Introduction to modern MS Excel - 15min Savior

I have baffled at how people are ineffective in MS Excel. Many people would do tasks manually (and error prone) for many years without realizing that so many unproductive hours they could alleviate through these three simple features. This 15min read will open eyes for many of you just as they have done to everyone that has attended my Efficiency in MS Excel lectures.

According to BCG study, 70% managers waste their time for data management or reporting coupled with meeting peers & unproductive tasks[1]. Only 30% is productive value-adding work. This is mind-blowing that we spend so much of our limited time in such way. If we could cut this by half, theoretically, we would be able to progress into our careers twice as fast.

From my experience, when I was working as an analyst, becoming efficient in MS Excel was the single most important contributing factor to my career success and progression as I had more time to do value adding tasks. As my manager though that it should take longer time that I was able to do, I had time to work on important but not urgent projects that made the difference.

Without further ado, here are the three features that will immensely help you in your daily work:

- Hotkeys
- Flash Fill
- Ideas

Hotkeys – deconstructing most important ones

I know that the first may seem unfair, but once you understand the hotkey structure, they become an ease. Starting with hotkeys, you have to understand that they fall into three distinct groups.

- Navigation
- Right mouse click substitute with (keyboard symbol - 🖿 or [fn]+shift+F10)
- Alt hotkeys

Navigation has three main elements coupled with arrow keys. They are:

- Ctrl
- Shift
- Ctrl+Shift

Holding ctrl button and using and of the arrow keys, you can navigate in the report until the end of data entries.

Once you have space between two data arrays, ctrl button will "jump" over the empty spaces and land on the first entry of the data array. Just be careful, if this is the end of dataset and you execute ctrl button again, you will land on the very edge of excel sheet (which is about 1'048*10^3 row or about 650 column). To get back just move arrow button back.

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[1] BGC report: Bringing Managers Back to Work, October 4, 2018, retrieved January 20, 2020: https://www.bcg.com/publications/2018/bringing-managers-back-to-work.aspx

Holding Shift button and using arrow keys, you can select multiple cells. The magic happens when you pair both Ctrl+Shift together, now they can easily select a dataset.

Another feature is in the lower right corner the selected values show what is the sum/average/count of the values. This can come in handy to quickly see sums or understand how many entries there are.

As a bonus, there are shift+space (which selects the entire row) and ctrl+space (which selects the entire column) keys that are also very useful.

These are the basics of navigation. That's it.

Right mouse click (keyboard shortcut – ▤) is another significant time-saver. Some laptop versions do not have it (or it can be executed paired with fn key), those that do not have it, have PrtScn key which can be changed in the system settings to right mouse click. This key can let you keep your palms on the keyboard and still be able to copy/insert row/delete column/sort/etc. and eventually in a much faster way than using a mouse.

For those that do not have this button, there is an alternative. It is much less convenient but allows to do right mouse click without a mouse: Shift + F10 button. It can be that F10 button is secondary button, therefore Fn button would have to be clicked too, which makes it a not so nice three button combination to get right mouse click. It might seem less efficient that actual mouse, but trust me, even with this setup it will be much quicker once you get a hang of this shortcut.

The beauty of this key is when it is executed, each functionality has underlined letters (for example Delete has letter "d"). Upon clicking on that key, it will execute the function.

Next, there is the Alt function. If you click right Alt button letter will appear on your ribbon menu. I can bet that once you saw those letters you frantically tried to cancel or escape them. They allow you to execute any function found in the ribbon, once again precluding the need to use mouse. These function in time can be executed so quickly that in my lectures many students cannot even follow what did just happen on the screen (it can also serve as a great show-off in your work).

The logic is that once Alt function is executed, you select the letter(s) to open a certain tab on the ribbon menu (for example "H" for Home); from there you select the letter(s) which will execute the function you intend (for example "P" to convert number format as percentage).

The Alt function has many options and has vast library of combinations which cannot be memorized (let alone used on a daily basis); therefore, I suggest you to think of the most used functions and try to execute them using Alt function. With time I guarantee that you will become so efficient in mundane operations with Excel that it will leave time for actual productive work.

As a bonus, I will uncover you my all-time favorite hotkey – F4. It is a jewel of hotkeys as it can serve multiple purposes depending on the situation you are in. Here is the list of them:

- It repeats the last action that was done
- It freezes cell when a formula is written

- It can get you back to page where you have written the formula, if you refer to another sheet/workbook

Flash Fill – substitute to most text and data manipulation tasks

If the first pillar is something that everyone knows than Flash Fill is a function that seldom have heard, let alone used it. This function was introduced about six years ago with the aim to simplify the use of MS Excel. This function that sounds more like a superhero name, in a way acts as a superhero. If previously to get any data manipulation it was confined to use of various formulas that no one can remember; Flash Fill, in turn, uses your given examples as a basis to conjure up a formula that will fit your given examples.

The sequence is as follows: you simply write in the cell your intended result (let's say you want to split James Bond surname in another cell), then highlight (i.e. select) cells where you want to have the result else and simply click Flash Fill (which you can find under Home -> Fill -> Flash Fill) and voila! Magic does happen! A shortcut for this function is ctrl+E.

This of course is not a cure for all problems as it cannot match data for you or perform complex or nested functions, but it will do the job right for most basic functions.

In some cases where the given manual example can be fitted to many formulas, the Flash Fill won't work the first time it is executed. To fix this, you simply need to find the first cell where is the mistake and fix it, once it is fixed it will adjust the result. It might need couple more examples if the database is very large.

Be aware of caveats which this functionality has:

- Flash Fill does not show the formula, thus is cannot be used for dynamic data
- It only works when precise result has been given, if there are human errors in the data it will not work
- You cannot ensure that all data has properly given the intended result, so formulas will always be better than Flash Fill

It can be used for multiple ad-hoc tasks or simple queries, so enjoy using it!

Ideas – performing bulk of analysis for you automatically

The last function that came just recently (and as of now is still in preview mode) is the Ideas. For many this can revolutionaries the way data is analyzed and understood.

This is the simplest function to use as it only requires push of a button (Home -> Ideas). What it does is that cloud-based MS Artificial Intelligence goes through all the data, looks for meaningful summaries, for outliers, correlations, insights. This can help exploring the data or finding previously unseen links in the data. As of now it still is not flawless in understanding the data and finding meaningful patterns but with time it will get better.

So, these are few tricks that can tremendously help in your daily work with MS Excel. I hope that this shows how user friendly and "smart and easy to use" MS Excel has become, and it can make a difference whenever you will work with it.