



# Excel Chapter 4: Organizing Large Amounts of Data



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# Learning Objectives

- After studying this chapter, you will be able to:
  - ▲ Start a workbook from a template
  - ▲ Import and export data
  - ▲ Change worksheet view options
  - ▲ Sort and filter data
  - ▲ Create IF functions
  - ▲ Apply data validation rules
  - ▲ Use the Scale to Fit options
  - ▲ Create and modify tables

# Starting with a Template

## ■ Default template is Excel Workbook

A	B	C	D	E	F	G	H	I	J	K	L
PAYROLL CALCULATOR			<div>GENERATE PAY STUBS</div> <div>PERIOD ENDING: 4/8/2013</div>								
ID	Employee Name	Reg Hours Worked	Vacation Hours	Sick Hours	Overtime Hours	Overtime Rate	Gross Pay	Taxes and Ded's	Other Ded's	Net Pay	
1001	Tony Smith	50	5	1			\$560.00	\$273.08	\$20.00	\$266.92	
1002	David Jones	40					\$320.00	\$131.76		\$188.24	
1003	Denise Smith	35	3				\$532.00	\$240.43		\$291.57	
1008	Sebastien Motte	50	5	1			\$1,120.00	\$441.16		\$678.84	
1011	Isabelle Scemla	40			2	\$15.00	\$430.00	\$223.62		\$206.39	
1012	David Bristol	40	5	1			\$552.00	\$270.04		\$281.96	
1025	Anne Weiler	36		2	1	\$18.00	\$474.00	\$225.36	\$25.00	\$223.64	
1032	Luka Abrus	40	5	1			\$460.00	\$175.03	\$50.00	\$234.97	
1049	David Ludwig	40	1				\$615.00	\$259.01	\$23.00	\$332.99	
Totals	9	371	24	6	3		\$5,063.00	\$2,239.47	\$118.00	\$2,705.53	

Worksheet structure, formatting, and formulas are in place in template.

## ■ Choose from online collection

## ■ Create your own custom template



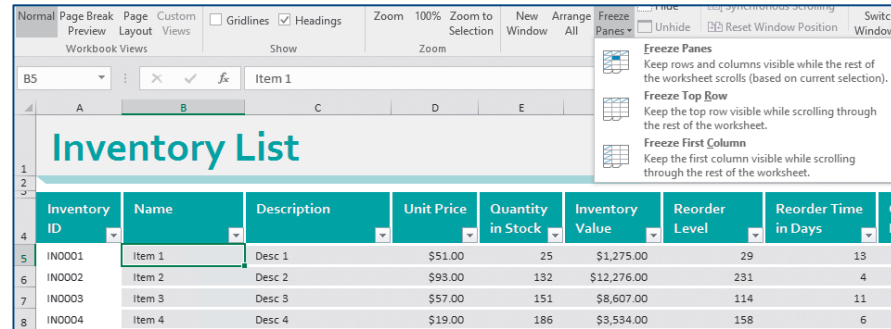
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# Importing and Exporting Data

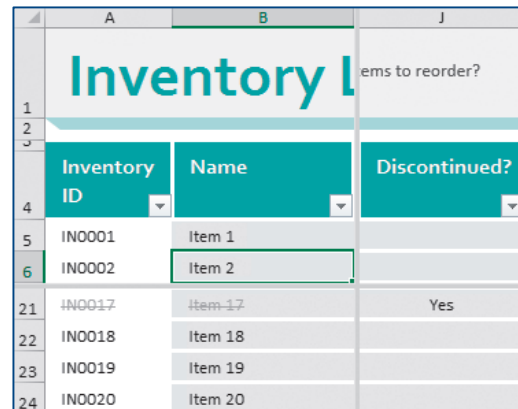
- Create CSV (Comma Separated Value) file to export to other programs
- Use Save as Type option
- Import and export between Word, Excel, Access, accounting, and data software

# Adjust View Options for Large Worksheets

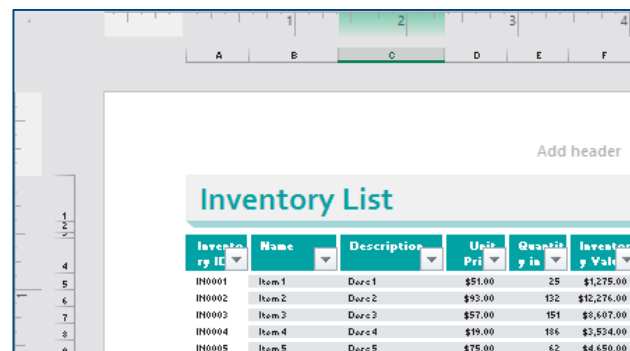
## ■ Freeze Panes



## ■ Split a Window



## ■ Change Views



# Sort and Filter to Organize Data




## ■ Using Sort and Filter

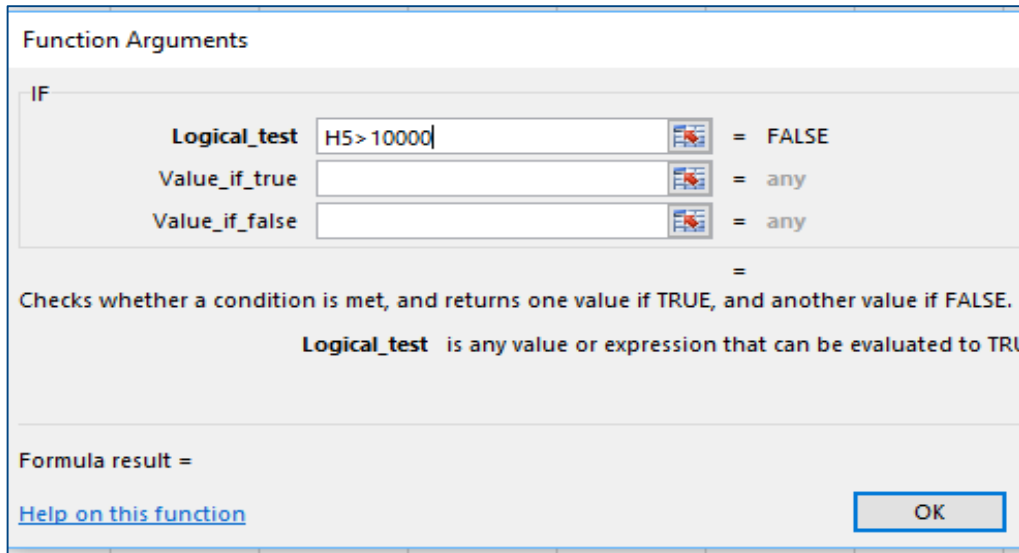
- ▲ Sort by multiple columns in ascending or descending order

- ▲ Filter out data you don't want by unchecking columns

- ▲ Create custom filters

# Perform Advanced Calculations

- All functions have a name and required arguments
- Using the IF Function 
  - ▲ Determines a value for a formula with two possible outcomes; one if the value is True and another if False
  - ▲ Contains three function arguments:

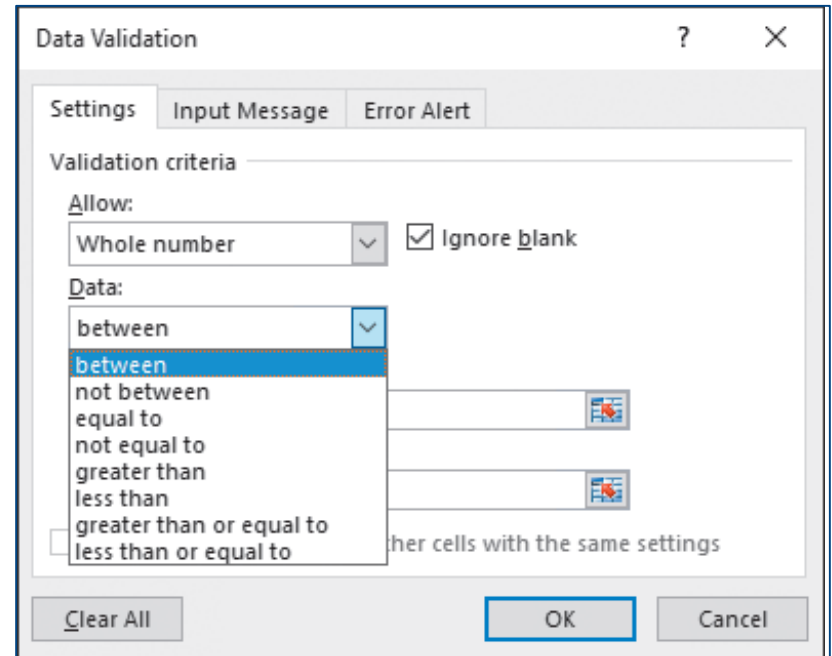


The image shows the 'Function Arguments' dialog box for the IF function in Microsoft Excel. The dialog has a title bar 'Function Arguments' and a tab 'IF'. It contains three input fields: 'Logical\_test' with the value 'H5>10000', 'Value\_if\_true' which is empty, and 'Value\_if\_false' which is empty. Each field has a small icon to its right. To the right of each field is an equals sign followed by a default value: '= FALSE' for Logical\_test, '= any' for Value\_if\_true, and '= any' for Value\_if\_false. Below these fields, there is a description: 'Checks whether a condition is met, and returns one value if TRUE, and another value if FALSE.' and a note: 'Logical\_test is any value or expression that can be evaluated to TRUE or FALSE.' At the bottom, there is a section 'Formula result =' followed by a blue link 'Help on this function' and an 'OK' button.

# Controlling Data Entry with Data Validation


## ■ Helps ensure data is consistent and accurate

- ▲ Criteria is set for cells to limit possible entries
- ▲ Input Messages show what is acceptable before data is entered
- ▲ Error Alerts inform user why the entry was unacceptable





# Printing Options for Large Worksheets

- Large worksheets may need adjustments made before printing
- Printing a large worksheet 
  - ▲ Use preview to view how the worksheet will print
  - ▲ Scale to fit the worksheet on a specific number of pages
  - ▲ Set to print column headings on each page
  - ▲ Adjust page breaks
  - ▲ Set a print area
- Add a header or footer

# Create Tables

- Organize and analyze related data easier
- Header row contains menu button to sort or filter data
- Banded rows are alternating colors
- Entering a formula in one cell automatically copies the formula to other cells in that column

Employee Name ▾	Department ▾	Salary ▾
Carol Gregory	Sales	\$40,000
Natasha Dyas	Admin.	\$34,500
James Norman	Management	\$68,000
Joshua Garcia	Sales	\$46,000
Sarah Mckinnon	Sales	\$42,750
Shannon Miller	Management	\$52,000
Katrina Kormylo	Admin.	\$48,000
Susan Colley	Sales	\$44,800
William Emerson	Admin.	\$41,000
Eugene Fink	Sales	\$37,000
Total	10	\$454,050.

