



# Excel for HR Cheat Sheet

## Excel functions to create formulas

**01**

**Relative (referencing cells)**

Use when you want to perform the same operation across multiple rows or columns.

**02**

**Absolute References**

Include a \$ sign to lock a cell reference's row and/or column when you have a constant value or a specific cell across multiple calculations.

**03**

**Name Ranges**

Make formulas easier to read and reduce errors using name ranges for cells or cell ranges you frequently reference in formulas.

## Tips to manage employee data in Excel

- Data Cleaning**
  - Check for and remove duplicates with The 'Remove Duplicates' feature.
  - Use Excel functions like "IF" or "ISBLANK" to find and flag missing data.
- Structured Data Entry**
  - Specify formats for dates and numerical data.
  - To maintain consistency, create dropdown lists for fields (like departments or job titles).
  - Use conditional formatting to highlight fields that contain errors or outliers.
  - Set data validation rules to allow only certain types of data in a cell (e.g., numbers only).
- Efficient Organization**
  - Organize employee data in separate columns (e.g., first name, last name, department, role, start date, contact info).
  - Use tables to better manage data sets.
- Data Segmentation**
  - Use filters to view specific subsets of data (e.g., employees in a particular department).
  - Utilize pivot tables to summarize and analyze data, like department-wise headcount, average tenure, etc.
- Data Analysis and Reporting**
  - Use built-in Excel functions for quick analysis of data (e.g., average age, highest salary).
  - Create dynamic charts and graphs for visual representation of key HR metrics.
- Maintaining Confidentiality**
  - Keep sensitive information (like salaries or personal information) in a separate, password-protected sheet.
  - Limit access to confidential data only to authorized personnel.
- Regular Backups**
  - Regularly back up the employee data to prevent loss due to accidental deletion or system failures.
- Updating Records**
  - Establish a regular schedule for updating employee records to ensure data remains current.
- Documenting Processes**
  - Keep a manual or guide ensuring any staff member can understand and follow the procedures.
  - Regularly review and update the guide to reflect any changes in procedures or best practices.

## 8 types of Excel functions HR needs

- 01 Basic arithmetic functions**  
**SUM, AVERAGE, MAX, MIN**  
*Example: Sum of the total annual salaries of all employees, the average number of days taken as leave, or determine the highest and lowest salaries within the company.*
- 02 Counting functions**  
**COUNT, COUNTA, COUNTIF, COUNTIFS**  
*Example: count the number of employees in a specific department; calculate the number of employees who have been with the company for more than 5 years and are in a leadership position.*
- 03 Logical functions**  
**IF, AND, OR**  
*Example: eligibility for a particular training program based on multiple criteria, like department, tenure, and performance ratings.*
- 04 Lookup functions**  
**VLOOKUP; HLOOKUP; XLOOKUP; INDEX and MATCH**  
*Example: Retrieve specific information on an employee's performance rating from a table or dataset.*
- 05 Text functions**  
**LEFT, RIGHT, MID**  
*Example: Extract an employee ID from a longer string.*
- 06 Text formatting functions**  
**TRIM, UPPER, LOWER, PROPER**  
*Example: Clean and standardize text data, like removing extra spaces or standardizing the case of names.*
- 07 Date functions**  
**DATE, YEAR, MONTH, DAY; NETWORKDAYS**  
*Example: Calculating an employee's tenure or the number of working days between dates.*
- 08 Conditional functions**  
**SUMIF, SUMIFS, AVERAGEIF, AVERAGEIFS**  
*Example: Sum of sick days taken by the Marketing department or the average amount of training hours completed by Sales.*

## 3 Essential Excel Shortcuts

- ### Navigation Shortcuts
- ▶ **Ctrl + Arrow Key:** Jump to the edge of data regions (e.g., Ctrl + Down Arrow takes you to the last filled cell in a column)
  - ▶ **Home:** Go to the beginning of a row.
  - ▶ **Ctrl + Home:** Move to the beginning of a worksheet.
  - ▶ **Ctrl + End:** Jump to the last cell with data on a worksheet.

- ### Data Entry and Editing Shortcuts
- ▶ **Ctrl + D:** Fill down. Copies the content and format of the topmost cell of a selected range into the cells below.
  - ▶ **Ctrl + R:** Fill right. Similar to Fill Down, but to the right.
  - ▶ **F2:** Edit the active cell, putting the cursor at the end of the current text.
  - ▶ **Ctrl + ; :** Insert today's date into the active cell.

- ### Selecting Cells and Ranges
- ▶ **Ctrl + A:** Select the entire worksheet.
  - ▶ **Shift + Arrow Key:** Extend the selection by one cell.
  - ▶ **Ctrl + Space:** Select the entire column.
  - ▶ **Shift + Space:** Select the entire row.

## Common Excel errors

Cause:	Resolution:
<b>#DIV/0!</b> Occurs when a formula tries to divide a number by zero or an empty cell.	Ensure the denominator in any division operation is not zero or empty. You can use the IF or IFERROR function to handle this error.
<b>#VALUE!</b> Appears when a formula has the wrong type of argument (e.g., using text in a mathematical operation).	Check the formula for inappropriate arguments. Convert text to numbers if necessary, or use functions like VALUE or TEXT.
<b>#REF!</b> Appears when a reference is invalid, usually when a cell referred to in the formula is deleted.	Check the formula for broken links or deleted references. Replace or update the references as needed.
<b>#NAME?</b> Excel doesn't recognize the text in the formula. This often occurs with misspelled functions or ranges.	Check for typos in your formula. Ensure all function names and named ranges are spelled correctly.
<b>#N/A</b> Commonly appears in lookup functions when Excel can't find a match.	Verify the lookup value exists in the source data. Consider using IFNA or IFERROR to handle these errors gracefully.
<b>#NUM!</b> Indicates a problem with a number in the formula, like an invalid numeric value or a calculation that results in a number too large or too small.	Check for unrealistic or incorrect calculations. Modify the formula to avoid excessively large or small numbers.

## Tips to protect data privacy in Excel

- 01** Avoid storing highly sensitive data
- 02** Password protect your documents to prevent unauthorized access to sensitive data
- 03** Limit access to specific cells or ranges
- 04** Create user-specific views to display only specific workbook parts to different users
- 05** Utilize data validation to control the type of data or the values that users enter into a cell
- 06** Use secure storage and transfer methods
- 07** Implement version control and keep track of different versions of the document
- 08** Educate users on best practices
- 09** Comply with legal and regulatory standards