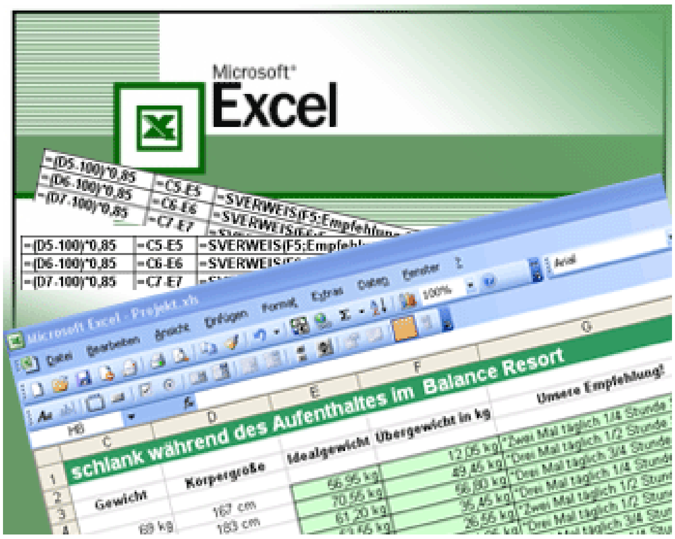
Access Panel
Network

Training Guides

A guide to creating an Excel data table

An Excel data table can be used to keep track of valuable information such as phone numbers, DVD collections, a list of parts, or a contact list of your organisation's members.

At times, it is helpful to keep information in one place, so that it is easier to keep information up-to-date, and we can provide accurate records as required. You might need this, for example, if someone has given you funding, or a list of contacts for your newsletter.

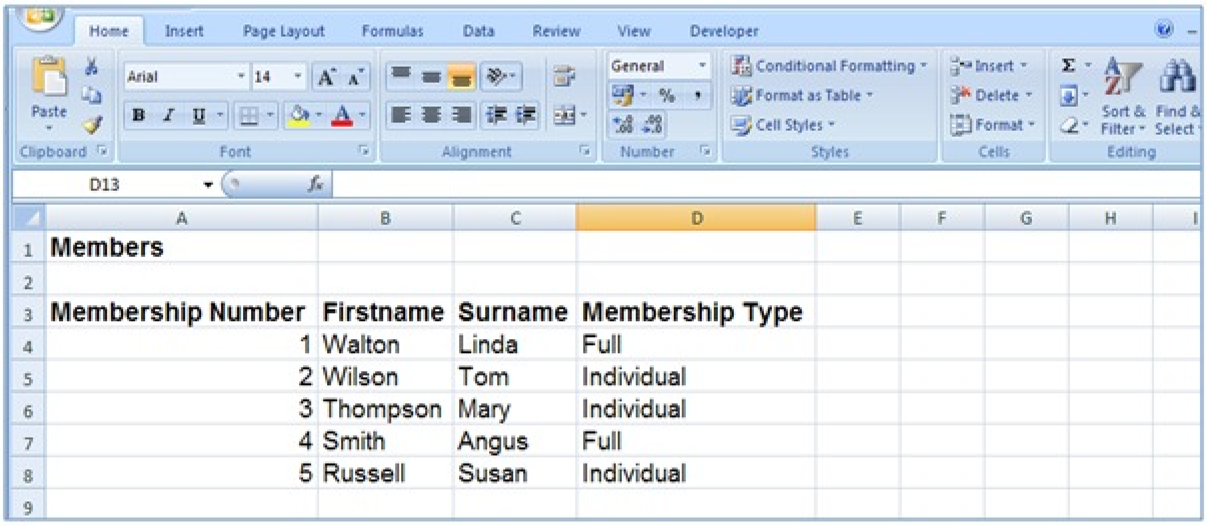

Microsoft
Excel

An Excel data table makes this easier to do because it has tools to analyse and sort information. With its hundreds of columns and thousands of rows, an Excel spreadsheet can hold an enormous amount of data.

Entering data

Tables of data

The basic format for storing data in Excel is a table. Tables are made up of rows (1, 2, 3) and columns (A, B, C).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Members

Membership Number	**Firstname**	**Surname**	**Membership Type**
1	Walton	Linda	Full
2	Wilson	Tom	Individual
3	Thompson	Mary	Individual
4	Smith	Angus	Full
5	Russell	Susan	Individual

Rows are Records

Each individual row of data is known as a record. When entering records keep these guidelines in mind:

- Do not leave blank rows in your table - this includes a blank row between the column headings and the first row of data.
- A record must contain data about one specific item only, for example a person or a company.
- A record must contain ALL the data about an item on the same row.

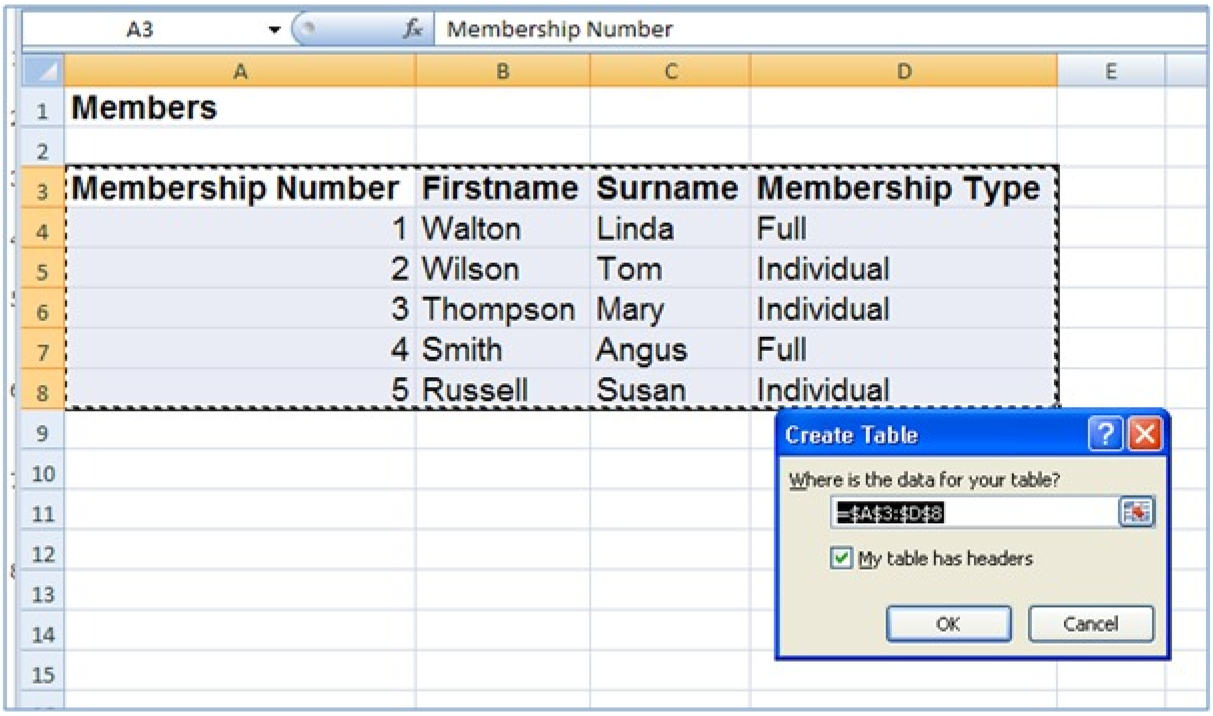
- Each record should have a unique identifier, such as a membership number to distinguish it from any similar records.

Columns are Fields

While rows are referred to as records, the columns are known as fields. Each column needs a heading to identify the data it contains. These headings are called field names.

- Field names are used to ensure that the data for each record is entered in the same sequence.
- Make sure that all the data in a column is entered using the same format. If you start entering 1, 2, 3, 4 etc be consistent and don't start entering one, two, three, etc.
- Do not leave blank columns in the table.

Create the table



A3 fx Membership Number

	A	B	C	D	E
1	**Members**				
2					
3	**Membership Number**	**Firstname**	**Surname**	**Membership Type**	
4	1	Walton	Linda	Full	
5	2	Wilson	Tom	Individual	
6	3	Thompson	Mary	Individual	
7	4	Smith	Angus	Full	
8	5	Russell	Susan	Individual	

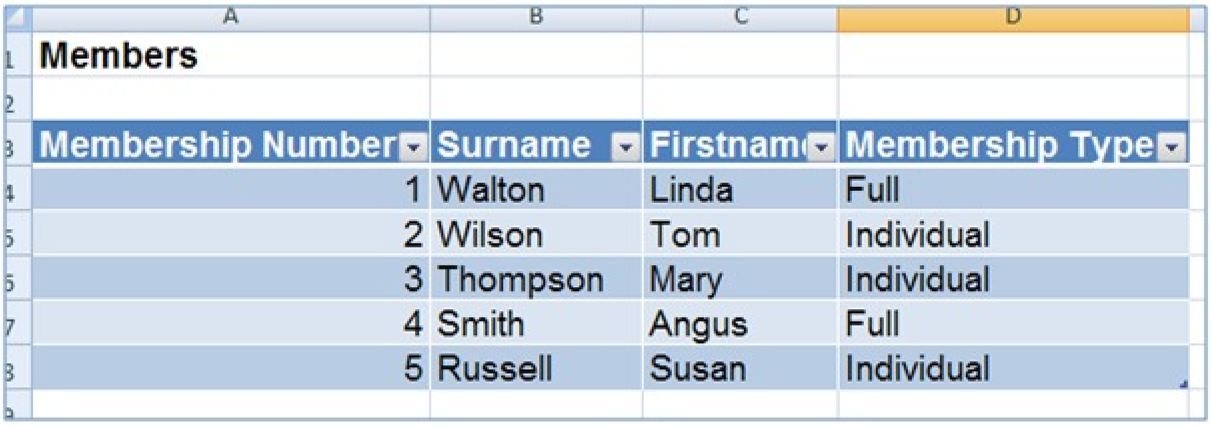
Where is the data for your table?
=$A$3:$D$8
☑ My table has headers

Once the data has been entered, it can be converted into a table. To do this:

- Click and hold the left mouse button and drag to select the cells containing the data in your spreadsheet (in the example above cells A3 to D8 have been selected).
- Click on the **Insert** tab.
- Click on the **Table** option then click on **OK**.
- Your data is now a table with drop down arrows beside each field name and the table rows formatted in alternating light and dark colours.

- In the Design Tab you can change the Table Style from the default style to change colours etc.

Using the data table tools



Members

Membership Number	Surname	Firstname	Membership Type
1	Walton	Linda	Full
2	Wilson	Tom	Individual
3	Thompson	Mary	Individual
4	Smith	Angus	Full
5	Russell	Susan	Individual

Once you have created a table, you can use the tools located under the drop down arrows beside each field name to sort or filter your data.

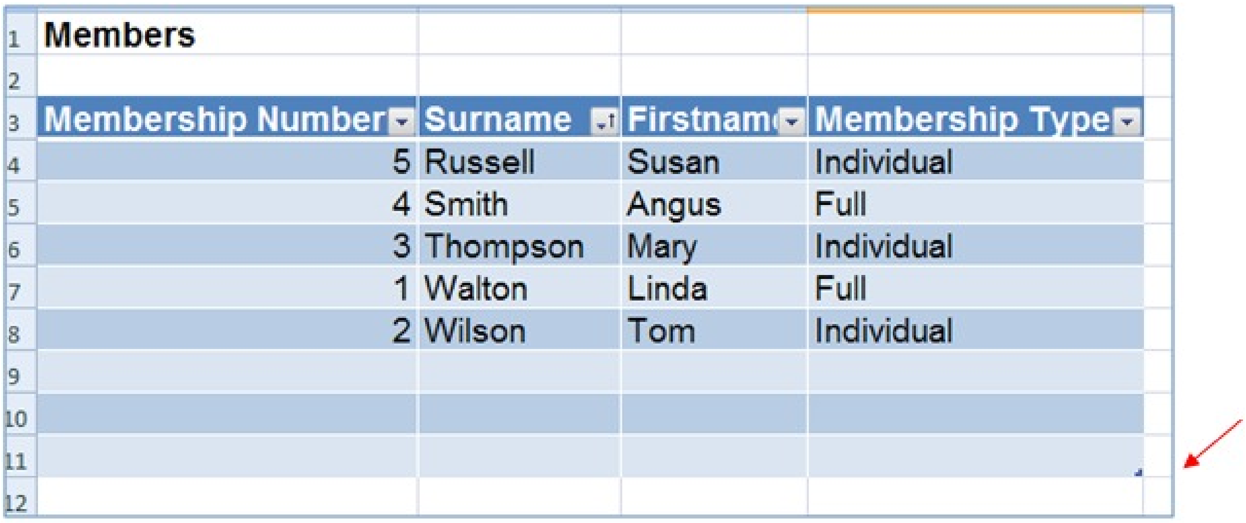
Sorting data

- Click on the drop down arrow next to the Surname field name.
- Select the Sort A to Z option to sort the data table alphabetically.
- Once sorted, Russell should be the first record in the table and Wilson should be the last.

Filtering data

- Click on the drop down arrow next to the Membership Type field name.
- Click on the check box next to the Select All option to clear all check boxes.
- Click on the check box next to the Full option to add a check mark to the box.
- Click OK.
- Only two records – Smith and Walton should be visible since they are the only two Full Members.
- To show all records, click on the drop down arrow next to the Membership Type field name.
- Select the Clear Filter from "Membership Type" option.

Expanding your table



Members

Membership Number	Surname	Firstnam	Membership Type
5	Russell	Susan	Individual
4	Smith	Angus	Full
3	Thompson	Mary	Individual
1	Walton	Linda	Full
2	Wilson	Tom	Individual

To add another record to the table simply start typing in the row immediately below your table. When you tab to the next column the row is included in the table automatically.

The same will happen if you start typing in the column to the right of the table. After typing your field name press the Enter key and the column will automatically be included in your table.

Alternatively you can expand your table with multiple rows and columns as follows:

- Place your mouse pointer over the small dot in the bottom right hand corner of the table. (see above)
- The mouse pointer will change into a two-headed arrow.
- When this happens, click and hold down the right mouse button and drag the pointer down and across to add as many blank rows and columns to your table as you need.

Templates

You can download free templates from the Microsoft website at http://office.microsoft.com/en-us/templates/excel-templates-FX102828204.aspx.

Chances are there is a template available for anything and everything you might ever need to do, and not just for Excel. So rather than start from scratch why not browse the available templates which you can customise to your own needs.

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