

NACM'S 129TH
CREDIT CONGRESS
& EXPO *Cleveland*
MAY 18-21, 2025

Excel Automation, Shortcuts, & Visualization

Toolkit

#3

Presented by: **SHERI TINGLE**
May 21, 2025 • 2 - 3 PM
Session **#37086**

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Toolkit #3 Outline

Excel Macros & Automation
Tools

1. Record Macros

2. Macro Keyboard Shortcuts

3. Macro Buttons

Data Analysis & Reporting

1. Quick Charts

2. TEXTJOIN and CONCAT

3. Date Format in CONCAT

4. Formula Auditing

Data Validation & Manipulation

1. Data Validation

2. Transpose

3. Text to Columns

4. Remove Duplicates

Rules of Math

RULES OF MATH

1. Always begin with an **equal sign =**
2. Function **name**
3. Open **parenthesis (**
4. Include **arguments**
5. Close **parenthesis)**


=SUM(B3:P47)

Rules of Math

- Can use real numbers, cell addresses, range names
- NO spaces
- NO % signs, 50% typed as .5
- Text must be enclosed in " "
- Follow the rules of math—**PEMDAS**
Please Excuse My Dear Aunt Sally
Parenthesis, Exponentiation,
Multiplication, Division, Addition,
Subtraction
- Use \$ to represent an absolute value

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NESTED FUNCTIONS: IF Grading Example			
A = 90-100%		A nested function includes more than one function	
B = 80-89%			
C = 70-79%			
D = 60-69%			
Student 1	97%	=IF(B7>=0.9,"A",IF(B7>=0.8,"B",IF(B7>=0.7,"C",IF(B7>=0.6,"D","F"))))	
Student 2	30%	F	
Student 3	81%	B	
Student 4	92%	A	
Student 5	63%	D	



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