

Excel 2019 (Part 16): Basic Tips for Working with Data

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Excel workbooks are designed to store a lot of information. Whether you're working with 20 cells or 20,000 cells, Excel has several features to help you organize your data and find what you need. You can see some of the most useful features below. And remember to review the other lessons in this tutorial series for detailed step-by-step instructions for each feature.

Fix rows and columns

You might want to see certain rows or columns at all times in your spreadsheet, especially the header cells. By fixing rows or columns in place, you'll be able to scroll through the content while continuing to view the fixed cells. This example has fixed the top two rows, which allows the viewer to follow the dates regardless of where they are scrolling in the spreadsheet.

	A	B	C	D	E	F
1	2014-2015 Sales Data					
2	Salesperson	Jan 2014	Feb 2014	Mar 2014	Apr 2014	May 2014
18	Hodges, Melissa	\$4,624.00	\$14,772.00	\$19,830.00	\$6,303.00	\$5,667.00
19	Jameson, Robinson	\$2,552.00	\$1,627.00	\$4,382.00	\$9,083.00	\$4,269.00
20	Kellerman, France	\$4,281.00	\$7,375.00	\$17,730.00	\$19,998.00	\$3,502.00
21	Mark, Katharine	\$4,679.00	\$3,058.00	\$1,497.00	\$5,722.00	\$5,853.00

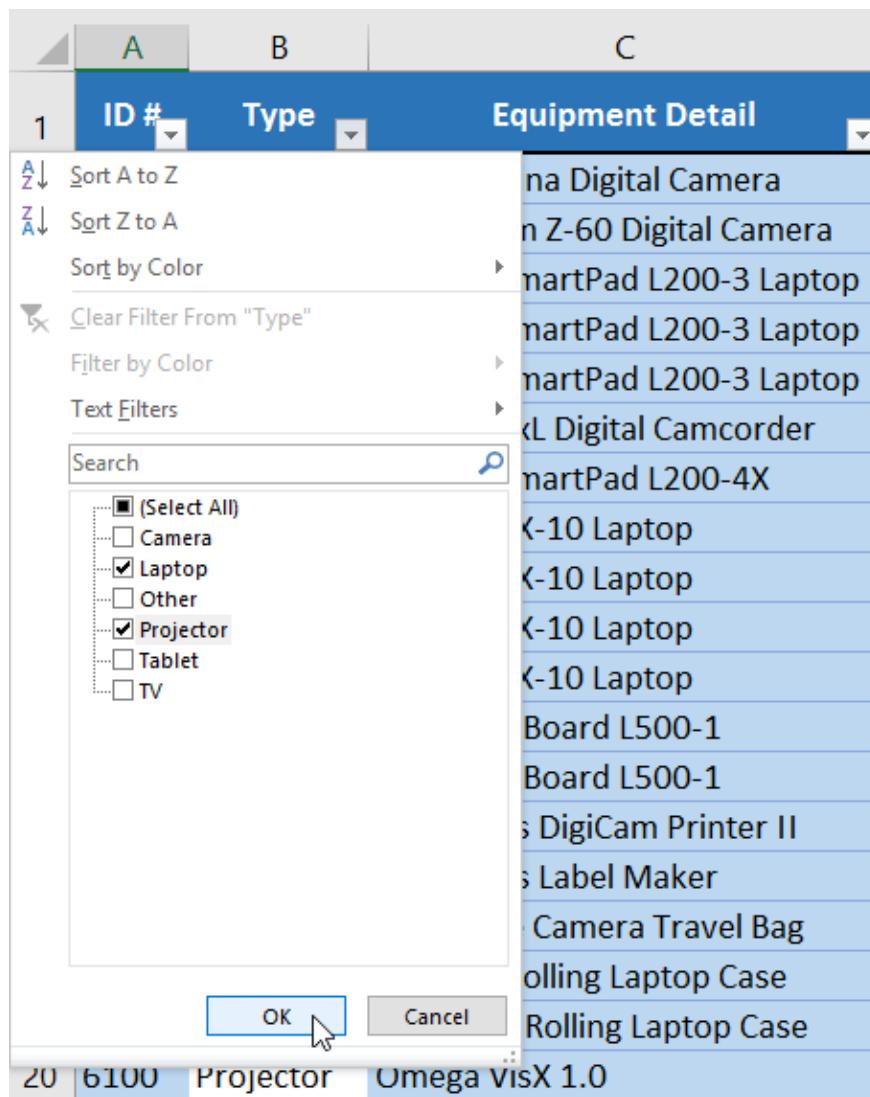
Sort the data

You can quickly reorganize a spreadsheet by sorting your data. Content can be sorted alphabetically, numerically, and in several other ways. For example, you can sort a list of contacts by last name.

	A	B	C	D
1	Customer Contact List			
2	CONTACT NAME	BILLING ADDRESS	PHONE	EMAIL ADDRESS
3	Chaturvedi, Rick	2428 S Redding St #2 B	360-555-5422	info@newhaventraders.com
4	Dean, Hank	3034 Foggy Wharf Loop	308-555-1050	hdean@venturebrewing.com
5	Figgis, Mallory	3520 Sleepy Hearth Dr	425-555-5370	malloryf@archerproperties.com
6	Finn, Jake	1407 Dusty Fawn Ln So	605-555-6435	jake@adventureoutfitters.com
7	Kinkade, Chris	1028 Quiet Dale Rd Ho	443-555-4942	chris.kinkade@placervilleins.com
8	Lawson, Miranda	5316 Colonial Pkwy Est	575-555-9255	mlawson@massairlines.com
9	Reyes, Felicia	8544 Lazy Bluff Ave Wh	316-555-3256	felicia@everlypublishing.com
10	Sebastian, Lil	9060 Easy Evening Ln V	207-555-7225	lil@knopeequestrian.com
11	Silva, Vivica	8595 Thunder Brook Ci	360-555-4289	vivica@rileygardensupply.com
12	Stark, Katie	971 Cinder Butterfly St	603-555-2460	katie.stark@ariaestate.com
13	Torrance, Jill	3160 Amber Gate Rd R	605-555-4495	jtorrance@overlookinn.com
14	Yuen, Phillip	5108 Crystal Gate Blvd	913-555-5928	yuenp@corepharmaceuticals.com

Filter data

Filters can be used to narrow down the data in your spreadsheet, allowing you to view only the information you need. This example is filtering the spreadsheet to show only the rows containing the words "**Laptop**" or "**Projector**" in column **B**.



Data compilation

The Subtotal command allows you to quickly summarize data. The example has created subtotals for each t-shirt size, making it easy to see how many shirts are needed for each size.

	A	B	C	D	E
1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
2	105	Melissa	White	Debit Card	Small
3	105	Esther	Yaron	Pending	Small
4	135	Anisa	Naser	Check Bounced	Small
5	220-A	Brigid	Ellison	Cash	Small
6	220-A	Christopher	Peyton-Gomez	Check	Small
7	220-B	Michael	Lazar	Cash	Small
8	220-B	Malik	Reynolds	Cash	Small
9	220-B	Wendy	Shaw	Cash	Small
10				Small Count	8
11	105	Nathan	Albee	Check	Medium
12	105	Christiana	Chen	Check Bounced	Medium
13	105	Sidney	Kelly	Check	Medium
14	110	Matt	Benson	Money Order	Medium
15	110	Gabriel	Del Toro	Cash	Medium
16	135	James	Panarello	Check	Medium
17	135	Chantal	Weller	Debit Card	Medium
18	220-A	Chevonne	Means	Money Order	Medium
19	220-B	Samantha	Bell	Check	Medium
20	220-B	Avery	Kelly	Debit Card	Medium
21				Medium Count	10

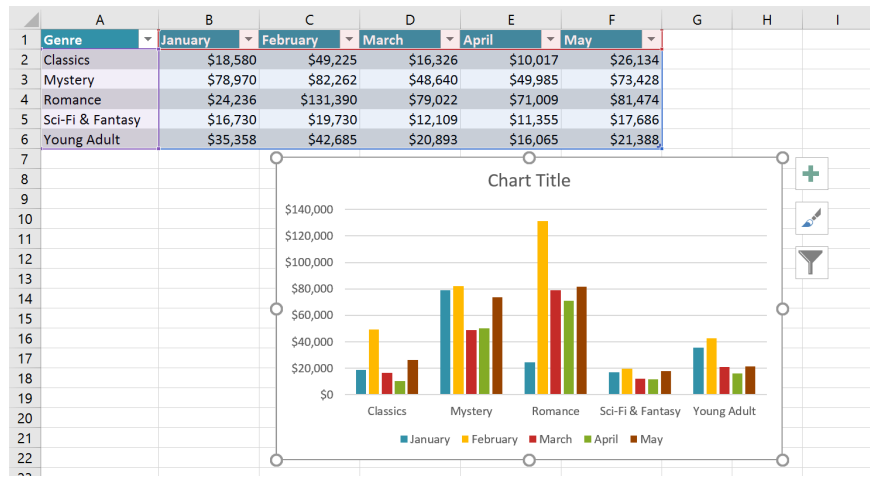
Format the data as a table.

Just like regular formatting, tables can improve the look and feel of a workbook, but they also help organize your content and make data easier to use. For example, tables have built-in sorting and filtering options. Excel also includes several predefined table styles, allowing you to create tables quickly.

	A	B	C	D
1		Catering Invoice		
		Sabrosa Empanadas & More		Invoice #: 5686B
		1202 Biscayne Bay Drive		Date: 05/10/16
		Orlando, FL 32804		
2	MENU ITEM	UNIT PRICE	QUANTITY	LINE TOTAL
3	Empanadas: Beef Picadillo	\$2.99	15	\$44.85
4	Empanadas: Chipotle Shrimp	\$3.99	10	\$39.90
5	Tamales: Chicken Tinga	\$2.29	20	\$45.80
6	Tamales: Vegetable	\$2.29	30	\$68.70
7	Arepas: Carnitas	\$2.89	10	\$28.90
8	Arepas: Queso Blanco	\$2.49	20	\$49.80
9	Beverages: Horchata	\$1.89	25	\$47.25
10				


Visualize data using charts.

An Excel workbook containing a lot of data can be difficult to understand. Charts allow you to visualize your workbook data graphically, making it easier to visualize comparisons and trends.



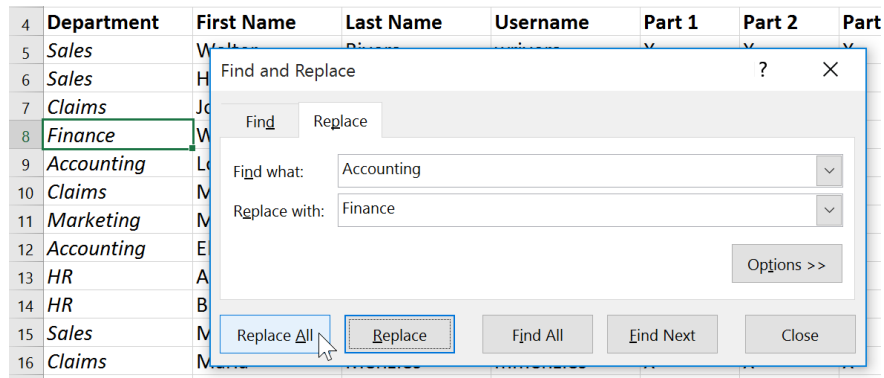
Add conditional formatting

Imagine you have a spreadsheet with thousands of rows of data. It would be difficult to spot patterns and trends just from examining the raw information. Conditional formatting allows you to automatically apply cell formatting—including color, icons, and data bars—to one or more cells based on the cell value.

	A	B	C	D	E	F	G
1			Westbrook Parker Sales Data				
2	Salesperson	May	June	July	August	September	October
3	Albertson, Kathy	▼ \$3,799.00	▼ \$557.00	▼ \$3,863.00	▼ \$1,117.00	▼ \$8,237.00	▼ \$8,690.00
4	Allenson, Carol	▲ \$18,930.00	▼ \$1,042.00	▼ \$9,355.00	▼ \$1,100.00	▼ \$10,185.00	▲ \$18,749.00
5	Altman, Zoey	▼ \$5,725.00	▼ \$3,072.00	▼ \$6,702.00	▼ \$2,116.00	▼ \$13,452.00	▼ \$8,046.00
6	Bittiman, William	▼ \$1,344.00	▼ \$3,755.00	▼ \$4,415.00	▼ \$1,089.00	▼ \$4,404.00	▲ \$20,114.00
7	Brennan, Michael	▼ \$8,296.00	▼ \$3,152.00	▼ \$11,601.00	▼ \$1,122.00	▼ \$3,170.00	▼ \$10,733.00
8	Carlson, David	▼ \$3,945.00	▼ \$4,056.00	▼ \$3,726.00	▼ \$1,135.00	▼ \$8,817.00	▲ \$18,524.00
9	Collman, Harry	▼ \$8,337.00	▼ \$4,906.00	▼ \$9,007.00	▼ \$2,113.00	▼ \$13,090.00	▼ \$13,953.00
10	Counts, Elizabeth	▼ \$3,742.00	▼ \$521.00	▼ \$4,505.00	▼ \$1,024.00	▼ \$3,528.00	▲ \$15,275.00
11	David, Chloe	▼ \$7,605.00	▼ \$3,428.00	▼ \$3,973.00	▼ \$1,716.00	▼ \$4,839.00	▼ \$13,085.00
12	Davis, William	▼ \$5,304.00	▼ \$1,562.00	▼ \$2,945.00	▼ \$1,176.00	▼ \$9,642.00	▼ \$13,714.00
13	Dumlao, Richard	▼ \$9,333.00	▼ \$2,779.00	▼ \$7,549.00	▼ \$1,101.00	▼ \$5,850.00	▲ \$15,065.00
14	Farmer, Kim	▼ \$1,103.00	▼ \$3,470.00	▼ \$3,862.00	▼ \$1,040.00	▼ \$10,024.00	▲ \$18,389.00
15	Ferguson, Elizabeth	▼ \$1,333.00	▼ \$1,913.00	▼ \$4,596.00	▼ \$1,126.00	▼ \$5,503.00	▼ \$10,686.00
16	Flores, Tia	▼ \$12,398.00	▼ \$2,883.00	▼ \$2,142.00	▼ \$2,014.00	▼ \$13,547.00	▲ \$21,983.00
17	Ford, Victor	▼ \$3,251.00	▼ \$4,931.00	▼ \$8,283.00	▼ \$1,054.00	▼ \$9,543.00	▼ \$11,967.00
18	Hodges, Melissa	▼ \$4,624.00	▼ \$4,798.00	▼ \$8,420.00	▼ \$1,389.00	▼ \$10,468.00	▼ \$12,677.00
19	Jameson, Robinson	▼ \$2,552.00	▼ \$4,459.00	▼ \$2,248.00	▼ \$1,058.00	▼ \$6,267.00	▲ \$14,982.00
20	Kellerman, Frances	▼ \$4,281.00	▼ \$4,172.00	▼ \$11,074.00	▼ \$1,282.00	▼ \$2,365.00	▼ \$9,380.00

Use the Find and Replace function.

When working with large amounts of data, identifying specific information can be difficult and time-consuming. You can easily search your workbook using the **Find feature**. Excel also allows you to modify content using the **Replace feature**.



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