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History:

Excel has been around since PC's were first introduced in the mid 80's. Excel has become the 'standard' spreadsheet with little competition. Despite this applications tenure, the average user does not use Excel in the most appropriate or effective manner. Sadly in this day when everyone appears to be overloaded with data, turning data into information is still a daunting challenge for many users. Excel has significant power under the hood. Learning to harness this power requires a few simple lessons.

Learning these lessons can translate into significant time savings.

The Bad:

1. Unstructured, poorly formatted sheets are hard to read & even harder to understand.
2. Don't create a different tab or sheet for every element (tabs by month....Why?)
3. Don't hard code formulas. Excel is great at math, & handling variables. Changing the variables in a column will significantly increase the chance that errors will occur.
4. Structure the data consistently. This will ensure that you can add columns or rows without the chance of missing something. Format the data to aid in its readability.
5. Don't create columns that have data alternating that then needs to be summed. This makes the formulas very tedious. (+An+Cn+En+Gn+....., is more difficult to enter and maintain than =sum(An..Dn)).
6. Don't use the columns as a place holder or to position elements. Having Columns A through E not used to allow for a margin does not make the sheet easier to work with. Use the width of the columns & keep empty columns to a minimum. Don't create excessive blank columns or rows. This simply makes navigation & data elements harder to access.
7. Enter dates as dates, not text! You may find a need to perform date arithmetic.

The Ugly:

1. Many users simply use Excel as a place to 'dump stuff'. Its structure lends itself to rows & columns. Users often quickly depart from this by locating elements in obscure parts of a sheet. Ever try following someone else's worksheet & logic?
2. Don't insert page headers into the middle of the block of data. Use the page setting (header, footer, print range).
3. Don't use colour excessively. This is not art class. It also makes printed copies illegible.

The Good:

1. Learn to keep your spreadsheets organized.
 - 1.1. Keep like data together, always. There are formulas/tools that can easily segregate the data if needed. Auto filters, if, sumif, & pivot tables all allow the filtering of data so you can focus on what you need.
 - 1.2. Segregate dissimilar data and output pages. If you have a report with numerous pages, ensure each page is in a separate tab.
 - 1.3. Format the sheet to make it easier to follow.
 - 1.1. Label the sheet & tabs.



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- 1.2. Put commonly used data in a single tab & refer to the common elements. This could include things such as GST/PST rate, dates, company name. When a change need to be made you need to change a single element, not search an entire sheet to find all instances to be corrected. Try to follow the motto: “Enter data only once”.
2. Label & describe your workbook.
 - 2.1. Define the sheets use. This is especially important if someone else will need to use it, but also if you need to refer it & may not recall the specific requirement.
 - 2.2. Label the tab & also add the reason or explanation at the top of the sheet in cell A1.
 - 2.3. Use print setup/headers & footers to put date, page numbers and file references in. Locating a file at a later date is much easier when you have the file name.
3. Learn to use some of Excel more powerful features:
 - 3.1. Auto Filters (reduces the need to sort).
 - 3.2. Learn to use the keyboard & put the rodent (mouse) down. Some little known shortcuts include:
 - 3.2.1. Ctrl+D – Duplicate Down.
 - 3.2.2. Ctrl+R – Duplicate Right
 - 3.3. More common shortcuts include:
 - 3.3.1. Ctrl+P - Print
 - 3.3.2. Ctrl+C - Copy
 - 3.3.3. Ctrl+V - Paste
 - 3.3.4. Ctrl+S - Save
 - 3.4. Pivot tables. They are incredibly powerful & not as difficult as they appear. They can take large amounts of data & condense it into something meaningful.
 - 3.5. Use formulas. Don’t hard code variables. If you need to extract the GST from expenses, it is far more efficient to have a formula written than to manually extract the GST for each instance.
 - 3.6. Use Range Names – This will make your sheets easier to follow.
4. Do Colour the cells where you want data entered. (Lotus would colour unprotected cells blue, as opposed to black).
5. Colour code tabs to differentiate input worksheets from output worksheets format/sheet/tab colour
6. Highlight column headings to differentiate it from data. Use clear labeling to describe what the data is. Reference is less meaningful than cheque number.
7. Use Data validation if you want to restrict what data is entered in cells. This will improve the accuracy of the sheet.