



IT Tips and Tricks: 21

Excel as a Database (Part 2)

In Tips and Tricks 3 we began to look at using Excel as a Data Source for a Mail Merge. In this edition, we will take that a stage further enabling us to use the database that we have created in Excel for more than just a data source.

Filtering Data

To specify a conditional filter criteria

- ❖ You can use AutoFilter to filter conditionally. For instance, you could display only those clients that have more than 3 claims in a period. To do this you would use the following procedure.
 - First make sure that no unwanted filters have accidentally been put in place.
 - Click on the drop down control in the relevant column of the database (in this example, number of claims).
 - Select **Custom**, which will display the **Custom AutoFilter** dialog box.
 - Click on the **Claims** drop down control (displayed within the **Custom AutoFilter** dialog box). This will display the conditional operators.
 - In this example select **is greater than**.
 - In the entry box, immediately to the right, enter the figure **3**, and click on the **OK** button.

The database will now be displayed, listing only those clients that have more than 3 claims in a period.

Operators available using Custom AutoFilter:

=	Equal to	<>	Not Equal to
>	Greater than	<	Less than
>=	Greater than or equal to	<=	Less than or equal to

Using the And/ Or filters

You can use the **And / Or** buttons to impose additional criteria on your filters. For instance, you could display all clients whose turnover was between two values.

To remove all AutoFilters

- From the **Data** drop down menu select **Filters**.
- If the **AutoFilter** command is checked this indicates **AutoFilters** are in place.
- Click on **AutoFilter** to remove all filters and display all records.

Totalling and Manipulating Filtered Data

Totalling fields within a filtered database

- Use **SUBTOTAL** not SUM. (SUBTOTAL ignores hidden records, whereas SUM does not.)



Creating Subtotals

To create subtotals

- First, sort the data.
- From the **Data** menu, select **Subtotals** to display the **Subtotal** dialog box.
- Select the column by which you wish to group from the **At each change in** drop down list box.
- Select the calculation you wish to perform from the **Use function** drop down list.
- Select the column(s) you wish to calculate by selecting the check boxes in the **Add subtotal to** list box.
- Select the **Replace current subtotals** check box if you wish to replace any existing subtotals.
- The subtotal and grand totals appear at the end of the data group by default. If you want to show them before the data group, deselect the **Summary below data** check box.
- Select **OK**.

To remove subtotals

- From the **Data** menu, select **Subtotals** to display the **Subtotal** dialog box.
- Click the **Remove All** button.