Texas ELMS

Working with Excel
Quick Tips for formatting files and creating reports
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Converting Spreadsheet to Table

To manipulate data for better analysis and reporting

1. Click any cell within the spreadsheet
2. Click on the **Insert** tab
3. Click on **Table** to open a dialogue window. Excel automatically selects all cells for the table, stopping at the first blank column and row.
4. Make sure **My table has headers** is checked.
5. Click **OK**
Adding a “Total” Row

Creating a “total” row to add all numbers within columns or a column

To add a “total” row:

• With the entire table selected, go to the Table Tools tab
  • To select entire table, click the *select all* button
  • In the Table Style Options category:
    • Check the Filter button box
    • Check the box for Total Row
### Coding in the Count Formula

To get total number of entries in a number field with a range of numbers, it is important to change the columns listed here to make reporting those numbers easier.

<table>
<thead>
<tr>
<th>Unique Student ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>DOB</th>
<th>Address</th>
<th>Gender</th>
<th>CE ID</th>
<th>Site ID</th>
<th>Count</th>
<th>Program</th>
<th>Meal Code F or RP Derived from Program value</th>
<th>EDG #</th>
<th>Eligibility Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>10961209-5835</td>
<td>Leblanc</td>
<td>Ursula</td>
<td>02/18/12</td>
<td>Ap M53-8972 O F</td>
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<td>001</td>
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<td>Yvette</td>
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<td>602-3332 Ar, Av F</td>
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<td>McCullough</td>
<td>Yvonne</td>
<td>08/24/09</td>
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<td>001</td>
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<td>Bevis</td>
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<td>12/23/10</td>
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</tr>
</tbody>
</table>

To change **Last Name**, **Site ID**, **Program** and **Meal Code** formulas:

- Select a cell on the last row of the **Last Name** column
- Click the filter arrow that appears to the right
- Select **Count**
- Repeat this for the **Site ID**, **Program** and **Meal Code** columns
Freezing Rows and Columns

Freezing the top row or first column to see them while scrolling

Freezing the top row or first column

- To freeze top row, select the row directly below the row(s) you want to freeze
- To freeze first column, select the cell immediately to the right of the column you want to freeze
- Go to the View tab
- Select the Freeze Panes command and choose Freeze Top Row or Freeze First Column
For example:
If you want to sort by SNAP program:
1. Click on the *filter* button on the Program column
2. Click *Select All* box to remove the check mark
3. Click on SNAP to check mark it
4. Click OK
The “Total” row now shows the number of SNAP students. You can also sort by multiple criteria by selecting and filtering the desired categories.
Clearing Filters

Removing one or all filters will return your spreadsheet to its original display

To clear all filters at once:
- Click the Data tab
- Select Clear next to the funnel with the red X

To clear one filter:
- Click on the filter button for the desired column
- Select Clear Filter From (name of column).
Sorting Columns

Sorting to reorder your data into groups

**Sorting Alphabetically:**
1. Click on Filter Button at the top of the desired column
2. Select Sort option (A to Z or Z to A)

**Custom sorting:**
1. Click on *Home* tab
2. Select *Sort and Filter* (on the right)
3. Click on *Custom Sort*
Custom Sorting

Examples of custom sorting by multiple criteria

1. To sort **students grouped by program and then site**, start with program.
2. To sort a group **by the program at each site**, then start with the site and then add program.
3. To sort **students alphabetically by program at each site**, then start with site, add program, then last name.
   - Select Values in the Sort On section when sorting data
   - Select how you want it ordered (A to Z, Z-A, or custom)
Invisible Data May be Causing Upload Errors

Spreadsheets may contain invisible data that causes uploading problems. Clearing this type of data is a good practice to maintain.

Clearing a column:
- Click the letter of the column you want to clear, this selects the entire column.
- Press and hold Ctrl + Shift + Right Arrow
- Right-click highlighted cells and select Clear Contents

Clearing a row:
- Click the number of the row you want to clear, this selects the entire row.
- Press and hold Ctrl + Shift + Down Arrow
- Right-click highlighted cells and select Clear Contents
Clearing CE ID

Extraneous or invisible data in the CE ID column

This also can cause problems during the upload process. To potentially avoid such issues, it is important to clear this column of invisible or nonessential data.

To clear CE ID column:
- Click the cell after the last complete row of data
- Press Ctrl + Shift + Down Arrow
- Right-click highlighted cells and select Clear Contents