

# Planning and Using Data Tables in Excel 2010

## PLAN YOUR FIELDS

- Each column in the table will represent one “field” of data to be tracked
- Each row represents one “record”
- There should only be one table per worksheet (or tab) in a workbook

## Layout the Table

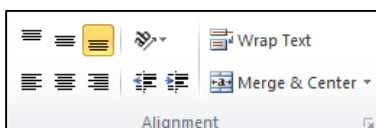
- Enter the labels of each column in Row 1.
- Format these labels so Excel recognizes them as separate from the actual data. (I.E: bold, italic and/or underlined, or even shade the cells)
- **Some things to keep in mind at this point are:**
  - Sorting only works from left to right, so plan the order of the fields accordingly
  - If some records have a certain piece of information, and others do not, there MUST be a field for it in order to track it. It is OK for a record to have a field that is empty
  - If the data has any sort of “Family” or “Group Level” type naming, include that as one field.

## Add the Data

- The table is ready for data using basic data entry skills
- It may be better to use the right arrow key or to use Tab to move across the row. Shift+Tab can be used to move backwards
- **CONSISTENCY** – is very important. Dates should all be formatted the same, same for references to States, months, or anything else that might be repeated in many records.
- **Helpful Key Strokes:**
  1. Ctrl+; (semi colon) inserts the current date
  2. Ctrl+' (apostrophe) copies the contents of the cell immediately above the active cell (similar to Auto Complete or if Auto Complete has been turned off)

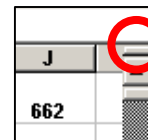
## TIDBITS ALONG THE WAY - FORMATTING

- Use the **Alignment** group from the Home ribbon as a white space tool.



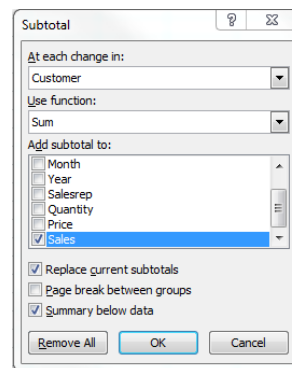
- **Freeze Pane** – freezing the row where the field labels are makes it easy to never lose track of which data is which. Keep control over this tool using the drag n’ drop method.
  - Balance on the small bar at the top of the vertical scroll bar.

- Click and drag it down the spreadsheet and drop it underneath the row of field labels.
- Drop down the Windows menu, select Freeze panes



## Getting the Answers

- **Filters** – One of the fastest and easiest manipulations to work with in a table of data. Click on the cell containing the first field label, drop down the Data Menu, Filters, select Auto Filter. This should apply small drop down arrows to each field.
  - Filters allow the data to be searched, sorted and almost queried based on existing data and some basic Boolean parameters.
  - Filters can be applied to more than one field at a time, the first being the first group, then the second filter being applied “within” the first, and so on, narrowing down the results.
  - Filter results can still be sorted any way desired and will only print the results, not the whole table.
- **Subtotals** – Another very useful tool, especially with very large tables. Subtotals allow for sub-sums, averages, counts and other functions, so it IS useful when dealing with straight text data.
  - Turn off AutoFilters if they are turned on.
  - Sort the table by the column to be referenced (in this screen shot it would be by Author)
  - >Data>Subtotals



- The decisions are to ask “For each change in [what group] do something for me [use which function] and show me that answer in [which column]”.
- Generally leave the bottom check mark defaults, click OK.
- The table is now broken out and has extra rows. Notice the familiar expand and collapse +/- signs.
- **CAVEAT!! In order to make changes to or remove the Subtotals, the active cell must be somewhere in the data (not off to the side somewhere)**

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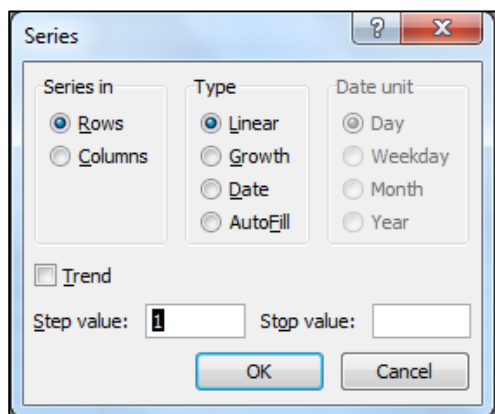
## FAQ's

### Q. How to I make it go back the way it was?

A. >**Insert>Column** (usually in front of A). Label this field "Count" or "Ref". Put a 1 in the field for the first record. Click on the Green Check Mark on the Formula Bar to accept this entry. Hold Shift and press the down arrow key to select this column all the way to the bottom of the table. Click on the Fill button



in the Editing group and select **Series...**



Switch the radio button to "Series in Columns", leave Type as Linear and growth as 1. Click OK. Now the records are number in original order, so they can always be returned by A-Z sorting.

### Q. How can I keep track of how many records there are – even if I did a filter?

A. This is why you might want to keep the first row or two empty. A simple Count formula can be entered there. Be very clear you are sure what field you want to count the records by.

- A Basic Count might be by **Begin Bates** -  
`=Count(B2:B4000)`

|   | A   | B               | C             | D    | E      | F         |
|---|-----|-----------------|---------------|------|--------|-----------|
| 1 | Fix | BEGIN BATES NO. | END BATES NO. | DATE | AUTHOR | RECIPIENT |

- If a Count is needed even when filters are being used, then the SUBTOTAL function would be used.

**Example:** If there was a filter on for **Author**, but the user still wants to know how many records, even when filtered, then use  
`=SUBTOTAL(3,E2:E4000)`

### Q. Can I import data into Excel from other sources? What do I do if someone has already done the import for me?

A. 1) Yes you can. Data can be brought in from many sources including Word tables, .TXT files, Access databases, Outlook, and other data managing applications. The key is know the second application well enough to be comfortable with it's exporting tool and keeping in mind the rules concerning Fields = Columns.

A. 2) If someone has already done an export from a DMS, docketing system or accounting system, then the bulk of the work is done for you. Remember to format the Field Names (labels) to be sure Excel will recognize them as labels. (Bold, Italic, etc.). Also, take a good look at the order of the fields. Remember that multi-level sorting ONLY works from left to right. It is not a simple drag and drop thing to rearrange the fields here. You must use >Insert>Column to first create the column in the position it needs to be in, then select the header of the column in its current position, Cut, select the header of the new empty column and press ENTER. This will Paste the data down and end the Paste cycle. Then select the old column, >Edit>Delete>Entire Column. In order to get rid of the empty space in the table.