

CPA Australia Podcast

Episode 49 - Transcript

- Intro: Hello and welcome to the CPA Australia podcast, your source for business, leadership and public practise accounting information.
- Ben: Hello and welcome to the CPA Australia podcast. My name is Ben O'Halloran and I'm the content and social media manager here at CPA Australia. Today, we are discussing Excel keyboard shortcuts with Neale Blackwood, CPA. Neale has written the Excel Yourself articles for our monthly In The Black magazine since 2002. He's also presented Excel sessions at numerous CPA Australia events over the years. Neale's first book was published in 2014 by Wiley and it's titled Advanced Excel Reporting for Management Accountants. Welcome to the show, Neale.
- Neale: Thanks, it's great to be on a podcast. I've loved podcasts for many years, so to be on, yeah, it's a buzz.
- Ben: Yeah, and I'm certainly excited, Neale. I know you've got many great tips to share with us today, so thanks again for joining us. Now your first article in the magazine was back in 2002 and it was about shortcuts.
- Neale: Yes, that's right. I wrote an article about Control key shortcuts in Excel and sent it in and I was lucky enough to get it published, which led eventually to the Excel yourself series of articles which followed or started later in that year.
- Ben: Yes, and I know those articles have been very popular around In The Black. For any listeners that are interested, links to Neale's articles will be in the show notes from today's episode. So in terms of shortcuts, what are the ones you use every day? I imagine they are the ones that give you the most time saving?
- Neale: Yeah, well, it is the Control key shortcuts, they are the mainstay of shortcuts, especially keyboard shortcuts in Excel. One of the advantages, they work in most versions and I find that the keyboard shortcuts can be quicker than doing things with the mouse. Also, keyboard shortcuts can work in the other Office applications like Word and PowerPoint and even Outlook.
- I also wanted to cover today some shortcuts that not a lot of people are aware of. That involves the Alt key and how you can use that to speed up your work. So every day, I tend to use the ... it's actually the simple ones are the ones that can save you a lot of time. Now I use Control S which is the save option, so just hold the Control key down and press S. If you haven't saved a file already, that will actually open Save As and there's also a shortcut for Save As so if you do need to save a different version, I use a lot of versions when I'm creating or developing a file and so I use F12 a lot which is the shortcut to open the Save As dialogue.
- Just a note on saving too. Something changed back in Excel 2007 and not a lot of people knew about it. In the old days, before Excel 2007, if you saved a file, it actually cleared

the undo list. That doesn't happen anymore. So just saving a file doesn't clear the undo. If you do use the Control Z which is the undo command, you can do that after you save a file. So if you close the file, that will clear it or that will stop you being able to undo in that particular file but saving a file no longer clears that undo list which, as I said, in the old days it did.

Ben: I like that point, Neale. I'm a person who likes to constantly save my work so having the ability to undo after pressing save I reckon is a life saver. Now in terms of making the best use of the Excel interface, do you have any tips you'd like to share with us.

Neale: When I'm working in a spreadsheet, I tend to want to maximise the area for the spreadsheet and so I tend to hide the ribbon that's at the top of the screen. Now to do that, you just use Control, so hold the Control key and press F1, the F1 function key. Now that's a toggle, so it will hide and unhide the ribbon, depending on what its state is at the time that you press it.

I also use the Quick Access toolbar a lot which is the little toolbar that's either above or below the ribbon. But that's sort of a mouse type thing so I don't want to go into too much depth on that one.

I work in tables most of the time when I work in Excel, the shortcut I use probably the most is Control and the asterisk. Now some people call it the star, it's above the number eight on the keyboard. I tend to use my keypad a lot so the keypad, it's on the right hand side, some people call it the accountant's keypad, there is an asterisk on there. So I tend to hold the Control key and press that asterisk. And what that does is if you're in a table, if you got a cell inside a table, that selects the whole table in one step which is really useful if you want to copy or format the table.

Now there is another way to do that which some people like and it involves Control and A. Now Control A is a good shortcut because the A is very close to the Control key. Control A, however, sort of leads a double or even a triple life. If you're in a cell that hasn't got any cells around it or no values around it and you press Control A, you'll actually select the whole sheet in one go which is something you may want to do.

If you're in a table, so if you've got a cell in a table and select Control A, it will select that table. Control A can be pressed one after the other. So if you press Control A once in a table, you'll select the table. If you select it again, you'll end up selecting the whole sheet. And if you use a formatted table, so formatted tables use the format as table icon from the Home ribbon which was added in Excel 2007, I don't want to get into formatted tables too much but suffice to say that Control A works a little bit differently in a formatted table.

When you first press it, you will only select the data, so it actually leaves out the headings. Press it again, and it will select the headings as well as the data. Press it again, so this is the triple, you will select the whole sheet. So as I said, Control A works a little bit differently depending on where you are and how many times you press it.

And it's actually working ... Control asterisk and Control A sort of work with a concept called the current region. Now what that means is, the current region is the area around the current cell, up until Excel finds a blank row or a blank column. Now you shouldn't have any blank rows or blank columns in your tables, so that's sort of best practise.

Once you've selected the range, you may just want to check it because obviously if you're in a large table, you can't see where the actual range goes to. So there is another shortcut that I use a lot and it's holding the Control key down and pressing the full stop or the decimal point. And what that does is it goes through all of the corners, so you've got four corners of the range. So after you've pressed it a couple of times, you usually end up down the bottom of the range so you can confirm that you have included all of the table. 'Cause as I mentioned, if you have a blank row in a table, that can throw things off or blank columns.

You should avoid blank rows and blank columns in your tables. It's okay to have a column with a heading and nothing in it but don't have a blank column in there. Again, it's also okay to have a table row that has one item in it and nothing else. Also, as I mentioned, I work a lot in tables, I tend to use the Control key and the arrow keys. If you want to find sort of go to the extremities of the table, if you hold the Control key and then press the down arrow for example, that will take you to the bottom of that particular column.

Now if there is a blank cell in that column, it might stop it there. Another one I use a lot, on a daily basis, is copying from above. So if you're in a cell and you've got an entry above where you are and you want to copy that down, if you hold the Control key and press the single inverted comma, so that's the key on the left of the enter key, that will copy exactly what is above the cell you're in, even in terms of a formula. So it won't do any relative reference changes, so row numbers don't change.

Ben: Yeah, yeah, tables and formulas in accounting are very important. So those are handy tips. Now do you have any other shortcuts we could use for tables?

Neale: Again, in tables I tend to ... you want to insert rows and insert columns maybe to increase the size and to do that, you can use Control and the plus symbol. Now again, I use the keypad so the keypad on the right hand side, there is a nice big plus sign. So I hold the Control key and press that. If you're on a laptop, you might be a bit stuck because if you don't have a keypad, so you have to use Control Shift and the equal sign to insert.

Now whether I want to insert a row or a column, the secret here is you need to select the row or column first. To select a column, hold the Control key down and press the space bar and that will select a column and this is also an example of how you can press them in sequence. So if you want to insert a column from the cell you've already got selected, just go Control space bar and keep the Control key held down and then just press the plus symbol, the plus key and that will insert. And each time you press the plus, it will insert more columns. And you can select more than one column as well. You can use the mouse to select multiple columns, go Control plus and that will insert that

many columns. And it works for rows as well. To select a row using the keyboard, use Shift, hold the Shift key down and press the space bar and that will select a whole row.

Be a little bit careful with the Control plus and by the way, Control minus deletes. So Control and the plus signs inserts, Control and the minus sign deletes. Just be aware that if you don't have a whole row or a whole columns selected and you use Control plus or Control minus, then you can ... Excel might display the insert or the delete dialogues. Be very afraid if you see those because they can really damage your databases. So the insert and the delete dialogues are actually inserting cells, they do not ... there is an option to insert rows but the default is to insert cells.

And that can be quite fatal for databases so be very, very careful if you see the insert or the delete dialogues. In most cases I tell people just to hit the escape key and get out of there.

Another shortcut that I use on a regular basis is Control and the left square bracket. Now that's on the right hand side of the letter P on your keyboard, it's the opening square bracket and what that does is it follows links. So if you need to ... if you've got a link to another sheet or even another file, you can use Control and the opening square bracket, the left square bracket to follow that link to either the sheet or the file. So that can be quite handy if you ... could be working in your own sheet, own file or someone else's file.

Ben: Yeah, that's a nice little tip, Neale. Nice little shortcut for people jumping between files. Now, I just want to move on to something else. Something you haven't mentioned yet is the F5 or the go to dialogue box. Can you tell us what exactly that is and how it can help?

Neale: Now the go to dialogue isn't too special in itself but it does have a special button on it and that special button allows you to access a whole lot of different types of cells like blank cells, formula cells, logic cells, all that sort of stuff. So I use that a lot and lastly, the F5, it has a good shortcut when you're working with hyperlinks.

So hyperlinks are great for navigating around a file and you can navigate to different sheets and you can even navigate to other files and even to the internet. But if you follow a hyperlink within a file and you want to go back to where you were, the quick way to do that is just to press the F5 key and then press enter. So you don't hold them down, you just press F5 and then press enter and that will take you back.

So Excel remembers where you were when you followed the hyperlink and it will take you back there. The shortcut by the way for hyperlinks is Control and the letter K. And that will allow you to insert a hyperlink.

Ben: Okay, thanks Neale. So many great points. I think while we're talking about navigating our way around Excel, do you have any tips to speed up the process?

Neale: Yeah, navigating around a sheet, because remember, now we've got over a million rows and there's over 16,000 columns in just a single sheet now. If you ever want to get back to the top left, just hold the Control key down and press the home key on your keyboard, so Control home. It normally takes you to A1 but sometimes, depending on how you've got your file set up, it just might take you to the top left of the sheet.

Also, if you've got multiple files open, you can move between the files very simply by just holding the Control key and pressing your tab key. So Control tab. Now it will cycle through all of the open files, it will go in the sequence that you opened the files. You can't go back, so unfortunately you just sort of keep cycling through, you just keep pressing Control tab until you get to the file that you're after.

In terms of sheets, you've got a little bit more control. You can actually go left and right. So if you're in a sheet and you want to go to the left, just hold the Control key down and press page up. And if you want to go to the right, press page down. And you can keep pressing and that will take you to the end. Now these don't cycle through, so once you get to the end, to the right if you like of all these sheets and if you keep pressing Control page down, nothing will happen. You have to use Control page up to go back to the left. So this one doesn't cycle through, whereas Control tab, for files, does cycle through that.

Ben: Yeah, that's great Neale. That'll help our listeners out a great deal, I'm sure. Now formatting can be an issue in Excel. What about some of the formatting shortcuts, you know we know there are a few, can you tell us about some of those?

Neale: Yeah, formatting can be a bit tricky sometimes in Excel. So there are a couple of keyboard shortcuts that are worthwhile knowing. If you want to put the dollar sign, so the currency format, now this is where we're going to use three keys together this time. So Control and Shift, so you hold the Control and Shift key down, and press the number four which just has the dollar sign above it. So that's really easy to remember and that will apply the currency format.

If you want to apply a date, then you hold down Control, Shift and you use the hash symbol and that will apply a date format. Now the date format that it does use is sort of the one dash and then the three letters for the name of the month. So J-A-N for January and then two letters or two digits for the year.

And also percentages. If you want to apply a percentage, it's Control, Shift and number five which has the percentage symbol above it. So they're the three main ones. The dollar sign, the hash symbol and the percentage.

Now in terms of formatting, you may include hiding as part of that. So hiding rows, hiding columns, I'm not a big proponent of just hiding rows and columns, I prefer to use the grouping feature in Excel. So you can group columns and group rows. And by doing that, you allow people to hide and unhide the rows and columns very quickly and easily, using icons.

So for example if you select a number of columns, you know, they should be in sequence and then hold the Shift and the Alt key down and press the right arrow, so Shift, Alt and the right arrow, that will ... it won't actually hide anything but it will put an icon on there with a plus and a minus and so you can use the plus and the minus symbol to actually hide and unhide those columns.

Now that's a lot better for the user 'cause I know that something has been hidden whereas if you just sort of right click hide, then the user has to actually look at the column letters for example to figure out that something's been hidden. Oh, and by the way, if you want to remove the grouping, you just go Shift, Alt and the left arrow after you select the range.

And be very careful with that shortcut because when I do training, some people press the Control and the Alt key, don't do that because you will switch around your screen. If you happen to do it accidentally, to fix it, you just go Control, Alt and the up arrow and that will sort things out. So just be very careful because that's also a shortcut key for spinning the display around on your screen which is not usually what you want to do.

Okay. In terms of hiding as well. If you've hidden rows and you don't want to copy them, 'cause if you hide rows, no matter how you hide them and you select the range, and then go copy and then go somewhere else and paste, you'll actually paste the whole lot. To get around that, there is something called visible cells only. You can access it through the F5 special that I mentioned earlier but there is a keyboard shortcut to just select the visible cells only. So basically you select the range as normal and then you hold the Alt key down, so this is the Alt key and press the semi colon. So that's on the right of the letter L, it's the wink, if you like. So Alt and the semi colon and that will select.

So nothing really changes much. You might, if you got really good eyes, you might notice some things change. And then if you go, for example Control C to copy that, you will see a difference because the dotted lines will go within the range. And then you can go somewhere else and Control V to paste it. Hold the Alt key down and press the semicolon, it's just an extra step before you copy and that will only copy the visible cells only which is really handy.

Lastly, speaking of the Alt key. There is, when you're entering in a cell, there is a technique where you can put ... it's like a hard line break or a hard line feed in the cell and as you're typing in the cell, hold the Alt key down and press enter. And what it does, it goes down a line within the cell. So this is within a cell, you almost get like another row within the cell and then you can keep typing and you can have as many as you like, usually you only have one or two. And great for headings in tables and things. Just, it's a little bit similar to the format of Wrap Text but the difference with Wrap Text is the sort of the line break is dependent on how many or how wide the column is.

When you use Alt enter as you're entering the data, it is a fixed line break. So no matter how wide the column is, that will still break at that same stop. So that's Alt enter. And then when you're finished, you just use the normal enter key.

Ben: Yeah, okay. And you mentioned at the start, there was some Alt shortcuts that many people hadn't tried. Were those the ones you just mentioned?

Neale: Actually no. There is some Alt key shortcuts that are in Excel and they've been in Excel for many, many versions that a lot of people aren't aware of. They sort of date back to the early days of computing when we didn't have a mouse. So I can remember those days. And we used a keyboard for pretty much everything, Excel or Microsoft have sort of kept those Alt key shortcuts working and some of them are actually a lot quicker than using the mouse.

And we sort of just talked about the Wrap Text format which is on the home ribbon and you can access that very quickly by using ... now these are shortcuts that are a little bit different. You press them in sequence, you don't hold the keys down. Select the range where you wanna apply the Wrap Text, press the Alt key and so you just press it, then you press the H and then you press the W.

Now as you're doing that, you may notice on the screen that Excel is showing you some letters. As soon as you press the Alt key, a whole lot of letters display on the screen above the ribbon. What it allows you to do is to identify the shortcut keys that you can apply to use certain icons and so when you press Alt and H, it actually activates the home ribbon and then W is the shortcut that is above the Wrap Text icon. And so Alt H W will apply Wrap Text.

Another one I use a lot because I work in tables a lot is Alt A C. And what that does is it clears all the filters. So no matter how many filters you've got in place, when you're in the table, Alt A C, pressed in sequence will remove all of those filters which as I said, is really really handy.

Couple of others that I use a lot. I use freeze panes on my files or on my sheets so that I can keep the rows at the top and the columns at the left. Now this is not a printing thing, that's titles. This is actually on the sheet. So to do that, you sort of select the upper left corner where you want to set up the freeze for the rows and the columns. And in sequence do you press Alt W F F and that will apply the freeze panes setting to freeze it. And it's a toggle, so if you press it again, it will turn it off. So Alt W F F. And because you got F F at the end, you're really only pressing a couple of keys because you just press the F twice.

A couple of others that are like that. If you use data validation, so data validation allows you to limit what's in the cell and the common one that people use is the dropdown list. To open the data validation dialogue, in sequence press Alt A V V. That's a V for Victor. So Alt A V V and that will open the data validation dialogue where you can apply certain data validations.

Also, pasting values. So pasting values is a handy thing to do. You typically, after you've copied, you just want to capture the values, lots of reasons to paste values. And to do that, after you've copied, you can somewhere to paste the values and press in

sequence, Alt H V V. The H opens up the home ribbon and then the V is paste and then the V is value. So Alt H V V will paste values.

Ben: Now you've mainly talked about the Control and Alt keys. Does the Shift key have any useful shortcuts?

Neale: The Shift key doesn't have a lot, it's ... you can use the Shift key with the mouse but seeing we're talking keyboard here, you can use the arrow keys and the Shift key. So if you hold the Shift key down and then you use your arrow keys, you'll notice that you're actually creating a range or a selection. You can use page up and page down as well. So holding the Shift key down allows you to create a range with your keyboard.

So again, sometimes that can be quicker than using ... than letting go of the keyboard and grabbing the mouse and then selecting. You can also Control and Shift together, so have a play with that. So Control and Shift and the down arrow and Control and Shift and the right arrow, you can get some interesting results because you can select whole ranges very quickly.

There is a Shift and the F2 function key. That will insert or edit a cell comment. So cell comments are sort of like post it notes for your cells, they're great for documentation and training and things like that. To insert, it's just Shift, hold the Shift key down and press the F2 function key and that will allow you, that will insert a cell comment.

I've mentioned earlier about the row. If you want to select a row, it's Shift and the space bar, in terms of selecting a column, that was Control and the space bar.

Ben: Yeah, more real handy tips, Neale, you've given us so many good tips today but unfortunately, we are running out of time. Now before we leave, are there any parting suggestions on Excel shortcuts?

Neale: I suppose the main thing is, don't try and learn too many at once. Hopefully, I've given you a few that you can think, "Oh yeah, I can use that straight away," and that's what you should do. So Excel is sort of a use it or lose it piece of software, so they can become second nature very very quickly. So eventually, you'll start pressing them and you won't even be thinking about it. You do need to, just of start using some of them and then sort of build on them after you get used to using keyboard shortcuts.

A lot of people sort of just stick to the mouse and it can be an age thing because I started without a mouse, I tend to use the keyboard a bit more. You can actually use the mouse and the keyboard together which I do a lot which may be the subject of a separate session we do. But people tend to be either keyboard or mouse focused. And as I said, you can get quite quick with the keyboard, so give it a go, it can be worth it.

As an example, let's say you bring in some data in Excel and it's an email address. Now when it's an email address, unless it's underlined, it's not actually a hyperlink. So let's say the email address comes in and it's not underlined. And assuming it's a valid email address. To get it to be valid, what you need to do is you need to edit the cell and then

just hit enter basically, you don't even need to change it. And as soon as you do that, Excel will recognise that email as a valid hyperlink. And so when you click on it, it'll open up your email client and you can write an email.

To do it really quickly, all you need to do is press F2 which is the ... that's the edit shortcut, so you can edit a cell. Now let's say you got a list of 10 for example. All you need to do is press F2 enter, F2 enter. So you can press that 10 times, that combination and that would automatically fix all of those emails into hyperlinks so that you can send an email by clicking it. And it's just F2 enter, F2 enter, and as I said, you can use both hands and you can be very very quick to do it.

If you needed to do more then you probably need a macro to actually make that work. If you're using an icon frequently, can be a good idea to check out the Alt key sequence for that icon. So all you do is just press the Alt key, then press the letter that pops up over the ribbon that you want to use and then just have a look at the letter or letter sequence for the icon that you're using. Maybe, it doesn't take that many to actually use it on the keyboard which saves you, again, using the mouse to do it.

Also, keep an eye on the ribbon because if there is a Control key shortcut, Excel will typically show you what that is. As an example, I use range names a lot and there is a couple of useful range name shortcuts. So the F3 function key is sort of dedicated to range names and there is a, in the formula section, there is something called Create from Selection for range names. And there is a Control key shortcut to do it. So it's Control Shift F3 and so that's what I tend to use instead of using the icon.

So I guess, it's just a question of trying different things and seeing how they go. As I said, you can get very, very fast on the keyboard and as I said, in a lot of times, you can be quicker than using the mouse.

Ben: Yeah, you're right, the mouse does certainly slow you down in Excel. Okay, time has certainly flown by. I'd like to thank you for joining us today, Neale and if people would like to access these tips, they will be available in the show notes from today's episode at www.cpaaustralia.com.au/podcast. I want to thank everybody for joining us today and see you next time.

Outro: Thanks for listening to the CPA Australia podcast. To download the transcript and find more information on today's episode, visit www.cpaaustralia.com.au/podcast/49