Sort

A common database task is to rearrange the information based on a header/field or headers/fields. This is called Sorting or Filtering. Sorting rearranges all of the information in the database based on the sort criteria. Filtering hides unwanted data. The remaining data may then be sorted.

Sorting may be initiated in one of three ways: The “Sort & Filter icon at the far right of the “Home” tab ribbon,

the “Sort” icons on the “Data” tab,

or the “Right-Click” menu.

To sort using a single column as the criterion and the “Sort & Filter” icon on the “Home” tab ribbon: Place the “Active Cell” in the column to be used to control the sort; Select “Home” on the Menu Bar; Click on the “Sort & Filter” button at the far right end of the ribbon. Click on the desired sort direction. (Excel will determine the location of all of the data and complete. To sort on multiple columns: Place the “Active Cell” within the data to be sorted; Select “Home” on the Menu Bar; Click on the “Sort & Filter” button at the far right end of the ribbon; Select “Custom Sort”. If the data to be sorted has headers, be sure that the “My data has headers” check box at the far right is checked.

This allows the use of field names in defining the sort. If this is not checked, selection will be by column letter. As shown, this sort is no different than a single column sort based on “Date” (The
“Sort by” field can be changed to a different field by clicking on the down arrow next to “Date” and selecting a different field from the list.

To make it a multiple field sort, click the “Add Level” button. A second level, titled “Then by” has been added to the sort criteria (It comes up blank and the field is chosen from the drop down list. (I chose “Shift” for this level).

The up and down arrows can be used to change the order of the sort fields. Additional levels may be added as needed by clicking on the “Add level” button. Click on OK at the bottom of the dialog box to execute the sort.

Filter

Filters can be used to narrow down the data in your worksheet and hide parts of it from view. Filtering may be initiated from one of three sources: The “Sort & Filter icon at the far right of the “Home” tab ribbon, the “Filter” icon on the “Data” tab, or the “Right-Click” menu (These are the same locations used with the “Sort” feature). To Filter from the “Home” tab ribbon, click “Sort & Filter” on the Home ribbon. Select “Filter” from the drop down menu. Note that drop down arrows have been added next to each field name.

Clicking on one of these arrows will display a dialog box from which sorting or filtering can take place. In addition, unique entries in that field will be displayed. Which entries are displayed will be determined by which boxes in the bottom portion of the dialog box are checked. Note that when a filter is in place, the arrow changes to a funnel.
Removing the check from the “Select All” box and then checking the individual boxes will determine which entries are displayed.

A filter can be placed on more than one field at a time. To remove a filter on a field, click the funnel for that field and select “Clear filter from …” in the upper portion of the dialog box. To turn off filtering, click “Sort & Filter” on the Home ribbon. Select “Filter” from the drop down menu, or click the “Filter” icon on the Data ribbon, or Click Filter on the right-click menu.

Pivot Tables

A Pivot table (turning the data to look at it in different ways) in Excel is a versatile reporting tool that makes it easy to extract information from large tables of data without the use of formulas. It may also be thought of as “filtering with calculations”. To create a Pivot Table, make a cell within the data the active cell. Click the Pivot Table icon at the left end of the Insert ribbon.

The resulting dialog box will have the range of cells to be included in the Pivot Table filled in. In this example, “Data” is the name of the sheet containing the data and the exclamation point is added by Excel to separate the sheet name from the data range. To place the Pivot Table on a new worksheet, click the “New Worksheet” button. To place the Pivot Table on the current worksheet, click the “Existing Worksheet” button and provide a location for the upper left corner of the Pivot Table. Click “OK”. A “PivotTable Fields” dialog box will appear with the field names in the upper portion and four boxes to be used in defining the Pivot Table in the lower portion. The boxes are labeled “Report Filter”, Column Labels”, “Row Labels”, and “Σ Values”. Dragging the desired field name to the appropriate box
will define the Pivot Table and populate it with the requested data.
In this example, “Sales Rep” was dragged to the “Row Labels” box, and “Sales” was dragged to the “Σ Values” box. The table can be rearranged by dragging field names out of or into any of the appropriate boxes.

When working with a Pivot Table, two new tabs are added to the Menu Bar under the heading “PIVOTTABLE TOOLS”.

Features on these tabs are used to change the design and appearance of the Pivot Table. In the following example, “Date” was dragged to Columns and then grouped by month and years, “Sales Rep” was dragged to Rows, and “Sales” was dragged to “Σ Values”.

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