



Transcript for Session 043

Listen to the podcast session, see resources & links:

<http://chandoo.org/session43/>

Transcript:

Hi, welcome to <http://chandoo.org> podcast. This is session number 43. <http://chandoo.org> podcast is dedicated to making you awesome in data analysis, charting, dashboards and VBA using Excel.

I hope you are having a fantastic time. For me, August 2015, has been one of the best months so far. I am running Awesome August festival on <http://chandoo.org> and as I speak and record this podcast on 26th August, we are at the tad end of the Awesome August festival. More than 25 articles have been already published and the response has been amazing. Thank you so much if you are one of the readers who picked up the Awesome August festival, read a couple of articles, shared your comments, posted a tweet or linked to us on Facebook or listened to the podcast and dropped a beautiful review. Thank you so much.

In this episode, I just want to share **9 time saving secrets** that are my favorite. Now Excel has tons of features and there are so many things that we can do with it. As you have listened to the previous podcast episodes, you already know many of the powerful, time-saving features of Excel. In this episode, I just want to take a moment and share my personal favorites when it comes to working faster and better with Excel. What are these things that can save you a ton of time? Now, don't worry, I am not going to talk about keyboard shortcuts or productivity techniques that most of us would know. Those are the low hanging fruit of the Excel productivity world. So, we are not talking about keyboard shortcuts here but we are talking about some features and some buttons in the Excel ribbon that can save you a ton of time.

My first and most favorite item is **Remove Duplicates**. This powerful feature introduced in Excel 2007 is basically like a God-send. That is because practically every day if you are working as an Analyst, you will be dealing with data that is not clean. It can contain duplicates, it can contain messed up values, it can contain duplicate combinations and taking care of those duplicates manually is a time waste. Remove Duplicates, as the names says, just removes the duplicates from the data when you select a bunch of data and hit that button. This is in a way an extremely time-saving feature for me because manually identifying duplicates can take a lot of time and you can make mistakes. You could identify duplicates with formulas but the formula approach tends to be long winded and very complex. Not everybody is comfortable with that whereas Remove Duplicates is a simple solution for dealing with the duplicate



data problem which is quite universal in the business world. If you could go one step ahead, you could actually automate the remove duplicate thing by using a little bit of VBA code. But, we will talk about that maybe in another episode or in a blog article.

The second favorite time saving feature for me is **tables**. Tables is a feature introduced in Excel 2007 - now we are talking about features that have been there for more than 8 years already and these features continue to save us a lot of time. Tables help you structure your data. Usually, when you are analyzing data, you deal with data that is tabular in structure. Tabular structure means that there are few columns and few rows and each column contains one type of data. For example, one column contains the name of the customer, the second column contains the age of the customer, the third column contains the zipcode where the customer lives and so on and so forth. Each column explains one type of data and each row talks about one customer. So, this tabular structure is quite popular and it is the universal standard when it comes to maintaining data. Until earlier versions, before the 2007 version, maybe 2003 also had a rudimentary version of tables but until 2007, we had to deal with business data that is essentially in table structure by bringing that and putting it in Excel. Once it is in Excel, there is really no way to say that this is customer data, sales data or product data. Everything just became a bunch of ranges. So, your customer data suddenly looks like A1:D712 and your product data would look like C75:Z355. This kind of makes you a little distant from your data and you have to really go to the level of Excel to communicate with it whereas, with tables, which are introduced in 2007, you could now talk to data as if you are talking to real business entities. So, you can ask for the total of customers or how much the total sales for 2015 are. Tables are a time saving feature in the sense that once you set up your data as a table, you can forget about a lot of problems that occur when you are not using tables. So, what happens when there are more customers added? We don't care because the table gets extended and we still call the data 'customers'. So, every formula, chart, pivot table that you build on top of it is going to work just as beautifully. So, tables are one of the most time saving features for me in Excel. In fact, I use tables practically every day. Any time that I import data from the web - I run a business and so I naturally get data from my eCommerce platform, my payment gateways, my website analytics, and lots of different places - any time that I get the data and I usually get the data as a csv file or a database connection, once I put the data in Excel, the first thing that I do is press Ctrl+T so that I can make a table from the data. The shortcut is also easy to memorize - T for table - so **Ctrl+T** - and you can immediately create a table. That is my second best Excel time saving strategy. There is really no priority here. I just listed them the way I thought about them and I am now talking about them.

The third time saving strategy or secret for me is **pivot tables**. Pivot tables are not looked up to by everybody; especially advanced Excel users, i.e. people who are kind of like Ninjas when it comes to writing formula and SUMPRODUCTS and array formulas sometimes look down at pivot tables like they are really powerless things. But, for me, pivot tables work beautifully well. This is because pivot tables focus on the problem at hand rather than the problem of figuring out the right formula and the syntax and the way to write it, setting up named ranges and thinking whether this formula is the best formula or if there is another way to write it and all that. Pivot tables let you ignore all those problems and focus on the problem at hand, for example when I am analyzing my data I sometimes ask questions like



whether more customers bought this item last month versus this month, and I just need to get the answer for that and that can be very quickly answered by a simple pivot table. So, pivot tables are a powerful and time saving feature for me. There are many things that you can do with pivot tables. In the 2013 version of Excel, Microsoft added a whole bunch of features called Data Model so that you can take data that is in multiple tables and inter-connect them just like you would do in a database and then put the entire thing in front of the pivot table so that you can actually synthesize data from multiple tables to create interactive and interesting pivot tables and you could then add slicers or timelines on top of them so that it kind of really looks amazing. That's pivot tables which for me is another time saving feature especially when it comes to analyzing data.

The next feature is **auto-fill**. This is again a feature that has been around for decades. What this does is that when you are trying to do something, Excel will follow that pattern and fill up the things for you. Most of the time we are not really typing numbers 1, 2, 3 in Excel and when you type 1, 2, 3 and drag down, Excel will automatically write 4, 5, 6, 7, 8 etc. But, that's not a real powerful business case for you and me. We are not going to do this kind of work. But, we do write lots of formulas when we are analyzing data and let's say that there is thousand row table and we are writing a formula to calculate something in row number 1, we don't have to do this for all the other rows. We can simply use the auto-fill so that that can do this for you. When you use auto-fill, not only are you saving time but you are also reducing the chance of error. This is because when you manually write formulas one at a time, there is always a chance that you might forget one of the parameters or mis-interpret or maybe out of boredom or lack of attention, you can make a mistake. There is no chance of that with auto-fill. When you are filling down, every other formula will just look like the way the first formula did and this can save you a lot of time and trouble. So, auto-fill is another powerful, time saving feature for me.

The next one is **Format Painter**. If you've got a big workbook and you want to format things, i.e. you want to set up a beautiful looking dashboard or report, we usually end up formatting one section at a time and this can take a lot of time. What Format Painter does is that once you format a range or a cell or a bunch of cells, you can then copy that and using Format Painter, just paste the formatting alone to another range. For example, you are applying header in one color and body in another color and the next two cells in another color and there are some fill colors and some bold text somewhere and some conditional formatting in there. So, you can copy that entire thing and when you paste it in another range, that entire formatting information gets carried over and pasted to the new range and the new range looks exactly like the old range. So, this is a very powerful time saving feature for me. I use Format Painter any time that I am making a dashboard or a report. Format Painter also allows us to make mistakes in isolation. When I am formatting a dashboard or a report, sometimes I don't know what I want. I just want something that looks elegant or beautiful but we don't know what things are going to look like until you actually paint the colors, fill the colors and apply the formatting. I format only a sub-section of the dashboard and take a look at it, imagine how this is going to look like for the rest of the dashboard and if I am happy, only then I apply format painter and do the formatting for the rest of the sections. If I feel that the color combination is not right or the fonts are not good or not readable or whatever then I make changes and then I apply the Format Painter. This way, Format painter gives you



the flexibility to focus on hitting the right combination of colors and fonts and everything before you can make changes for the rest of the report. That's your Format Painter which is again a very powerful time saving feature.

The next one is your good old **Find & Replace**. Not often do I use Find & Replace but whenever I use it, I find that it is an amazing time saving tool. Again, no pun here, but what Find does is - basically your Excel workbook is like a document and there are a lot of numbers and values and everything there and you just want to quickly find out where a certain number is or where a certain name is or where a certain invoice is or something. You could scroll down and go through the entire list and find it but that can take a lot of time. You can simply press **Ctrl+F** where F stands for Find and that opens up your Find dialog where you can type what you want to find and it will find that for you. Excel's Find function is quite powerful and robust. It can not only find a particular text value but it can also find cells that match a certain type of formatting criteria. So, you can use that to find all the red cells or all the orange colored ones and do something to it. So, Find and its cousin Replace wherein you find something and replace it with some other value are things that I often use especially when working with text kind of data so that I can save time and I don't have to worry too much about writing formulas for that. So, Find is another time saving feature for me.

The next one is **Visual Basic** or macros especially **Macro Recorder**. Why do I find VBA time saving? It is because if you are doing a really long time consuming task, VBA introduces you an option to automate that entire thing. All you've got to do is just set up a macro recorder, record the steps, run that again and Excel will do it for you. Some sample cases for VBA are - for example if you are formatting a report and the report has multiple worksheets and you are doing it one at a time - you could record a macro to do the formatting once per first sheet and then apply the VBA Macro Recorder and run it on other sheets so that the recording will take care of that. Of course, it is not as simple as I mentioned. You may need to customize the VBA code but if you are familiar with VBA, you will find that VBA saves you a lot of time. Please tune into podcast session 22 where we talked about an introduction to VBA. That is a good podcast in case you are not familiar with VBA where I talked about what VBA macros are all about, how to learn them, what some of the basic concepts there are etc. Just tune into that and you should be able to understand why VBA is such a time saving feature for me.

The next one is Excel's **auto-save and recovery feature**. This is because when I am working with Excel, I usually save my work every 2-3 minutes. It is kind of an obsessive disorder for me because I have been working with computers since 1996 and living in India where power cuts are the norm, you could expect a couple of power cuts in a day especially back in the 1990's. I kind of got used to the idea that if I don't save my work, I will lose it and so I had to press Ctrl+S every few minutes but I am fortunate that Excel has these auto-save and recovery features nowadays and I just set it and Excel automatically saves my work every few minutes and it saves me the time and worry because bad things can happen even if you live in a country where there are no power cuts. Even in India nowadays we have less power cuts but it is still possible that you may lose your work due to some other reasons. For example, you have written a



macro or something and your Excel has gone wrong and it crashed then in such cases you can always recover an older version of the work by using the save and recovery feature. It has helped me and saved my back so many times so I think it is a real time saving feature.

The last time saving feature for me is the **auto-complete** feature of Excel. Auto-complete or **IntelliSense** is a powerful feature. What it does is that when you are writing a formula or a VBA statement, Excel will automatically suggest the options available. So, let's say that you are writing something like VLOOKUP - so you start with VL and Excel will narrow it down to VLOOKUP and once the formula is narrowed down, you don't have to type the rest of the letters - you can simply press the Tab key on your keyboard and Excel will do the rest of the typing for you. This is like a powerful way to save time especially when you are writing formulas or VBA code because I don't know about you but, for me, when I am usually writing a formula or especially when I am writing VBA code, I kind of get into the zone where my mind is thinking and producing the code that I need to type and I find that I usually think a little faster than I can type and so sometimes my mind gets ahead of my hands. So, it is better if I can actually speed up my typing. Of course, when you are working with computers, you usually develop a typing rhythm but I still find auto-complete to be a God-send. When I see the auto-complete suggestion, I just press Tab and the typing is done so I can focus more on the thinking part rather than looking at the screen and writing the correct characters especially some of the lines like Application.ScreenUpdating that can be really long and it is really no fun writing those things. So, you can press the Tab key and Excel will do the typing for you.

So, those are my 9 favorite time saving features of Excel. A quick **recap - Remove Duplicates** to get rid of the duplicates in your data, **pivot tables** and **tables** to structure your data and do quick analysis of the data, **auto-fill** to fill up any series or patterns or formulas that can do the work for you, **Format Painter** so that you can apply formatting once and clone it across the report or dashboard, **Find** to find anything that you want in a workbook, **VBA** to automate some of the repetitive tasks so that you could focus and use that time for more useful things and **auto-save and recovery** feature of Excel so that you can save your work and recover it should there be an accident and finally **auto-complete or IntelliSense** so you can focus more on the thinking part rather than the typing part. These are the time saving features of Excel for me.

Now, it is time for me to ask you what the best time saving feature of Excel according to you is. Go ahead and post your comments on <http://chandoo.org/session43>. That is the permanent link for this podcast. If you go there, you will find all the resources and material corresponding to the 9 time saving strategies that I just spoke about but apart from that it also offers you a facility to write your comments. I request you to please share your time saving strategy, i.e. what is the best or what are the best 2-3 time saving strategies in Excel. Please post them there. I would like to see what saves you most time and maybe learn about those things so that I could also incorporate them into my daily workflow. Thank you so much for listening to this podcast. I hope you enjoyed this material. In case you like it, please leave an honest review and feedback on iTunes or any other application where you listen to this podcast. Please



visit <http://chandoo.org/session43> where there is a link to provide your iTunes review. I know quite a few of you have reviewed our podcast in the last few weeks. So, thank you so much for all your honest reviews. We now have 35 reviews on iTunes and most of them are rated 5 or 4. I think a majority of them are 5 and a few like 2 or 3 each in the 4-star and 3-star categories. So, thank you so much for all your awesome, wonderful support of <http://chandoo.org> podcast. I hope you are enjoying the journey. I really like talking to you every week. Talk to you again soon. Bye.