STEPS TO ACHIEVE

10 Spreadsheet Time-Savers for School Staff

Quick wins in Excel and Google Sheets for office staff, data coordinators, counselors, and anyone who manages school data. Windows or Mac.

1 Turn every list into a Table

Click inside your data and make it a Table. You get filter buttons, banded rows, and formulas that copy down on their own as you add students.

Excel: `Ctrl+T` (Windows) or `Cmd+T` (Mac) **Sheets:** Format > Convert to table

2 Match records across files with XLOOKUP

Pull a homeroom, grade, or bus number from another list using the student ID. No more copy and paste between two windows.

`=XLOOKUP(A2, Roster!A:A, Roster!C:C, "Not found")` Works in Excel 365 and Google Sheets

3 Count anything with COUNTIFS

Tally attendance codes, referrals, or course requests by grade, building, or date in a single formula.

`=COUNTIFS(C:C, "Unexcused", D:D, 9)` counts unexcused absences for grade 9

4 Clean up messy exports

SIS and state report exports often come with extra spaces or ALL CAPS names. Fix a whole column at once, then paste the results back as values.

`=PROPER(TRIM(A2))` turns " SMITH, JANE " into "Smith, Jane"

5 Remove duplicates in two clicks

Combined rosters or sign-up lists often have the same person twice. Remove exact duplicates by ID or email.

Excel: Data > Remove Duplicates **Sheets:** Data > Data cleanup > Remove duplicates

6 Freeze the header row

Keep column names in view while you scroll through hundreds of rows.

Excel: View > Freeze Panes > Freeze Top Row **Sheets:** View > Freeze > 1 row

7 Use drop-downs for consistent entries

Stop "Gr 9", "9th", and "Nine" from showing up in the same column. A drop-down keeps everyone's entries the same, so your counts are right.

Excel: Data > Data Validation > List **Sheets:** Insert > Dropdown

8 Flag what needs attention with color

Highlight students over an absence threshold, overdue items, or blank required fields automatically.

Excel: Home > Conditional Formatting **Sheets:** Format > Conditional formatting

9 Summarize in seconds with a PivotTable

Drag fields to see totals by building, grade, or month without writing a single formula. Refresh it when the data changes.

Excel: Insert > PivotTable **Sheets:** Insert > Pivot table

10 Share without stepping on each other

In a shared Google Sheet, a Filter View lets you sort and filter for yourself without changing what everyone else sees. Protect key columns so formulas don't get typed over.

Sheets: Data > Create filter view, and Data > Protect sheets and ranges **Excel:** Review > Protect Sheet

EXCEL SHORTCUTS: WINDOWS AND MAC

Action	Windows	Mac
Jump to the end of your data	`Ctrl + Arrow`	`Cmd + Arrow`
Select to the end of your data	`Ctrl + Shift + Arrow`	`Cmd + Shift + Arrow`
Create a Table	`Ctrl + T`	`Cmd + T`
Fill down from the cell above	`Ctrl + D`	`Cmd + D`
Format cells	`Ctrl + 1`	`Cmd + 1`
AutoSum	`Alt + =`	`Cmd + Shift + T`
Undo	`Ctrl + Z`	`Cmd + Z`

In Google Sheets, press `Ctrl + /` (Windows) or `Cmd + /` (Mac) to see every shortcut.

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