5. Click to place cursor inside the formula within the formula bar. [Alt][Enter] will insert a new line.
[Ctrl] and ' [apostrophe]	Select a blank cell beneath one with data. Copies the data from the cell above
[Ctrl] and ; [semicolon] [Ctrl] [Shift] and ; [semicolon]	Select a blank cell and insert the current date. Or include [Shift] to insert the current time. (Stays static – does not update when date or time changes)
Highlight a row or column, then press Ctrl, Shift +	Inserts a row above or a column to the left
F2	Select a cell with data.
Esc to quit the formula	Edits the active cell and positions the insertion point at the end of the cell contents

Microsoft Outlook 365: Highlight & Remove Duplicates

Top Tip 3: Highlight & Remove Duplicates

File 'Excel 365 Top Tips' using 'Duplicates' worksheet



Microsoft Outlook 365: Highlight & Remove Duplicates

Practice Highlight & Remove Duplicates

File *'Excel 365 Top Tips'* using *'Duplicates'* worksheet

To Highlight Duplicate Values

Select A4:A30

Home tab / Conditional Formatting / Highlight Cell Rules
/ Duplicate Values / Press OK

To Remove Duplicate Values

Select A4:L30

Data tab / Remove Duplicates

In the panel choose 'Unselect All'

Then tick only the 'Duplicates Column'

Microsoft Outlook 365: Turn a List into a Table

Top Tip 4: Turn a List into a Table

File 'Excel 365 Top Tips' using 'Numbers' worksheet

Select the 'Numbers' worksheet. Pressing CTRL+T within a worksheet range turns that range into a table.

Tables offer several advantages over ordinary ranges.

The screenshot shows the Microsoft Excel interface with the 'Table Design' ribbon active. The table below is a structured list of sales revenue data.

Revenue	Jan	Feb	Mar	Apr	May	Jun	Total	Column1
Paris	550,998	850,554	818,874	837,228	746,864	856,887	4,861,205	Loss
Berlin	838,223	926,778	879,114	983,225	848,999	1,042,224	5,518,563	Loss
Auckland	1,050,254	1,547,000	1,488,369	1,523,124	1,358,854	1,557,147	8,524,548	Break even
Moscow	1,936,882	1,641,554	1,507,774	1,386,448	1,240,885	1,406,992	9,120,535	Break even
Dublin	1,524,294	1,685,548	1,599,854	1,789,552	1,542,963	1,896,159	10,038,370	Profit
New York	2,531,225	2,621,889	2,453,999	2,547,441	1,977,558	2,477,332	14,609,444	Profit
Melbourne	3,521,487	2,985,448	2,741,221	2,521,447	2,255,665	2,558,666	16,583,934	Profit
Total	11,953,363	12,268,771	11,489,205	11,588,465	9,971,388	11,795,407	69,056,599	

Advantages →

Microsoft Outlook 365: Turn a List into a Table

Top Tip 4: Turn a List into a Table

File *'Excel 365 Top Tips'* using *'Numbers'* worksheet

Tables offer several advantages over ordinary ranges

- You can apply styles to them such as apply horizontal banding.
- Filtering is automatically switched on.
- Tables expand intelligently as your data grows. If you add a row or column, all formatting and formulas are included (also mouse over the bottom right cell, when the mouse pointer changes shape to a double-headed arrow, hold and pull down to increase the table size).
- Pivot tables and Pivot charts built from table columns expand/contract automatically as the data changes. (The PivotTable 'Refresh' button needs to be clicked to achieve this).
- You can toggle a total row on or off, displaying sums, averages, and other aggregate calculations when needed.

Microsoft Outlook 365: Turn a List into a Table

Practice Turning a List into a Table

File *'Excel 365 Top Tips'* using *'Numbers'* worksheet

Select any cell in the Revenue table

Press Ctrl + T

A 'Create Table' box will appear, the range should be \$A\$4:\$I\$11 by default.

Make sure 'My Table has Headers' is ticked.

Press OK

On the 'Table Design' tab tick 'Total Row'.

Sum up the Columns

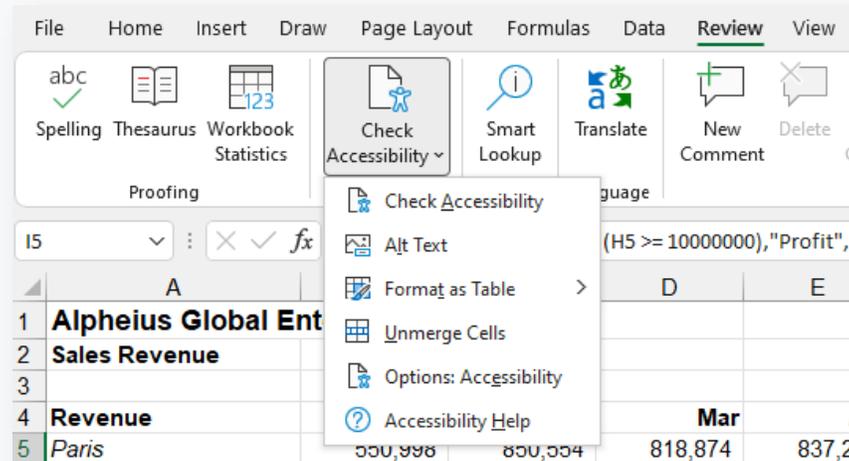
Choose a different 'Table Style'

Microsoft Outlook 365: Accessibility Checker

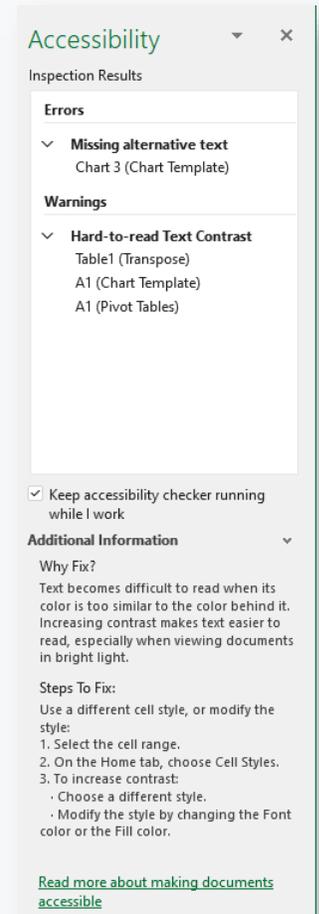
Top Tip 5: Accessibility Checker

File 'Excel 365 Top Tips' or open a new Template

Under the 'Review' tab, select 'Check Accessibility'.



When your spreadsheets are accessible you unlock your content to everyone, and people with differing abilities can read and use Excel workbooks and charts.



Microsoft Outlook 365: Accessibility Checker

Practice using the Accessibility Checker

File *'Excel 365 Top Tips'* or open a new Template

Using the current *'Excel 365 Top Tips'* workbook or a new template of your choice run the *'Accessibility Checker'* to look for problems with your spreadsheet.

Select the *'Review'* tab

Press the *'Accessibility Checker'* button

The panel on the right will list the problems and will advise on how to correct them.

More information can be found at these two Microsoft Support sites:

[Make your Excel documents accessible to people with disabilities](#)

[Improve accessibility with the Accessibility Checker](#)

Microsoft Outlook 365: Flash Fill

Top Tip 6: Flash Fill

File 'Excel 365 Top Tips' using 'Names' worksheet

Flash fill deals with multiple data in a single column to separate out data based on the pattern you need, e.g. separating the first name from a last name.

To use the feature:

Use the Flash Fill button

Or look out for auto Flash Fill



	A	B
1	Terri Byrd	Terri
2	Desiree Montgomery	Desiree
3	Ruben Potter	Ruben
4	Elsie Bowen	Elsie
5	Willie Dixon	Willie
6	Alexander Holloway	Alexander
7	Irving Walsh	Irving
8	Lynn Brown	Lynn
9	Angel McCormick	Angel
10	Antoinette Gill	Antoinette
11	Victoria Butler	Victoria
12	Rosalie Briggs	Rosalie
13	Robin Fitzgerald	Robin
14	Francisco Pope	Francisco
15	Laurence Marsh	Laurence
16	Annie Webster	Annie
17	Tommie Brady	Tommie
18	April Stone	April
19	Diane Morgan	Diane
20	Herman Wells	Herman
21	Arlene Powell	Arlene
22	Roger Collier	Roger
23	Wilfred Blair	Wilfred
24	Oscar Pittman	Oscar
25	Julia Colon	Julia
26		

Microsoft Outlook 365: Flash Fill

Practice Flash Fill

File *'Excel 365 Top Tips'* using *'Names'* worksheet

Click in the first cell to the right of the list (i.e. B1).

Type the element from the left-hand cell that you want to extract or copy.

Select the Data tab,
Data Tools Group,
Flash Fill button.

Try copying just the first or last name

or

making an email address, i.e. t.byrd@cam.ac.uk

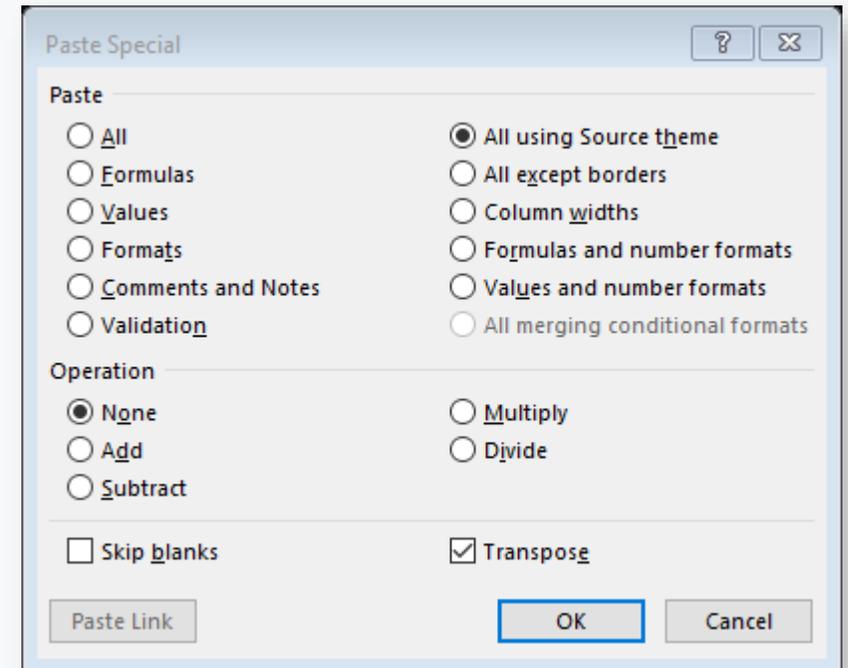
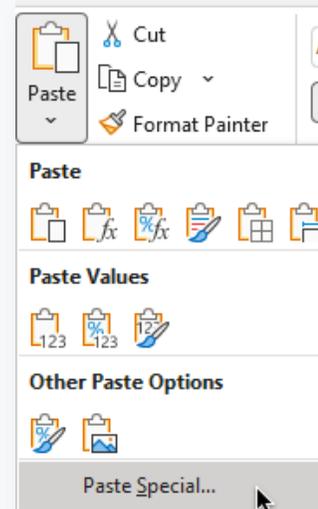
Look out for auto Flash Fill!

Microsoft Outlook 365: Transpose Data using Paste Special

Top Tip 7: Transpose Data using Paste Special

File 'Excel 365 Top Tips' using 'Transpose' worksheet

Excel's Paste Special command offers various options other than a simple paste of copied data, for example, pasting the cell contents without any formatting, or paste values which removes the formula and leaves just the result. Transpose switches your data around.



Microsoft Outlook 365: Transpose Data using Paste Special

Practice Transposing Data

File *'Excel 365 Top Tips'* using *'Transpose'* worksheet

Select A4:I11 and copy the data (Ctrl + C).

Click the cell where you want to start pasting the data.

On the Home tab go to the Clipboard group on the left of the ribbon.

Click the bottom half of the Paste button.

Select 'Paste Special'.

Choose 'All using Source theme' and tick the 'Transpose' check box and press OK.

Microsoft Outlook 365: Convert and other functions

Top Tip 8: Convert and other functions

File 'Excel 365 Top Tips' using 'Convert' worksheet

= CONVERT can convert a number from one measurement system to another.

	A	B	C
1	CONVERT		
2			
3	Category	No Units	Convert
4	Weight: UK pounds to kilograms	7	3175.14659
5	Time: minutes to seconds	10	600
6	Temperature: Celsius to Fahrenheit	25	77
7	Liquid: Litres to UK pints	7	12.3182779

Microsoft Outlook 365: Convert and other functions

Practice Converting Data

File *'Excel 365 Top Tips'* using *'Convert'* worksheet

Select cell C4.

Try to find the correct conversion units for:

Weight

Time

Temperature

Liquid

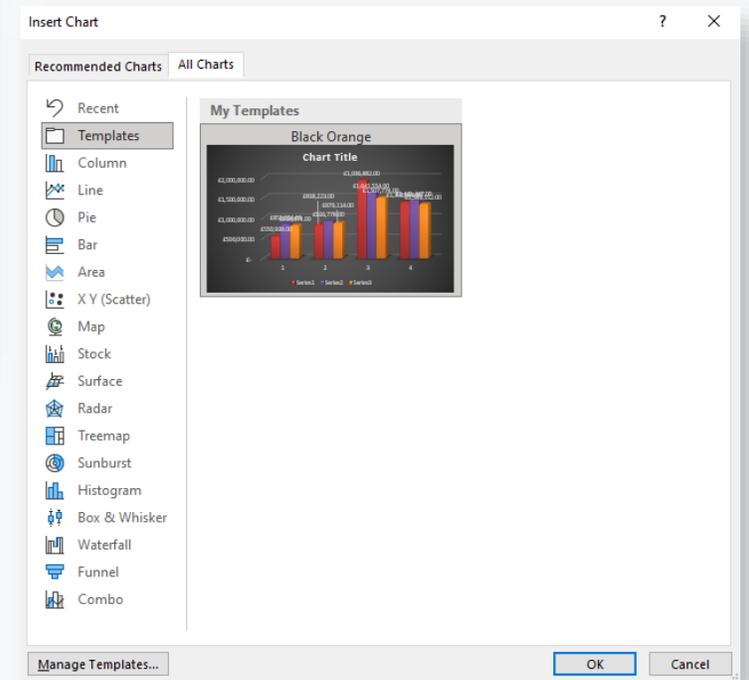
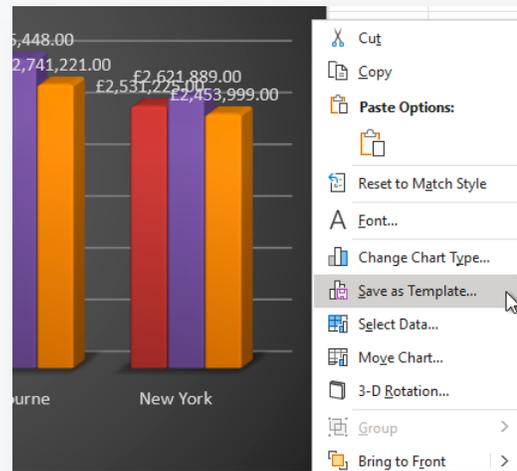
Using =Convert(number, From Unit, To Unit)

Microsoft Outlook 365: Create a Chart Template

Top Tip 9: Create a Chart Template

File 'Excel 365 Top Tips' using 'Chart Template' worksheet

Saving a chart as a template saves the chart formatting and appearance, not the data. First create a chart and format it as you want. Then Save as Template.



Microsoft Outlook 365: Create a Chart Template

Practice Creating a Chart Template

File 'Excel 365 Top Tips' using 'Chart Template' worksheet

Select A5:D9.

On the Insert tab click Clustered Column and click OK.

Change the formatting from the Chart Tools, Design tab.

Right click the chart border and choose 'Save as Template' to the suggested location of:

'C:\Users\yourusername\AppData\Roaming\Microsoft\Templates\Charts.'

Select A13:D17.

On the Insert tab click the dialogue box launcher and choose All Charts, then the 'Templates' option.

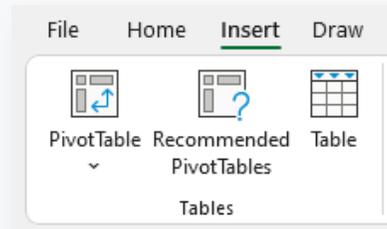
Select the template you want and click OK.

Microsoft Outlook 365: 'No effort' Pivot Tables

Top Tip 10: 'No effort' Pivot Tables

File 'Excel 365 Top Tips' using 'Pivot Tables' worksheet

Select the 'Pivot Tables' worksheet. Pivot Tables are a powerful analysing tool. Excel 365 makes it super easy to create a meaningful Pivot Table.



The image shows a screenshot of an Excel spreadsheet titled 'Used Car Sales' with a sub-header '1st Quarter Sales'. The data table has columns for No, Month, Salesperson, Make, Model, Type, Colour, and Year. A 'Recommended PivotTables' dialog box is open, showing several pivot table options. The 'Sum of Price by Region' pivot table is selected and expanded, showing a summary table with Row Labels (East, North, South) and Sum of Price (155002, 345188, 492017) and a Grand Total of 992207.

No	Month	Salesperson	Make	Model	Type	Colour	Year
1	Jan	Mary O'Dwyer	Toyota	Corolla	Sedan	Red	1988
2	Jan						2003
3	Jan						2001
4	Jan						2002
5	Jan						2001
6	Jan						2000
7	Jan						2000
8	Jan						1999
9	Jan						2001
10	Jan						2005
11	Jan						2008
12	Jan						2001
13	Jan						1999
14	Jan						1998
15	Jan						1985
16	Jan						2003
17	Jan						2001
18	Jan						2005
19	Jan						2003
20	Jan						2000
21	Jan						2000
22	Jan						2001
23	Jan						2000
24	Jan						2001
25	Jan						1999
26	Feb						2000
27	Feb	Mary O'Dwyer	Ford	Escort	Wagon	Silver	2002

Row Labels	Sum of Price
East	155002
North	345188
South	492017
Grand Total	992207

Microsoft Outlook 365: 'No effort' Pivot Tables

Practice 'No effort' Pivot Tables

File 'Excel 365 Top Tips' using 'Pivot Tables' worksheet

Click in the data set you want to use.

On the Insert tab click 'Recommended Pivot Tables'.

Excel will select all the data including the headings.

A window opens displaying a selection of Pivot Tables. Each thumbnail has a title describing what the Pivot Table is Summarising.

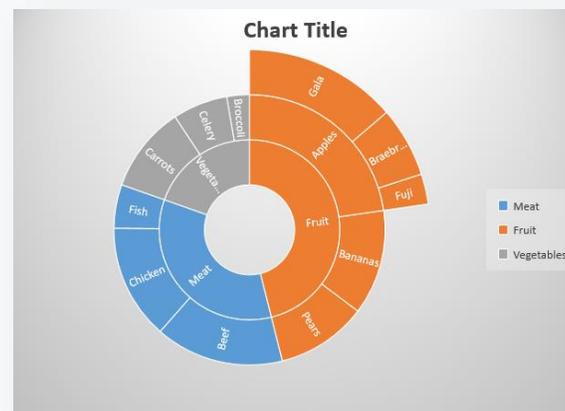
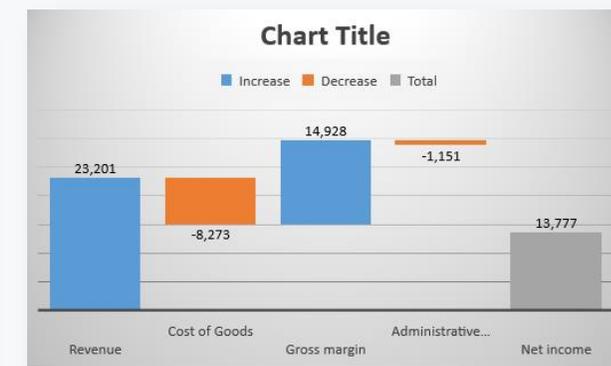
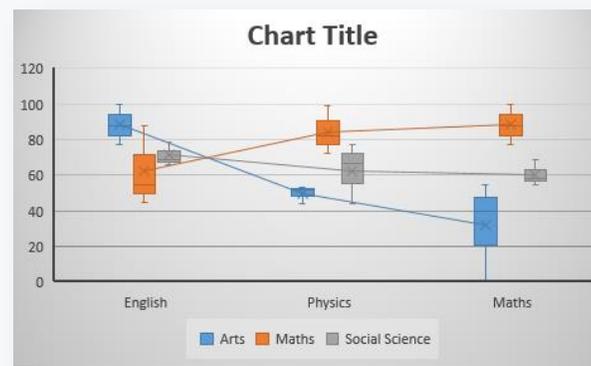
Click on the one that matches your criteria the closest and click OK. The PivotTable will be created on a separate worksheet.

Microsoft Outlook 365: New Chart Types

Top Tip 11: New Chart Types

File 'Excel 365 Top Tips' using 'Histogram' worksheet and 'Excel examples of new charts.xlsx'

Create a 'Histogram' chart and open the Excel workbook named 'Excel examples of new charts.xlsx' to view these various charts.



Microsoft Outlook 365: New Chart Types

Practice New Chart Types

File *'Excel 365 Top Tips'* using *'Histogram'* worksheet and *'Excel examples of new charts.xlsx'*

On the *'Histogram'* worksheet select A1:A21

On the Insert tab click the dialogue box launcher and choose All Charts, then the *'Histogram'* option.

Press OK.

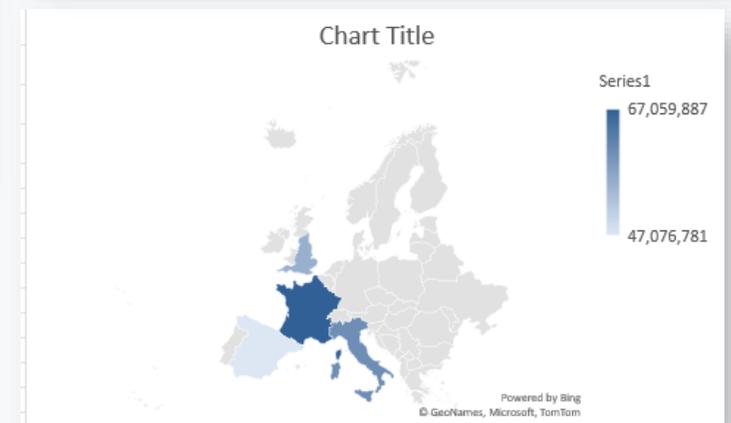
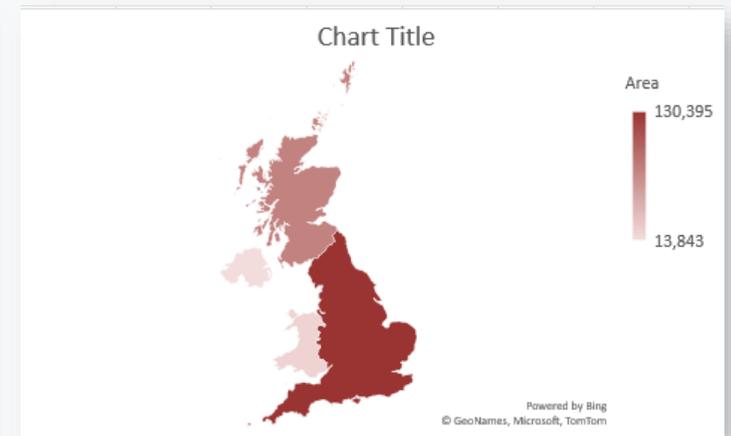
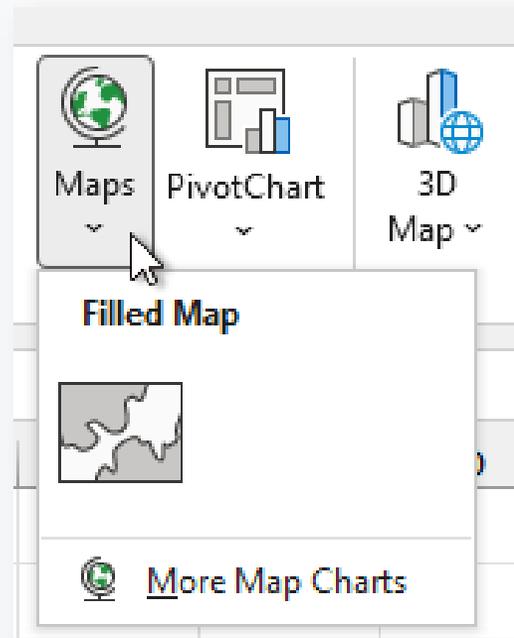
Open the *'Excel examples of new charts.xlsx'* workbook to view other chart options available.

Microsoft Outlook 365: Turn Data into Maps

Top Tip 12: Turn Data into Maps

File 'Excel 365 Top Tips' using 'Turn Data into Maps' worksheet

Create Maps from your Data.



Microsoft Outlook 365: Turn Data into Maps

Practice Turning Data into Maps

File *'Excel 365 Top Tips'* using *'Turn Data into Maps'* worksheet

Select A2:B5

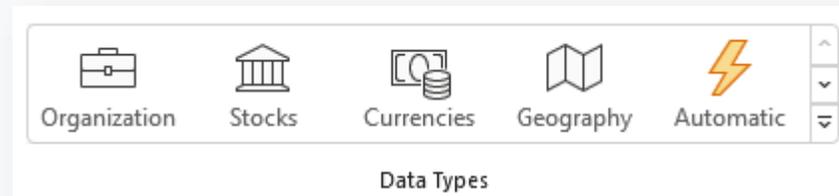
On the 'Insert tab' in the 'Charts groups' select 'Maps' / 'Filled Map'.

A map of the United Kingdom should be displayed. You can move this into position and change the formatting and colour using the 'Chart Design' tab on the ribbon.

Repeat for A19:B22

Microsoft Outlook 365: Stock & Geographic Data Types

Top Tip 13: Stock & Geographic Data Types
File 'Excel 365 Top Tips' using 'Data Types' worksheet



	A	B
1	Country	
2	🇺🇦 Australia	25,364,307
3	🇨🇦 Canada	37,589,262
4	🇨🇳 China	1,397,715,000
5	🇲🇽 Mexico	126,014,024
6	🇷🇺 Russia	144,373,535
7	🇬🇧 United Kingdom	66,834,405
8	🇺🇸 United States	328,239,523
9		
10		

Company Name	
🏢 AMAZON.COM, INC. (XNAS:AMZN)	\$ 3,350.44
🏢 APPLE INC. (XNAS:AAPL)	\$ 179.70
🏢 CISCO SYSTEMS, INC. (XNAS:CSCO)	\$ 61.25
🏢 MICROSOFT CORPORATION (XNAS:MSFT)	\$ 329.01

Microsoft Outlook 365: Stock & Geographic Data Types

Practice Stock & Geographic Data Types File *'Excel 365 Top Tips'* using *'Data Types'* worksheet

Select A2:A8

On the 'Data tab' in the 'Data Types' group select 'Geography'.

Click on the icon which appears in cell B1 and from the submenu choose population.

Repeat for G2:G5, this time choosing 'Stocks' from the 'Data Types' group and choose 'Price' from the submenu.

To remove Data Type, select A2:A8, right click and select Data Type / Convert to text.

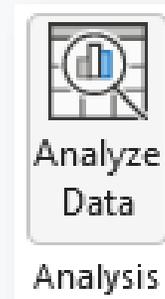
This is worth watching in your own time:

[Office 365 New Features \(Microsoft 365\) - Use new data types in Excel](#)

Microsoft Outlook 365: The Analyze button

Top Tip 14: The Analyze button File 'Excel 365 Top Tips' using 'Analyze button' worksheet

The Analyze button analyses your selected data and offers a series of charts and pivot tables you may want to apply to your spreadsheet.

The screenshot shows the 'Analyze Data' pane in Excel. It includes a search bar, a list of suggested questions, a bar chart titled ''Jan', 'Feb', 'Mar' by 'Sales' (Thousands), a pivot table titled ''Feb' and 'Jan' by 'Sales', and a horizontal bar chart titled ''Sales': Melbourne and New York have noticeably higher 'Jan'. The pivot table data is as follows:

Row Labels	Sum of Feb	Sum of Jan
Melbourne	£2,985,448.00	£3,521,487.00
New York	£2,621,889.00	£2,531,225.00
Dublin	£1,685,548.00	£1,524,294.00
Auckland	£1,547,000.00	£1,050,254.00
Grand Total	£8,839,885.00	£8,627,260.00

Microsoft Outlook 365: The Analyze button

Practice using the Analyze button

File *'Excel 365 Top Tips'* using *'Analyze button'* worksheet

Select A5:E9

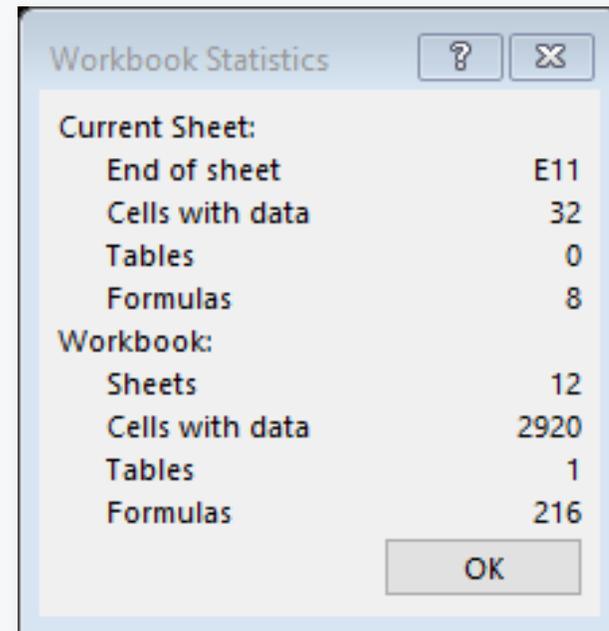
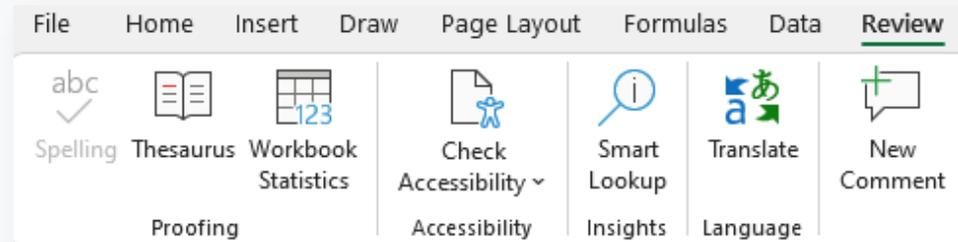
On the 'Home tab' select the 'Analyze' button.

A panel will open on the right offering you choices of various charts or pivot tables which may be useful.

Choose one and insert it.

Microsoft Outlook 365: Workbook Statistics

Top Tip 15: Workbook Statistics File 'Excel 365 Top Tips'



Microsoft Outlook 365: Workbook Statistics

Practice using Workbook Statistics

File *'Excel 365 Top Tips'*

Select any Worksheet within 'Excel 365 Top Tips'

On the 'Review tab' in the 'Proofing' section select the 'Workbook Statistics' button.

A panel will open showing you statistics from the Worksheet you have selected as well as the 'Excel 365 Top Tips' Workbook.

Thank you



**Trainer: Simon Meaker ssm38@uis.cam.ac.uk
University Information Services – Training Services**

service-desk@uis.cam.ac.uk