

Transcript | Hacks for Working with Spreadsheets

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Hello and welcome everyone! Post in the chat where you are joining us from, and what organization you work for. A technical note that your messages might come through to only our backstage team, due to Zoom's default settings.

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So please be sure to select everyone from the blue drop-down menu on the Zoom chat if you'd like to send a message to all of us here today.

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Well, here, today, we are looking at how public servants can work more efficiently with spreadsheets.

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One of the most used but least taught tools in government.

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We'll explore practical ways to clean your data, fix formulas, structure sheets to save time, reduce errors, and take the frustration out of your day-to-day work. A very well-known feeling.

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I can see many, many introductions coming through the chat, please.

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Continue, and I will read some. I can see London, I can see Shetland Islands, very far north, Canada, that's amazing.

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Please continue. For those of you who may be joining us for the first time, welcome!

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Apolitical is the world's largest online network of public servants.

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With a mission to make governments smarter. It is used by half a million public servants and policymakers across 170 countries.

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Providing governments with the tools, the skills, and the networks they need to become more effective and tech-enabled organizations.

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Apolitical is a strategic partner to governments, helping them prepare their workforces for the future.

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We achieve this by upskilling government workforces through short online courses.

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focused on government priorities, enabling them to find and share best practice through peer communities and building innovative tools designed for and with governments.

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I can see continuing some introductions in the chat. Now we have Switzerland.

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Um, many other countries, Wales, Ontario, Canada, again, that's... that's great. We are very thrilled to welcome you all.

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And especially to extend an invitation to join your peers in public service from across the globe in the Data Skills Network.

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Whether you use spreadsheets ad hoc, or you're a seasoned data analyst, this forum is the place to share resources, ask questions, and gauge collective wisdom from your peers working with data.

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The link is in the resources tab at the bottom of your screen, and my colleague.

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We'll also post this link in the chat right now, so please do take a look, and we love to see your voices in there.

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Um, that's great. Oh, Bolivia and Rwanda, welcome! I love this diversity of people on this call today. That's amazing. So, I'll get a few technical notes out of the way before we continue. The event is recorded for on-demand viewing on the Apolitical website, so please do not record it yourself.

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Contact details for privacy concerns are in the apolitical homepage footer.

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Closed captions are available and can be toggled on or off on your screen settings.

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Well, now introducing our speaker, this is what we are all here for today. We are very fortunate to have a brilliant guest, David, joining us today.

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Hello, David. David Beneim is an Excel and PowerPoint vlogger, trainer, and comedian. David runs XL Consulting, which helps organizations optimize operations via spreadsheets.

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He also runs a highly popular YouTube channel with over 20,000 subscribers covering tech tutorials.

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Since 2020, David has been a Microsoft Most Valued Professional for Excel and PowerPoint.

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As part of this, David liaises with Microsoft regularly about future directions for Excel and PowerPoint.

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After a sold-out run at Edinburgh Fringe in 2025, David is performing an Excel-themed comedy show at Adelaide and Edinburgh French festivals this year in March and August, respectively.

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Well, David, welcome, welcome. It's great to have you.

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Um, I will hand over now to you for the next 15 minutes.

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Over to you, David.

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Thank you, thank you, thank you. Alright, I will... share my screen...

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Okay, great, great, great, great. So, uh, can you see my screen okay?

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Let's get started with hacks for working with spreadsheets. Yes, yes, I like the reactions, keep the reactions coming, yeah. As you said, I have a... The world's first hour-long Excel-related comedy show.

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that we... we sold out every day for a whole month a 60-seater.

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The largest performing arts festival in the world, and I'm going back to Edinburgh Friends this year, and I'm doing shows in Singapore, Phnom Penh, and Adelaide as well. I live in Cambodia, by the way.

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So, we're going to be looking at 6 things, cleaning data, using AI in spreadsheets, automatically coloring, and we're going to do a summary. I will.

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try and take questions throughout, so drop the questions in the Q&A as you can.

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And I've just dropped in my socials, so if you want to follow me on LinkedIn, or YouTube, or the Excel Comedian on Instagram.

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The socials are in that. So, cleaning data, we're going to be looking at validation.

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Using the trim function, the text split function, and converting from month to year to year.

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year, month, day. Uh... to day-month year. So, this was one of the questions that we got in advance, which was, how can you get drop-down lists to work?

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So we've dropped down this stopped working like this, how can you get them to work? Well, what you can do.

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is adjust the date of ideation. But for now.

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If it doesn't work, you might get something like this.

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Give me a reaction if you can read that on the screen.

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Because this is quite fun, as well as being... As well as being a very useful tool, this is probably the best way to play a pastiche joke on your Excel buddy. What you can do is you can select the data.

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And then you can go to the Data tab and choose here.

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this thing called data validation. Click on that, and then allow you to choose a list.

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And in source, you choose. the list here. So it might have been broken, it might need to be over here, for example. You choose it like that, usually leave an empty gap.

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At the end, just in case you need to add one.

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And then press OK, and now it works. Like this. Which is pretty good. So that's data validation. Data validation can do lots of other things, but hey, we've got a lot to get through in the next half hour.

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So, I've also got... this new function called sexplit. So, you can actually split.

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from first into last name. You can write equals text split.

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This one, double click that. And when you have functions in Excel.

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Especially the more modern functions, you often have. some things... it's intimidating, because there's a lot of things in it, but.

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This is very important. Anything with a square bracket is optional, so you don't need to care about it.

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So, in TechSplit, I'm going to be doing this person.

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comma, and then I have a column delimiter. Delimiter is a word we use in tech.

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to mean a character or a group of characters that splits up text.

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In this case, we're going to be doing a space, and whenever you do text inside a formula in Excel, you need to start and end with.

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these speech marks, double quotations. Press enter, and you get it appearing like this.

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And then you can drag it down. And let me know in the chat, give me a reaction if you like that one. So that is called TechSplit. It's available to Excel 365, and.

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Excel 2024. Here's the thing that happens a lot with us, which is.

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US states. How annoying are these? You know, why did Americans have to.

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have to do this to dates. Everyone else in the world does dates in one way, whereas Americans decide to do it completely different.

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So what you can do is you can select a column, this is a very hidden feature, it's in the data tab again, you have this thing called text to columns.

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And you can click on that, and then what you're gonna do has nothing to do with text-to-column, so you'd assume it wouldn't work for this, but it does.

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click the next two times, because you don't care about the texted columns, and here, if you click on date.

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You can choose MDY, that is the source of your data, month, day, year.

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You click finish, and it will swap them. How cool is that? Give me a reaction if you enjoyed that one.

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Good, good, good. The next one is a question that came in the pre-chat, which is, what happens if you have.

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Like some of these hidden. Uh, extra lines that you want to reduce, or if you have extra spaces.

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So you have two functions. One is called equals trim. Trim will reduce, will remove any.

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white space before or after text, and in the middle, it will reduce it to 1, like that.

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So, very simple, equals trim, click on the cell.

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And if you want to remove a kind of new line, you have one called clean.

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In a perfect world, I wish that you had one function that did both.

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But you don't. Equals clean will remove that. Uh, you might want to add a space, of course, because it's not replacing it with a space, but yeah, it is able to do that.

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Great! So that is why I wanted to cover in this one. As you can tell, we are moving quite fast.

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Uh, but, the good thing is I have bite-sized videos on my YouTube channel with a lot of these things.

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Um... Does it work for double-barreled names? Uh, TechSplit does work for double-barreled names if you give it enough space.

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So that was a question that came through. So, if I was to have a... an insert here. Now I have an extra column if I have Brittany.

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jonespizz, don't ask me how I know that, I am a bit of a Britney fan, but who isn't, right? Um... So, we're going to move on to some other things.

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Now we're going to go through using AI. As we all know, AI is what everyone's talking about. I've got analyzed data and translate, and you do not need the paid version of Copilot.

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for these things. So, to do this. Yeah, we've got analyze data. So, this is pretty cool, especially since we've got people from so many countries joining today, and a lot of Canadians, and as we all know, the Canadians, love to use two languages. Check this out.

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translates. Double click that. All you have is your text, and you have the others in square brackets. Again, you don't need to care about that.

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So you click on this one, and then you close your brackets.

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And it will translate it. I do speak French, so I can tell this is it. Of course, it uses AI, so it's not going to be perfect.

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Um, you can drag it down, but here's another trick. It needs to have an internet connection, because it's using AI on the internet.

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If you want to go all the way down to the end, instead of dragging down, you can do this. Move your mouse till it's a black cross on the bottom right.

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and double-click it. There you go. It's now gone all the way... Until the end of the column.

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Check that out, we've done translation for 200 things.

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in about 5 seconds. And you can write however... you can write very long lists of things in here, it's all fine. I will send you a copy of this completed file as well.

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after the end of today. Analyze data is another one.

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This one, you don't need Copilot for. It's actually something that got released.

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about 6 years ago. If you go to the Data tab, you have this icon.

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in Excel 365 only. And this will launch the analyze data.

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Pain, so it will give you ways to... give... to look at some analytics, like, these two products have noticeably higher sales.

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And I can click on Insert Pivot Charts. And it will go on there and create a new worksheet with that data.

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These are outliers as well. Um... Yeah, and here... Yeah, you can do all sorts of things, and here you can do this, you'll recognize this from ChatGPT or Copilot. You can ask a question about your data. So I could say something like.

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What were the top 3 cities? Bye.

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I do believe I have... yeah, by sales. I can unskit that, and these are the top 3 cities.

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But then I can say. In 2020, because notice that I have the date column, and it's... it's telling you what it's doing, where US date is 2020, or I can even say.

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in a bar chart. Yeah, how cool is that? You can do it without having co-pilots, it's in the data tab.

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this little icon over here. Um, I have a couple of questions that have come through.

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How do you use data validation to restrict the input.

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to limit it to text only or numbers only in cells.

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So, numbers only, you can do it by saying... A decimal or a whole number, usually I would do greater than.

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0. Or something, if you want to allow it to be a negative number, I would do greater than a really huge number like that.

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minus, so this will force it to be a number. Force it to be text, um, that's tricky because anything can be text, really, so there isn't anything specific for that.

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Uh, and then... We had another one which was... How do you type text on more than one line in Excel? Can't push enter. Good question.

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Uh, you type Alt-enter, so hey, Alt-enter. Yeah.

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is... more. Like that. Alt-enter at the same time will do that.

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Great. So that is the AI part with translate, equals translate. It does do... you can choose your own language in target language.

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If you leave it blank, it will default to the language on your computer, but if I wanted to, I could do... Uh...

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Yeah, like, Afrikaans or something, or Arabic. And it will do that as well, like that.

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Okay, yep.

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Um, David, sorry, we just received a question. If you could show again the icon for the analyze data?

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Yep. Uh, this one. So it used to be in the Home tab, and much easier to see, but now it's this one, it's Analyze Data, it's... a little bit hidden, and the icon's not very useful, but this is that one,

and this is data validation. For me, I think these two are very useful, that they shouldn't be hidden away.

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But yeah, these are the two that are the... Um, good. Okay, so next up, we've got.

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automatically color. And for this, we're going to be looking at a feature called conditional formatting, which.

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is really, really easy and very underused. So what conditional formatting can do, I can, for example, select this cell.

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all the way till the bottom. And I can go to the Home tab, Conditional Formatting is over here, this one at least has a label.

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And I can choose highlight cell rules, text that contains.

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And I can choose. to highlight the text that says, Microsoft.

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And I can choose the color. Like yellow, and press OK, and now every time it says Microsoft, it's automatically highlighted.

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If I write in Microsoft here, it's highlighted. Let me know, give me a reaction if you like that one. If I write.

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Microsoft is... Fun, it's text that contains, so it still allows me to do that.

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And, yeah, and it works like that. A couple of other conditional formatting tips that you can do.

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is... You can go to... The numerical conditional formatting, for example, here, going to select the sales column.

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And I can go to Conditional Formatting. Essentially, conditional formatting as a concept is how you make cells look different based on what's in them.

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Without writing a single formula, super... Super, uh, easy to understand.

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Uh, so we have greater than, less than, these are numerical constraints, obviously the text one I showed you.

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Duplicate values, very useful as well, but what I can do is I can go to Color Scales.

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And I can just choose. this. And then it makes the lowest numbers in red.

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The highest numbers in green, and anything in between in that scale, like a heat map.

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And if you have something that is really, really high, like, let me add in a few zeros, you're going to see this one become very, very green, and all the rest become.

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something else, because this is a much higher order of magnitude now.

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Lost conditional formatting thing I'll show you. Also, with lots of numbers, select the cells.

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Go to conditional formatting, and you have data bars.

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Check this out. You can do a bar chart inside the cell.

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Where the highest number is filled up all the way till the end. People like that one.

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And just... and then zeros filled up like that. I can do, for example.

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30, this will be the highest, and then everything else adjusts to it.

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Which is pretty great. Had two more questions.

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How do you save the results of analyzed data?

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So, if I go back to my data tab and analyze data, this icon here.

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Then, if you want to. insert this into a chart, you can click on this down here.

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The grey ones are usually... histograms, frequency distribution, you can go to show all results.

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If you have something that you find interesting, you can click this, Insert Pivot Shot.

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Or it might just be insert charts, like this one, but this will create a new worksheet.

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Like this, with your related pivot table and your data. If you're not using pivot tables currently, I highly recommend using them. They are absolutely fantastic.

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And if you enjoy this session, then ask Apolitical to do more on Excel, because I love teaching this stuff.

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As you can tell, and making people laugh about it. And then we had another question, can I lock a column from typed data entry, but allow the drop-down selections.

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to be made. For what to view still. Can I lock the column from type data entry?

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Right. Uh, so you can do that... There are ways to lock things in the review tab.

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You can choose protect sheet here. And, yeah, it is a little bit... longer than I... than I think I have to show this, but essentially.

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You need a few steps. You need to go to Format Cells.

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And then you need to go to protection. And untick locked, and that means that all of these, you can choose them.

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And then if you go to the review tab and protect sheet.

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Uh, yeah, you can press OK. And then the person cannot edit things, but they can choose from the drop-down list, like that.

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I think this is what you mean. drop-down list, annoyingly, they break with copy and paste, but if you use the protect sheet, you avoid that.

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I have... I have a video where I talk more about this stuff.

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Um, that you can check out as well. Alright, uh, have we got any other questions?

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Because I've finished with my demo. I still have a summary to do.

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I'll take questions now. Um... So, yes. Okay, I see one here.

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Can you add two hyperlinks in the same cell?

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Uh, I believe the answer is no. Uh, for now. But there is a hyperlink function that allows you to do.

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Uh, stuff for that. Or just, uh, separate across columns, that's what I would suggest.

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Where can we access the recording to this session? Uh, you'll be sent an email with some follow-up resources, including.

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This workbook, and links to specific YouTube videos about what I want to watch, so if you want to.

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If you want a little bit more time with data validation, you want a bit more time with conditional formatting, it's a video with.

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thousands of views that's been linked to that.

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So, we've got another one... Can you add emails to a cell so you can click this cell, it takes your team out? Yeah, that's just a hyperlink, really, so if I do, for example.

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You can right-click and choose. link.

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I can choose email address, and... I can say... This is my... Email address... And whatever, like that one, and then... I can press OK, and now I can click that, and it will open up my Outlook.

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With doing that.

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Um, thank you, David. I'm just gonna pause very quickly the questions we can see. We've had some questions about recording and about the resources, so please continue sending in your questions, but we just... I just wanted to share that we've actually prepared a great follow-on resource.

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to today's topic, and we think we'll find it extremely useful because it's... it's a cheat sheet of some of David's spreadsheet hacks that he shared today, so no need to decipher your notes to find them again. We've summarized them all in one place.

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And to receive the link to the cheat sheet, please go to the Data Skills Network and leave a comment on the post pinned at the top of the page.

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We'll send you a link to the resource, and a few days after the event.

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And my colleague has just posted the link to that thread in the chat.

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But we're going to continue on the Q&A, because I can see so much interest, and obviously very specific questions.

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Um, I think... just one of the, uh, David, to start again, somebody asked if these features could also work on Google Sheets.

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Ah, well, um... I... I'm obsessed with Google Sheets as well, in fact, I'm the only Microsoft MVP.

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Of the 100 or so that exist that takes Google Sheets seriously, and I have written what is probably the world's largest ever.

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comparison article on Excel versus Google Sheets. So, um, for the broad part, yes, I will say... I mean, I'd have to go through them one by one.

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Uh, data validation is much better in Google Sheets than Excel. Textsplit existed as.

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function equals split in Google Sheets before Excel. Uh, this one, no. This one of converting... Uh, that one, clean and trim, yes, conditional formatting, yes.

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The one of just the text is pretty easy. The other ones are.

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an equal sparkline in a function that are a little bit more advanced. Analyze data has just recently been launched in Google Sheets.

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Who, yeah, I could literally go on about this for a long time. Uh, but yeah, if you check out my.

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YouTube video, and... Uh, my LinkedIn is where I posted that.

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really long article. Uh, great, yeah, okay. Any other ones?

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To go through, Victoria?

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Um, we have a question from Mo. Um, is it possible to duplicate the formula of a worksheet to make more without copy and paste?

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Duplicate... oh, well, what you can do if you want to duplicate an entire worksheet is you can right-click.

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and move a copy, and then press create a copy.

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Or, if you want a really quick version of that, you can click on the worksheet.

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name, hold down CTRL and SHIFT. And then drag it, and you've created a copy.

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in seconds. I use that quite a lot. Um... yeah.

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That's a great tip. We have another question from Linda. If I have a filter at the top of a sheet.

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And then protect the sheet. It stops me using the filter. How can I rectify this?

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Oh, okay, haha. I am not a fan of the protect feature. I have a video where I talk about a workaround, which is... better, but what you can do is, if you have to first add your filters.

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And then if you go to Protect Sheet, you can tick on.

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Uh, use auto filter, and then it does work. However.

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You can't toggle your filters on off, so if you didn't have your filters before, this is grayed out.

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There are lots of things that are grayed out.

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Which shouldn't be. If you use protect sheets, even if you tick on.

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all of the options. So, I do have a workaround that I use that's to do with data validation that I think.

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Works better. I have a YouTube video about it. I'll put that.

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video in the, uh, in the summary that we sent afterwards as well, and hopefully you might find that useful.

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I would love a session on pivot tables... yeah.

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Thank you. We have time for last question from Laura.

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We could do that afterward? Yep.

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How do you do a traffic light system to show when a task is due by a date range? For example, red would be a task is due, amber would be nearly due, and green would not be due yet.

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Okay, so... Conditional formatting with dates, you have a couple of approaches you could do. If you go to the Home tab.

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Oh, yeah, I need to unprotect my sheet. You can go here, conditional formatting, you can do... You have a date occurring, this is relative data, I don't use this very much, but I think this is relevant to.

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kind of relevant to what you've done, so... If you have something that is, for example, coming up in the next month.

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You can click next month here, and then it will pop up. This will not do anything, because these are all old dates from 2021.

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However, another way that you can do it, if you want to do it based on a specific date.

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You go to Highlight Cell Rules, and you can choose this one. Greater than or less than. I know we don't think of dates as that, but Excel treats dates as numbers, therefore it does work this way.

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So if I do greater than. And I type in whatever date, I can type in 31st of May 2021.

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then everything that is after. this date is going to appear in red.

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So, yeah, I hope that kind of answers between those two.

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And you can stack conditional formatting, so right now, I've got two. If you go to Manage Rules.

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You can see both of them are showing like this, and from this you can delete the rule or edit the rule.

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As you need to. Uh, great, yeah. I have another video where I talk more sophisticated about this stuff that.

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I'll add two in the description as well.

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Great! Oh, thank you so much, David. I think it's been a very speedy session. We've had some incredible wisdom from you, so please, I can already see all the emoji reacts, but I'd like to ask you all to join me in giving David a virtual round of applause.

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Mm-hmm.

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Yeah, and I'm putting my links again, if you want to follow that as well, yeah.

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Yeah.

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And most importantly. Um, thank you for sharing. Thank you all... all of you, dear attendees, for investing your time in learning. Um, the team is going to pull up a quick poll to find out how you felt about today, and this will help us continue and improve on our content.

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Um, before you go, and while you're responding to that poll, I want to share a few more events that you can register to to join us again. If you're not available, please remember that you can still register to receive the recording and watch and catch up whenever it suits you.

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So next week, we have how to craft a Brilliant Briefing Note with insights from both brief writers and decision makers who read them.

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Then, in 2 weeks, we have nerve-busting tactics for confident presenting for stress management, voice and body language tips.

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And finally, our next speedy 30-minute session will be on AI for research.

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So, this is all what we have time for today. I hope that you find it really useful. Thank you so much, David, for joining. Thank you, everybody who's made today happen, and to you, dear attendees, for taking the time out of your busy days.

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Keep an eye out with the email, uh, with the resources that David will share, the recording.

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Don't forget to find my post in the community, and we hope to see you soon at another apolitical event.

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Have a great