

Lesson 6

Lesson 6

Filtering to Find Specific Information

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Learn how to:

- ◆ Filter a list to find specific information
- ◆ Find totals and averages quickly using AutoCalculate
- ◆ Calculate sets of filtered records using the SUBTOTAL function

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Records and Fields

- ◆ In a worksheet, columns of information such as customer name, product name, price, quantity are referred to as “Fields”
- ◆ Rows are referred to as “Records”
 - ✓ For example, each record (row) has information about a specific customer, product, price, quantity etc
 - ✓ Every record has information pertaining to the same set of fields (columns)
- ◆ A worksheet can have hundreds of records
 - ✓ You can narrow the list of records you want to see by specifying filtering criteria or conditions
 - ✓ Example: view only records pertaining to a specific product

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Filtering to Display Specific Records

- ◆ Use the AutoFilter option
 - ✓ Data | Filter | AutoFilter
 - ✓ You should notice that down arrows appear next to each of the columns headers
- ◆ Assuming that you are practising with Lesson 6 Inventory file, click the down arrow in column Category
 - ✓ you should notice the following: All, Top 10., Custom, Coffee, Tea
 - ✓ The first three options are common in all column filters
 - ✓ The remaining (Coffee, Tea) are a list of all unique entries in the column. In this case just coffee & Tea
 - ✓ Contd....

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Filtering to Display Specific Records

- ◆ What do options All, Top 10..., Custom mean?
 - ✓ All: Apply no criteria for this column
 - ✓ Top 10...: Show the top (highest) 10 records for this field
 - ◆ Not applicable for fields containing alphabetic information
 - ◆ 10 in Top 10 can also be changed to any other number such as Top
 - ✓ Custom: To define any other criteria
 - ◆ Example: Show me all records in the price range of \$ 5 to \$ 10
- ◆ You can define multiple criteria (criteria in more than one column)

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Calculating Filtered Sets of Records

- ◆ Once you have filtered records, you can do computations on those filtered set of records
- ◆ Computing using AutoCalculate
 - ✓ Make sure the status bar is on (View | Status Bar)
 - ✓ Select any numeric range. You would notice the sum of the selected numbers on the status bar (at the right)
 - ✓ If you want to see other computations such as Average, right click on the sum (in the status bar), and choose from the available functions

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Calculating Filtered Sets of Records

- ◆ AutoCalculate is useful, but if you want the computed figure to be placed on the worksheet, then you can use the SUBTOTAL function
 - ✓ Apply the criteria to say, the cost column
 - ✓ At the end of that column (say in D41) click the AutoSum button (Σ). This will put the SUBTOTAL function in the cell
 - ◆ If the criteria was not defined, the AutoSum button would have placed the SUM function
 - ✓ Notice the number 9 to the left of the comma in the parantheses. This number stands for SUM.
 - ◆ Refer to page 105 in text book for numbers for other computations such as Average, Maximum etc

