Lesson 6

Filtering to Find Specific Information

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
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

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….
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)

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
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