CSCI-1102: Introduction to Computing

Microsoft Excel 2: Filtering Data

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Filtering Introduction

- If your worksheet contains a lot of content, it can be difficult to find information quickly.

- Filters can be used to narrow down the data in your worksheet, allowing you to view only the information you need.

To filter data

▶ In our example, we'll apply a filter to an equipment log worksheet to display only the laptops and projectors that are available for checkout.

1 In order for filtering to work correctly, your worksheet should include a **header row**, which is used to identify the name of each column. In our example, our worksheet is organized into different columns identified by the header cells in row 1: **ID#**, **Type**, **Equipment Detail**, and so on.

	A	B	C	D	E	F
1	ID #	Type	Equipment Detail	Checked Out	Checked In	Checked Out By
2	3000	Camera	Saris Lumina Digital Camera	12-May-13	15-May-13	Shannon Nguyen
3	3005	Camera	Saris Zoom Z-60 Digital Camera	27-Jul-13	06-Aug-13	Sela Shepard
4	3070	Camera	Omega PixL Digital Camcorder	06-Oct-13		Min Seung
5	1021	Laptop	15" EDI SmartPad L200-3	15-Sep-13		Sofie Ragnar
6	1022	Laptop	15" EDI SmartPad L200-3	14-Aug-13	16-Aug-13	Hank Sorenson
7	1023	Laptop	15" EDI SmartPad L200-3	08-Aug-13	15-Aug-13	Jennifer Weiss
8	1025	Laptop	15" EDI SmartPad L200-4X	26-Sep-13	04-Oct-13	Min Seung
9	1031	Laptop	17" Saris X-10 Laptop	04-Oct-13		Nick Ortiz
10	1032	Laptop	17" Saris X-10 Laptop	19-Sep-13		Stanley Geyer
11	1033	Laptop	17" Saris X-10 Laptop	24-Sep-13	26-Sep-13	George D'Agosta

To filter data

2 Select the **Data** tab, then click the **Filter** command.
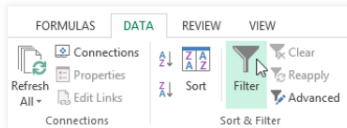
3 A **drop-down arrow**
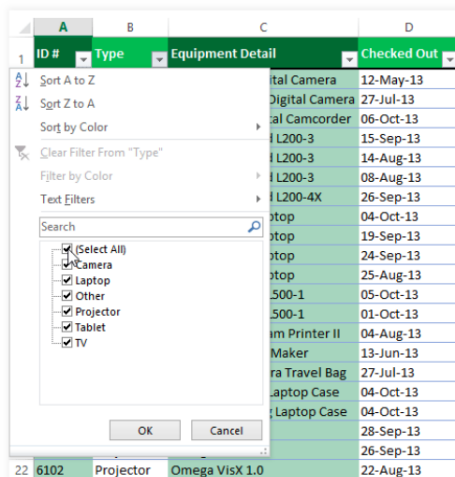

will appear in the header cell for each column.

4 Click the **drop-down arrow** for the column you want to filter. In our example, we will filter column **B** to view only certain types of equipment.

To filter data

5 The **Filter menu** will appear.

6 **Uncheck** the box next to **Select All** to quickly deselect all data.

To filter data

7 **Check** the boxes next to the data you want to filter, then click **OK**. In this example, we will check **Laptop** and **Tablet** to view only those types of equipment.

Check only the data you want to view, then click OK

To filter data

8 The data will be **filtered**, temporarily hiding any content that doesn't match the criteria. In our example, only laptops and tablets are visible.

	A	B	C	D	E	F
1	ID #	Type	Equipment Detail	Checked Out	Checked In	Checked Out By
5	1021	Laptop	15" EDI SmartPad L200-3	15-Sep-13	01-Oct-13	Sofie Ragnar
6	1022	Laptop	15" EDI SmartPad L200-3	14-Aug-13	16-Aug-13	Hank Sorenson
7	1023	Laptop	15" EDI SmartPad L200-3	08-Aug-13	15-Aug-13	Jennifer Weiss
8	1025	Laptop	15" EDI SmartPad L200-4X	26-Sep-13	04-Oct-13	Min Seung
9	1031	Laptop	17" Saris X-10 Laptop	04-Oct-13		Nick Ortiz
10	1032	Laptop	17" Saris X-10 Laptop	19-Sep-13		Stanley Geyer
11	1033	Laptop	17" Saris X-10 Laptop	24-Sep-13	26-Sep-13	George D'Agosta
12	1034	Laptop	17" Saris X-10 Laptop	25-Aug-13	27-Aug-13	Jay Peralta
26	1011	Tablet	Saris SlimTab Pro	04-Aug-13		Jay Peralta
27	1012	Tablet	Saris SlimTab Pro	29-Sep-13		August Zorn
31						
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To apply multiple filters

▶ Filters are cumulative, which means you can apply multiple filters to help narrow down your results.

▶ In this example, we've already filtered our worksheet to show laptops and projectors, and we'd like to narrow it down further to only show laptops and projectors that were checked out in August.

1 Click the **drop-down arrow** for the column you want to filter. In this example, we will add a filter to column **D** to view information by date.

To apply multiple filters

2   The **Filter menu** will appear.

3   **Check** or **uncheck** the boxes depending on the data you want to filter, then click **OK**. In our example, we'll uncheck everything except for **August**.
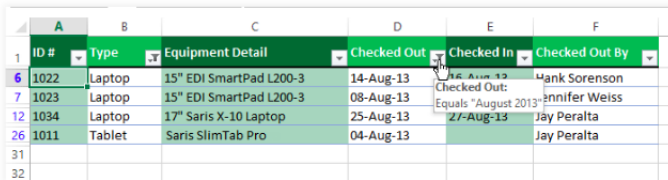
To apply multiple filters

4 The new filter will be applied. In our example, the worksheet is now filtered to show only laptops and tablets that were checked out in August.

	A	B	C	D	E	F
1	ID #	Type	Equipment Detail	Checked Out	Checked In	Checked Out By
6	1022	Laptop	15" EDI SmartPad L200-3	14-Aug-13	16-Aug-13	Hank Sorenson
7	1023	Laptop	15" EDI SmartPad L200-3	08-Aug-13	15-Aug-13	Jennifer Weiss
12	1034	Laptop	17" Saris X-10 Laptop	25-Aug-13	27-Aug-13	Jay Peralta
26	1011	Tablet	Saris SlimTab Pro	04-Aug-13		Jay Peralta
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To clear a filter

- After applying a filter, you may want to remove – or clear – it from your worksheet so you'll be able to filter content in different ways.

1 Click the **drop-down arrow** for the filter you want to clear. In our example, we'll clear the filter in column **D**.

2 The **Filter menu** will appear.

To clear a filter

3 Choose **Clear Filter From [COLUMN NAME]** from the Filter menu. In our example, we'll select **Clear Filter From "Checked Out"**.

To clear a filter

4 The filter will be cleared from the column. The previously hidden data will be displayed.

	A	B	C	D	E	F
1	ID #	Type	Equipment Detail	Checked Out	Checked In	Checked Out By
5	1021	Laptop	15" EDI SmartPad L200-3	15-Sep-13	01-Oct-13	Sofie Ragnar
6	1022	Laptop	15" EDI SmartPad L200-3	14-Aug-13	Checked Out: (Showing All)	Hank Sorenson
7	1023	Laptop	15" EDI SmartPad L200-3	08-Aug-13	15-Aug-13	Jennifer Weiss
8	1025	Laptop	15" EDI SmartPad L200-4X	26-Sep-13	04-Oct-13	Min Seung
9	1031	Laptop	17" Saris X-10 Laptop	04-Oct-13		Nick Ortiz
10	1032	Laptop	17" Saris X-10 Laptop	19-Sep-13		Stanley Geyer
11	1033	Laptop	17" Saris X-10 Laptop	24-Sep-13	26-Sep-13	George D'Agosta
12	1034	Laptop	17" Saris X-10 Laptop	25-Aug-13	27-Aug-13	Jay Peralta
26	1011	Tablet	Saris SlimTab Pro	04-Aug-13		Jay Peralta
27	1012	Tablet	Saris SlimTab Pro	29-Sep-13		August Zorn
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To remove all filters

To remove all filters from your worksheet, click the **Filter** command on the **Data** tab.
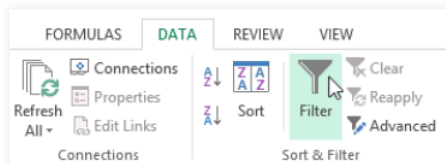
Advanced filtering

- If you need to filter for something specific, basic filtering may not give you enough options.

- Fortunately, Excel includes many advanced filtering tools, including search which can narrow your results to help find exactly what you need.

To filter with search

- Excel allows you to search for data that contains an exact phrase, number, date, and more. In our example, we'll use this feature to show only Saris brand products in our equipment log.

1 Select the **Data** tab, then click the **Filter** command. A **drop-down arrow** will appear in the header cell for each column. Note: If you've already added filters to your worksheet, you can skip this step.

2 Click the **drop-down arrow** for the column you want to filter. In our example, we'll filter column **C**.

	A	B	C	D	E	F
1	ID #	Type	Equipment Detail	Checked Out	Checked In	Checked Out By
2	3000	Camera	Saris Lumina Digital Camera	12-May-13	15-May-13	Shannon Nguyen
3	3005	Camera	Saris Zoom Z-60 Digital Camera		06-Aug-13	Sela Shepard
4	3070	Camera	Omega PixL Digital Camcorder	06-Oct-13		Min Seung
5	1021	Laptop	15" EDI SmartPad L200-3	15-Sep-13	01-Oct-13	Sofie Ragnar
6	1022	Laptop	15" EDI SmartPad L200-3	14-Aug-13	16-Aug-13	Hank Sorenson
7	1023	Laptop	15" EDI SmartPad L200-3	08-Aug-13	15-Aug-13	Jennifer Weiss
8	1025	Laptop	15" EDI SmartPad L200-4X	26-Sep-13	04-Oct-13	Min Seung
9	1031	Laptop	17" Saris X-10 Laptop	04-Oct-13		Nick Ortiz
10	1032	Laptop	17" Saris X-10 Laptop	19-Sep-13		Stanley Geyer

To filter with search

3 The **Filter menu** will appear. Enter a **search term** into the **search box**. Search results will appear automatically below the **Text Filters** field as you type. In our example, we'll type **saris** to find all Saris brand equipment.

4 When you're done, click **OK**.

To filter with search

5 The worksheet will be **filtered** according to your search term. In our example, the worksheet is now filtered to show only Saris brand equipment.

	A	B	C	D	E	F
1	ID #	Type	Equipment Detail	Checked Out	Checked In	Checked Out By
2	3000	Camera	Saris Lumina Digital Camera	12-May-13	15-May-13	Shannon Nguyen
3	3005	Camera	Saris Zoom Z-60 Digital Camera	27-Jul-13	06-Aug-13	Sela Shepard
9	1031	Laptop	17" Saris X-10 Laptop	04-Oct-13		Nick Ortiz
10	1032	Laptop	17" Saris X-10 Laptop	19-Sep-13		Stanley Geyer
11	1033	Laptop	17" Saris X-10 Laptop	24-Sep-13	26-Sep-13	George D'Agosta
12	1034	Laptop	17" Saris X-10 Laptop	25-Aug-13	27-Aug-13	Jay Peralta
15	3800	Other	U-Go Saris DigiCam Printer II	04-Aug-13	05-Aug-13	Hank Sorenson
16	3900	Other	U-Go Saris Label Maker	13-Jun-13	20-Jun-13	Clint Gosse
23	6200	Projector	Saris Lux T-80	01-Sep-13	04-Sep-13	Jolie Chaturvedi
24	6301	Projector	Saris Lux T-81 Lite	10-Sep-13		Marques Herndon
25	6302	Projector	Saris Lux T-81 Lite	08-Sep-13	15-Sep-13	Dean Sorenson
26	1011	Tablet	Saris SlimTab Pro	04-Aug-13		Jay Peralta
27	1012	Tablet	Saris SlimTab Pro	29-Sep-13		August Zorn
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To use advanced text filters

- Advanced text filters can be used to display more specific information, such as cells that contain a certain number of characters, or data that excludes a specific word or number.

- In our example, we've already filtered our worksheet to only show items with Other in the Type column, but we'd like to exclude any item containing the word case.

To use advanced text filters

1 Select the **Data** tab, then click the **Filter** command. A **drop-down arrow** will appear in the header cell for each column. Note: If you've already added filters to your worksheet, you can skip this step.

2 Click the **drop-down arrow** for the column you want to filter. In our example, we'll filter column **C**.

To use advanced text filters

3 The **Filter menu** will appear. Hover the mouse over **Text Filters**, then select the desired text filter from the drop-down menu. In our example, we'll choose **Does Not Contain...** to view data that does not contain specific text.

To use advanced text filters

④ The **Custom AutoFilter** dialog box will appear. Enter the **desired text** to the right of the filter, then click **OK**. In our example, we'll type **case** to exclude any items containing this word.
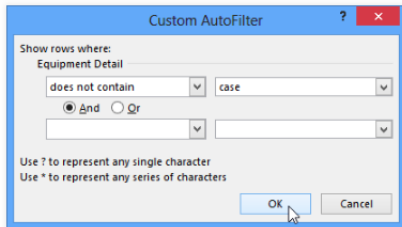
⑤ The data will be filtered by the selected text filter. In our example, our worksheet now displays items in the **Other** category that do not contain the word **case**.

To use advanced date filters

- Advanced date filters can be used to view information from a certain time period, such as last year, next quarter, or between two dates.

- In this example, we will use advanced date filters to view only equipment that has been checked out today.

To use advanced date filters

1 Select the **Data** tab, then click the **Filter** command. A **drop-down arrow** will appear in the header cell for each column. Note: If you've already added filters to your worksheet, you can skip this step.

2 Click the **drop-down arrow** for the column you want to filter. In our example, we will filter column **D** to view only a certain range of dates.

	A	B	C	D	E	F
1	ID #	Type	Equipment Detail	Checked Out	Checked In	Checked Out By
2	3000	Camera	Saris Lumina Digital Camera	12-May-13		Shannon Nguyen
3	3005	Camera	Saris Zoom Z-60 Digital Camera	27-Jul-13		Sela Shepard
4	1021	Laptop	15" EDI SmartPad L200-3	15-Sep-13		Sofie Ragnar
5	1022	Laptop	15" EDI SmartPad L200-3	14-Aug-13	16-Aug-13	Hank Sorenson
6	1023	Laptop	15" EDI SmartPad L200-3	08-Aug-13	15-Aug-13	Jennifer Weiss
7	3070	Camera	Omega PixL Digital Camcorder	06-Oct-13		Min Seung
8	1025	Laptop	15" EDI SmartPad L200-4X	26-Sep-13	04-Oct-13	Min Seung
9	1031	Laptop	17" Saris X-10 Laptop	04-Oct-13		Nick Ortiz
10	1032	Laptop	17" Saris X-10 Laptop	19-Sep-13		Stanley Geyer
11	1033	Laptop	17" Saris X-10 Laptop	24-Sep-13	26-Sep-13	George D'Agosta
12	1034	Laptop	17" Saris X-10 Laptop	25-Aug-13	27-Aug-13	Jay Peralta

To use advanced date filters

3 The **Filter menu** will appear. Hover the mouse over **Date Filters**, then select the desired date filter from the drop-down menu. In our example, we'll select **Today** to view equipment that has been checked out on today's date.

To use advanced date filters

4 The worksheet will be filtered by the selected date filter. In our example, we can now see which items have been checked out **today**.

	A	B	C	D	E	F
	ID #	Type	Equipment Detail	Checked Out	Checked In	Checked Out By
7	3070	Camera	Omega PixL Digital Camcorder	06-Oct-13		Min Seung
31						
32						

✳ If you're working along with the example file, your results will be different from the images above. If you want, you can change some of the dates so the filter will give more results.

To use advanced number filters

- Advanced number filters allow you to manipulate numbered data in different ways.

- In this example, we will display only certain types of equipment based on the range of ID numbers.

To use advanced number filters

1 Select the **Data** tab on the Ribbon, then click the **Filter** command. A **drop-down arrow** will appear in the header cell for each column. Note: If you've already added filters to your worksheet, you can skip this step.

2 Click the **drop-down arrow** for the column you want to filter. In our example, we'll filter column **A** to view only a certain range of ID numbers.

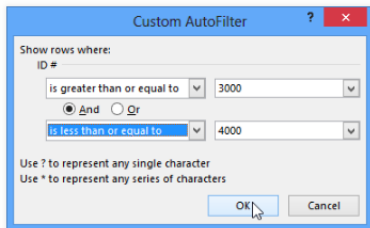|	A	B	C	D	E	F
1	ID #	Type	Equipment Detail	Checked Out	Checked In	Checked Out By
2	3000		Saris Lumina Digital Camera	12-May-13	15-May-13	Shannon Nguyen
3	3005		Saris Zoom Z-60 Digital Camera	27-Jul-13	06-Aug-13	Sela Shepard
4	1021	Laptop	15" EDI SmartPad L200-3	15-Sep-13	01-Oct-13	Sofie Ragnar
5	1022	Laptop	15" EDI SmartPad L200-3	14-Aug-13	16-Aug-13	Hank Sorenson
6	1023	Laptop	15" EDI SmartPad L200-3	08-Aug-13	15-Aug-13	Jennifer Weiss
7	3070	Camera	Omega PixL Digital Camcorder	06-Oct-13		Min Seung
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9	1031	Laptop	17" Saris X-10 Laptop	04-Oct-13		Nick Ortiz
10	1032	Laptop	17" Saris X-10 Laptop	19-Sep-13		Stanley Geyer
11	1033	Laptop	17" Saris X-10 Laptop	24-Sep-13	26-Sep-13	George D'Agosta
12	1034	Laptop	17" Saris X-10 Laptop	25-Aug-13	27-Aug-13	Jay Peralta

To use advanced number filters

3. The **Filter menu** will appear. Hover the mouse over **Number Filters**, then select the desired number filter from the drop-down menu. In our example, we will choose **Between** to view ID numbers between a specific number range.

To use advanced number filters

4. The **Custom AutoFilter** dialog box will appear. Enter the desired **number(s)** to the right of each filter, then click **OK**. In our example, we want to filter for ID numbers greater than or equal to **3000** but less than or equal to **4000**, which will display ID numbers in the 3000-4000 range.

5. The data will be filtered by the selected number filter. In our example, only items with an ID number between **3000** and **4000** are visible.

Reference

https://edu.gcfglobal.org/en/excel2013/