LESSON HANDOUT

Filtering and Sorting in Excel

Why:

Filtering and sorting data is a easy way to:
- Understand your data set
- Gain immediate answers
- Identify and clean missing or incorrect values (for a small data set)

When:

You'll usually use these skills to:
- Understand the scope of the data set
- To clean the data set

Useful Tips:

Alignment

Excel automatically aligns values it recognises as numbers or dates to the right.

| JobTitle	BasePay
Accounting supervisor	10966.80
Accounting supervisor	12019.62
Accounting supervisor	24522.66
Accounting supervisor	30541.48
Accounting supervisor	32971.27
Accounting supervisor	33644.66
Accounting supervisor	32886.86
Accounting supervisor	46771.68
Accounting supervisor	68888.99
Accounting supervisor	81805.11
Accounting supervisor	87929.23

Example: Excel has recognised column D as a numerical and aligned it to the right

Cleaning

Always record your cleaning steps in a separate tab.

Change formatting of Data

- On the Home Tab, use the dropdown to change the Formatting of your selected cells

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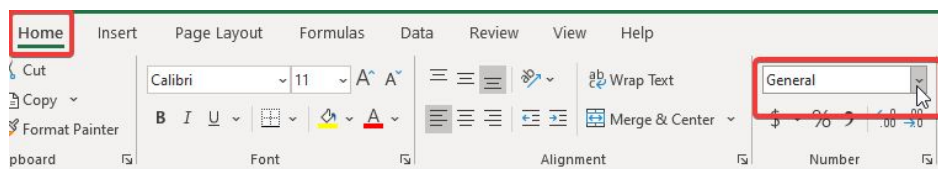
Note: you'll be given a preview of each formatting so you can better select the correct option for your data. See the example below which has a number '305.43'. This relates to **pay**, so I would choose **currency** or **accounting** as my format.
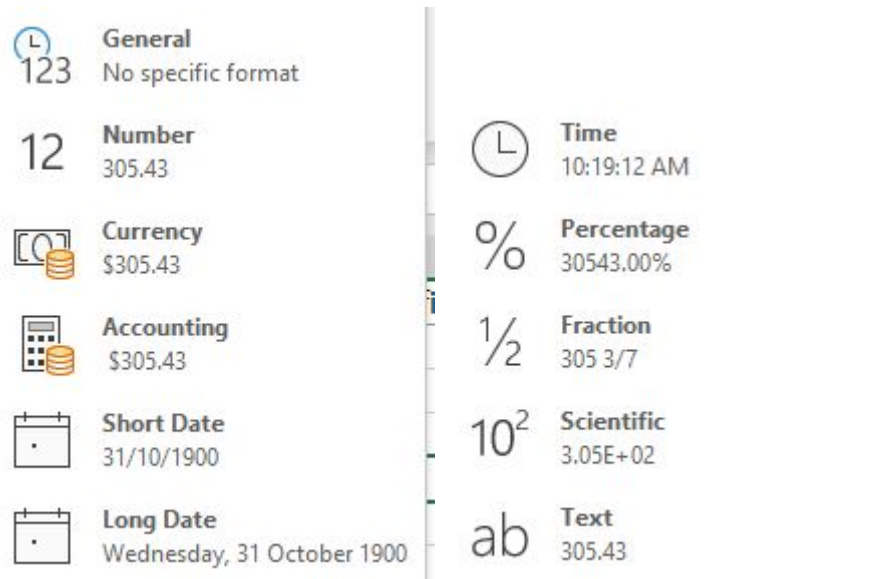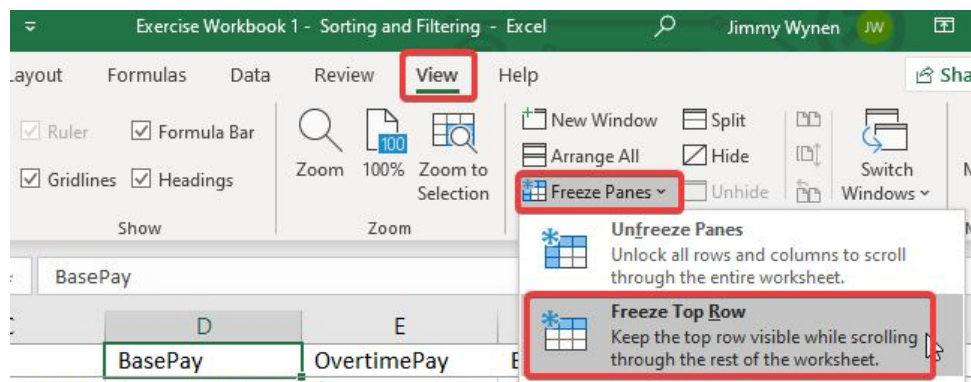

Increase / Decrease Decimal places

- On the home tab, under the formatting dropdown use the 2 buttons to increase or decrease the decimal places in your selected cells
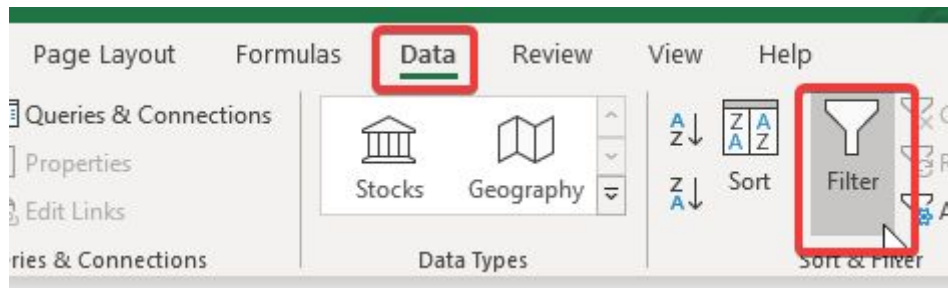

  o
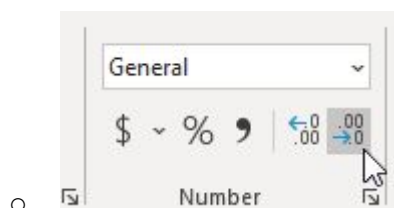
Freeze top Row

- On the View Tab, click 'Freeze Panes' > 'Freeze Top Row'

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Filtering

- With a cell in your data selected, In the Data tab, click on 'Filter'
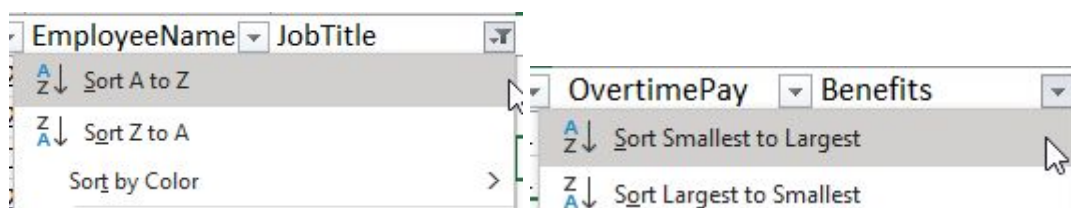

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  - Shortcut: Ctrl + Shift + L
- Select the drop-down on the right of a column to filter that column
- You can now select and deselect values you want to be included in the table as well as searching specific values you want to include in your table

Clear filters

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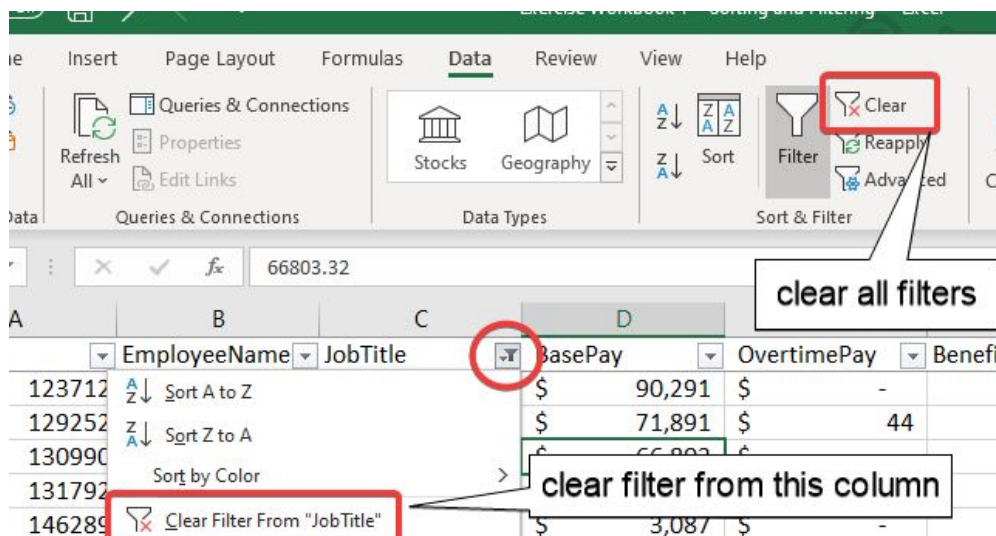
Sort

- Sort A to Z / Z to A for text columns, or Smallest to Largest / Largest to Smallest for number columns

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Status bar

- Use the status bar located at the bottom of the Excel window to see valuable information about the selected cells
- Right click to customise what is displayed on the status bar. Recommended is having the below 6 all ticked:

✓ A̲verage	$59,370
✓ C̲ount	5
✓ Numerical Coun̲t	5
✓ Mi̲nimum	$3,087
✓ Max̲imum	$90,291
✓ S̲um	$296,850

Copy data down to all available cells

- With your cell selected, double click on the bottom right corner

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  - Tip: make sure your cursor is showing ✚ instead of ✛
  - Tip: you can also click and drag to replace values with the highlighted cell

Paste: Transpose

Pastes vertical cells horizontally, and vice versa (important for recording cleaning steps!)

- Right click > Paste Options > Transpose

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