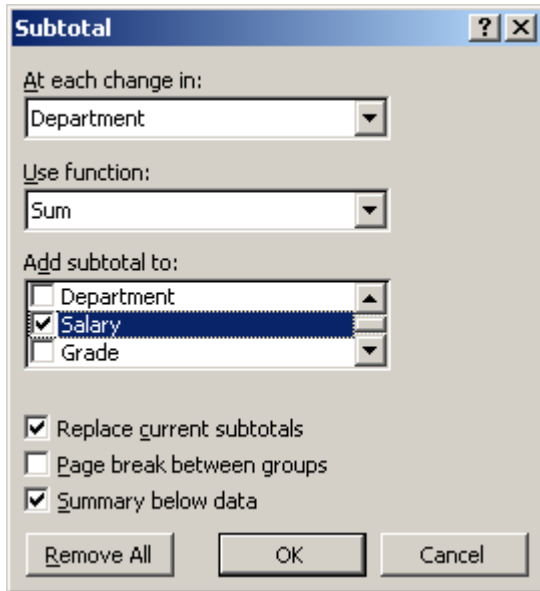


PRODUCING SUBTOTALS

Excel provides a very quick and easy way to produce subtotals that summarise different parts of your database. Subtotals would normally be added to a database that has already been sorted.

To add subtotals to your database, first carry out the sorting that you require and then select *Data/Subtotals* from the main menu. You will now see the following dialog box:



The first item you must specify is what will actually cause the subtotals to be calculated. This is done by using the drop-down list **At Each Change In**. When you click on the drop-down arrow, the list will display the fields contained in your database area. Select the one you require and press the *Tab* key.

You can now specify the type of calculation that will be undertaken. Normally you would accept the default (Sum) which will provide you with a subtotal. However, if you click on the drop-down arrow, you will be able to choose from other items such as Average, Count, Product, etc.

PRODUCING SUBTOTALS CONTINUED...

Having made your selection, the next step is to move on to the **Add Subtotal to:** list box. In this box you can select the fields in your database that will be subtotalled. You do this by clicking on the required fields and thereby placing a cross in the check box.

You can now use the three check boxes in the bottom left corner of the dialog box to set the last few options. It is normally advisable to have the **Replace Current Subtotals** box checked so that your worksheet always presents the most recent data.

When you click on the *OK* button or press *Enter* you will be returned back to the worksheet and subtotals will have been added to the database area. You will also see that Outlining has been applied automatically. You can now display either more or less detail on the worksheet to meet your requirements.

To remove subtotals from the worksheet select *Data/Subtotals* from the main menu and then click on the **Remove All** button on the dialog box.



Managing Excel Data Lists

A Quick Guide

For more Excel guidance visit :
knowledge.senansolutions.com



INTRODUCTION

Whether you type a list of data directly into Excel or import it from an external source, Excel offers a number of tools that are useful to help you view and analyse your data.

A database in Excel can be any list provided that the list conforms to two clear rules:

- Every column must have a unique column heading to act as the field name.
- There must be no blank rows or columns within the list otherwise Excel will not recognise the list as a single database.

Whenever you have a list of data you need a way to filter out everything except the specific information that you need at the moment. You also need to be able to sort the data by specific criteria. Excel provides two useful tools for locating specific information in a list: *filtering* and *sorting*. With these tools, you can easily sort and filter the data in your worksheet.

AUTOFILTER

Filtering Lists to see only the data you need

When you work with a database, you need to be able to find information quickly. If you need to find all of the policies placed by a specific Broker don't want to look through the whole list and pick out the names manually. You can use the field names in your database to filter your data automatically to show only the records you need.

When you filter a list automatically you can select any cell and the entire list around the cell is selected. Then you filter the data, using field names to show only the records you need. When you have finished filtering data, you turn off automatic filtering.

AUTOFILTER CONTINUED...

Filtering your data

1. Select any cell within your database.
2. From the **Data** menu choose **Filter** and then choose **AutoFilter**.

The range adjacent to your selected cell is assumed to be the database you want to filter. Filtering arrow buttons appear next to your column labels.

3. Click the filter arrow next to the field you wish to filter. A list of criteria drops down showing the options that you can choose from.

There are four choices that always appear in your list of criteria, The **All**, **Custom**, **Blanks**, and **NonBlanks** options let you show all of the records, only records that meet custom criteria, all blank records, or all records that contain information.

In addition to these four choices any other word, code or number that appears in the column you select for filtering will appear once in the criteria list.

4. Select any one of the standard choices or the choices from your data to be the criterion for filtering your data.

When you select an item in the criteria list, all of the other data is filtered out of your worksheet. The other records still exist, but they are hidden for the moment.

Restoring your data

When you have finished filtering your data you will want to restore your database to show all of the records.

To do this:

- From the **Data** menu choose **Filter** and then choose **Show All**.

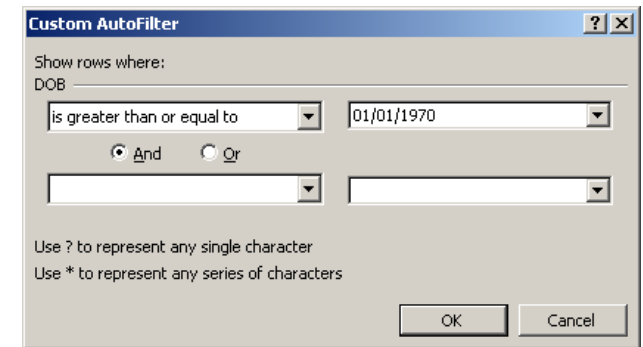
AUTOFILTER CONTINUED...

Finding Data Using Custom Filters

To use a custom filter:

1. Select any cell within your database.
2. From the **Data** menu choose **Filter** and then choose **AutoFilter**.
3. Click the filter arrow to the right of the field you wish to filter and then select Custom.

The Custom AutoFilter dialog box opens.



4. Select the Operator and add criteria as required.