


Excel Tips and Tricks

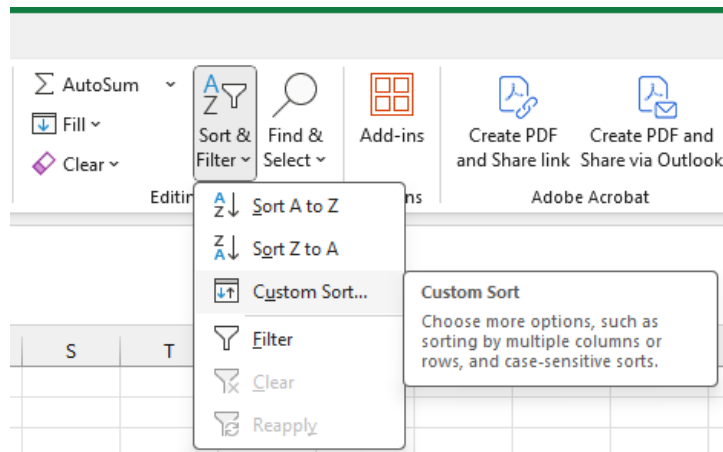
Sorting

Sorting your data allows you to rearrange data in a specific order. To start, click on the grey triangle in the upper left corner where the rows meet the columns:

	A	B	C	D	E	F	G
1	Student ID	First Name	Last Name	77 File?	IEP Services?		
2	741474	Joe Bill	Sampsonite				
3	74805	Berry	Boberry				
4	741412	Sa	Strawberry				
5	742147	Zach	Zucchini				
6	743597	Oscar	Orange				

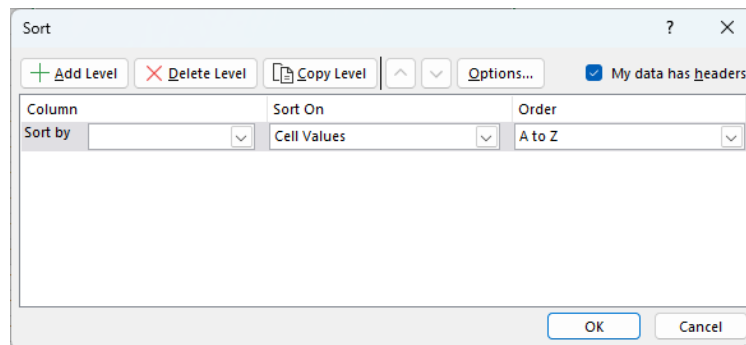
1. On the Home ribbon, go to the Editing section and hit the down arrow next to the

Sort & Filter symbol .



a.

2. Select Custom Sort to sort using more than one criteria

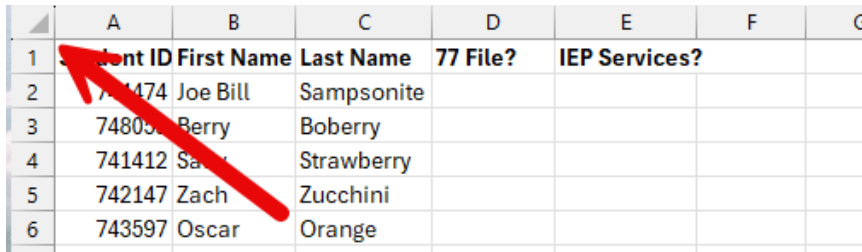


a.

3. As you add levels to the sort, it will further sort your information.

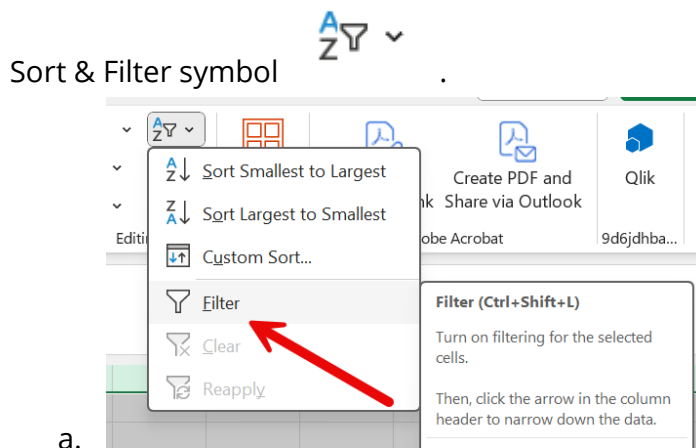
Filter

Filter temporarily hides data that does not meet specific criteria, allowing you to focus on a specific subset of data without changing the layout. To start, click on the grey triangle in the upper left corner where the rows meet the columns:



	A	B	C	D	E	F	G
1	Student ID	First Name	Last Name	77 File?	IEP Services?		
2	744474	Joe Bill	Sampsonite				
3	748059	Berry	Boberry				
4	741412	Sa	Strawberry				
5	742147	Zach	Zucchini				
6	743597	Oscar	Orange				

1. On the Home ribbon, go to the Editing section and hit the down arrow next to the

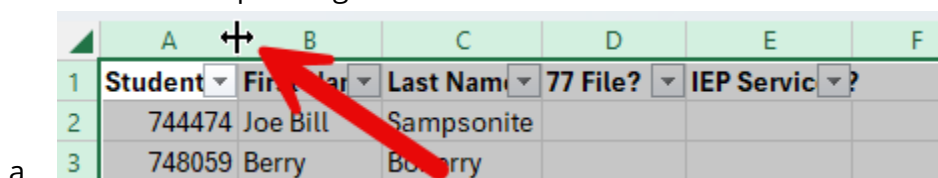


2. Select Filter. This will put selection dropdowns next to each column header and allow you to filter specific criteria (last name, student ID, IEP service, etc.)

Resizing columns/rows

Sometimes you will need to resize your columns/rows because they aren't wide enough to view your information or you need to make them smaller to see everything on your screen at once. To do this:

1. Hover your mouse on the line between your columns or rows and you will see a line symbol with arrows pointing in both directions:

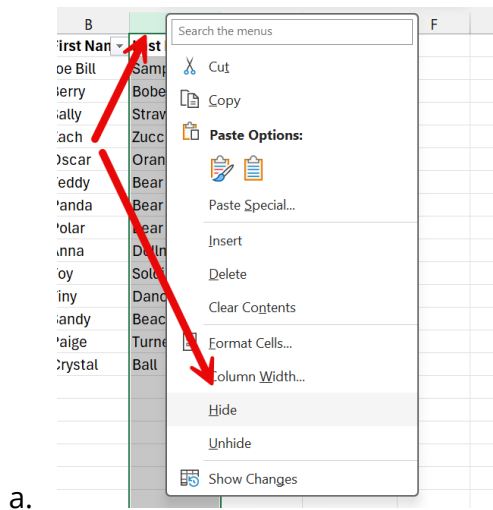


2. From here you can either click and drag to resize, or you can double click to allow excel to automatically resize the columns so that everything is visible
 - a. Note: if you select your entire sheet by clicking on the triangle at the upper left corner where the rows meet the columns and then double click between the columns/rows, it will automatically resize all of the rows and columns rather than doing them one at a time.

Hiding columns/rows

Sometimes you may want to hide information that you don't want to see at any given time. To do this:

1. Select the column/row you want to hide
2. Right click on that column/row and select Hide

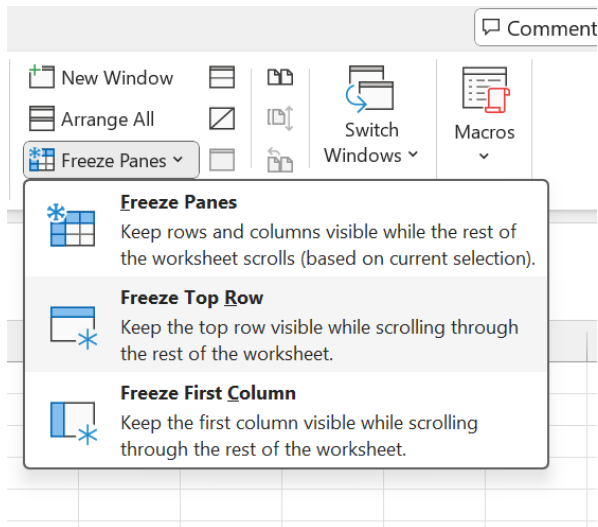


When you want to see that information again:

1. Select the columns/rows on either side of the hidden column/row
2. Right click on that selection and select Unhide
 - a. You can also select the entire spreadsheet and do the same thing if you have multiple rows and columns hidden that you want to unhide.

Freeze Panes

If you have a large spreadsheet and you need to scroll through the information, freezing panes can help you keep specific information visible while scrolling.



Freezing header row

This will allow your column headers to stay visible while you scroll through your data

1. Go to the View tab and select Freeze Panes
2. Hit Freeze Top Row

Freezing header and columns

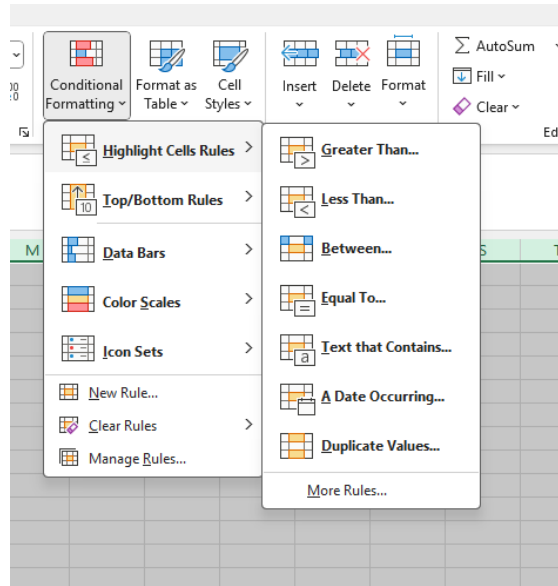
This will allow you to freeze specific columns and rows, so you always see them while scrolling down and side to side

1. Put your cursor in the first field AFTER the rows and columns you want to freeze
2. Go to the View tab and select Freeze Panes
3. Hit Freeze Panes

Conditional Formatting

This will automatically highlight your data/fields based on specific settings.

1. On the Home tab, go to Conditional Formatting and select your rule:



a.

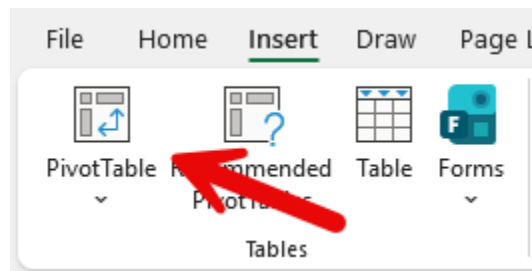
2. Examples of when/how to use this:

- a. Duplicate Values- helps you find duplicate student ID numbers or Medicaid ID numbers
- b. Equal To- can help you automatically highlight specific IEP services listed (OT/PT/Speech Therapy, Counseling, Nursing, etc.) in a specific color
- c. Color Scales- highlight numbers in a range of colors (helpful with counts of service logs entered)

Pivot Tables

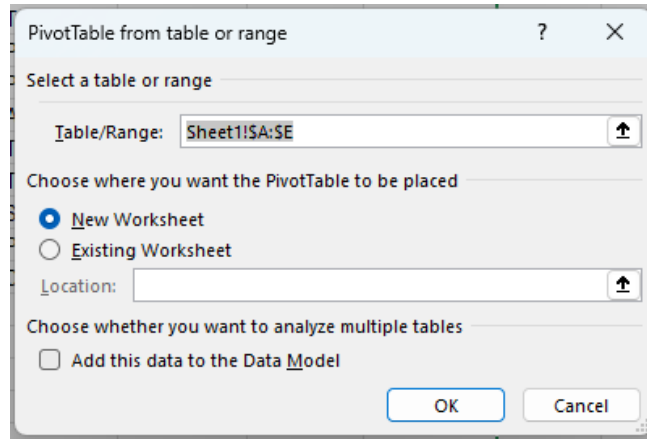
A pivot table in Excel is a powerful, interactive tool used to quickly summarize, analyze, and explore large datasets without using formulas. It rearranges data to transform thousands of rows into a concise, meaningful report, allowing users to calculate sums, averages, or counts across different categories.

- 1. Select the data you want in your pivot table
 - a. Make sure it has headers
- 2. Go to the Insert tab and click Pivot Table

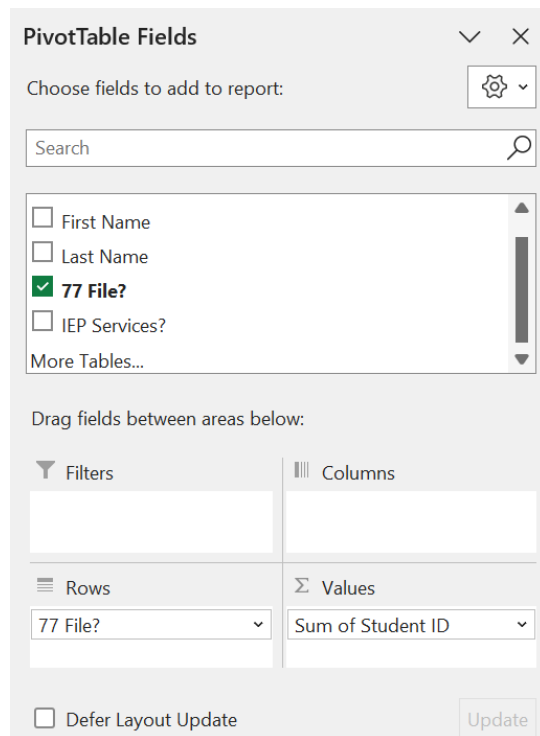


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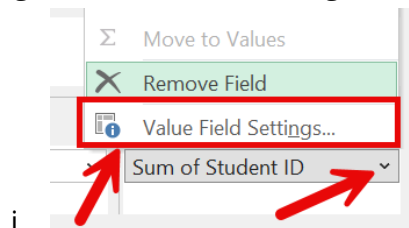
3. Choose the location you want your pivot table in
 - a. Usually best to create them in a new tab



- b.
4. Configure your table by selecting the categories you want in the rows, columns and value settings



- a.
 - b. If your Values field needs to be adjusted, click on the down arrow next to it and go to Value Field Settings. Ex: changing from Sum to Count

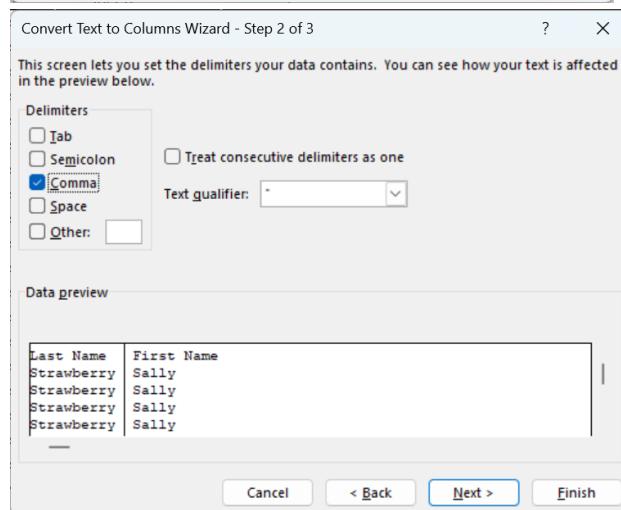
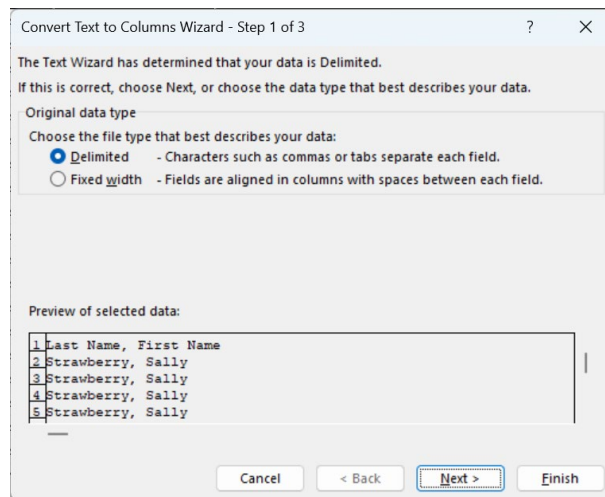


i.

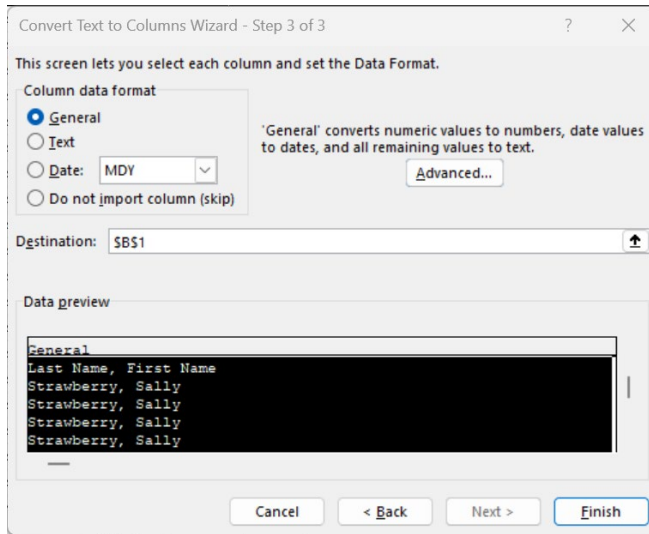
Text to Column

This allows you split the contents in your cells into separate columns using delimiters (commas, spaces, tabs, etc.) or fixed widths.

1. Highlight the column that has data you want to separate
2. Go to the Data tab and click Text to Columns in the Data Tools group
3. Choose how you want to separate the information



4. Set your data format for the new columns and the destination for the output.
 - a. Beware of the Destination of your data. If the column you are wanting to split the data out of is in the middle of your spreadsheet, it usually tries



5.

V Lookup

1. =vlookup(lookup_value,table_array, col_index_num,range_lookup)
 - a. Lookup value= what you are trying to find
 - b. Table array= Fields you are searching through
 - c. Col index num= number of the column they are looking for the return value from
 - d. Range lookup= FALSE

<https://www.youtube.com/watch?v=xlynD1gFOLo>

=isna matches

This formula identifies when values do not match.

1. Copy and paste the data you want to match into the same excel document
2. Sort the two sections of data by the same feature
 - a. Student ID, Medicaid ID, etc.
 - b. Make sure the data you want to match your information by is formatted the same way (general, number, text, etc.)
3. Add a column to both and add the =isna function
 - a. =isna(match(D2,T:T,FALSE))
 - b. D2 will be the cell you want to match in the other data source
 - c. T:T will be the column in the other data source that you are trying to match D2 to
4. Copy the formula down

- a. False will show up if there is a match
 - b. True shows up if there is no match
5. It is highly recommended that you filter for False/True and replace it with "Yes"/"No"