

Managing Data With Excel

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I. Introduction

A. Students

1. Introduce yourself to your neighbor
2. Discuss what kind of data you want to work with

B. Instructor

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C. Topics

1. Creating or getting data
2. Work with the data

II. Creating Your Data Set (table)

A. Characteristics of a good data set

1. Header row
2. Each row is a record
3. Column for each field
4. No blank rows or columns
5. No spaces in front of data
6. No blank cells
7. Make a simple set of data: firstname, lastname, age. Add 4 records

B. Excel Tables

1. A data set that is formatted as a table that has characteristics and features that make it easier to work with.
2. Characteristics-Compare data set to a table
 - a) *Header row with filters*
 - b) *Banded rows*
 - c) *Totals Row*
 - d) *Calculated Columns*
 - e) *Sizing Handle*
 - f) *Multiple tables on one sheet*
 - g) *Can quickly change formatting-has a ribbon*

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3. Create Table
 - a) *Create the header row*
 - b) *Add the first row of data*
 - c) *Format the first row*
 - d) *Use data validation to add drop down lists*
 - (1) Click in the cell
 - (2) Go the Data ribbon, data validation
 - (3) Use Settings then Allow List
 - (4) In the source box, put the choices separated by commas
 - e) *Convert to a Table*
 - (1) Click in the cell group
 - (2) Go to Insert, Table
 - (3) You can give the table a name in the Design ribbon
 - f) *Each new row will now inherit all the formatting and lists*
4. Working with Tables
 - a) *Change the colors of the Table-Home, Format as Table*
 - b) *Add a Totals Row-Right click on Table, go to Table options*
 - c) *Convert Table back to a Range-Right click on Table, go to Table options*
5. Practice
 - a) *Type a header row with name, date, amount, response*
 - b) *Now fill in the first row with data*
 - c) *Create a drop down list in the first row for the response column with choices of yes, no, maybe*
 - d) *Format the cell in the first row for the date column and the amount column*
 - e) *Make the cell under name bold and red.*
 - f) *Convert the cells to a table*
 - g) *Add three more rows of data*
 - h) *Add a totals row*
6. Questions-

III. How to get Useful Information from your Data

- A. Search/Replace
 1. Use Find and Select on the Home ribbon
 2. You can search and replace formatting also
 3. Practice
 - a) *Search for all the instances of Fruit*
 - b) *Make all the instances of Fruit bold*

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B. Sort

1. Highlight cells in one rows to show they stay together
2. Click in the column you want to sort by and use the buttons on the Home or Data ribbon or the arrow button by the column heading
3. You can use the custom sort for multiple sort criteria

Practice

- a) *Sort by product*
- b) *Sort by country and then product*

C. Filter

1. Filtering limits what you see based on the criteria you choose
2. When you create a data table, filtering is turned on automatically
3. You can turn it on or off on the Data ribbon
4. You can filter by multiple criteria
5. Can also use custom filters

Practice

- a) *Filter to show only United States and Canada*
- b) *Filter to show only Apples*
- c) *Clear all the filters*

D. Subtotals

1. This does not work in tables, you have to convert the table to a range
2. You can subtotal your data by one of your columns or fields and then count, sum or average the information
3. First you need to sort your rows by that column
4. Choose Subtotals and select the item you want to subtotal by and what you want to do with the data
5. Choose where to show the subtotal
6. Go back to subtotal to remove them
7. Practice

- a) *Create subtotals that tell you total sales by country*
- b) *Collapse and expand some of the countries*

E. Pivot Table Demonstration

1. Column is country
2. Row is product
3. Value is amount
4. Filter is category
5. Create a pivot chart

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G. Extras

1. Slicers-Easier Way to Filter
 - a) *Click in data table*
 - b) *Go to Table Tools, Design, Insert Slicer*
 - c) *Choose which fields to create slicers for*
 - d) *You can select multiple areas in a slicer*
 - e) *There is a button to clear selections*
 - f) *There is a new ribbon with options*
 - (1) *Style*
 - (2) *Arrangement and size of buttons*
 - (3) *Selection Pane to control which Slicers are visible*
2. Use a data form to add data
 - a) *Add the option to the quick access toolbar*
 - b) *Use the data form for search*
 - (1) *Click on criteria*
 - (2) *Put in what you are looking for and then click find next*
3. Importing data
 - a) *Locate or prepare your external data-csv file*
 - b) *Go to Data, Get Data, From File*
 - c) *Sources for practice data*
 - (1) *Generate data.com*
 - (2) *Databasetestdata.com (copy to text file)*
 - (3) *Briandunning.com/sample-data*
4. Split data using text to column
 - a) *Insert a blank row*
 - b) *Select data or column*
 - c) *Go to Data, Text to Column, put in none for delimiter*
5. Remove duplicates
 - a) *Click in the column that has the duplicate*
 - b) *Choose remove duplicate*
6. Flash Fill – New with Excel 2013
 - a) *Use Flash Fill to fill out data based on an example.*
 - b) *Flash Fill typically starts working when it recognizes a pattern in your data, and works best when your data has some consistency.*
7. Practice
 - a) *Type John Smith in a cell and copy it down 10 times*
 - b) *Split the name column so you have a first name and last name column*
 - c) *Remove the duplicates*
 - d) *Use Flash Fill to put the first and last name together again*