

MICROSOFT EXCEL, PART II

Displaying, Importing and Analyzing Data

Allyson Mower, Instructor amower@lib.med.utah.edu



DISPLAYING DATA

Displaying Data

If you are working within a large spreadsheet, there are many ways to search, display, import and analyze particular pieces of information. This tutorial features several of those methods.

- *Sort*
Sorting is one of the easiest ways to order and display parts of your worksheet. Go to **Data > Sort... > Ascending or Descending** or use the A to Z icon on the toolbar. The feature will sort by column and you can decide if you want to expand your selection or keep it limited to just the column.

- *Auto Filter and Advanced Filter*
Filtering allows you to choose pieces of your data to display by inserting pull down menus. Select the row where you want the pull down menus to be placed and go to **Data > Filter > AutoFilter**. Within the pull down menu, you can show **ALL** data, **Top 10** or **Custom** pieces. Use **Custom** to refine your filtering from columns to individual instances of a word and/or series of characters.

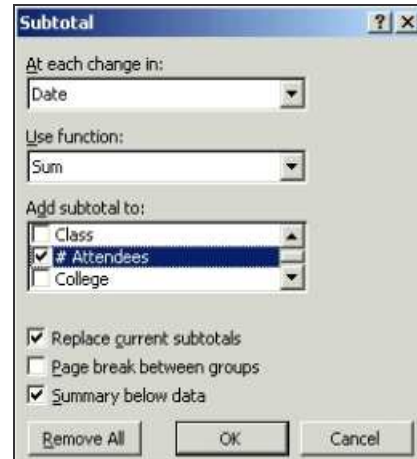
Advanced Filter lets you copy the filtered list (all or part) to another location and also has the option of filtering for **unique records only**.



- *Form*
If you need to search your worksheet, use the Form feature. Go to **Data > Form**. The default option is to scroll through individual records using the **Find Prev** and **Find Next** buttons. You can also select the **Criteria** button and enter the specific piece of information you need to search. Once you have filled in the areas of the criteria, continue to use the Find Next button and it will jump to each record that contains the criteria you have input.



- *Subtotal*
Use the subtotal feature to organize your worksheet by category. Go to **Data > Subtotal**. You will need to choose where the subtotals are positioned, what function should be used to create the subtotals and if the subtotals should be added to another column. By enabling subtotals you will activate the outline feature displayed on the far left side of the document. This feature allows you to hide specific grouping.



- *Freeze and Split*
When browsing through your worksheet, you can continually display the column headings in order to maintain the knowledge of your whereabouts. Go to **Window > Freeze Panel** or **Window > Split**. Either feature locks the area above the location of your cursor. Splitting essentially allows you to have two different scrolling points.

IMPORTING AND EXPORTING DATA

Import Text Files

To import data from a text file go to **Data > Import External Data > Import Data**. Select the drive, folder, and then the document to be imported. You will need to select where the data should be placed. You may also drag and move the document or copy and paste.

Import From or Export to Other Microsoft Applications

Open the document to be imported. Select and copy the document. Within Excel, select the area where the information should be imported to, go to **Edit > Paste Special** to complete the import. Use the reverse method to export an Excel document into another application.

- *Export Worksheets into Access*
Open the Excel worksheet, select data to be exported. Go to **Edit > Copy**. Open an Access database, go to **Edit > Paste**. The data will be formatted into an Access table. You can also open Access, go to **File > Get External Data** and choose which Excel file to import.

Import HTML File

Go to **Data > Import External Data > New Web Query**. Select the web tables you need, choose **Options > Full HTML** and then press 'Import'. Excel will ask where you want the data to be placed. Refresh the data within Excel by using the red exclamation point on the table's toolbar.

CHARTING AND ANALYZING DATA

Charts and Graphs

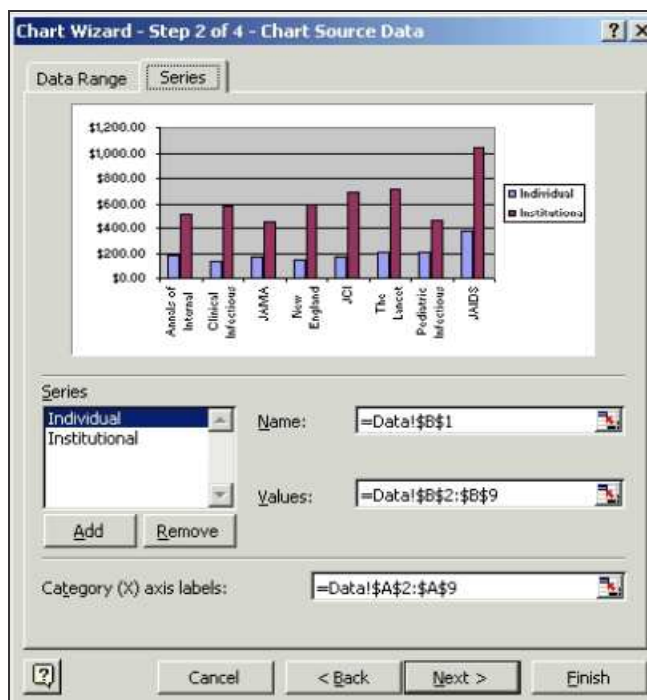
Charts and graphs provide the means to display and analyze all or part of your workbook. Most chart types allow up to 255 different data series; you can also display multiple chart types within one.

- **Go to Insert > Chart**

Step 1: Chart Type. You may choose from ‘Standard Type’ or ‘Custom Type.’ Standard offers basic, easy-to-read charts that can be customized by selecting one of the subtypes. Custom types have more graphics as well as multiple kinds within one type. Click **Next**.

Step 2: Chart Source Data. If the default data selection is incorrect, you can change it by going into your worksheet and highlighting the desired range.

Data are categorized into either **Rows** or **Columns**, select what’s applicable. Notice the **Series** tab, if you need to add a series that isn’t included already, click **Add**. Place your cursor in the Name field, select the cell that contains the category name, then place your cursor in the Values field and select the inclusive range. Click **Next**.



Step 3: Chart Options. Use this step to add titles, determine axis values, alter gridlines, modify labels and position the legend. Click **Next**.

Step 4: Chart Location. Select the radio button to determine chart location. Click **Finish**.

Editing a Chart

Right click within the chart background to edit layout colors, chart type, chart options and/or location. Use your right mouse button on an individual bar to edit color patterns, change series data, add error bars and modify bar style.

Pivot Table and Pivot Chart

Pivot Table analyzes the values in fields of a worksheet in relationship to other fields. Use Pivot Chart to display the analysis. Go to **Data > PivotTable and PivotChart Report**. This will generate the PivotTable wizard.

Step 1: Choose Data Source and Report Style. Click **Next**.

Step 2: Enter Data Range. Click **Next**.

Step 3: Layout and Location. Click on the **Layout** button; drag the field buttons on the right into the diagram on the left. Click **OK**. Choose location as new or existing worksheet. Click **Finish**.

