



# MORE EXCEL TIPS AND TRICKS

Combining Data

## ABSTRACT

Not all users are aware of the time savings that can be experienced when trying to combine data across sheets or workbooks in Excel. This seminar will cover both of those topics, with some tried-and-true Excel shortcuts sprinkled along the way. Enjoy the seminar – feel free to chime in with your favorite tips and/or ask questions!

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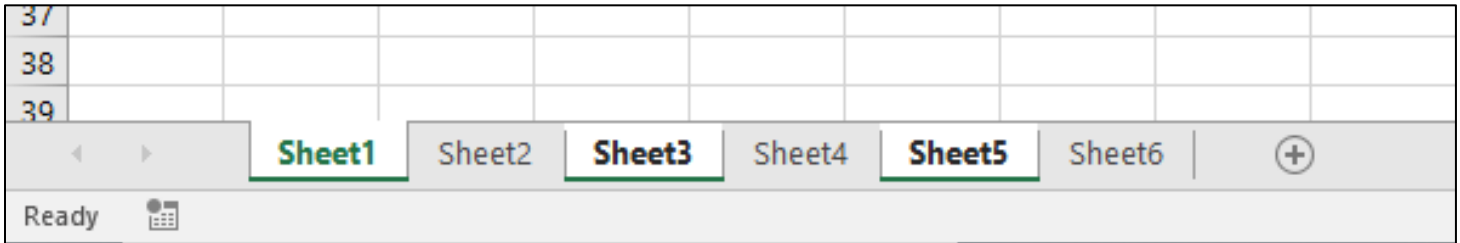
## Shortcuts for Working Across Worksheets

To perform setup/data entry/formatting functions across worksheets, simply select all worksheet tabs first, using either the Shift or Ctrl keys on the keyboard.

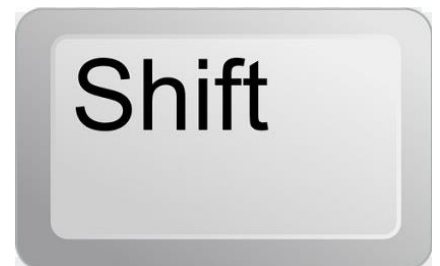


The Ctrl key will select sheets that are not next to each other. In other words, you can skip a sheet using Ctrl.

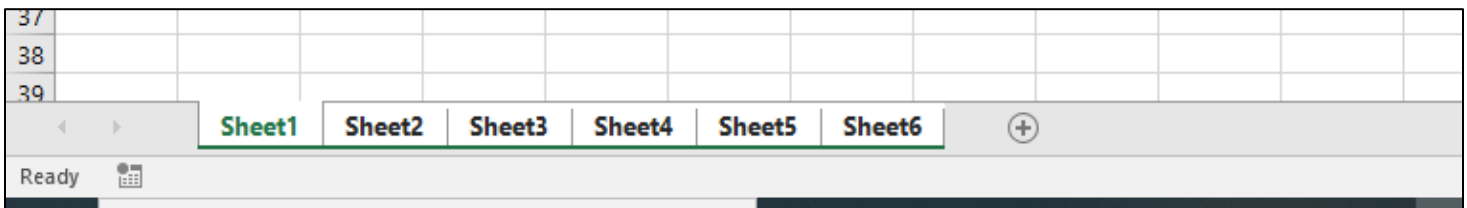
- Click on the first sheet tab you want to select.
- Press the Ctrl key on the keyboard.
- Click on other sheet tabs you want to select.



The Shift key will select sheets that are next to each other. In other words, the Shift key highlights sheets from the first one you click on through the last one you click on.

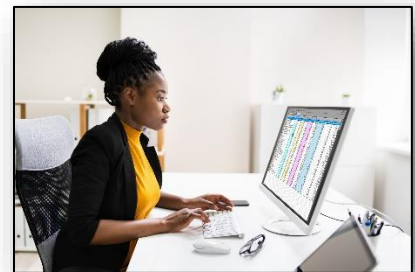


- Click on the first sheet tab you want to select.
- Press the Shift key on the keyboard.
- Click on the last sheet tab you want to select (all between first and last will be selected).



### Why does this matter? When multiple sheets are selected:

- Entered data will show up on all selected worksheets
- Formatting changes made on one sheet will affect all selected sheets
- Formulas/functions entered on one sheet will appear on all selected sheets



# Seven Steps to Spreadsheet Success!

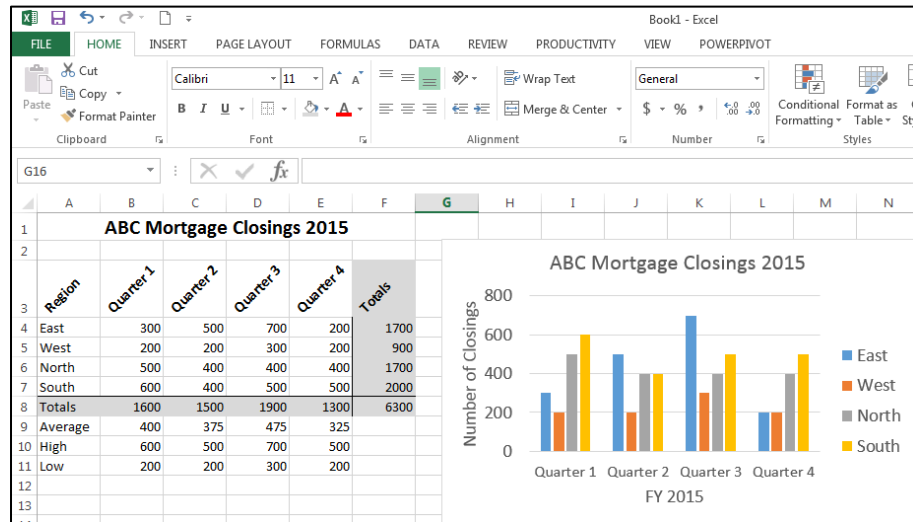
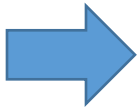
Setting up a spreadsheet can be a bear. Fortunately, there is an amazingly simple 7-step method for creating a spreadsheet. We will use this process to accomplish our spreadsheet objectives with the greatest of ease.

## The Seven-Step Method is:

1. Enter a Title
2. Enter Row Labels and Enter Column Headings
3. Enter the Data
4. Save the Worksheet
5. Perform any Calculations (and save again!)
6. Enhance the Worksheet (and save again!)
7. Print the Worksheet (and save again!)



A spreadsheet put together using the 7-Step Method



<b><i>Tips and shortcuts every user should know</i></b>	<b><i>How they are accomplished</i></b>
The amazing “fill handle”	<i>Use the lower right corner to fill in a series like Quarters, Months, and/or Dates</i>
Keyboard shortcuts for date, time and summing	<i>Ctrl + ; is the current date. Ctrl + Shift + ; is the current time. Alt + = is AutoSum</i>
Pre-selecting a range for quick data entry	<i>Click where the range should begin. Hold down Shift and click where the range should end. Then, type in the data using only Enter or Tab to move to the next column (Enter to enter by column, Tab to enter by row). Do NOT use the arrow keys on the keyboard or click the mouse to relocate the cursor.</i>

## 3D Calculations Across Worksheets

### Shortcuts for Working with Worksheets and Workbooks

It is easy to create a worksheet that contains calculations based on numbers from other sheets in the workbook.

One way to do this is manually.

To calculate across worksheets manually:

1. Click on the cell where the result should reside
2. Type an equal sign
3. Click on a sheet tab
4. Click on the cell that should be included in the calculation
5. Type a math operator
6. Repeat steps 3-5 until done

However, if you are trying to subtotal or total data from many sheets, you can use a 3D calculation.

For this method, use the AutoSum key and follow these steps:

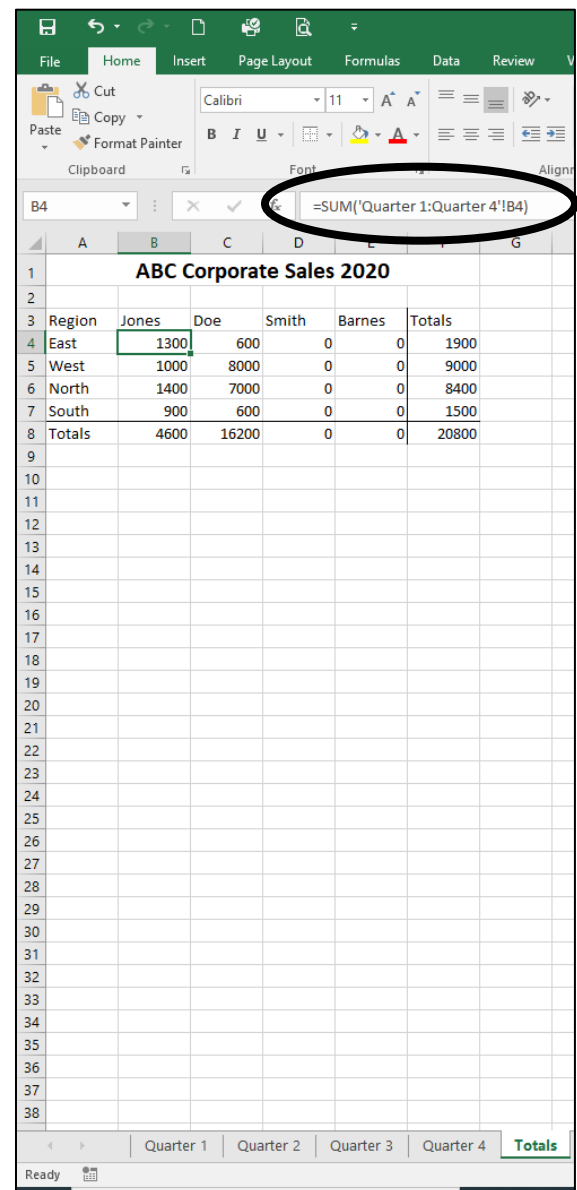
1. Click on the cell where the results should reside
2. Click on the AutoSum tool
3. Click on the first sheet tab that contains a number you want to include
4. Press and hold the Shift key
5. Click on the last sheet tab that contains a number you want to include
6. Click on the cell that should be added on each worksheet
7. Click on OK or use the check mark on the formula bar

*Note – this works best when the sheets are set up identically with only the data being different.*

If the sheets are NOT set up the same way, you will need to do the “old-fashioned, user-created” calculations.

### “Old-fashioned, user-created” Method

On the sheet where the answer should appear, type an equal sign. Click on the first sheet that contains a number to be included, and then click on the number. Type a math operator. Click on the second sheet that contains a number to be included, and then click on the number. Repeat until finished, then press Enter!

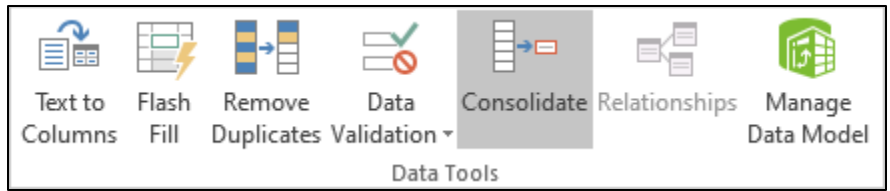


# Consolidating Data

## Consolidating Data across Workbooks with Active Links

Excel provides a very easy way to combine (add) data from several different “like” workbooks. This is called “consolidation.”

To consolidate workbooks, perform the steps below:



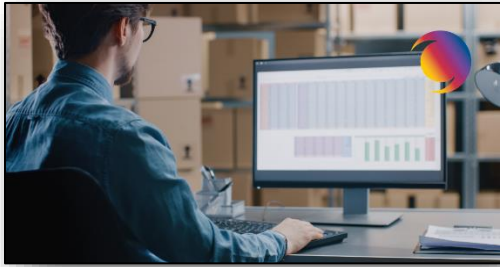
1. Open the workbooks that Excel must consolidate
2. Use the Window Arrange menu options to display all workbooks simultaneously
3. Click on the workbook and cell that should contain the result
4. Click on the Data tab on the Ribbon (it's in the Data Tools group)
5. Select the Consolidate option
6. Click on the first workbook and cells within that workbook that should be included
7. Click on the ADD button in the Consolidate window
8. Repeat steps 6 and 7 until all workbooks and cells have been included
9. Check the box at the bottom of the window that reads Create Links to Source Data
10. Then click on the OK command button at the bottom of the window

The screenshot shows four Excel workbooks open side-by-side. Each workbook contains a table with columns: Item Code, Item Price, Qty., Sales, and Commission. The workbooks are titled 'AllReps - Excel', 'Jaen - Excel', 'Hanover - Excel', and 'Lucy Hanover'. A 'Consolidate' dialog box is open in the center, showing the 'Function' set to 'Sum', the 'Reference' as '[Hanover.xlsx]Sheet1!\$C\$5:\$E\$14', and the 'All references' list containing three other workbooks. The 'Create links to source data' checkbox is checked. The dialog box has 'OK' and 'Close' buttons at the bottom.

# Consolidating Data

## Consolidating Data across Workbooks with Active Links

The resulting workbook now contains the consolidated (or summarized!) data – and the individual data points themselves.



The screenshot shows an Excel spreadsheet with the following data:

Item Code	Item Price	Qty.	Sales	Commission
1	10	36	\$ 420.00	\$ 63.00
2	6.53	107	\$ 698.71	\$ 104.81
3	98	29	\$ 2,842.00	\$ 426.30
4	79.32	23	\$ 1,824.36	\$ 273.65
5	76.22	18	\$ 1,371.96	\$ 205.79
6	0.23	71	\$ 16.33	\$ 2.45
7	55.35	23	\$ 1,273.05	\$ 190.96
8	10.2	68	\$ 693.60	\$ 104.04
9	11.32	16	\$ 181.12	\$ 27.17
10	14.67	54	\$ 792.18	\$ 118.83
<b>Totals:</b>			<b>\$ 19,806.62</b>	<b>\$ 2,970.99</b>

The formula bar shows the formula: `=SUM(C5:C7)`

To show the individual data points, use the PLUS sign in the left margin.

To hide the individual data points, use the MINUS sign in the left margin.



The screenshot shows an Excel spreadsheet with the following data:

Item Code	Item Price	Qty.	Sales	Commission
12		36	\$ 180.00	\$ 27.00
3		3	\$ 30.00	\$ 4.50
21		21	\$ 210.00	\$ 31.50
1	10	36	\$ 420.00	\$ 63.00
2	6.53	107	\$ 698.71	\$ 104.81
3	98	29	\$ 2,842.00	\$ 426.30
4	79.32	23	\$ 1,824.36	\$ 273.65
5	76.22	18	\$ 1,371.96	\$ 205.79
6	0.23	71	\$ 16.33	\$ 2.45
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10	14.67	54	\$ 792.18	\$ 118.83
<b>Totals:</b>			<b>\$ 19,806.62</b>	<b>\$ 2,970.99</b>

The formula bar shows the formula: `=[Finch.xlsx]Sheet1!$C$5`

A minus sign (-) is visible in the left margin next to row 5.

# Combining Data with Ease and Accuracy: Linking Data

## Linking Data across Workbooks Effortlessly

It is often necessary to create calculations that run across multiple workbooks.

To do this, follow these steps:

1. Open all workbooks that will be needed in the calculation
2. Use the Window Arrange menu commands to display all open workbooks
3. Click on the sheet and the cell that should show the result of the formula
4. Type an equal sign (=)
5. Click on the workbook that contains the first component part of the formula
6. Click on the cell that contains the first component part of the formula
7. Press a math operator (+, -, \*, /)
8. Click on the workbook that contains the next component part of the formula
9. Click on the cell that contains the next component part of the formula
10. Continue steps 7, 8 and 9 as needed
11. When the formula is complete, click on the green check mark on the formula bar



## Linking Across Multiple Files/Workbooks

The image displays two Excel workbooks side-by-side. The left workbook, titled 'LinkingExpenseReport - Excel', shows a table for 'Jim-Bob's Emporium Expense Report' with columns for Item, Qtr 1, Qtr 2, Qtr 3, Qtr 4, and Totals. The right workbook, titled 'LinkingProfitLossStatement - Excel', shows a table for 'Jim-Bob's Emporium P&L Statement' with columns for Item, Qtr 1, Qtr 2, Qtr 3, Qtr 4, and Totals. The formula bar in the right workbook shows a link to the 'Totals' cell in the left workbook: `=([LinkingExpenseReport.xlsx]Sheet1!B10)`.

Item	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Totals
Salaries	15000	15000	25000	28000	83000
Inventory	20500	15000	30000	45000	110500
Rent	900	900	900	1000	3700
Advertising	1200	3000	3500	4000	11700
Misc	200	500	750	500	1950
Totals	37800	34400	60150	78500	210850

Item	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Totals
Store Sales	50125	61250	75880	95670	282925
Internet Sales	1200	1850	2500	7500	13050
Investments	1500	1500	1500	1500	6000
Total Income	52825	64600	79880	104670	301975
Total Expenses	37800	34400	60150	78500	210850
Profit	15025	30200	19730	26170	91125

## Wrap Up

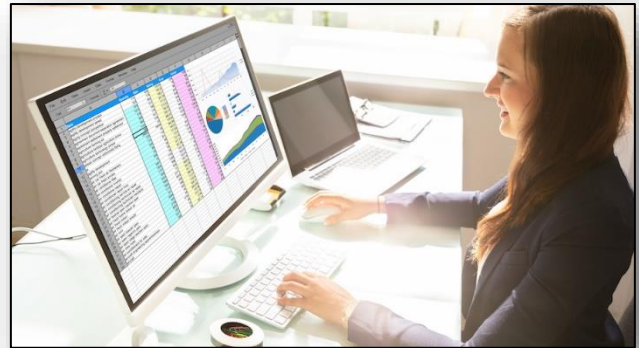
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Congratulations!

You now have a new set of Excel tips, tricks, and tools on your technology tool belt.

Please remember that as humans, we do not remember much unless we put it to practice and use it on a regular basis. So, practice when you return to work! Train someone in the office on the new concepts you think would be most useful.

If you have any questions about the material contained in this seminar, please contact Dr. Holly using any of the contact points listed below.



**Happy Excelling!**



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