2026

FGFOA Annual Conference

June 13-17, 2026

Loews Sapphire Falls Resort
at Universal

FGFOA **2026** Annual Conference

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Speaker

Rebecca Schnirman

Director, Financial & Support Services Division
Palm Beach County Parks & Recreation Department

Palm Beach County Board of County Commissioners

PALM BEACH COUNTY PARKS & RECREATION

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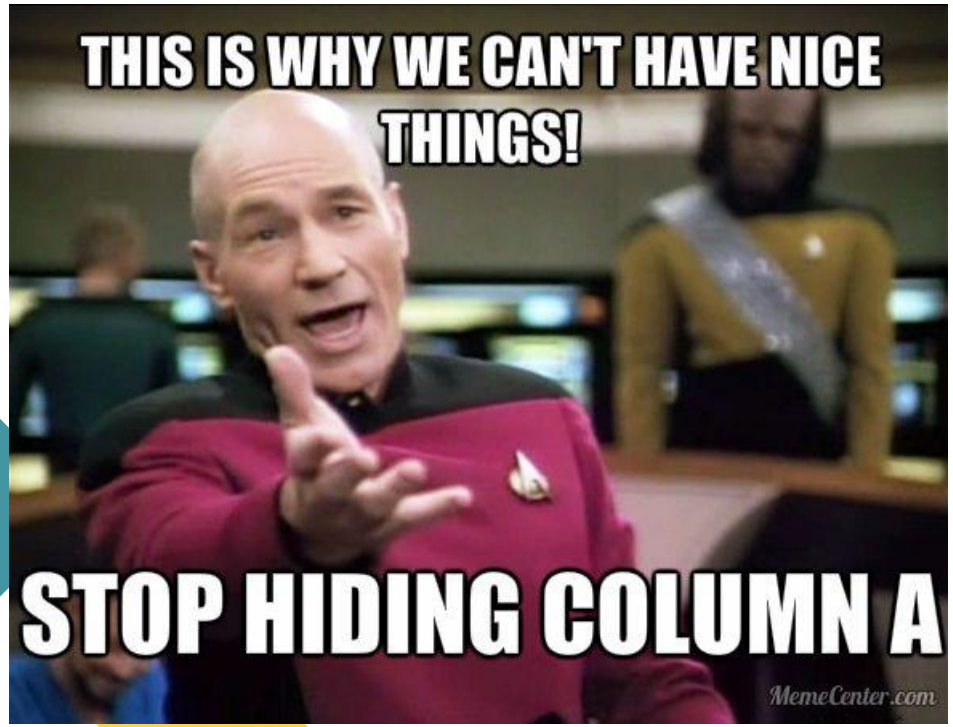
Excel Tips & Tricks

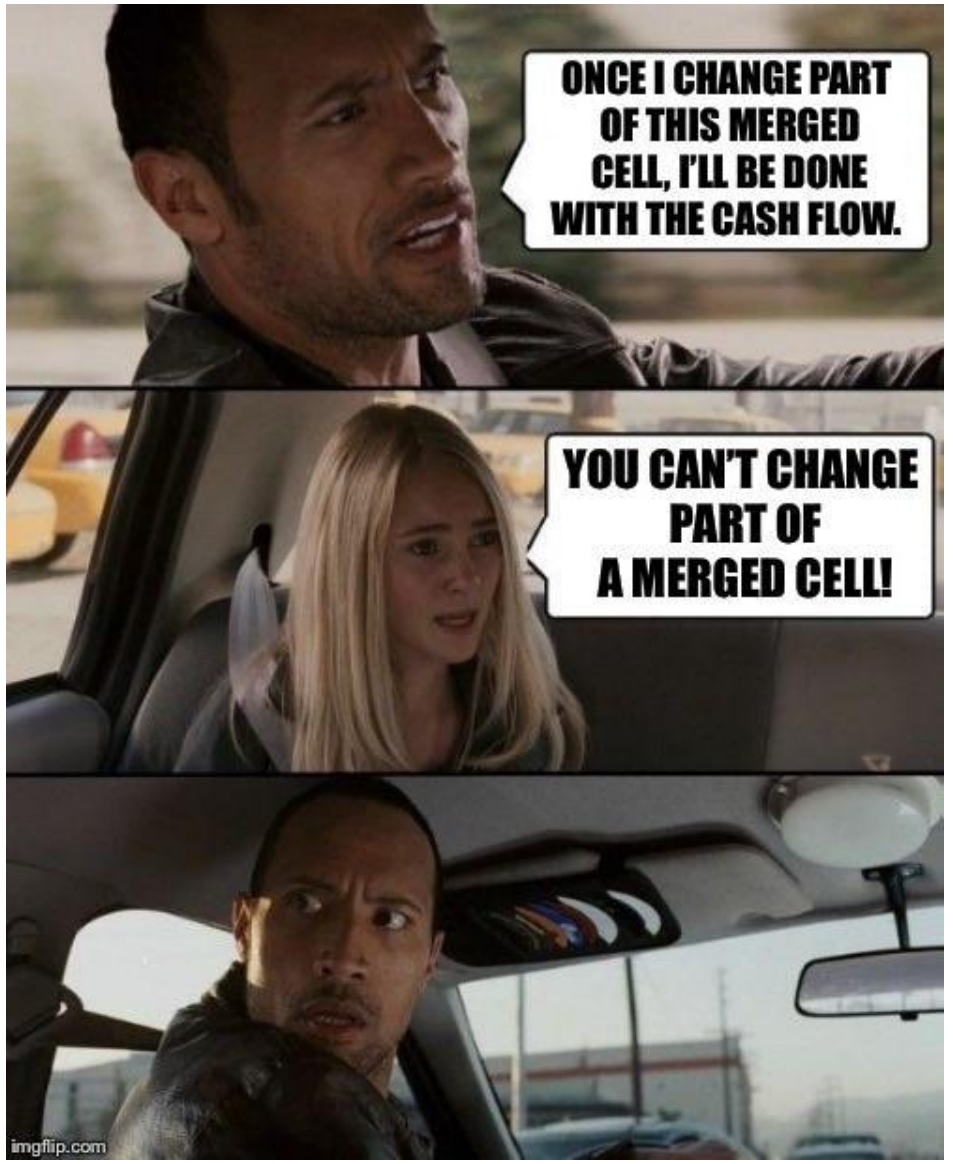
Boost Your Productivity and Master Key Features

Agenda

- Best practices
- Time-saving shortcuts
- Modern Excel formulas (Office 365)
- Data analysis tools
- Real-world examples

Best Practices





Best Practices

Use Consistent Formatting

- Makes reports easier to read
- Helps users quickly identify totals, headers, and key data
- Reduces confusion when sharing files

Keep Raw Data Separate

- Store raw data on one sheet and reports or summaries on another
- Protects source data from accidental changes
- Makes the workbook easier to troubleshoot

Avoid Hardcoding in Formulas

- Use cell references instead of typing numbers directly into formulas
- Makes formulas easier to update
- Reduces errors when assumptions change

Use Data Validation

- Creates dropdowns for consistent entries
- Reduces typos and inconsistent coding
- Helpful for departments, funds, object codes, or status fields

Use Clear Sheet Names

- Helps users navigate the workbook
- Makes linked formulas easier to understand
- Better than leaving tabs as Sheet1, Sheet2, Sheet3

Document Key Assumptions

- Add notes for formulas, rates, dates, or source data
- Helps others understand how the workbook was built
- Makes future updates easier

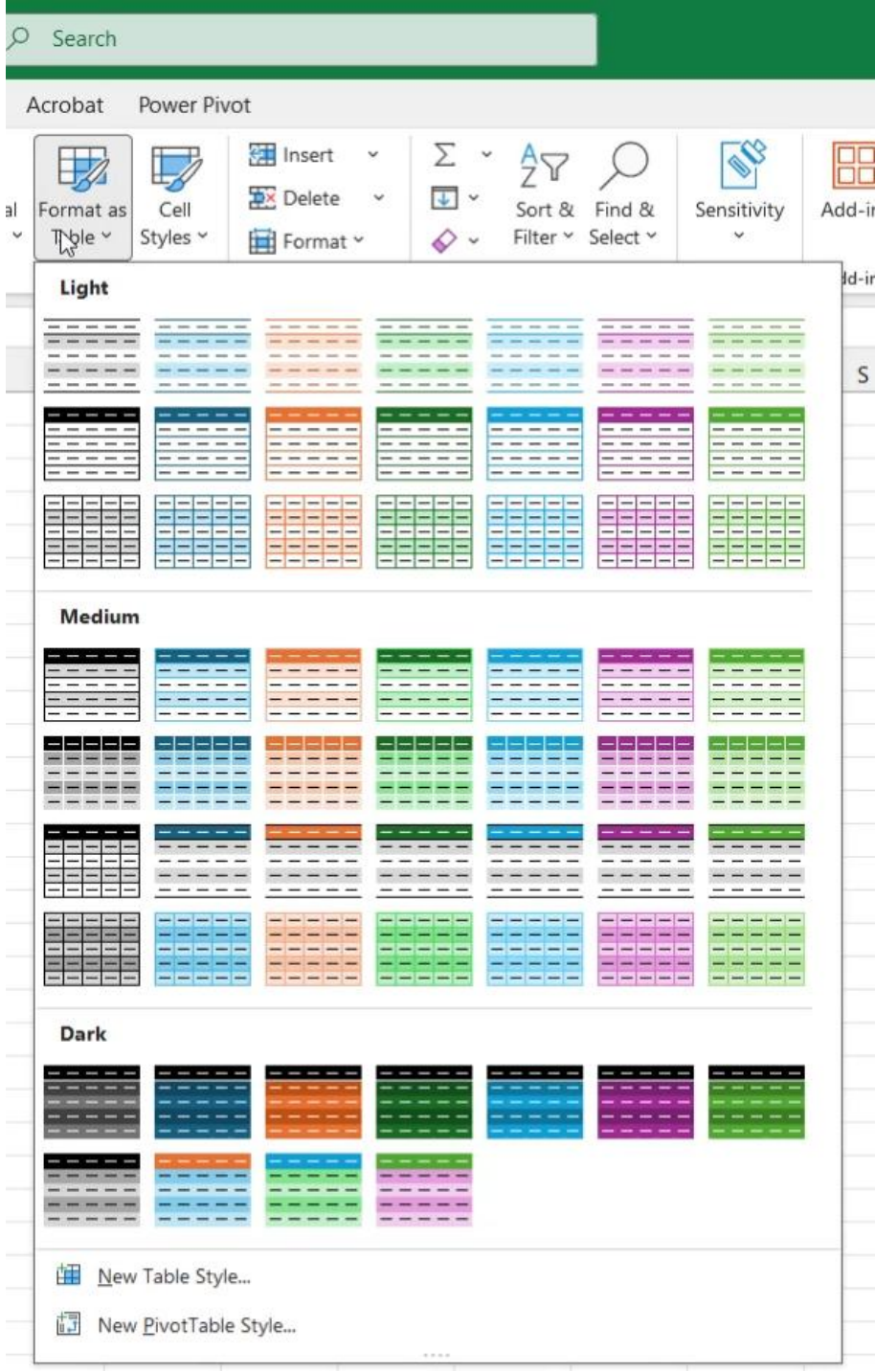
Format as Table

Benefits

- Expands automatically when new data is added
- Formulas are easier to read
- Works well with PivotTables, charts, and Power Query
- Built-in filters and totals row

Reminders

- Structured references can be confusing at first
- Less flexible for custom formatting
- Some formulas or copy/paste actions may behave differently
- Large tables may slow down the file



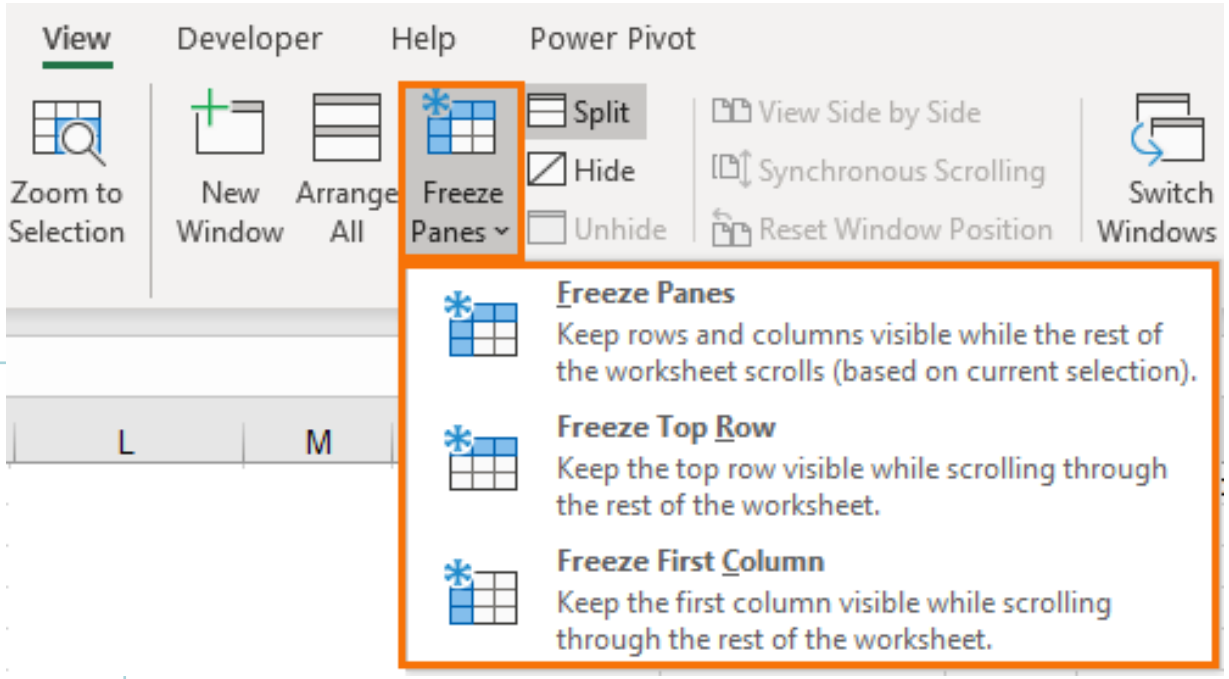
Freeze Panes

Benefits

- Keeps headers visible while scrolling
- Makes large worksheets easier to navigate
- Helps users review data without losing context
- Especially useful for wide or long reports

Reminders

- Freeze the correct row or column
- Remember it only affects screen view, not printing
- Can be turned off easily if the view gets confusing



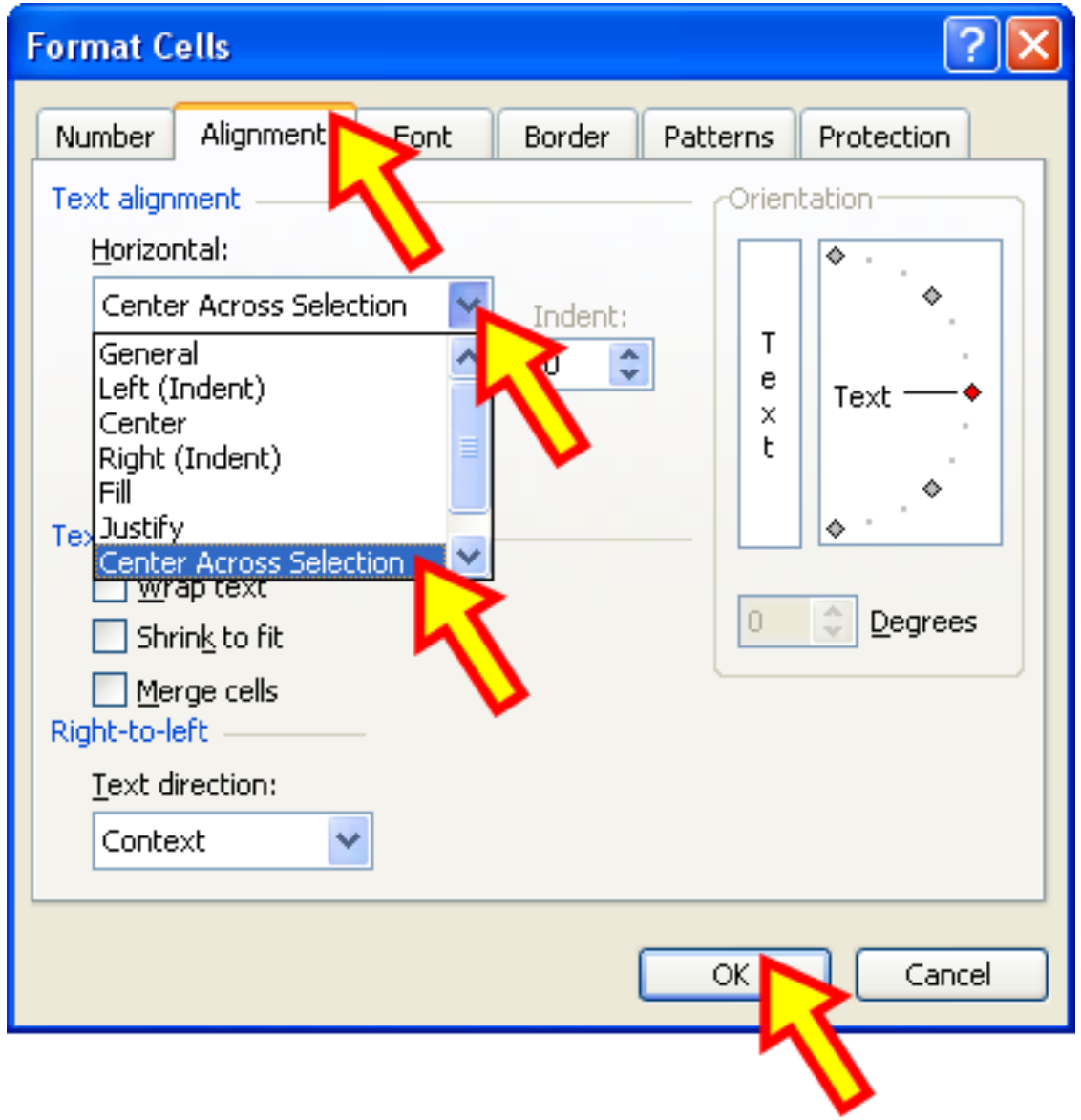
Center Across Selection

Benefits

- Looks like merged cells without merging
- Keeps sorting and filtering working properly
- Avoids issues with copying, pasting, and selecting cells
- Better option for report headers

Reminders

- Only works horizontally, not vertically
- Can be harder to find than Merge & Center
- Other users may not realize the cells are not merged

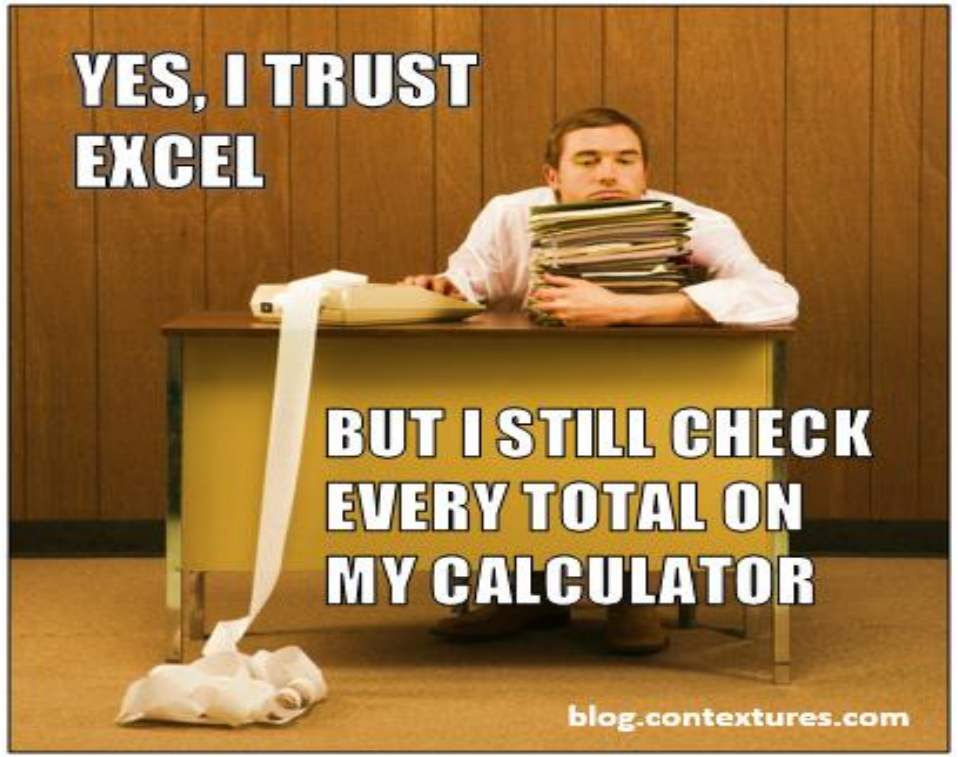


Me: Didn’t save for 47 minutes
Excel: Stops responding
Me:

Time Saving Shortcuts

Keyboard Shortcuts You Should Know

Ctrl + A	• Select all
Alt + =	• AutoSum
Ctrl + F	• Find
Ctrl + T	• Create Table
F4	• Cycle through absolute/relative references (A1) in formula
F2	• Edit the active cell
Ctrl + S	• Save
Ctrl + C	• Copy selection
Ctrl + X	• Cut selection
Ctrl + V	• Paste selection
Ctrl + Y	• Redo recent action
Ctrl + Z	• Undo recent action



Excel Formulas

Beginner Excel Formulas

Formula	What It Does	Example Formula	What's it for?
SUM	Adds numbers together	=SUM(number1, [number2], ...)	Total expenditures or revenues
AVERAGE	Calculates an average	=AVERAGE(number1, [number2], ...)	Average monthly spending
MIN	Returns the lowest value	=MIN(number1, [number2], ...)	Lowest transaction amount
MAX	Returns the highest value	=MAX(number1, [number2], ...)	Highest transaction amount
IF	Applies basic logic	=IF(logical_test, value_if_true, value_if_false)	Flag budget overruns
ROUND	Controls decimal places	=ROUND(number, num_digits)	Control decimal precision in reports
COUNT	Counts numeric cells	=COUNT(value1, [value2], ...)	Count numeric transactions
COUNTA	Counts non blank cells	=COUNTA(value1, [value2], ...)	Count filled records
TODAY	Returns current date	=TODAY()	Timestamp reports
TRIM	Removes extra spaces	=TRIM(text)	Clean imported text data

Intermediate Excel Formulas

Formula	What It Does	Example Formula	What You Would Use It For
XLOOKUP	Finds matching values	=XLOOKUP(lookup_value, lookup_array, return_array, [if_not_found], [match_mode], [search_mode])	Convert fund codes to fund names
SUMIFS	Sums using multiple criteria	=SUMIFS(sum_range, criteria_range1, criteria1, [criteria_range2], [criteria2], ...)	Total spending by fund and year
COUNTIFS	Counts using multiple criteria	=COUNTIFS(criteria_range1, criteria1, [criteria_range2], [criteria2], ...)	Count transactions by criteria
IFERROR	Handles expected errors	=IFERROR(value, value_if_error)	Prevent divide by zero errors
TEXT	Formats values as text	=TEXT(value, format_text)	Format values for reports
LEFT	Extracts text from left	=LEFT(text, [num_chars])	Extract fund code from account string
RIGHT	Extracts text from right	=RIGHT(text, [num_chars])	Extract year or suffix
MID	Extracts text from middle	=MID(text, start_num, num_chars)	Extract department code
CONCAT	Joins text values	=CONCAT(text1, [text2], ...)	Build full account numbers
YEAR	Extracts year from date	=YEAR(serial_number)	Determine fiscal year
PROPER	Capitalizes the first letter of each word	=PROPER(text)	Clean up inconsistently entered text

Advanced Excel Formulas

Formula	What It Does	Formula Syntax	What You Would Use It For
FILTER	Returns dynamic filtered data	`=FILTER(array, include, [if_empty])`	Show only current fiscal year data
UNIQUE	Returns distinct values	`=UNIQUE(array, [by_col], [exactly_once])`	List unique funds or departments
SORT	Sorts data dynamically	`=SORT(array, [sort_index], [sort_order], [by_col])`	Rank expenditures highest to lowest
SORTBY	Sorts based on another column	`=SORTBY(array, by_array1, [sort_order1], …)`	Sort by spending amount
LET	Simplifies complex formulas	`=LET(name1, value1, calculation)`	Simplify complex calculations
LAMBDA	Creates custom functions	`=LAMBDA([parameter1, parameter2, …], calculation)`	Create reusable rate formulas
TEXTBEFORE	Extracts text before delimiter	`=TEXTBEFORE(text, delimiter, [instance_num])`	Extract fund code
TEXTAFTER	Extracts text after delimiter	`=TEXTAFTER(text, delimiter, [instance_num])`	Extract department or object
SEQUENCE	Generates number series	`=SEQUENCE(rows, [columns], [start], [step])`	Generate fiscal years
CHOOSECOLS	Selects specific columns	`=CHOOSECOLS(array, col_num1, [col_num2], …)`	Create dynamic report views

Common Excel Errors

Error Type	When It Happens	Common Finance Fix
#####	Column is too narrow **or** a date/time calculation returns a negative value	Auto-fit column, or fix date logic (common in payroll and CIP timelines)
#DIV/0!	A formula divides by zero or a blank cell	Use `IF` or `IFERROR` to control results
#N/A	A lookup value cannot be found	Verify lookup tables, then wrap with `IFERROR`
#NAME?	Excel does not recognize text in a formula (misspelled function or named range)	Correct function spelling or quotation marks
#NULL!	A space was used instead of a comma between ranges	Replace the space with a comma
#NUM!	Invalid numeric calculation (IRR, RATE, etc.)	Review assumptions and input values
#REF!	Formula references a deleted or invalid cell	Undo deletion or rebuild formula using continuous ranges
#VALUE!	Incorrect data type used in a calculation	Convert text to numbers or use proper functions

XLOOKUP

What It Does:

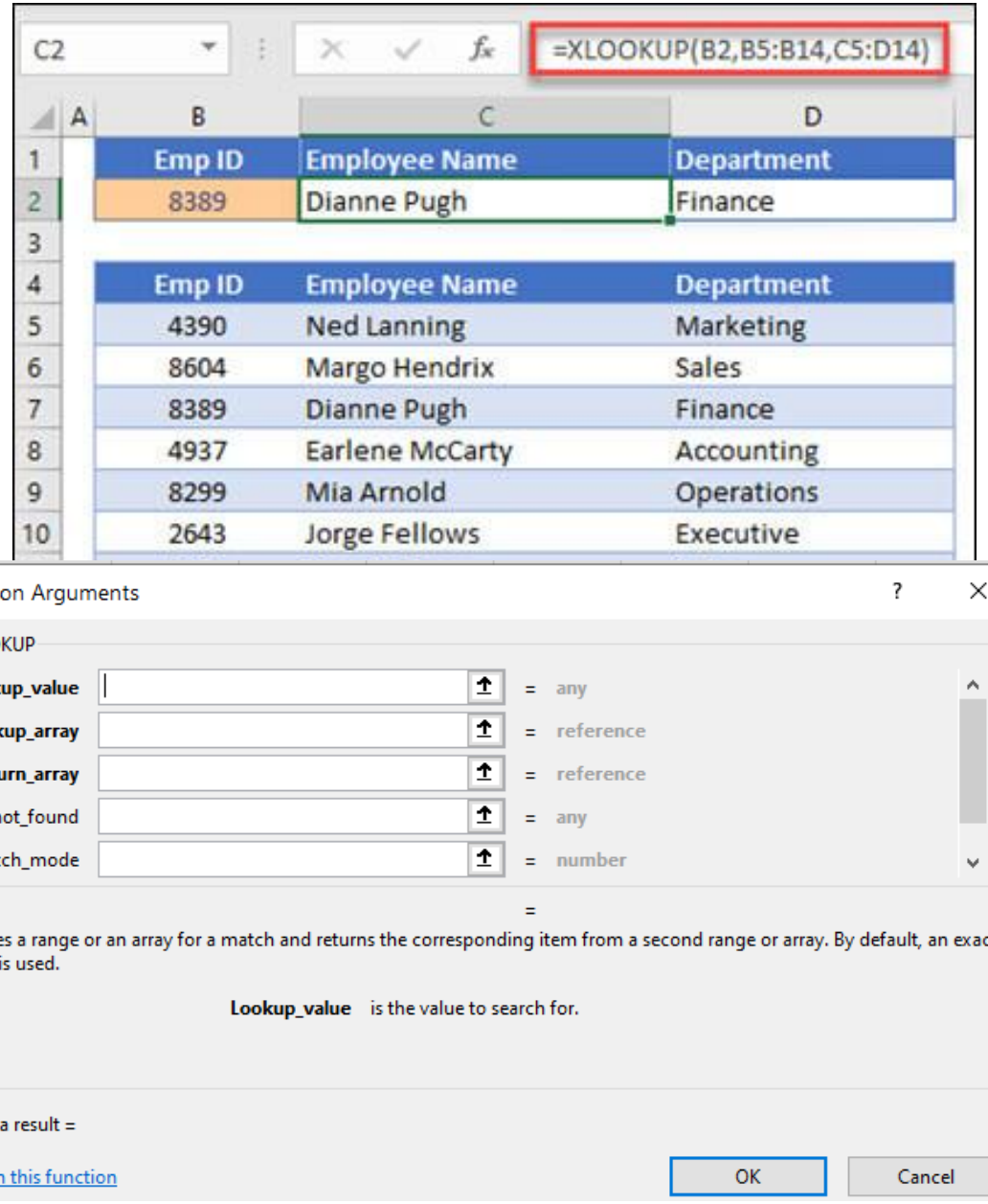
- Finds a value in one column and returns a related value from another column

Basic Syntax

- XLOOKUP(lookup_value, lookup_array, return_array, [if_not_found], [match_mode], [search_mode])

Why Use XLOOKUP?

- Looks left or right
- Exact match by default
- No need to count column numbers
- Cleaner error handling



SUMIFS

Note: *SUMIF/SUMIFS will error if the formula references a cell in a closed workbook. It only works within the same spreadsheet.*

	A	B	C	D	E	F	G
1	Fund	Fiscal Year	Amount				
2	1384	2025	1,200				
3	1384	2024	900				
4	3600	2025	750				
5	1384	2025	500				
6							
7							
8			$ 1,700	=SUMIFS(C2:C5,A2:A5,"1384",B2:B5,2025)			
9							
10							

What It Does:

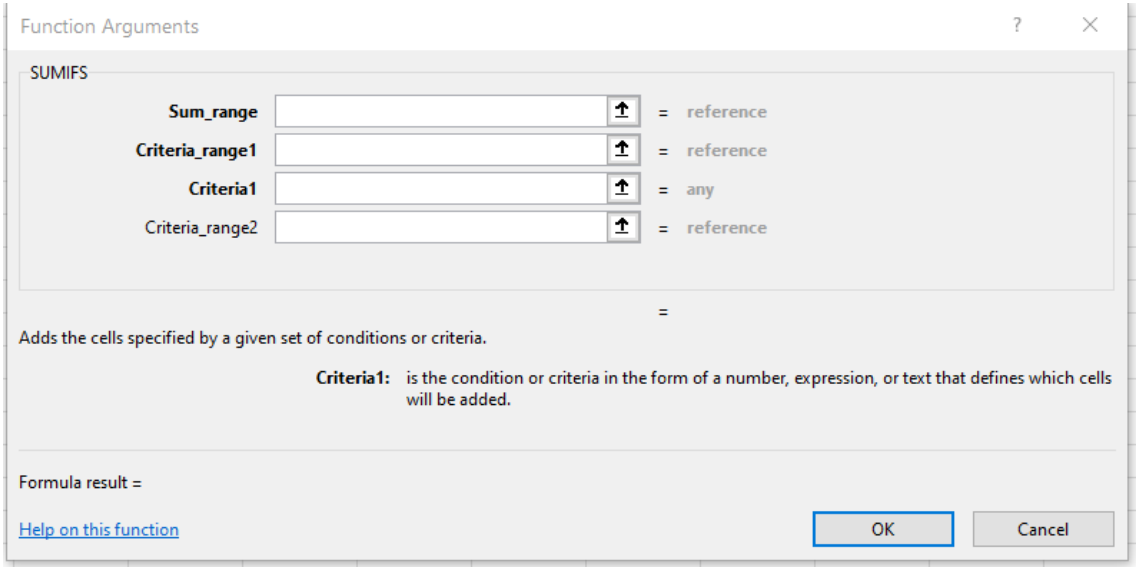
- Adds values that meet one or more conditions

Basic Syntax

- SUMIFS(sum_range, criteria_range1, criteria1, [criteria_range2], [criteria2], ...)

Why Use SUMIFS?

- Summarizes data quickly
- Handles multiple conditions at once
- Reduces manual filtering and sorting
- Helps answer specific questions from large datasets



IF

	A	B	C	D	E
1	Fund Code	Adopted	Actual	Status (IF Result)	
2	1384	50,000	52,300	Over Budget	=IF(C2>B2,"Over Budget","On Track")
3	3600	75,000	72,400	On Track	
4	1384	40,000	38,900	On Track	
5	3600	60,000	61,200	Over Budget	
6					
7					

What It Does:

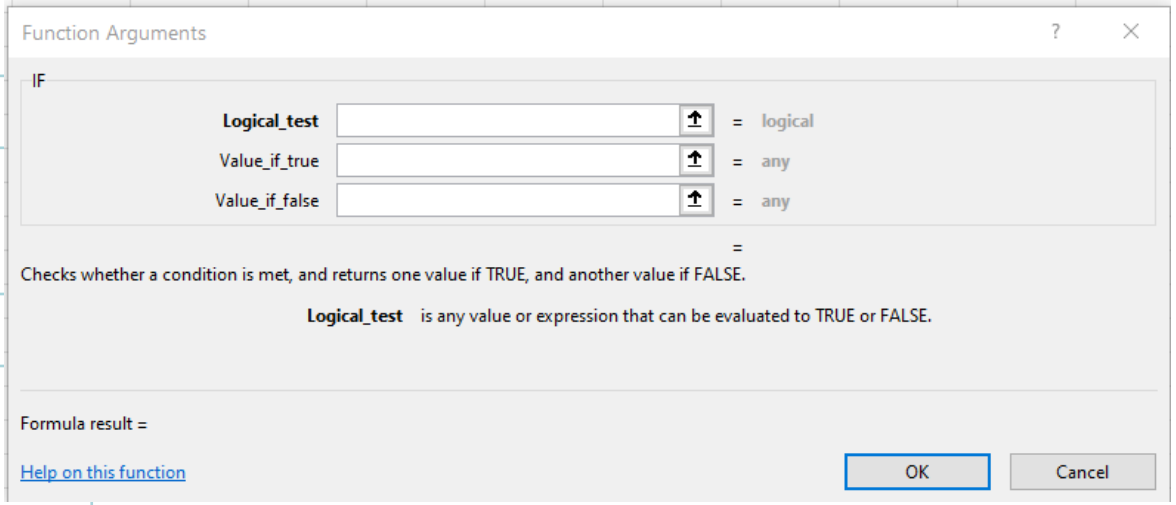
- Tests whether something is true or false and returns a result based on the answer

Basic Syntax:

- IF(logical_test, value_if_true, value_if_false)

Why Use IF?

- Adds decision-making to a spreadsheet
- Helps flag items that need attention
- Shows different results based on conditions
- Useful for yes/no, pass/fail, over/under, or status checks



SEQUENCE

What it does

- Creates a list of sequential numbers automatically

Syntax

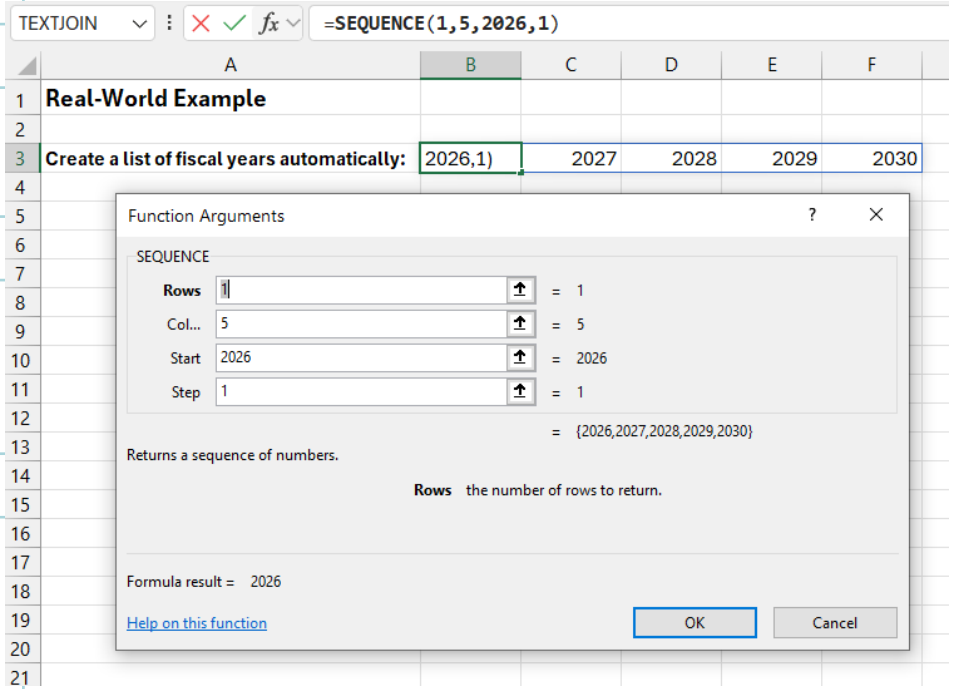
- SEQUENCE(rows, [columns], [start], [step])

Example

- =SEQUENCE(12)
  Creates a list of numbers from 1 to 12

Why Use SEQUENCE?

- Creates number lists quickly
- Updates automatically if the formula changes
- Useful for numbering rows, periods, months, or years
- Reduces manual typing and dragging formulas



FILTER

What it does

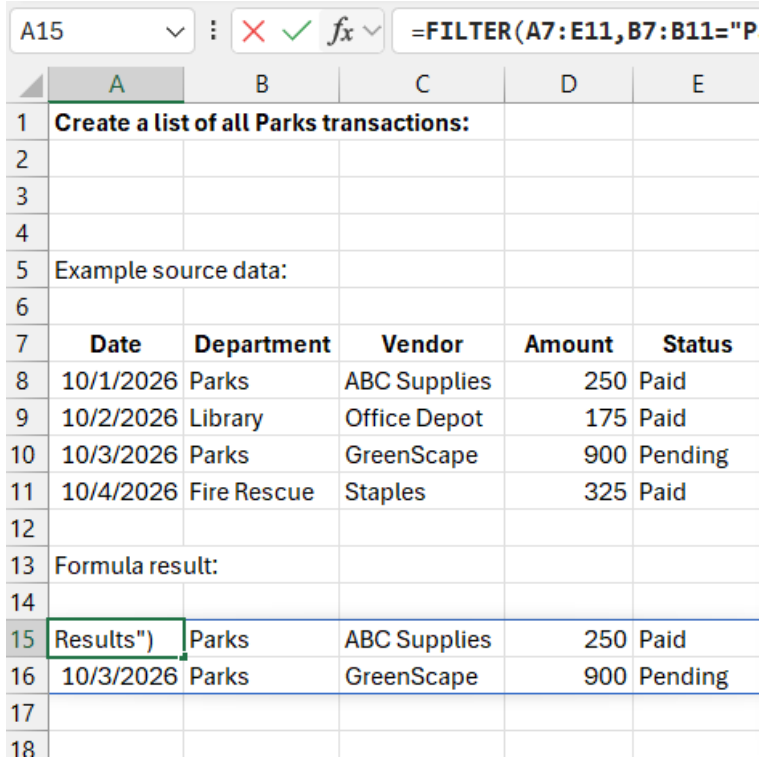
- Returns only the rows or columns that meet the condition you choose

Syntax

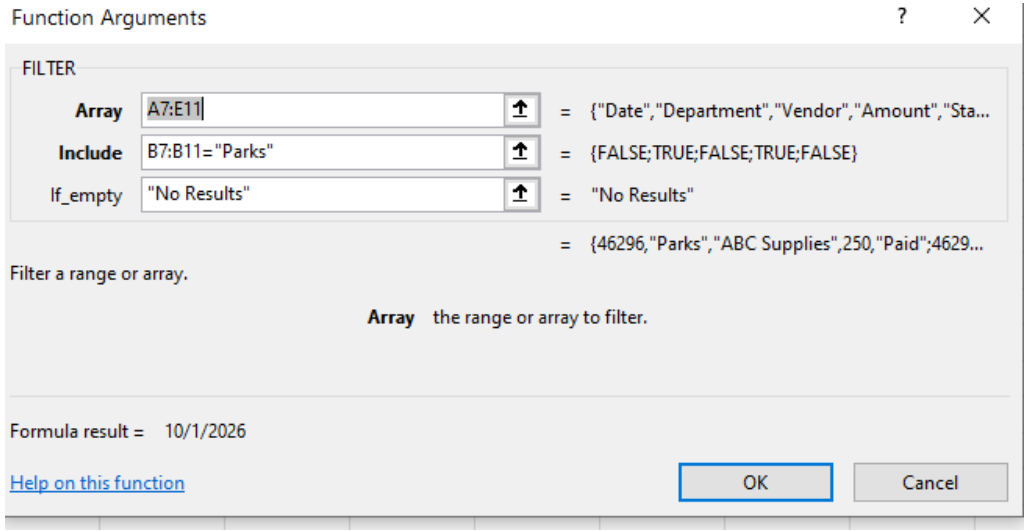
- FILTER(array, include, [if_empty])

Why Use FILTER?

- Pulls out only the data you need
- Updates automatically when the source data changes
- Reduces manual filtering and copying
- Great for creating dynamic reports or lists



	Date	Department	Vendor	Amount	Status
8	10/1/2026	Parks	ABC Supplies	250	Paid
9	10/2/2026	Library	Office Depot	175	Paid
10	10/3/2026	Parks	GreenScape	900	Pending
11	10/4/2026	Fire Rescue	Staples	325	Paid
15	Results")	Parks	ABC Supplies	250	Paid
16	10/3/2026	Parks	GreenScape	900	Pending



CONCAT

What It Does:

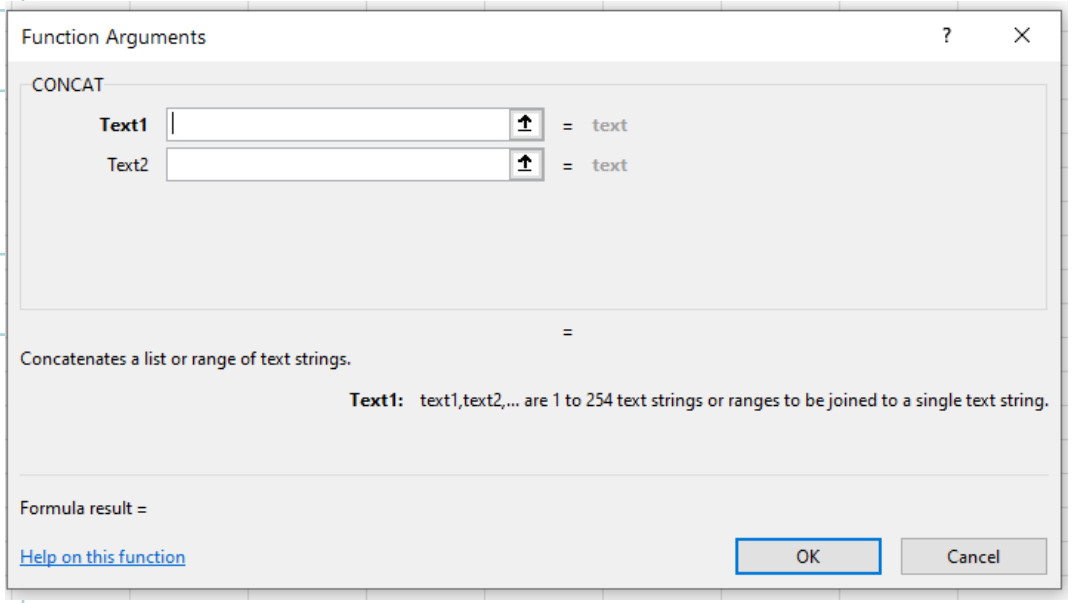
- Combines text, numbers, or cell values into one cell

Basic Syntax:

- CONCAT(text1, [text2], ...)

Why Use CONCAT?

- Joins values quickly
- Works with text, numbers, and cell ranges
- Replaces the older CONCATENATE function
- Useful for creating labels, IDs, or combined descriptions



TEXTJOIN

What It Does:

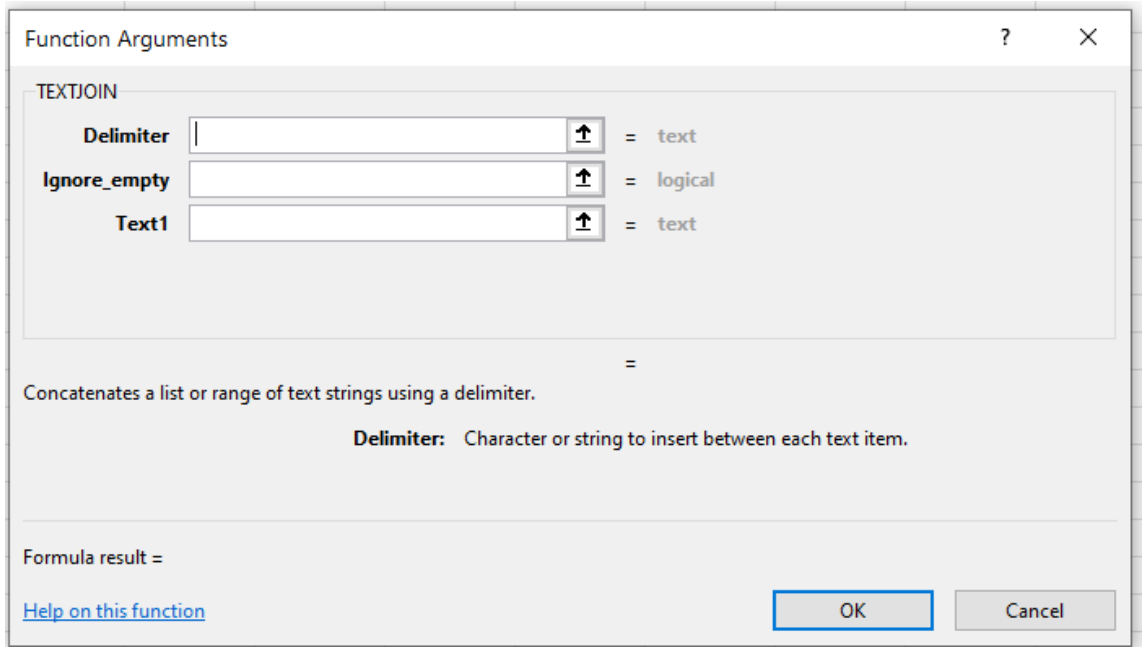
Combines text, numbers, or cell values into one cell with a separator between each value

Basic Syntax:

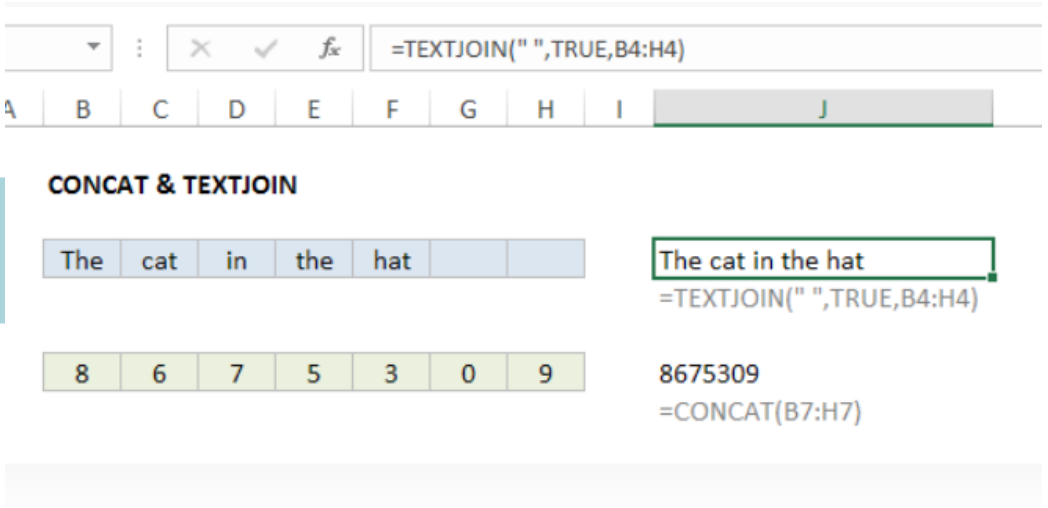
TEXTJOIN(delimiter, ignore_empty, text1, [text2], ...)

Why Use TEXTJOIN?

- Adds separators automatically, such as spaces, commas, or dashes
- Can ignore blank cells
- Works well with ranges or lists
- Creates cleaner combined text than CONCAT



CONCAT VS TEXTJOIN

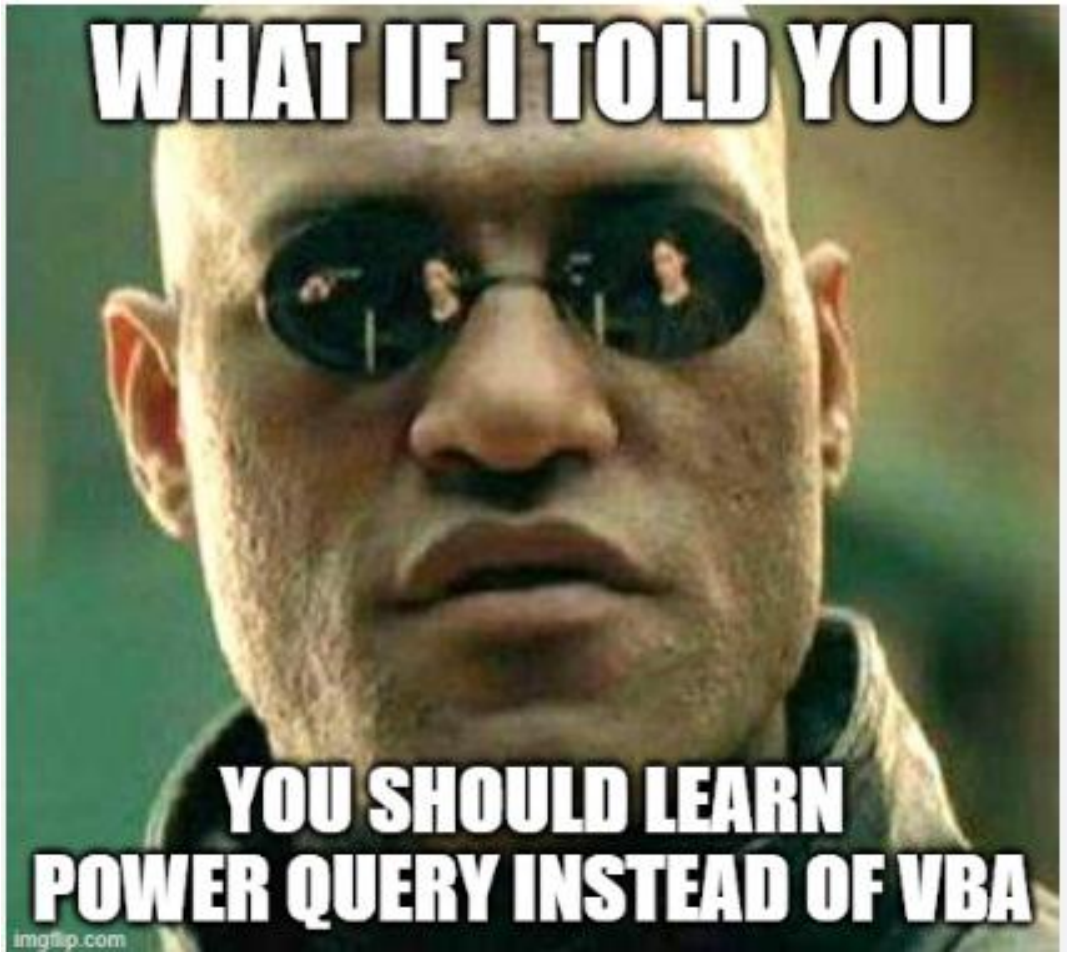


Use CONCAT when:

- You are joining a few values together
- You do not need automatic separators
- Blank cells are not a major issue

Use TEXTJOIN when:

- You want spaces, commas, or dashes between values
- You are combining a range or list
- You want to ignore blank cells automatically



Data Analysis Tools

Data Analysis Tools

PivotTables

- Summarize large data quickly
- Drag-and-drop analysis

Conditional Formatting

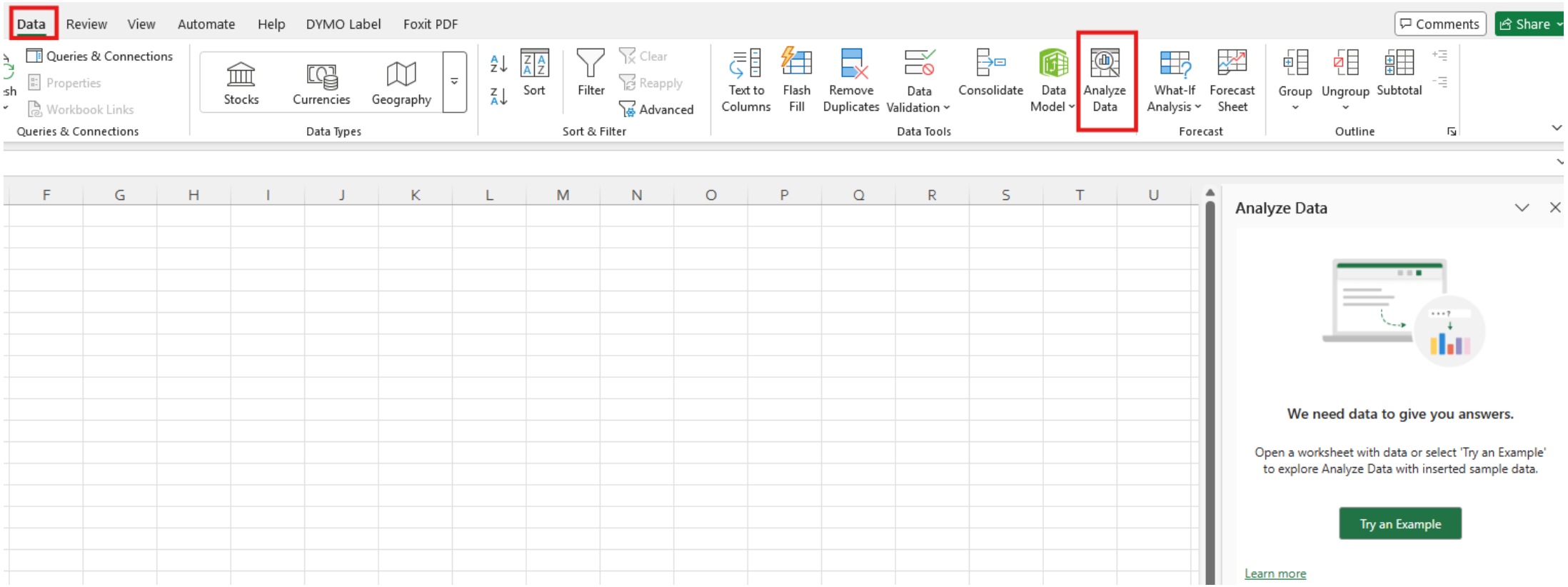
- Highlight trends
- Spot issues instantly

Data Validation

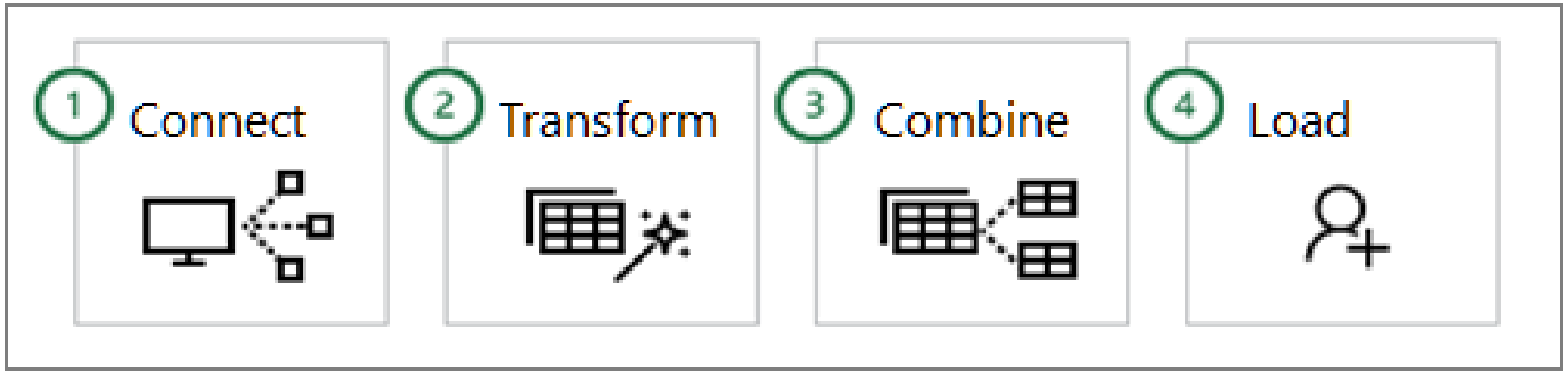
- Create dropdown lists
- Prevent data entry errors

Analyze Data Feature

- Select a cell in a data range, then on the **Data** tab, select the **Analyze Data** button.
- Analyze Data in Excel will analyze your data and return interesting visuals about it in a task pane.



What is Power Query?



https://youtu.be/x7mzOYEn0XA?si=eckoz5k0y1Dfv1Qm

Thank you

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