



Spreadsheet Tips For Admin Assistants

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WHAT TO EXPECT

- Demonstrate time-saving features
- Use both Google Sheets and Microsoft Excel

Note: Slidedeck and sample files available for download

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TIPS AND FEATURES DEMONSTRATED

- Fastest way to move columns or rows
- Fastest way to add (insert) lots of rows or columns
- Taking advantage of the Auto Fill feature
- Taking advantage of Excel's "Flash Fill" feature / Google "Smart Fill" feature
- Tips for sorting your data
- How to take advantage of the Filter feature
- How to split a column of full names into separate columns of first & last name
- Deciding how to design a spreadsheet (example: tracking staff PD budget)
- How to take advantage of Conditional Formatting
- How to use Conditional Formatting to highlight an entire row
- Getting started with pivot tables (time permitting)

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Fastest Way to Move Columns

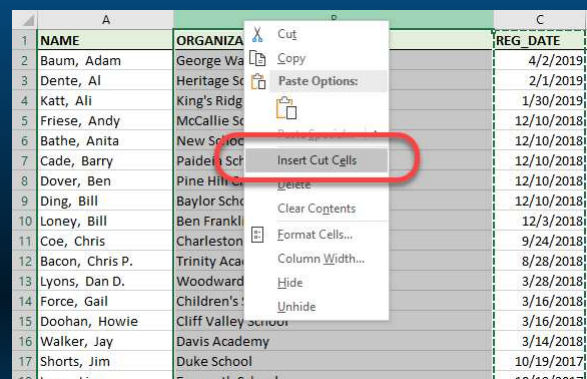
Need to move a column to a different spot?

Google Sheets:

- Click once on the column letter
- Drag that column to new location and let go

Microsoft Excel:

- Right-click the column's letter and choose 'Cut'
- Right-click on the new column location and choose 'Insert Cut Cells'



Don't Forget! Ctrl + Scroll tip

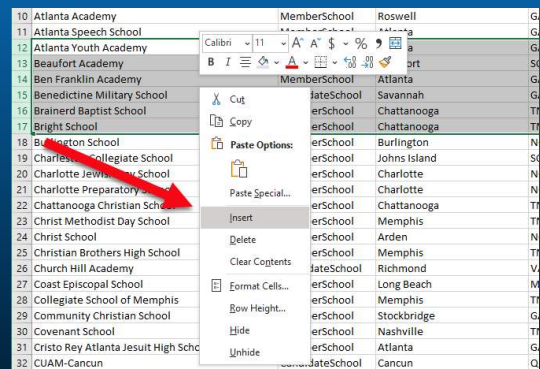
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Faster Way to Add Lots of Rows/Columns

Need to add several empty rows in your sheet?

Microsoft Excel:

- Click and select several existing rows
- Right-click on that selection and choose 'Insert'



Google Sheets:

- Click and select several existing rows
- Right-click on that selection and choose preferred 'Insert' option

Excel keyboard shortcut:

Ctrl + will Insert if you use the '+' on the numeric keypad. **Ctrl Shift +** works if you use the '+' that's near your Backspace key.

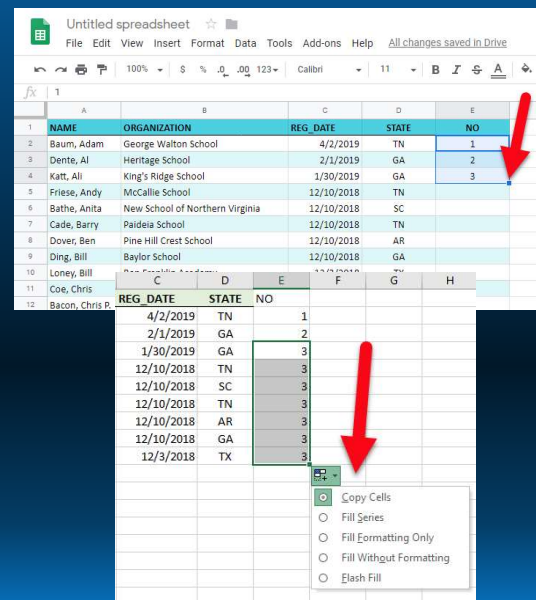
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Auto Fill

Auto-Fill

- After starting a series or pattern, use auto-fill to complete the series
- Select the first series of cells, then drag the bottom corner down
- Or, double-click the bottom-corner to quickly request an auto-fill

Related Feature: **"Paste Transposed"**



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Sorting

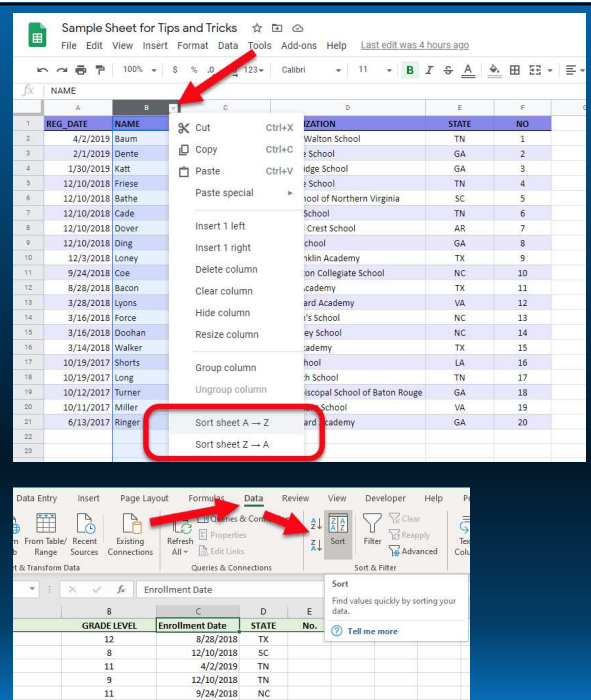
Google Sheets:

- Use drop-down arrow on columns to access sort feature

Microsoft Excel:

- Visit 'Data' menu to find Sort functions

Let's look at sorting multiple columns at the same time



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Put a list in a special order

Sometimes, you'll have a list that can't be sorted in any logical way, but you still want it in a specific order of your choosing.

Use an extra column like "No.", then manually enter values, and then sort on that column.

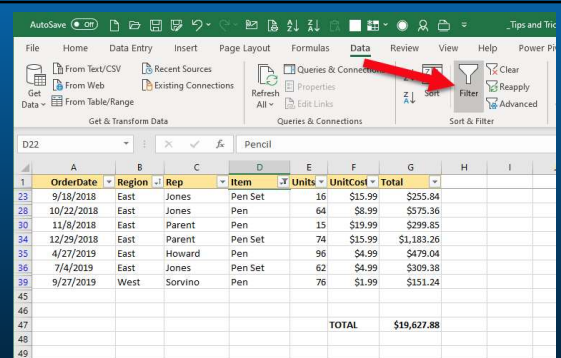
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Filtering

Filters are awesome and powerful!

Example test case:

- Filter for kids graduating from high school and middle school (8th and 12th) and copy/paste to new file
- Clear your filter
- Filter for staff who attended a webinar (in 'Staff PD I' worksheet)



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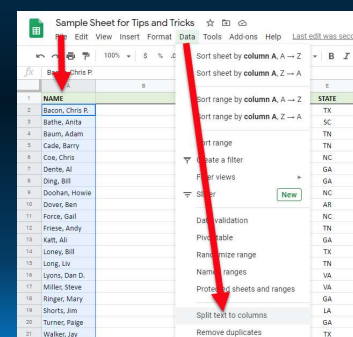
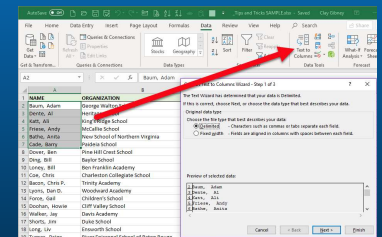
Split One Column of Names into Two

Need to split a list of full names into separate columns (first name, last name)?

Use the 'Text to Columns' feature!

TEST: Separate the name column into two columns, then move first name column to front

NOTE: This only works if there's something like a comma (",") as a delimiter. Be sure to add a blank column first before using this feature!

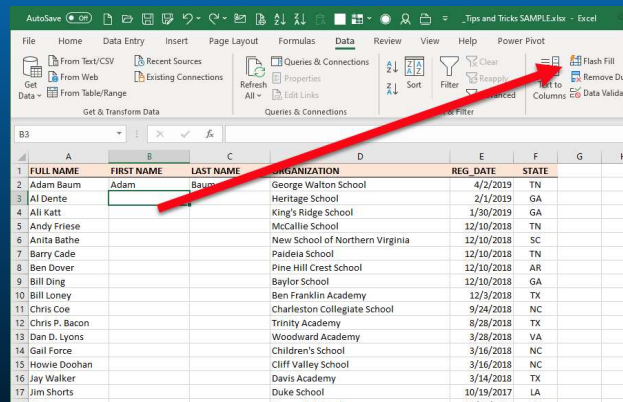


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Flash Fill

Excel (exclusive feature):

If you have a column with full name (no commas) and need to split it out to separate columns for first name & last name, Flash Fill can help!



Google Sheets:

- This feature wasn't previously available but there's now "Smart Fill"

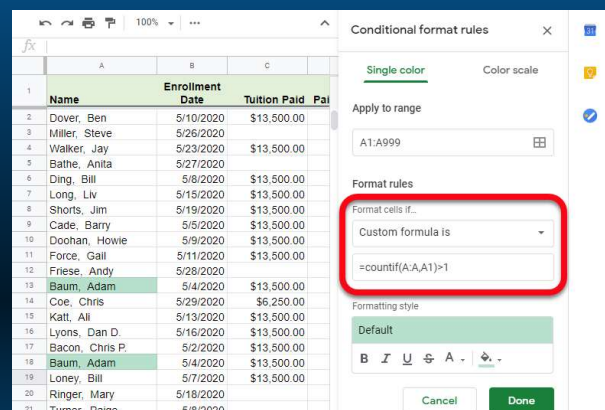
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Conditional Formatting

- Highlight a particular grade level or "paid in full" value
- Highlight duplicate members in a list
- Highlight unique values

Exercises:

1. In the 'Student List' sheet, put conditional formatting on the 'Paid in Full' column to highlight YES values
2. Check for duplicate names using conditional formatting, e.g., `=COUNTIF(A:A,A1)>1`



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Formatting Data – Excel for Windows Users

Challenge - Use the 'Student List' sheet and apply Conditional Formatting so that the entire row has a different background color for students in 12th grade

Steps for example using 'Student List':

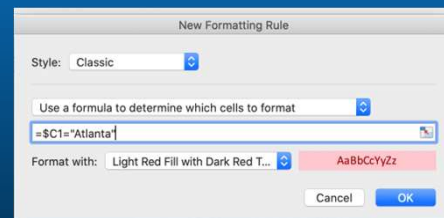
1. Select columns A-H (this decides which columns will be highlighted).
2. Next, under 'Conditional Formatting', create a 'New Rule' with type of 'Use a formula...'. Formula would be: **=G1=12**
3. Choose a desired format and click OK.

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Conditional Formatting: Highlight Entire Row – Mac Users!

Steps:

1. Select all columns (this decides which columns will be highlighted).
2. Next, under 'Conditional Formatting', click on 'New Rule'
3. Change 'Style' to be "Classic" (instead of 2-Color Scale)
4. Choose "Use a formula to determine which cells to format"
5. Formula would be: **=G1=12**
6. Choose a desired format and click OK.



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Thoughts on Spreadsheet Design

- Deciding how to arrange your spreadsheet is often the first big challenge!
- We'll look at three ways of designing a sheet to track staff professional development budget spending

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That's a wrap

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THANK YOU!

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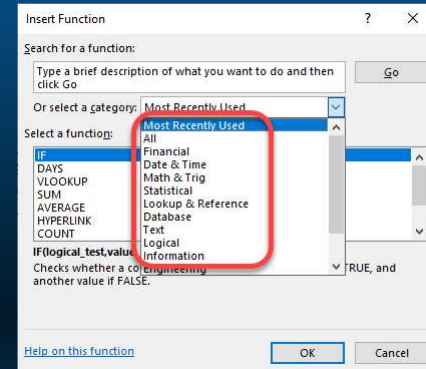
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**TOPICS NOT COVERED BUT
INCLUDED IN THE SLIDES**

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Formula Basics

- Formulas always start with "=" (equal sign)
- Popular formula types include: Basic Math, Financial, Date & Time, Text functions and Lookup/Reference
- Formulas typically reference cell locations (e.g., A2, D4)
- Formulas will automatically update when rows or columns are inserted



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Formula Basics

- Formula functions most likely useful to staff:
 - Math functions: + - * /
 - SUM, AVERAGE, MEDIAN, MIN and MAX
 - COUNT and COUNTIF

Formula Examples:

Adding: =SUM(A1:B1) or =A1+B1
Multiplying: =SUM(A1*B1) or =A1*B1
Dividing: =SUM(B1/A1) or =B1/A1
Subtraction: =SUM(B1-C1) or =B1-C1

Average: =AVERAGE(B10:G10)
Minimum: =MIN(B11:G11)
Maximum: =MAX(B11:G11)

Count Cells w/ # Values: =COUNT(B14:G14)
Count Non-Empty Cells: =COUNTA(B15:G15)
Count Cells with "HOS": =COUNTIF(B16:G16,"HOS")

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Formula Basics

Challenges

See the sheet called "Formulas1"

1. Insert formula to show today's date
2. Insert formulas under "D" column to answer the entries in rows 5, 6, 7 and 8
3. For rows 12 and 13, insert formula to calculate average, minimum and maximum
4. For rows 16 - 18, insert functions to count per the labels

Formula Examples:

Adding: =SUM(A1:B1) or =A1+B1
Multiplying: =SUM(A1*B1) or =A1*B1
Dividing: =SUM(B1/A1) or =B1/A1
Subtraction: =SUM(B1-C1) or =B1-C1

Average: =AVERAGE(B10:G10)
Minimum: =MIN(B11:G11)
Maximum: =MAX(B11:G11)

Count Values: =COUNT(B14:G14)
Count Non-Empty Cells: =COUNTA(B15:G15)
Count Cells with "HOS": =COUNTIF(B16:G16,"HOS")

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Formatting Data

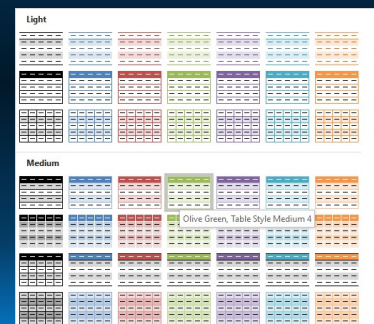
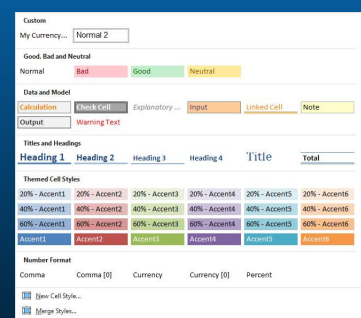
Make that boring spreadsheet pretty!

Suggestions:

- Use the 'Styles' dropdown to help format your headings
- Consider using the 'Format as Table' feature to add color plus alternate row shading

Challenge:

Visit the sheet called 'Vacation Budget'. Use the 'Format as Table' feature to spice up the look



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How to Make a Permanent Custom Style

1. Start with a new empty workbook
2. Type a number or any text and apply your desired formatting to that cell
3. Create a new style (Use 'New Cell Style') and give it a helpful name
4. Before saving it, be careful of the styles/formatting to be included. For example, if you are just creating a preferred currency format, I would Un-check all of the style boxes except for "Number: general"
5. Now that your style is saved in this empty workbook, delete any text to ensure the workbook is empty (if you don't do this, every new spreadsheet created going forward will have that same text)
6. Save this file with the filename "Book" but be sure to pick 'Save as Template' (file extension is "XLTX")
7. Exit (close) Excel
8. The next step varies for Windows vs. Mac. You'll need to move that "Book.XLTX" file to your Excel startup folder.

WINDOWS USERS: Here's where the Excel startup folder is (just replace my name with your name):

C:\Users\Clay\AppData\Roaming\Microsoft\Excel\XLSTART

MAC USERS: In the Finder app, I used the 'Go' – Go to Folder option to navigate to this folder:

/Users/Clay/Library/Group Containers/UBF8T346G9.Office/User Content/Startup/Excel