Excel Next Steps 1



Trust for London Tackling poverty and inequality



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Managing data with tables

The advantages of an Excel table include all of the following:

1) Quick Styles

Add color, banded rows, and header styles with just one click to style your data.

2) Table Names

Give a table a name to make it easier to reference in other formulas.

3) Cleaner Formulas

Excel Formulas are much easier to read and write when working in tables.

4) Auto Expand

Add a new row or column to your data, and the Excel table automatically updates to include the new cells.

5) Filters & Subtotals

Automatically add filter buttons and subtotals that adapt as you filter your data.

6) Dynamic Pivot tables

If you use an Excel Table for the source data of your pivot table, the data range becomes "dynamic". A dynamic range will automatically expand and shrink the table as you add or remove data, so won't have to worry that the pivot table is missing the latest data. When you use a Table for your pivot table, the pivot table will always be in sync with your data.

1. Make your data into a table



Where is the data for your table?

= SAS1:SNS52

My table has headers

OK

Cancel

Cancel

3. A window will open.

Confirm the cells to be

included in the table and that

the data has headers



2. Naming the table

It is good practice to name the table as it makes life much easier later when working with formulas. Naming the formula is basically giving your data set a name which will enable you to recognise which data set you need to be working with.

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3. Formatting the table

There are a number of table formatting options in Excel. The benefit of the table format is that it ensures each new column or row you add to your table will be automatically formatted in the same way.





4. Adding a Total column

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5. Adding a Row Total

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18		/IP Swansea				04/04/1979	30/09/1999			18	
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6. Filtering (Select & Deselect)

56 57	When you have applied the filter, look at the bottom of the sheet to see the total count of the filtered rows.
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7. Filtering (Text filters)

Excel has more advanced filtering options available via text filters:

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4	Margaret Atwood	HMP Bronzefield	18/09/1963	$\stackrel{Z}{A} \downarrow Sort Z to A$		8	2	
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8. Data Slicers

Slicers are visual filters. Using a slicer, you can filter your data (or pivot table **or** pivot chart) by clicking on the type of data you want.

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Conditional formatting

9. Highlight Cell Rules

The Highlight Cells Rules gives you lots of options for formatting your spreadsheet contents e.g. text colour, cell background fill colour etc, based on the values in the cells.

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	contents	satisfy your crit	eria ⁸		7	3	v	alues	under 48	are ¹⁷	47
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	Guid	elines Attendance Pa	rticipants Ment	ors Topic	1 exer	cise Topic 2 e	xerci		l.	(+)	: •



10. Identifying duplicates

Use the Highlight duplicates function in Conditional formatting to identify duplicates



Format cells that contain: Duplicate values with Light Red Fill with Dark Red Text
Duplicate values with Light Red Fill with Dark Red Text
OK Cancel

11. Removing duplicates

AutoSave 💿 💽	℃、 ~	Music Mentors data with	notes.xlsx 🗚 - Saved 🔎	Search		Alice Linell	
File Home Inse	rt Page Layout	Formulas Data	Review View Help	Table Design			ය Share 🖓 Com
Get Data ~ 🔛 From Text/CSV	Recent Sources	ons Refresh Prop All ~ & E	ie. actions		Filter	Text to Column 55 × 10 What	t-If Forecast is v Sheet
Get & Tran	sform Data	Querie	2. Click on the D	Data tab	Sort & Filter	ta Tools	Forecast
A	В	С			н	Remove Duplicate	es (
1 Name	Prison	Date of birth 🛛 🚽		Ľ	Total hours 💌 Poin	ts Iou Delete duplicate ro	ws from a sheet.
2		82	20/01/2002	Z Bass	1		as how as a hand at
1. Click a	nvwhere or	the 🖁	08/02/2012	2 Bass, guitar	9	be checked for due	columns should
	ing which c of		07/06/2015	5 Drums	8	information.	
table to s	select it		05/05/2014	4 Drums 2 Guitar	34	2	
7		15	21/03/2003	3 Guitar	1	2	
8 Harper Lee	HMP Bronzefield	07/09/1949	04/04/2009	9 Guitar		2	
9 Hone Heke	HMP Pentonville	27/04/1983	09/09/2016	5 Guitar		1	
10 Jason Robinson	HMP Swansea	02/02/1950	04/05/1999	9 Guitar		2	
11 Lionel Ritchie	HMP Bristol	08/12/1968	27/04/2007	7 Guitar		1	
12 Lorna Williamson	HMP Holloway	10/04/1948	19/02/2004	4 Guitar		1	
13 Serena Williams	HMP Holloway	31/01/1981	24/11/20			1	
14 John Steinbeck	HMP Pentonville	16/02/1965	21/03/20	Click on the	Remove	1	
15 John Steinbeck	HMP Pentonville	16/02/1965	21/03/20	Dualizatas es	a a a a a a	1	
16 Enid Blyton	HMP Bronzefield	18/05/1961	17/08/19	Duplicates col	mmand	2	
17 Marcus Clarke	HMP Bristol	16/02/1970	21/03/20	hutton		1	
18 David Beckham	HMP Pentonville	19/06/1971	31/01/20	Sutton		1	
19 Max Senski	HMP Swansea	08/03/1980	09/09/201			2	
20 Jane Goodall	HMP Holloway	03/02/1951	04/05/1999	9 Plano, drums	36	1	
21 Jane Goodall	HMP Holloway	03/02/1951	04/05/1999	Plano, drums	36	1	



Remove Duplicates	?	×	
To delete duplicate values, select one duplicates.	or more columns that co	ontain	
Select <u>A</u> ll	All My data has h	neaders	
Columns Name Prison Date of birth Age now Date registered	4. Select the colun (If you select multi duplicate value for containing the dup OK Ca	nns you wan iple columns, r the de-dupl plicate values	t to remove duplicates from. a all columns must contain a lication to happen. The whole row s will be deleted.)
Microsoft Excel 4 duplicate values found a	and removed; 47 unique OK	X values remain.	5. The number or duplicates removed will be displayed in a window. If you realise you made a mistake, use the Undo button.

12. Colour scales

Colour scales give you automatic recolouring based on your range of values – with different options to suit what you are looking to highlight (i.e. is a low number good and so indicated by green or is it of concern and needs to be highlighted in red?)

Fi	le Home	Insert Page Layout	Formulas Da	ta Review	View Help	Acrobat	and a second field			Comments
Pa	ste 💞	oppins v 11 v 3 I U v ⊞ v 🖄 v	$\begin{array}{c c} A^{*} & A^{*} & \equiv \equiv \equiv \\ \hline \\ A^{*} & \equiv \equiv \equiv \end{array}$	≫, °₽ 	General	Condition Formatting	al Format as Cell Table ~ Styles ~	Insert ~ Delete ~ Format ~	∑ ~ A Z ~ Z ~ Sort & Find & Filter ~ Select ~	Analyze Data
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1	Date	MM Supervisor	HMP Holloway	HMP Bristol	HMP Pentonv	НМР І		Swansea	Total attendance	
2	Jan-17	Amina Hussain	8	7	6		Qata Bars >	19	57	
3	Feb-17	Amina Hussain	7	8	5				57	
4	Mar-17	Amina Hussain	8	8	5		Color <u>S</u> cales		58	
5	Mar-17	Amina Hussain	8	8	5		con Sets >		58	
6	Apr-17	Amina Hussain	7	9	11				62	
7	May-17	Aslf Kahn	9	10	10	New New	/ Rule	More R	ules 64	
8	Jun-17	Aslf Kahn	10	8	3	🐼 🤇	r Rules >	19	55	
9	Jul-17	Aslf Kahn	8	8	2	🖽 Man	nage <u>R</u> ules	20	51	
10	Aug-17	Aslf Kahn	8	6	5	10	5	12	46	
11	Sep-17	Asif Kahn	6	7	2	9	4	13	41	
12	Oct-17	Asif Kahn	7	8	4	8	3	16	46	
13	Nov-17	Jon Potter	8	7	3	9	3	17	47	
14	Dec-17	Jon Potter	7	11	12	14	2	18	64	



You can also select More rules and precisely set what you need in terms of formatting based on contents of cells.

New Fo	ormattii	ng Rule					?	\times					
<u>S</u> elect a Rule Type:													
← Format all cells based on their values													
► Forn	► Format only cells that contain												
🛏 Forn	nat only	top or bottom ra	nked va	alues									
🛏 Forn	nat only	values that are a	bove or	below average									
🛏 Forn	nat only	unique or duplic	ate valu	ies									
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Edit the Forma	Rule De t all ce l t Style:	scription: Is based on the 3-Color Scale	ir value	•5:									
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Splitting columns

Often there is a need to break down data to make it easier to work with. For example, if you want to sort people in alphabetical order using their surname you will need to make sure their name is split into first name & surname columns.

Tip: It's a good idea to first create a column to the right of the column you wish to split, for the second part of the column contents to move into.



(A **Delimiter** is a blank space, comma, or other character or symbol that indicates the beginning or end of a character string, word, or data item)

In the preview below. Delimiters Tab Semicolon Comma Tex Space Other	T <u>r</u> eat consecutive delimiters as one t gualifier:	6. Select what delimiter to use to separate the data into columns. In this example the data to split is separated
Data preview Kate White Sorrel Parsons Sue Quilter		7. The wizard displays how the text will be split
Colin Cregen Nine Htet K	Cancel < <u>B</u> ack !	¥ext > Einish

Convert Text to Columns Wizar	d - Step 3 of 3	?	×	
This screen lets you select each col	umn and set the Data Format.			
Column data format				
⊙ <u>T</u> ext	'General' converts numeric values to nu	mbers, date	values	
◯ <u>D</u> ate: DMY ∨	<u>A</u> dvanced			
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Margaret Atwood Usain Bolt			v	
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8. Select the data format for each column. **General** automatically converts the column to the most appropriate format. You can override that now or later after the split

