

# Excel® Tables, PivotTables & Charts

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## Quick Reference Guide

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### Excel Tables

#### Understanding Lists and Tables

In Excel, a **list** (or **list range**) is a simple arrangement of data in a single column or multiple adjacent columns. It consists of rows and columns, where each row represents a separate record or entry, and each column represents a different attribute or piece of information related to that record. They are like miniature spreadsheets within an existing Excel worksheet and are suitable for basic data organization and analysis. They can be sorted, filtered and analyzed, and can also be converted into Excel tables, which are similar to lists, but offer additional features that make managing and analyzing a set of related data easier.

Excel tables are useful for managing large datasets, performing complex calculations, and creating visualizations. Key features of Excel tables:

**Header row:** By default, tables have a header row with filtering enabled so you can filter or sort data quickly.

**Banded rows:** Tables have alternate shading (banding) in rows to help better visualize data.

**Calculated columns:** A formula entered into the first table row is automatically copied down and applied to all other cells in that table column.

**Total row:** When a total row is added to a table, Excel adds an AutoSum drop-down to select from functions like SUM, AVERAGE, and COUNT. Once selected, the table automatically converts it to a SUBTOTAL function, ignoring rows that have been hidden with a filter, by default. To include hidden rows in calculations, you can change the SUBTOTAL function arguments.


**Sizing handle:** Tables include a sizing handle in the lower-right corner to change the size, as desired.

#### Creating an Excel Table

##### Guidelines to create problem-free tables:

1. Organize data in columns and rows, with each row containing information about one record.
2. Enter unique column headers into the first row.
3. Each column should include only one type of data, such as text, currency, or dates.
4. If possible, include a unique identifier for each row, such as a customer number.
5. Remove any blank rows or columns from the range.
6. Separate the list range from any other data on the worksheet with at least one blank row or column.



##### To create an Excel table:

1. Select the cells to convert, including the header row.
2. Click the "Table" button in the "Tables" group on the "Insert" tab in the Ribbon. 
3. Modify the data range, if desired.
4. Select the "My table has headers" checkbox, if appropriate. If the table does not have headers, Excel will create them ("Column 1," "Column 2," etc.). Excel also assigns a name to the table (e.g., "Table1").
5. Click the "OK" button. The "Table Design" tab in the Ribbon appears when any cell of a table is selected.

##### To rename a table from the one assigned by Excel:

1. Click into the table.
2. Click the "Table Design" tab in the Ribbon.
3. Enter a new name in the "Table Name" field in the "Properties" group and press the "Enter" key.

#### Adding and Deleting Rows/Columns


1. Click into the table where the row or column is to be added or deleted.
2. Click the "Home" tab in the Ribbon.
3. **To add,** click the "Insert" drop-down button in the "Cells" group and select "Insert Table Rows Above" or "Insert Table Columns to the Left". 
4. **To delete,** click the "Delete" drop-down button in the "Cells" group and select "Delete Table Rows" or "Delete Table Columns". 

#### Turning the Total Row On/Off

1. Click into the table and click the "Table Design" tab that appears in the Ribbon.
2. Check/Uncheck the "Total Row" checkbox in the "Table Style Options" group. When checked, a total row is added with the last column totaled.


#### Removing Duplicates

##### To delete rows with duplicated data:

1. Click into the table or list range.
2. Click the "Remove Duplicates" button in the "Tools" group on the "Data" tab in the Ribbon. 
3. Select (check) or deselect (uncheck) the columns on which to evaluate criteria as duplicates. Data must match in all selected columns for duplicate rows to be removed.
4. Click the "OK" button. Excel retains the first row of any matches and removes subsequent ones.
5. Click "OK."

#### Converting a Table to a List Range

Certain features, like subtotals and cell merging, do not work with Excel tables. To access these features, convert the table to a list range.

1. Click into the table.
2. Click the "Convert to Range" button in the "Tools" group on the "Table Design" tab in the Ribbon. 
3. Click "Yes."

#### Using Structured References

Create formulas using table elements instead of usual cell references to enhance the clarity and readability of formulas, more easily reference and understand data, and simplify formula creation. Structured references are built from a combination of:

**Table Name** References table data without any header or total row.  
**Column Specifier** Column name of the column it represents, without any header or total row.

**Item specifiers represent different parts of a table:**

**#All** The entire table, including column headers, data, and totals.  
**#Data** Only the data rows (excluding headers and totals).  
**#Headers** Only the header row.  
**#Totals** Only the total row.  
**#** Only the cells in the same row as the formula.

##### Structured References Syntax Rules:

1. Use brackets around specifiers. All column and special item specifiers must be enclosed in matching brackets [ ]. A specifier that contains other specifiers requires outer matching brackets.
2. All column headers are text strings and don't require quotes in a structured reference.
3. Add a single quotation mark before any of the following special characters if used within a column header name: left bracket ([), right bracket (]), pound sign (#), single quotation mark ('), or at sign (@).
4. Use reference operators to combine data ranges: colon (:) for adjacent data, comma (,) for non-adjacent data, and a space to reference the intersections of two or more overlapping ranges.

##### Examples:

**=Sales[@[Sold]]\*Sales[@[Commission]]**

Calculates the commission for each row in the Sales table based on the values in that row's Sold and Commission cell values.

**=SUM(Sales[#Totals])**


Sums all values in the totals row of the Sales table.

**=SUM(Sales[[Region '#1]:[Region '#3]])**

Displays the total of all Region #1 through Region #3 sales data in the Sales table.

### Sorting and Filtering





#### Sorting by a Single Column

1. Click into a cell within the column by which to sort the data.
2. Click either the "Sort A to Z" or "Sort Z to A" button in the "Sort & Filter" group on the "Data" tab in the Ribbon. 

Or, with AutoFilter turned on (see "Showing/Hiding AutoFilter"), click the column heading's drop-down arrow and elect a sorting option. 

#### Advanced Sorting

Sort by two or more columns or by other criteria such as cell or font color.

1. Click into the table or list range.
2. Click the "Sort" button in the "Sort & Filter" group on the "Data" tab in the Ribbon. 
3. For a list range, check or uncheck the "My data has headers" checkbox, as appropriate.
4. Select a column heading from the "Sort by" drop-down.
5. Select a criteria on which to sort from the "Sort On" drop-down.
6. Select an order for the sort from the "Order" drop-down.
7. **To add additional sort criteria,** click the "Add Level" button and repeat steps 4-6. 
8. **To delete a sort criteria,** select it and click the "Delete Level" button. 
9. **To change the order of precedence of the sort criteria,** select a criteria and click the "Move up" or "Move down" button. 
10. Click "OK."

#### About Filtering Data in Excel

Filter Excel data to show only the data you want while temporarily hiding the rest. Use **AutoFilter** for quick filtering with a maximum of 2 criteria per column. Use advanced filtering for greater control over filtering options and to copy filtered data to another location.

#### Showing/Hiding AutoFilter

AutoFilter adds drop-down arrows to column headers for quick filtering and sorting. AutoFilter is on by default in Excel tables and always on for PivotTables.

##### To show or hide AutoFilter:

1. Click into the table or list range.
2. Click the "Filter" button in the "Sort & Filter" group on the "Data" tab in the Ribbon. 

#### Filtering with AutoFilter

1. Click the heading's drop-down arrow. 
2. **To quickly deselect all data,** uncheck the "Select All" checkbox. Check the boxes next to the data you want to display. **Or,** select a filter and a comparison (depending on the data type), and enter criteria.  

<b>Filters:</b>	<b>Comparisons:</b>
<b>Text Filters</b>	Wildcards allowed. Use ? to represent one character or * for a several characters.
<b>Number Filters</b>	E.g., "Equals," "Less Than,"
<b>Date Filters</b>	E.g., "Before," "After."
<b>Label or Value Filters</b>	Pivot table headings only.
3. Click "OK." Once filtered, the heading's drop-down arrow changes to a filter icon. 

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