Excel Chapter 5: Organizing Large Worksheets

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Learning Objectives

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

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Starting with a Template

- The default file type is Excel Workbook. When creating a template, change the file type to Excel Template.
- You can choose from an online collection of templates.
- You can create your own custom template.

PAYROLL CALCULATOR GENERATE PAY STUBS PERIOD ENDING: 4/8/2013

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 Scernia	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 provided in a template, you just need to add your own data!

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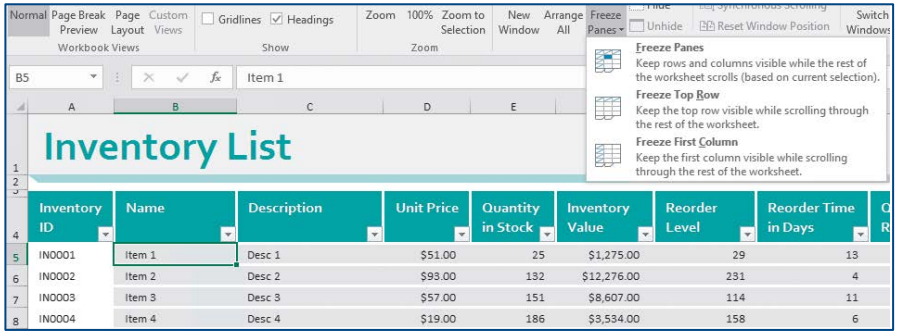
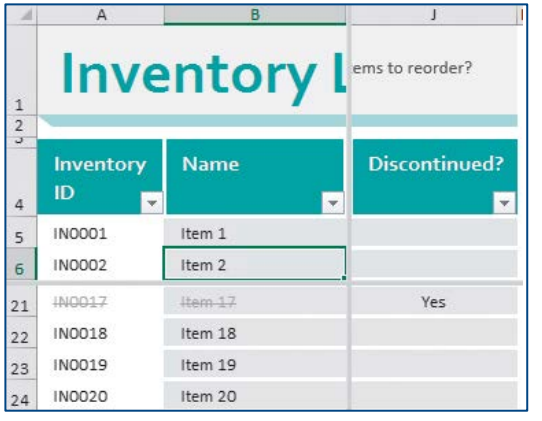
Adjusting View Options

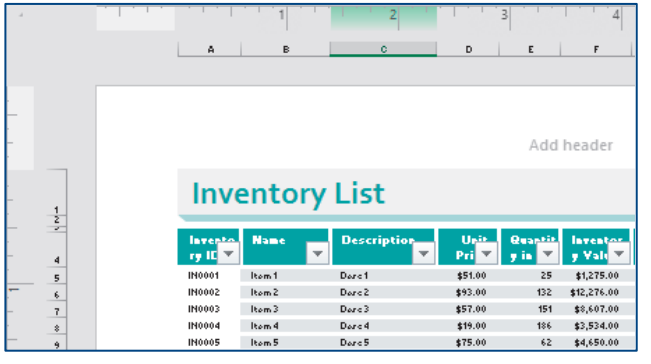
- Freeze Panes



- Split a Window



- Change the Workbook View



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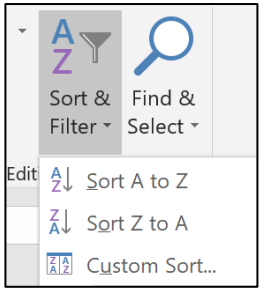
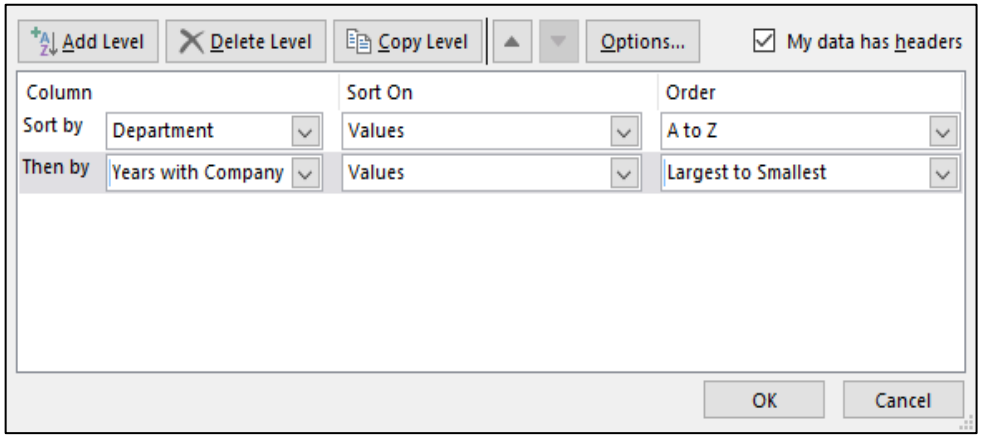
Sort and Filter to Organize Data

- Useful when working with large amounts of data
- Basic sort: one column
  - Use Ribbon commands.



- Custom sorts
  - You can sort by multiple columns in ascending or descending order.



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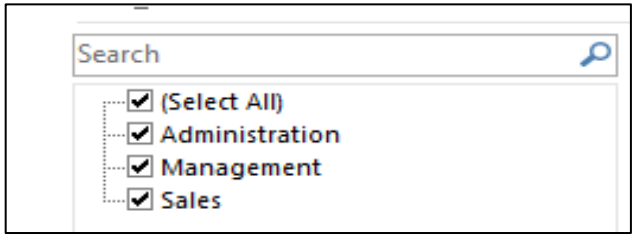
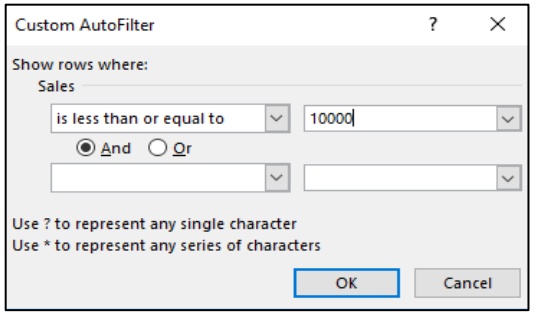
Sort and Filter to Organize Data

- Filters
  - You can choose which data to show and hide.
  - You can filter by text or numbers.
  - Filter out data you don’t want by unchecking columns.



  - You can create custom filters.



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Applying Sort and Filter to Data

Customers	Country
Carol Gregory	USA
Natasha Dyas	Canada
James Norman	Mexico
Joshua Garcia	USA
Sarah Mckinnon	USA
Shannon Miller	Mexico
Katrina Kormylo	Canada
Susan Colley	USA
William Emerson	Canada
Eugene Fink	USA

A customer list with no sort or filter applied.

Customers	Country
Katrina Kormylo	Canada
Natasha Dyas	Canada
William Emerson	Canada
James Norman	Mexico
Shannon Miller	Mexico
Carol Gregory	USA
Eugene Fink	USA
Joshua Garcia	USA
Sarah Mckinnon	USA
Susan Colley	USA

A customer list sorted by Country and then Customers.

Customers	Country
Carol Gregory	USA
Eugene Fink	USA
Joshua Garcia	USA
Sarah Mckinnon	USA
Susan Colley	USA

A customer list filtered to show only customers in the USA.

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The IF Function

- This IF function is used frequently due to its usefulness.
- It allows you to determine the value to enter in a cell based on the outcome of a logical test.
- IF function logical tests use comparison operators.

COMPARISON OPERATORS

Symbol	Meaning	Symbol	Meaning
=	Equal to	<>	Not equal to
>	Greater than	>=	Greater than or equal to
<	Less than	<=	Less than or equal to

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Example: IF Function in Practice

Use it when there are two possible outcomes and definite criteria to determine each one.

Example:

Sales reps will earn a $100 bonus if they achieve $5,000 sales on a month.

THE IF FUNCTION		
Arguments	**Description**	**Examples**
Logical Test	This is a question or criterion that must be a yes/no or true/false question, using a comparison operator, that usually includes at least one cell reference.	D2>5000 D2>=A1
There are two possible outcomes, so you need to enter two values.		
Value if true	If the answer is true, this determines what result is placed in the cell after completing the formula. The result can be text, numbers, cell references, or even another formula.	100 "Yes" D2*10%
Value if false	If the answer is not true, it must be false, so what will the result be? Again, the result can be text, numbers, cell references, or a formula.	0 "No" D2*2%

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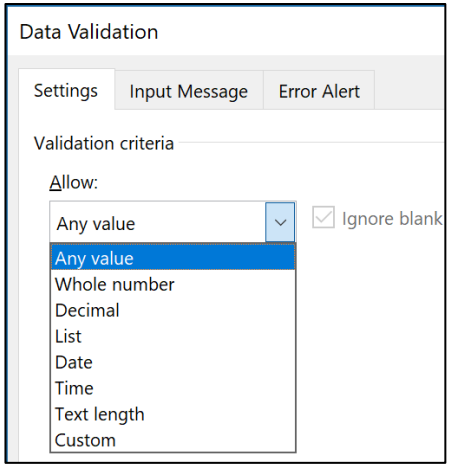
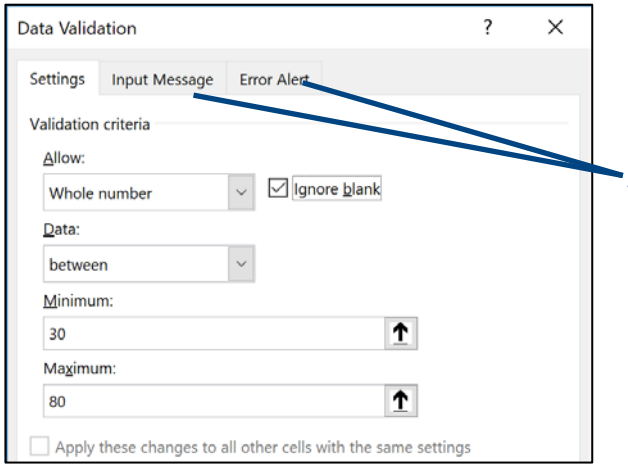
Controlling Data Entry with Data Validation

- This helps ensure data is consistent and accurate.
  - Criteria is set for cells to limit possible entries.
  - Input Messages show acceptable entries before entered.
  - Error Alerts inform user why the entry was unacceptable.



First, choose the type of data to allow.



Then set the criteria for the data.

Input Messages and Error Alerts can be set on these tabs.

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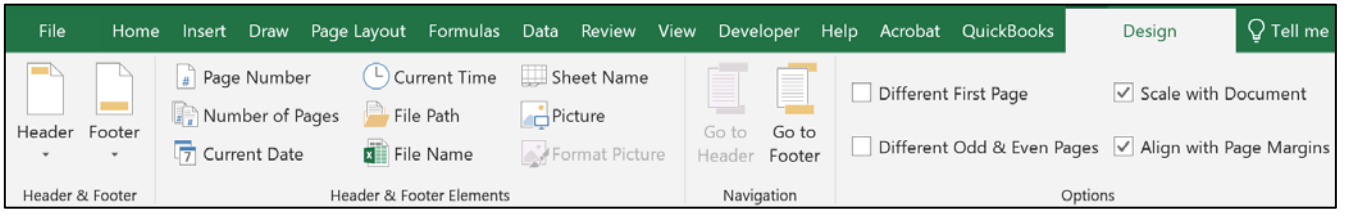
Printing Options for Large Worksheets

- Large worksheets may need adjustments before printing.
- There are various printing options for a large worksheet.

PRINTING OPTIONS

Feature	Description
Print Titles	Print the same headings on all pages by repeating the same rows or the same columns on all pages.
Print Area	Print only a specific area of your worksheet rather than the whole thing.
Breaks	Determine where one page ends and the next page begins when printing. Page breaks in Excel are both horizontal and vertical. Existing page breaks can be moved and new ones can be inserted.
Scale to Fit	Force data onto a desired number of pages, using width and height, by scaling or shrinking the size of the worksheet contents.

- You can add a header or footer using a contextual tab.



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Excel Tables

- They help you organize and analyze related data easier.
- The header row contains menu buttons to sort or filter data.
- Banded rows can be added or removed, and colors can be modified.
- Entering a formula in one cell automatically copies the formula to others in the 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

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**

The same data before and after a table is inserted.

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