**2013 Excel Lesson 9 Guided Notes**

**Working with Data and Macros**

**Software Orientation**

1. Which tab are most of the exercises in this lesson going to use?

**Importing Data**

1. Even simple \_\_\_\_\_\_\_\_\_\_\_\_\_ files where values are separated (\_\_\_\_\_\_\_\_\_\_\_\_\_) by \_\_\_\_\_\_\_\_\_\_ can be imported, because commas act like fence posts, and Excel recognizes fence posts.

**Opening Non-Native Files Directly in Excel**

1. What are Excel’s two main data formats?
2. What is the lowest common denominator for file compatibility?

**Getting External Data**

1. In the world of computers, there are \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_ files.
2. What is the difference in the two answers to question # 5?
3. When Excel imports data from a database as opposed to a data file, what are the three things that happen?

**Ensuring Your Data’s Integrity**

1. Can you create rules for each workbook in Excel?
2. Excel’s \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ tools can help you set up rules that keep you or anyone else from entering invalid or unusable data, or from failing to enter data when it’s required.

**Restricting Cell Entries to Certain Data Types**

1. What is the most common form of rule created for Excel Workbooks?
2. Does Excel’s validation rules apply to data created prior to creating the rules?

**Allowing Only Specific Values to be Entered in Cells**

1. How do you preempt events like data entry errors of entering an invalid character?

**Removing Duplicate Rows from a Worksheet**

1. Can you have Excel search for duplicate entries and purge the duplicate entries?

**Sorting Data**

1. Are data entries in Excel indexed by their row numbers?
2. The Sort A to Z button (also known as Sort Smallest to Largest) and Sort Z to A button (also known as Sort Largest to Smallest) assume that the column you wish to use as your sorting crite-rion is the one that contains the \_\_\_\_\_\_\_\_\_\_\_\_\_ cell. In selecting a range, whether you hold down Shift to select the opposite corner (as you did in this exercise) or whether you drag the pointer from one corner to the opposite corner, the (or Sort Smallest to Largest) the \_\_\_\_\_\_\_\_\_\_ that you clicked on \_\_\_\_\_\_\_\_\_\_\_\_\_.

**Sorting Data on Multiple Criteria**

1. A proper database containing records of people divides each element of their names into, at the very least, last and first names, and preferably includes optional elements such as middle initials and prefixes and suffixes. For this reason, any time you sort a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_\_, or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ by names, you want to sort by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ criteria.

**Sorting Data Using Cell Attributes**

1. Is Excel capable of sorting records based on the conditional formatting that is applied to their cells?
2. Does Excel have a “conditional sort” feature?
3. Can a table you intend Excel to sort contain merged cells?
4. For Excel to be able to exchange cell contents between positions evenly, each \_\_\_\_\_\_\_\_\_\_\_\_ must have an \_\_\_\_\_\_\_\_\_\_\_\_\_ number of \_\_\_\_\_\_\_\_\_\_\_. Each of the \_\_\_\_\_\_\_\_\_\_\_ in a \_\_\_\_\_\_\_\_\_\_\_\_\_ may be formatted differently, though their \_\_\_\_\_\_\_\_\_\_\_ may not vary

**Filtering Data**

1. With Excel, there’s a way for you to formally \_\_\_\_\_\_\_\_\_\_\_\_\_\_ the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ of your database table—to say, “This part of my worksheet is to be treated like a database” —and to then have Excel \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ out just those rows that don’t pertain to what you’re searching for. This does not change the database, and you don’t \_\_\_\_\_\_\_\_\_\_\_\_\_ any rows with a filter. You just \_\_\_\_\_\_\_\_\_\_\_ them temporarily.

**Using AutoFilter**

1. What is the quickest way for you to set up a table so that it displays only rows that meet simple criteria?
2. How do you know that an AutoFilter is active so that you see the filtered results and not the complete table?

**Creating a Custom AutoFilter**

1. A \_\_\_\_\_\_\_\_\_\_\_\_\_\_ AutoFilter uses a \_\_\_\_\_\_\_\_\_\_\_\_\_ that you create, instructing Excel how to evaluate the entries in each row.
2. What is the result of a custom AutoFilter evaluation?
3. The custom AutoFilter is among Excel’s most powerful tools? True or False

**Filtering Data Using Cell Attributes**

1. Can you have a filter hide rows where cells in a column don’t have a particular format, such as a shaded background or a font color?

**Outlining and Subtotaling Data**

1. What does Excel use outlines for?
2. What is the most important and probably most frequently used of the reports?

**Grouping and Ungrouping Data**

1. The simplest form of data \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ involves taking a \_\_\_\_\_\_\_\_\_ of cells that have one related \_\_\_\_\_\_\_\_\_\_\_\_\_\_, clustering them together, and then \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ the cluster like a folder that can be reopened later.
2. What is the point of data grouping?
3. Whenever you group \_\_\_\_\_\_\_\_\_\_ together or perform an operation (such as auto-outlining or auto-subtotaling) in which groups are automatically \_\_\_\_\_\_\_\_\_\_\_\_\_, Excel adds \_\_\_\_\_\_\_\_\_\_ next to the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_ headings.
4. What are these controls called?
5. Boxes marked with \_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_ symbols are placed at the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of \_\_\_\_\_\_\_\_\_\_\_\_\_\_ rows or to the \_\_\_\_\_\_\_\_\_\_\_\_ of grouped \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Each one acts like a clasp that can \_\_\_\_\_\_\_\_\_\_\_\_ or \_\_\_\_\_\_\_\_\_\_\_ the group’s contents
6. Can you have groups within groups?

**Defining a Title for a Table**

1. The one big difference between \_\_\_\_\_\_\_\_\_ and ordinary data \_\_\_\_\_\_\_\_\_\_\_\_\_ lay with the table’s ability to be given a \_\_\_\_\_\_\_\_\_\_\_\_\_, so that it and its constituent \_\_\_\_\_\_\_\_\_\_\_\_ can be referred to by \_\_\_\_\_\_\_\_\_\_\_\_ instead of by reference \_\_\_\_\_\_\_\_\_\_\_\_\_\_.
2. When you write formulas that refer to parts of a table do you have to know where they are located or what they are called?
3. What is the syntax of a reference in an Excel table?

|  |  |
| --- | --- |
| **Component** | **Meaning** |
| Table Name |  |
| Field Name |  |

1. Four Constants that refer to the same general area of a table used when applicable to replace the field name:

|  |  |
| --- | --- |
| #All |  |
| #Data |  |
| #Headers |  |
| #Totals |  |

1. With the table name entered, when it’s time to refer to a field name in the table, you can start with the left \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ bracket ( [ ). Excel displays a list of all the \_\_\_\_\_\_\_\_\_\_\_\_ names already in the table. You use the \_\_\_\_\_\_\_\_\_\_\_\_ keys to highlight the one you’re looking for, and then press \_\_\_\_\_\_\_\_\_\_\_\_\_. Then type the right square bracket ( ] ) to complete the reference
2. Similarly, whenever you want to use one of the four \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (#All, #Data, #Headers, or #Totals), you just start with the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ sign #. Excel displays the list, and then you \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ the one you want and press \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Microsoft markets this feature as \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, and you see it referred to as such in the Help System.
3. When you highlight the entry you want on the IntelliSense menu, make sure to press \_\_\_\_\_\_\_\_, not \_\_\_\_\_\_\_\_\_\_\_\_. The Enter key tells Excel the formula is \_\_\_\_\_\_\_\_\_\_\_\_\_\_, and at this point, it’s often not

**Using a Slicer to View Table Data**

1. What are the two ways to filter a table?
2. How do you relocate a slicer?
3. What do the white handles along the edges of a slicer do?

**Saving Work with MACROS**

1. For the purpose of this lesson, what is the one type of Macro concentrated on?

**Recording a Basic Macro**

1. What makes a recorded Macro useful?