

Excel Copy and Paste Tips and Tricks

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Introduction

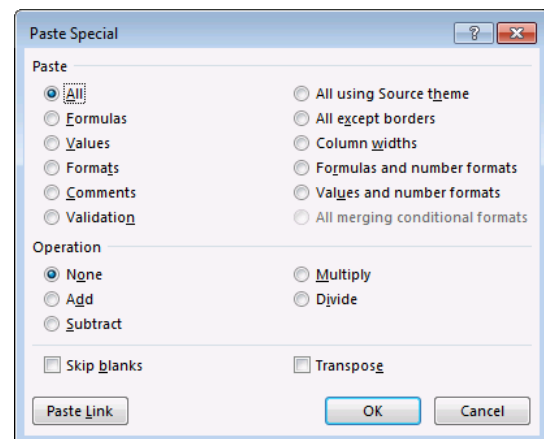
Copying and pasting are two of the most commonly performed tasks in Excel. There are techniques that can speed up the process and this session will cover many of them.

In MS Word or PowerPoint copying and pasting is a reasonably straightforward process. Due to Excel's formulas copying and pasting is a more complex. We will focus initially on the Paste Special dialog but we also examine a couple of other pasting techniques.

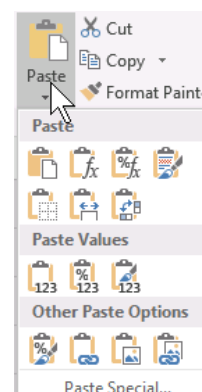
Excel has a Paste Special dialog which provides a lot of control on how and what you paste after you have copied.

We will spend most of the session going through the options on this dialog to show you how to get the most out of the Pasting.

Some of the options have right click and keyboard shortcuts that can speed up the process. This enables you to use a Paste Special options without opening the dialog.



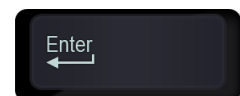
In this session I will take you through most of the options and demonstrate how and when to use them. Depending on your work only a few of these may be relevant to you but remember things change and knowing these techniques exist could save you a lot of time and effort in the future. On the Home ribbon tab the Paste button also has a drop down that lists many of these options. See image on right.



Old Paste Trick

This is a technique that goes all the way back to the earliest versions of Excel, but amazingly many users are completely unaware of it.

If you want to do a full paste after you have copied something, just select the destination cell and press Enter. This only pastes once and it also clears the clipboard after the paste.



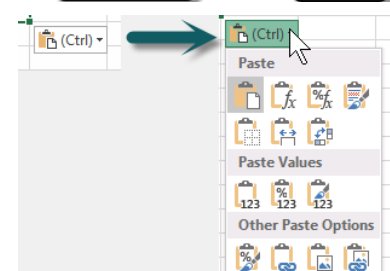
Ctrl + v allows you to paste multiple times after a copy because it doesn't clear the clipboard.



Changing your mind

After you paste Excel displays an icon that you can click on or press the Ctrl key to see the options.

This allows you to change your mind after you have pasted.

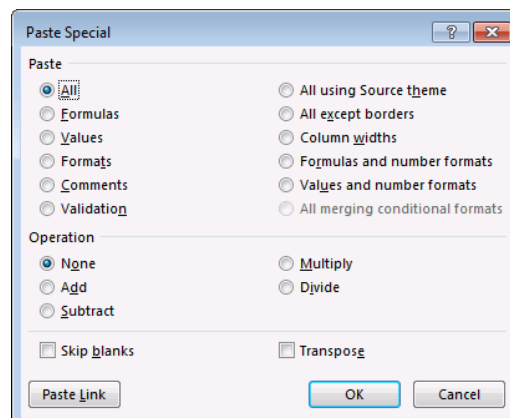


Paste Special Dialog

The dialog is split into three sections. You can make selections from all three sections at once.

The top two sections have radio buttons which means you can only choose one option from the top section and one option from the middle section.

The bottom section has two check boxes theoretically you can choose both, but that would be unusual.



The Paste Link button at the bottom left of the dialog may be deactivated (greyed out) based on other selections.

Shortcut to open the Paste Special dialog after copying. Ctrl + Alt + v



An alternate shortcut key combination is Alt E S pressed in sequence, not held down.



Paste Section

How the options in the Paste section work. The options on the right of the Paste section are self-explanatory.

Option	What is pasted
All	Default - everything is pasted, including all formulas and all formats.
Formulas	Only the formulas are pasted - no formats are pasted.
Values	The results of the formulas are captured and pasted. No formats or formulas are pasted.
Formats	All the formats are pasted - no formulas or values are pasted.
Comments	Only cell comments are pasted - no formulas, values or formats are pasted.
Validation	Only cell validations are pasted – these are from Data Validation in the Data ribbon tab – an in-cell drop down is a common Data Validation.

Did you Know?

You can use Paste Special more than once. You could paste once for values and then again to paste formats. This fixes some issues you may have with borders, values and dates not displaying correctly.

Let's review some of the more commonly used options

Paste Values

This is a common process when copying ranges and cells between and within files. Only the values are pasted/captured. This enables you to compare new results with previous results.

Why use it?

When you use paste values there are no links created to another file or sheet. It is as if all the cells were data entered. This captures the values at a point in time.

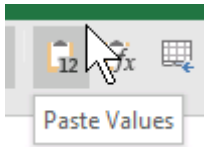
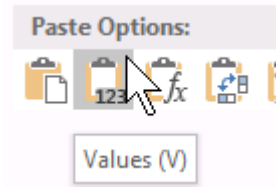

One use of this is to capture the values and then make changes to the file and compare the new results with the captured values to see what has changed and by how much.

Worked Example

In the Examples sheet we may want to capture the current values in column O and paste them in column P. We can change the value in cell B3 and see the difference by inserting formulas in column Q to calculate the differences.

Another use of Paste Special Values is to remove links to external files so that when you email a file there are no links when opened on another computer.

Paste Values Shortcuts

Quick Access Toolbar icon	Right click shortcut	Alt key shortcut - pressed in sequence, not held down
		

Paste Values and Number Formats Shortcuts

Quick Access Toolbar icon	Alt key shortcut - pressed in sequence, not held down
	

Paste Values and All Formats Shortcuts

Quick Access Toolbar icon	Alt key shortcut - pressed in sequence, not held down
	

Paste Formulas

This pastes just the formulas, it doesn't paste any formats. This can be useful when copying formulas from another sheet or file that has different formats but the same structure.

Why Use It?

The main reason you use this type of paste is to avoid having to reformat borders or other formats. Use this when you have similar formulas within a range but the borders are different. Rather than fixing the borders after the paste, it is easier to paste the formulas.

This mainly applies to copying across and down within an existing range.

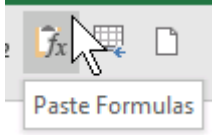
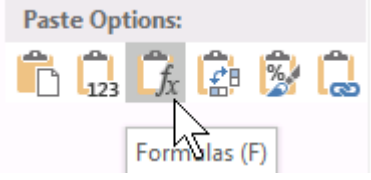




Worked Example

In the Examples sheet if you want to adjust the formula in cell C7 to include the Factor % in cell B2 we need to copy the revised formula across and down. This would affect the existing border formats. Rather than having to amend the formats after the paste we can just use Paste Formulas. Amend the formula in cell C7 to



=ROUND(\$B7*C\$3*\$B\$2/12,0)

Copy cell C7 and use Paste Special Formulas to paste in the range C7:N12.

Paste Formulas Shortcuts

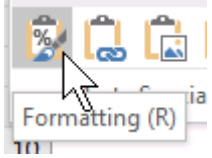
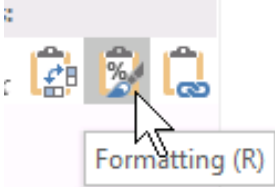


Quick Access Toolbar icon	Right click shortcut	Alt key shortcut - pressed in sequence, not held down
		   

Paste Formulas and Number Formatting Shortcuts

Quick Access Toolbar icon	Alt key shortcut - pressed in sequence, not held down
	   

Paste Formats

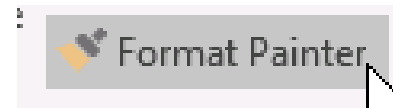
This only pastes the formats and doesn't change any values or formulas in the destination cells. Conditional Formats are included in the paste.

Quick Access Toolbar icon	Right click shortcut	Alt key shortcut - pressed in sequence, not held down
		   

See the following page for an alternative to paste formats.

Format Painter

There is an alternative technique for pasting formats. This involves using the Format Painter icon on the Home ribbon.



You first select a cell/range that has the format you want to paste and click the Format Painter icon. Then click another range to apply the same formatting to that new range.

The mouse cursor changes to include a paint brush when you are “painting” a format.



Double clicking the Format Painter icon allows you to paste formats multiple times.

You can either press the Esc key to clear the Format Painter icon or you click back on the Format Painter icon to stop it.



Pasting Column Widths

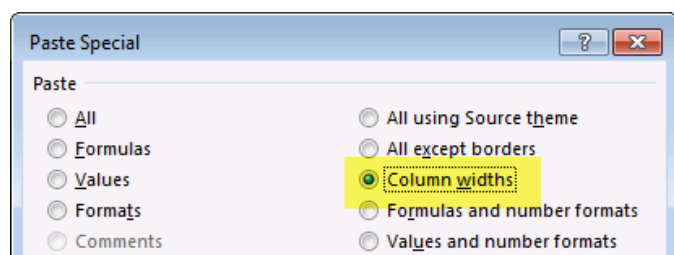
Let's say you have a template sheet that has set column widths. You then need to apply those same column widths to other sheets in the same file. You can copy a range in the template and then select multiple sheets and use Paste Special Column Widths to change the column across multiple sheets.

Worked Example

In the Template sheet select range A1:F1 and copy it. Click in the Report 1 sheet tab and click cell A1 then hold the Ctrl key down and click the Report 2 sheet tab with the mouse. This has selected both sheets – whatever you do will be applied to both sheets. This is called grouping the sheets.

With cell A1 selected press Ctrl + Alt + V and choose Column Widths and press Enter or click OK.

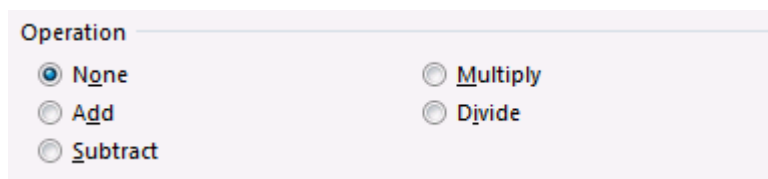
At this stage the Report 1 and Report 2 sheet are still grouped. Click the Template sheet tab to clear the grouping.



Warning: ALWAYS remove the grouping on grouped sheets when you are finished. If you save a file with grouped sheets they will be grouped when the file is opened and this can cause major issues. Changes made will affect all grouped sheets.

Operations Section

This section allows you to perform basic calculations on a cell or range.



Operation

☒ None ☐ Multiply

☐ Add ☐ Divide

☐ Subtract

Worked Example

In Operations sheet cell G1 has the value 0.98. Copy cell G1. Then select the range B2:B7 and open the Paste Special dialog using Ctrl + Alt + V and click Multiply and then OK. This will multiply all the cells in the range by 98%. In effect reducing all the values by 2%.

Try doing the same with the range D2:D7 which has formulas. The effect in the cell varies. See table below for the results of the above paste.

Cell	Type	Before	After Paste Special Multiply 0.98
D2	Formula	=ROUND(C2*B2,0)	=(ROUND(C2*B2,0))*0.98
B2	Value	142,616	139763.68

Values are changed and there is no indication that an adjustment has been made. Formulas are adjusted using the pasted value as a keyed-in value.

Warning

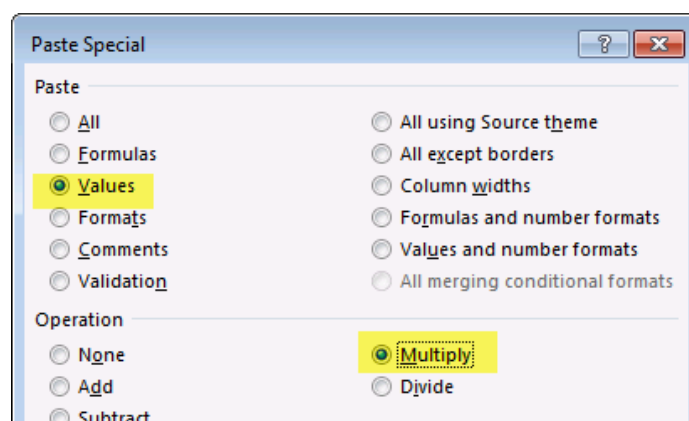
When performing this technique you may also need to select the Values option from the Paste section. This ensures the format of the copied cell isn't applied to the pasted cell(s).

Worked Example

Undo the previous two operations and return to the way it was. Change the format on cell G1 to a percentage. Try the steps again and see what happens.

Undo the last two operations and this time use Paste Special Values Multiply - as per the image on the right.

This avoids the format issue.



Paste Special

Paste

☐ All ☐ All using Source theme

☐ Formulas ☐ All except borders

☒ Values ☐ Column widths

☐ Formats ☐ Formulas and number formats

☐ Comments ☐ Values and number formats

☐ Validation ☐ All merging conditional formats

Operation

☐ None ☒ Multiply

☐ Add ☐ Divide

☐ Subtract

Why use it?

Fix negative or positive numbers

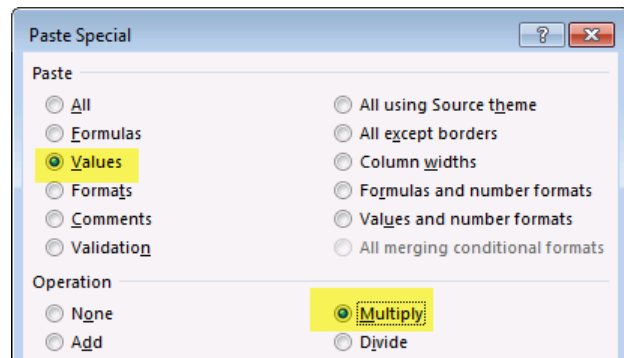
Sometimes when data is downloaded into Excel numbers have the wrong sign. You could use a separate column with a formula to convert them but you can also adjust them in-situ without using any formulas.

Worked Example

In the Sign Change sheet type -1 in cell E1 and then copy it.

Select the range C2:C10, as we want the credits to be negative. Press Ctrl + Alt + V and select Paste Special Values Multiply – see image on right.

If you don't use Values you will also paste the format, which you may not want.



This will place zeroes in the blank cells. If this is an issue then undo the previous paste and hold the Ctrl key down and use the mouse to select the cells C3, C5, C7, C9 and C10. Then use Paste Special Values Multiply.

Always using Values and Multiply together is a good habit to get into.

Fix text number values

Let's say a system provides values that are formatted as text. Excel doesn't treat text numbers as numbers.

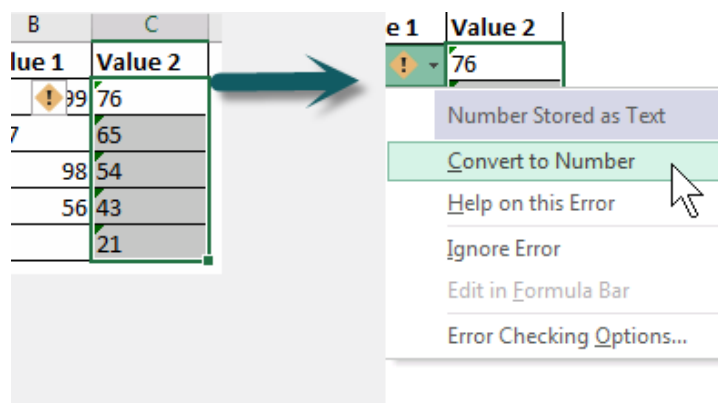
You can use the Values Multiply option as above to convert them all to values by multiplying all the text numbers by 1.

Worked Example

In the Text Numbers sheet type 1 in cell E1 and copy it. Select the range B2:C6 and press Ctrl + Alt + V and use Paste Special Values Multiply.

On the following page is an alternative built-in method

Note: there is a built-in system that can convert text numbers into real numbers – but the icon doesn't always display – see image on right.



If you select the range B2: B6 the icon won't display because the first cell is a real number and not a text number. If you select the range B3:B6 the icon will display as the first cell in the range has a text number.

Ad hoc increase by a factor

Let's say you have some values that you are manipulating and you want to increase them all by 10%. You could multiply them by 1.1 to achieve the result. But you may also want to increase by other percentages eg 5% or 15%. You want the ability to adjust the percentage change.

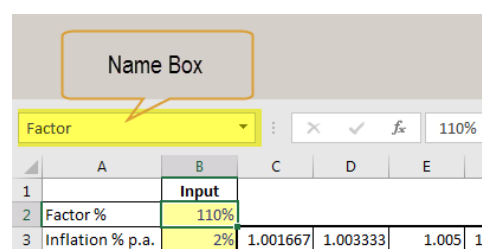
A paste technique can be used to apply a factor to multiple formulas in a range of cells.

Worked Example

You can use a range name to apply a factor throughout your file. This can be a useful technique for budgets and forecasts.

In the Factor sheet click in cell B2.

We need to name that cell. To do that click in the Name Box (left of the Formula Bar – see image on right) and type in the word Factor and press Enter.



In cell D1 type =Factor and press Enter. Then copy cell D1.

Select the range C7:N12 and use Paste Special Formulas Multiply. This technique can be applied throughout the file to adjust a range of formulas. Now you can change the value in B2 to adjust all the cells.

Cell C7 formula before Paste	Cell C7 formula after Paste
=ROUND(\$B7*C\$3/12,0)	=(ROUND(\$B7*C\$3/12,0))*(Factor)

If you used a cell reference in cell D1 like =\$B\$2 the above technique would only work on the sheet, not throughout the file. The range name can be used throughout the file.

Bottom Section

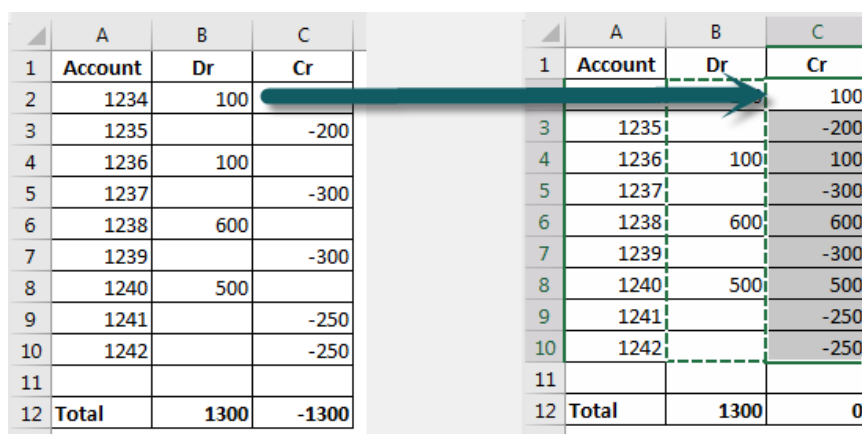
Skip Blanks

This feature is a little obscure but in some circumstances can save a lot of manual work. You can copy a range that contains blanks. When you paste the range, any blank cells are ignored. Hence only the cells with entries will be pasted.

I will demonstrate how it works and why you might need it.

Worked Example

In the Sign Change sheet we had a debit and a credit column. On each row there was either a debit or a credit. No row had both. This is a classic opportunity to use Skip Blanks. Select the range B2:B10 and copy it. Click cell C2 and press Ctrl + Alt + V and click the Skip blanks option and click OK. You could then delete column B and rename column C.



	A	B	C
1	Account	Dr	Cr
2	1234	100	
3	1235		-200
4	1236	100	
5	1237		-300
6	1238	600	
7	1239		-300
8	1240	500	
9	1241		-250
10	1242		-250
11			
12	Total	1300	-1300

	A	B	C
1	Account	Dr	Cr
2			100
3	1235		-200
4	1236	100	100
5	1237		-300
6	1238	600	600
7	1239		-300
8	1240	500	500
9	1241		-250
10	1242		-250
11			
12	Total	1300	0

Paste Link

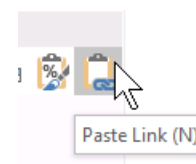
This is an underused Excel feature. Take this scenario. You are in a sheet called Inputs. You find an input cell or cells that you need to use in a sheet called Workings.

Typically you go back to the Workings sheet and press the = or + sign and then navigate back to Inputs sheet and click the cell you want and press Enter.

There is an easier way. Since you are already in the Input sheet. Copy the cell you want. Then go to the Workings sheet and use Paste Link.

Worked Example

In the Inputs sheet select the range B2:M2 and copy it. Go to the Workings sheet and right click cell C2 and click the Paste Link icon.



Repeat the same steps and copy cell B5 from the input sheet and Paste Link it to cell B3 in the Workings sheet. Note the type of formula reference used in cell B3.

Return to the Input sheet and click cell B8. Hold the Ctrl key down and click cell B10 and press Ctrl + C to copy. Go to the Workings sheet and select cell B6 and use Paste Link. Note the type of references used.

Tricks and Traps

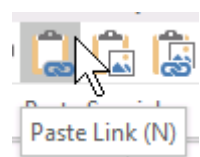
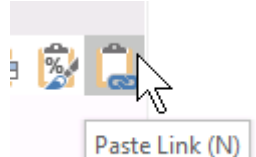

If you copy a single cell, when you paste Excel will use a fixed reference eg \$A\$1.

If you copy a range it will paste as relative references eg A1.

If you hold the Ctrl key down to make multiple selections before you copy, then the paste will bring all the cells together in the destination sheet. Fixed references are again used.

You can link to other workbooks this way as well.

Paste Link Shortcuts

Quick Access Toolbar icon	Right click shortcut	Alt key shortcut - pressed in sequence, not held down
		

Transpose

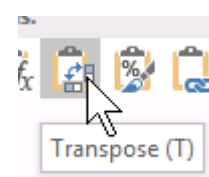
This is handy if you need to switch a report from being row-based to being column-based or vice versa.

You copy the source range as normal and then use Paste Transpose to convert the report. If there are formulas they are usually converted correctly but you should always check them after the paste.

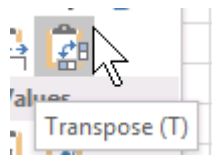
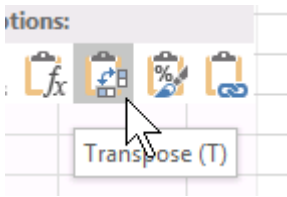

This is a paste so there are no links between the original range and the pasted range. It is a separate standalone range.

Worked Example

In the Inputs sheet select the range A1:N2 and copy it. Go to the Transpose sheet and click cell A1 and right click and choose Transpose. Note the formula in cell B14.



Paste Transpose Shortcuts

Quick Access Toolbar icon	Right click shortcut	Alt key shortcut - pressed in sequence, not held down
		

Paste Picture

This is not part of the Paste Special dialog but it is a special type of Paste that may solve a problem for you.

There are two types of Paste Picture

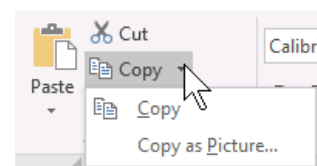
- Fixed picture – the image never changes
- Linked picture – picture varies based on the associated range

The fixed picture is ideal for pasting into Word or PowerPoint as it doesn't have any underlying data – see Warning below. If you need to change the size of the fixed picture it also scales very well as you re-size it.

Warning: If you copy a chart and paste it into Word or PowerPoint it will include the underlying data and whoever is reading the document can access the data.

Fixed Picture

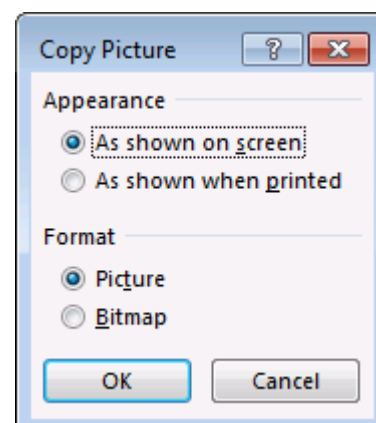
On the Clipboard section of the Home ribbon (far right) you may notice the Copy icon has a drop down. The drop down allows you to take a copy as a Picture.



When you use this option another dialog opens (see image on right). In general, the defaults shown are acceptable.

You can then go somewhere else and Paste – an image of the range is pasted.

Try this with the small report on the Picture sheet.



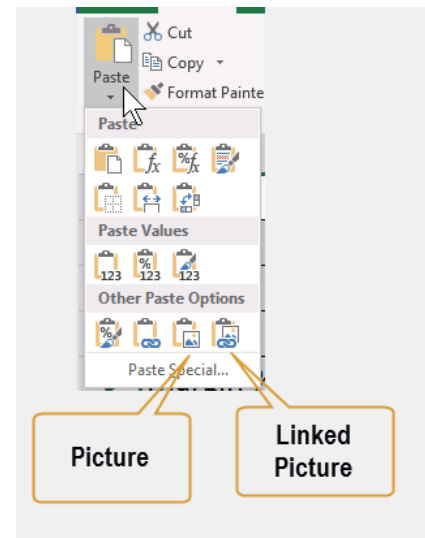
Also in the Clipboard section is the large Paste icon. This also has a drop down.

Note the two Picture icons at the bottom right - see image on right.

Linked Picture

This can be used as a last resort for some types of reports and dashboards.

It is useful for dashboards where you might want to include a small report but the rows and column layout may not allow it to fit exactly where you want.



WARNING: I have found that the performance of the file will be impacted if you use too many linked pictures.

Worked Example

In the Picture sheet select the range A1:C5 and copy it. Navigate to a separate cell where you want to paste the picture. This could be in another sheet.

Use the drop down on the Paste icon in the Home ribbon. Use the bottom right icon Linked Picture.

Problems

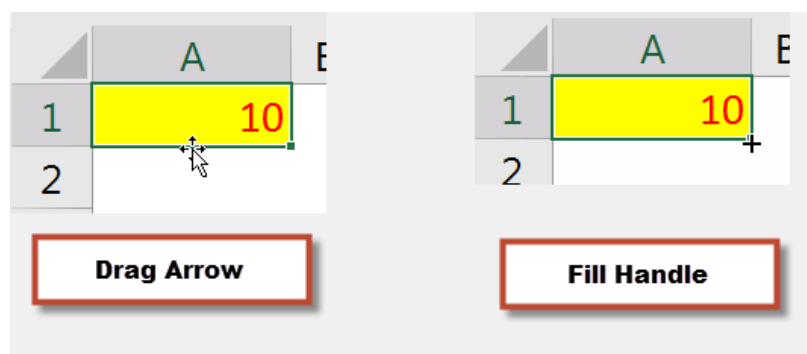
The linked picture updates automatically, but if rows or columns are inserted you may need to re-do the linked picture. Changing column widths and row height can also affect the image. You can re-size the picture - use the bottom right corner to do the resize as it will keep the proportion of the image.

This is an image and can be moved anywhere on the grid. You will find it works best if you turn off the gridlines in the source sheet.

Right Mouse Dragging

This is a technique that can take time to master but it is worth it.

It involves dragging two of Excel's mouse icons with the right mouse button. Something you may never have tried.



After you release the mouse a shortcut menu will display allowing you to select the type of paste you require. You can select from Paste Values and Paste Formats.