



# Managing and Summarizing Large Excel Datasets

## PROPER LIST DESIGN

- List headers should appear at the top of the list.
- No empty rows or columns in the list.
- Avoid merged cells in the list data or headers.

## FILTERING/SORTING DATA

### Apply Filter

Filtering data allows you to pull specific records from your list based on criteria.

- Click into the list – go to the **DATA TAB – FILTER**

### Sorting Data

Sorting your list makes the process of finding data easier. An Excel list can be sorted in ascending, descending alphabetical order, numerically or based on a custom sort order.

- Select a cell in the column you want to sort.
- Go to the **DATA** tab – use the **ASCENDING** or **DESCENDING** order.

### Custom Sort Order

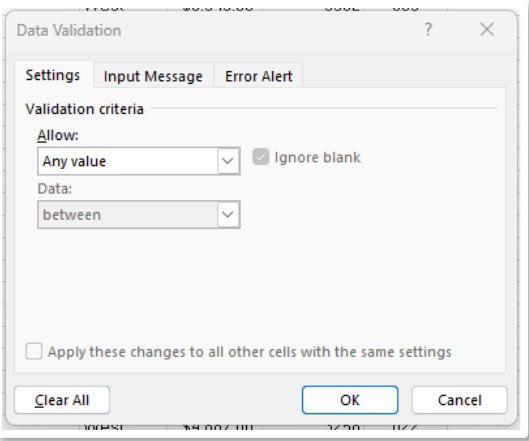
A custom sort allows you to create a custom list of values and use that as a sort order.

- **Create Custom List**
  - Go to **FILE** tab – **OPTIONS**.
  - **ADVANCED** section – **EDIT CUSTOM LIST**
  - **NEW LIST – ADD VALUES** – Click **ADD**

## APPLY DATA VALIDATION RULES

Data Validation setups constraints data entry users must adhere to when inputting data.

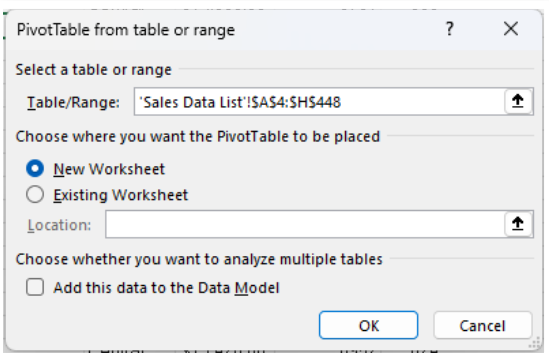
- Select the range the validation rule will be applied to.
- Go to the **DATA** tab – **DATA VALIDATION**



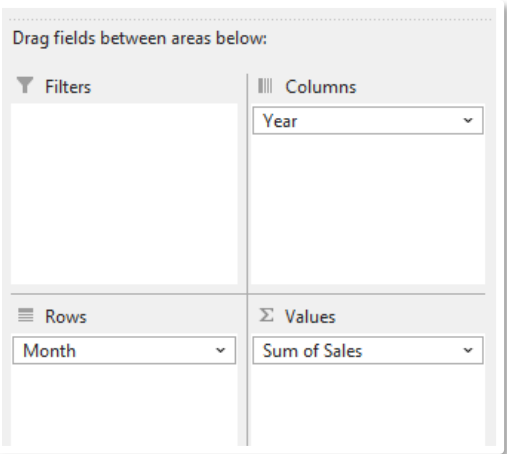
## CREATING PIVOTTABLES

PivotTables provide the ability to summarize large datasets into Rows, Columns and Values.

- Click into the list
- Go to the **INSERT** tab – **PIVOTTABLE**
  - Confirm the data range to be include and if you want the PivotTable on an existing or new worksheet



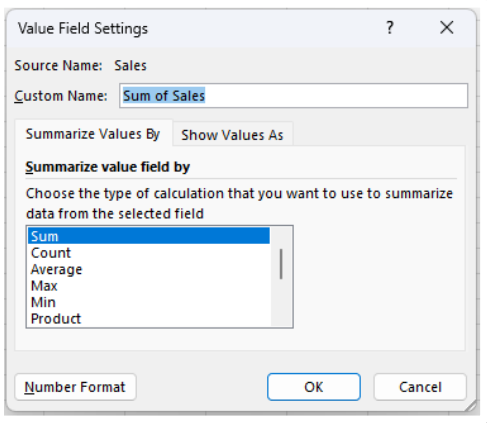
- Drag fields from the PivotTable **FIELD LIST** into the **ROWS**, **COLUMNS** and **VALUES** sections to summarize the data



## PIVOTTABLE CALCULATIONS

PivotTable calculations can be modified to various aggregate type functions, including SUM, MIN, MAX, AVERAGE, etc....

- Right Click the field name in the **VALUES** section – **VALUE FIELD SETTINGS**
- Select the proper Function to Summarize the Value Field



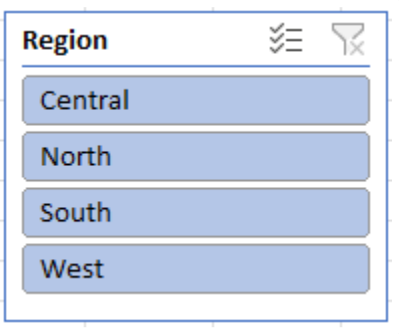
## GROUPING PIVOTTABLE DATA

- Highlight the ROW values to be GROUPED in the PivotTable
- Go to the PivotTable **ANALYZE** tab and select **GROUP SELECTION**
  - If the ROW value is a **DATE**, select the **GROUP FIELD** option

## FILTERING PIVOTTABLE DATA

PivotTable can be filtered using two methods.

1. **FILTERS**
  - a. Drag a field to the **FILTERS** section of the PivotTable
2. **SLICERS**
  - a. Click into the **PivotTable** – go to the **PivotTable ANALYZE** tab – **INSERT SLICER**
  - b. Select the field to use as the filter value



## PIVOT CHARTS

Pivot Charts are connected to the PivotTable the chart uses as the source. Any edits to the layout of the PivotTable will update the chart as well.

- Click into the PivotTable
- Go to the **INSERT** tab – select the type of chart for the Pivot Chart

## FORMAT LIST AS TABLE

Formatting an Excel list as a table offers various options that would otherwise not be available to large datasets, including;

- Table Formatting (Alternating Rows/Columns)
- Total Row
- Table Names in place of a range reference
- Slicers for Filtering the Table data

### FORMAT AS TABLE

- Click into the list
- Go to the **HOME** tab – **FORMAT LIST AS TABLE** – pick the formatting style



### SHORTCUT KEY

- Use *CONTROL + L* to format the list as a table

## INTRO TO POWER QUERY

Excel Power Query is part of the IMPORT options found on the Excel DATA tab.

Power Query allows you to import data from various sources, including;

- Excel Workbooks
- Excel Tables
- External Databases (MS ACCESS)
- Text Files
- Webpages

