AUTOMATING DATA ENTRY

### PICK FROM DROP-DOWN LIST

Since in a record a row keeps more or less same kind of data, use the **Pick From Drop-Down List…** to enter data quickly.

To display the filter list:
1. Right-click in the cell where you will enter the list data.
2. Select Pick from Drop-Down List…
3. Click on the data in the list
   Note: *Use the Keyboard shortcut, Alt+Down Arrow to display the filter list quickly and bypass the shortcut menu.*
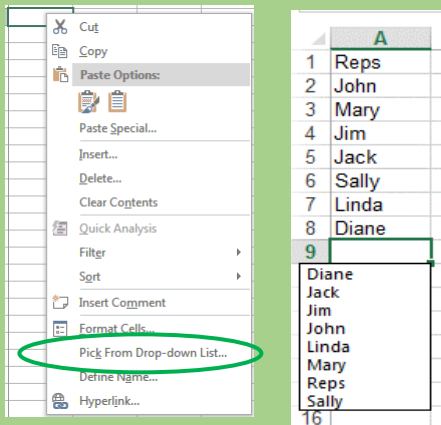
USING AUTOFILL

The **Fill Handle** button displays just below and to the right of each cell. When you drag the Fill Handle, Excel will copy the contents of the selected cell. The **AutoFill Options** button appears when you release the mouse button. Excel displays a list of options that vary depending on the contents of the initial cell. Accordingly, you can choose to fill the cells with text, numbers, formulas, formats, or fill without formatting. To modify the Fill options, select the **Home Tab|Editing Group|Fill|Series…** command on the Ribbon.

MANAGING DATA IN TABLES

CREATING TABLES

You create a table to help you manage and analyze related data.
1. Enter your table's column headings.
2. Enter the first row of data immediately below the column headings.
3. Click the **Insert Tab|Tables Group|Table** on the Ribbon.
4. Click the *My Table Has Headers* check box to select it.
5. Click OK.

Excel inserts and formats the new table and adds filter arrows to each field name.

NAME YOUR TABLE

When you create an Excel table, Excel creates a default table name (Table1, Table2, and so on), but you can change the table name to make it more meaningful.
1. Select any cell in the Excel table to show the Table Tools on the ribbon.
2. On the Design tab, in the Table Name box, type the name you want, and press Enter.

CONVERT A RANGE TO A TABLE

1. Open the target Worksheet.
2. Highlight the range of cells.
3. Click on the **Home Tab|Styles Group|Format as Table**.
4. Click on any one of the table styles.
5. Indicate whether your table has a Header Row.
   Note: *If your table does not have a Header Row, Excel will add generic names for each column in the selected range (e.g., Column1, Column2, etc.)*
6. Click **OK**.

INSERT TABLE USING THE QUICK ANALYSIS TOOL

After you create a table, you will see the Quick Analysis button next to it. Click this button to see tools that can help you analyze your table data, such as conditional formatting, Sparklines, charts, or formulas.
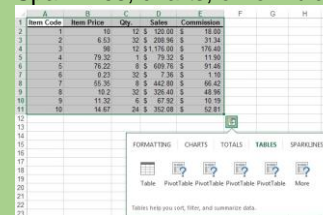
To add a row, select the last cell in the last row of the table, and press the Tab key.

When you type your data in a table, Excel adds filtering controls to the table headers automatically.

For quick filtering, do this:
1. Click the arrow in the table header of the column you want to filter.
2. In the list of text or numbers, uncheck the (Select All) box at the top of the list, and then check the boxes of the items you want to show in your table.
3. Click **OK**.

The filtering arrow in the table header changes to this icon to indicate a filter is applied. Click it to change or clear the filter.

FORMATTING TABLES

USE THE TABLE TOOLS > DESIGN CONTEXTUAL TAB

You can use the tools on the Design tab to customize or edit the table.
Note: The Design tab is visible only when you select at least one or more cells in the table.

APPLY TABLE STYLES

Select a cell in the table.

On the **Table Tools > Design Contextual Tab the More button in the Table Styles** group to display a gallery of table formats. Hover the mouse over any one of the formats to activate a **Live Preview** of the style on your table. Click the one you like to apply it to the table.

APPLYING CALCULATIONS TO TABLE DATA

ADD THE TOTALS ROW

On the **Table Tools > Design Contextual Tab** click the check box to apply the **Totals** row to your table. Excel will automatically apply the **Sum** function to any column of numbers. You may click the drop-down menu to display other functions in the **Totals** row for any of the columns. If the column stores data, Excel will automatically use the **Count** function.

CREATE CUSTOM FORMULAS

You may **insert** a column between existing columns in the table. Or you may begin typing a heading in the column to the right of the last column in the table to create a new column. Create a calculation in the first row of that column. Press the Enter key. Excel will automatically apply the same formula to other cells in that column.

SORTING DATA

SORT A RANGE

1. Select the cell range you want to sort.
2. Select the **Data Tab**| Sort and Filter Group| Sort command.

The **Sort** dialog box will appear.

3. Decide the sorting order (either ascending or descending).
4. Once you are satisfied with your selection, click **OK**.

Excel will sort the range by the selected column.

CUSTOM SORT

1. Follow steps 1 - 3 above then choose **Custom List…**

The Custom Lists dialog box will appear.

2. Select **NEW LIST** from the **Custom Lists:** box.
3. Type the items in the desired custom order in the **List** entries.
4. Click **Add** to save the new sort order.
5. Excel will add the new list to the **Custom Lists:** box. Make sure you select the new custom list and then select **OK**.

The Custom Lists dialog box will close.

6. Click **OK** in the Sort dialog box to perform the custom sort.

Excel will **sort** the worksheet by the custom order.

Sorting Levels Dialog Box
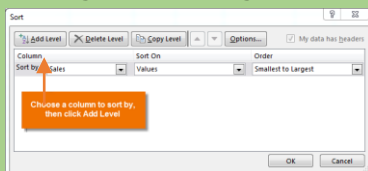
SORTING LEVELS

If you need more control over how you sort your data, you can sort your data by more than one column.

1. Click the **Data Tab| Sort and Filter Group | Sort** command.
2. The **Sort** dialog box will appear.
3. Select the first column you want to sort.
4. Click **Add Level** to add another column to sort.
5. Select the next column you want to sort by and then click **OK**.
6. The Excel will sort the worksheet according to the order you select.

You may apply the instructions above for Sorting data in a range to Sorting data in a table.

FILTERING DATA

1. Select the data that you want to filter.
2. On the click **Data tab |Sort and Filter Group|Filter**.
3. Click the down arrow in the column header to display a list in which you can make filter choices.
4. To select by values in the list, **clear the Select All** check box.
5. Select only the values you want to see, and click **OK**.
6.

FILTER ITEMS BY COLOR

If you have applied different cell or font colors or a conditional format, you can filter by the colors or icons that shown in your table or selected range.

FILTER USING CRITERIA

The **Advanced** command works differently from the **Filter** command in several important ways.

FILTER USING CRITERIA

It displays the **Advanced Filter** dialog box instead of the AutoFilter menu. You must create a separate criteria range that Excel will use as the source for the advanced criteria. You can name a range *Criteria*, and the reference for the range will appear automatically in the **Criteria range box**. You can also define the name *Database* for the list range to be filtered and define the name *Extract* for the area where you want to paste the rows, and these ranges will appear automatically in the **List range** and **Copy to** boxes, respectively.

To create an Advanced Filter, follow these steps:

1. Before filtering, create the Criteria area by copying the column labels in the list range.
2. Click the first cell of the area where you want to place your criteria; click the Paste button on the Home tab.
3. Click a cell in the list range.
4. Click the **Data Tab| Sort and Filter Group| Advanced** command.
5. *Do one of the following*:
   - To filter the list range by hiding rows that do not match your criteria, click **Filter the list, in-place**.
   - To filter the list range by copying rows that match your criteria to another area of the worksheet, click **Copy to another location.** Click in the **Copy to** box and then click the upper-left corner of the area where you want to paste the rows.
   - Click OK.

FILTER USING CRITERIA *continued…*

TIP When you copy filtered rows to another location, you can specify which columns to include in the copy operation. When you filter, enter a reference to the copied column labels in the Copy to box. The copied rows will then include only the columns for which you copied the labels.

GROUP AND OUTLINE

GROUP DATA TO ADD SUBTOTALS

Make sure that each column in a range of data for which you want to calculate subtotals has a label in the first row, contains similar facts in each column, and that the range does not include any blank rows or columns.

INSERT ONE LEVEL OF SUBTOTALS

1. Select a cell in the range.
2. Sort the column that contains the data you want to group by, select that column,
3. On the **Data Tab| Sort and Filter Group|Sort A to Z** *or* **Sort Z to A**
4. On the **Data tab| Outline Group|Subtotal**.
5. In the **At each change in** box, click the column to subtotal.
6. In the **Use function** box, click the summary function that you want to use to calculate the subtotals.
7. In the **Add subtotal to** box, select the check box for each column that contains values that you want to subtotal.

Optionally, you can add an automatic page break following each subtotal, a summary row either above or below the details row.

8. Click **OK** to apply the Subtotals.

REMOVE SUBTOTALS

1. Select a cell in the range that contains subtotals.
2. On the **Data Tab| Outline Group| Subtotal**.
3. In the **Subtotal** dialog box, click **Remove All**.