FILTER LIST

FILTER A LIST
AutoFilter allows you to view only the records you want to review. The Filtered List can be sorted in the same way that the whole database is sorted. When working with a Filtered List, it is possible to filter the records by more than one criterion. For this lesson, you will need the Database Exercise workbook that is available in the documents that were downloaded from the Excel 2013 Training Web page. You also need to complete the lesson on Entering Field Names and the Enter Data Series lesson.

Use One Criteria
- Make sure the insertion point is located somewhere in the database.
- Click the Data Tab.
- In the Sort and Filter Group, click the Filter button (see illustration below left).

- List arrows will appear next to each column label in the list as shown in the illustration above right.
- To see a list of filtering criteria for a specific column, click the list arrow next to the column heading.
- Click the Filter arrow for the Department field.
- Click the check box for the Select All area to remove the check marks from all the boxes.
- Click the Executive check box.
- Click the OK button to apply the filter.
- The records for the personnel in the Executive department should be displayed.

Use More Than One Criteria
- Click the Filter arrow again and click Select All.
- Click the OK button to once again apply the filter.
- All the records in the database should be displayed.
- Click the Filter arrow next to Salary.
- Click the Number Filters link.
- In the list that appears, click Greater Than.
- The Custom Auto Filter dialog box will appear (see illustration on next page).
- The Salary box will display is greater than.
- In the box next to the first box, input 40000.
- Click OK to list the Personnel who have a salary of more than $40,000.
- With this Filter still applied, click the arrow next to Department and choose Production.
- This Filter will list all the people whose Salary is greater than $40,000 and who work in the Production department.
- Clear the filter for the Department field. To do this:
  - Click the Filter arrow.
  - Click Select All.
- Clear the Filter from the Salary field. To do this:
Click the Filter arrow for the Salary field.

Click the Clear filter from “Salary” link.

The Data Table should appear with all the records displayed.

Advanced Filter
Advanced filtering is used to apply more sophisticated filtering criteria to a worksheet. To set up Advanced Filtering, follow the steps below.

Use One Criteria
- Insert four rows above the column labels for the database.
- These rows will be used for the criteria range for filtering purposes.
- Select the column labels from the list.
- On the Home Tab in the Clipboard Group, click the Copy button.
- Select the first blank row of the criteria range, cell A3.
- Click the Paste button to insert the column headings into Row 3.
- In cell D4 the cell directly the Department heading, input Production.
- Click a cell in the database list, below the second row of headings.
- Click the Data Tab.
- In the Sort and Filter Group, click the Advanced button (see illustration below left).

The Advanced Filter dialog box will appear (see illustration above right).
Choose the option **Copy to another location**. This will copy the filtered information to a specified location in the worksheet.

The range for the database list should appear in the **List range** box.

Click the **Collapse** button for the **Criteria range** box.

Select the range A3:F4.

Click the **Expand** button to return to the **Advanced Filter** dialog box.

To filter the list by copying rows that match your criteria to another area of the worksheet:
- Click the **Copy to** box.
  - Click the upper-left corner of the area where the rows are to be pasted.
  - For this exercise, select cell **H3**.
- Click the **Unique records only** check box if you don’t want duplicate records to appear in the filter.
- Click **OK** to apply the filter.

The information meeting the criteria should appear beginning in the range that was specified in the **Advanced Filter** dialog box.

**Use More Than One Criteria (Specifying an And Criteria)**

- In cell **F4** input greater than or equal to (\(\geq 40,000\)).
- Click a cell in the database list, below the second row of headings.
- Click the **Data Tab**.
- In the **Sort and Filter Group**, click the **Advanced** button (see illustration below left).

The **Advanced Filter** dialog box will display (see illustration above right).

The information that was specified in the previous filter will still be selected in the List Range and Criteria Range areas.

Click the option to **Copy to another location**.

In the **Copy to** box, click the **Collapse** button and choose cell **H27**.

Click the **Expand** button to re-open the dialog box.

Click the **Unique Records Only** check box.

Click **OK** to run the filter.

This filter will display the employees in the Production Department that have a Salary greater than or equal to $40,000.
Use More Than One Criteria (Specifying an Or Criteria)

✦ In cell D5 input **Marketing**.
✦ Click a cell in the database list, below the second row of headings.
✦ Click the **Data Tab**.
✦ In the **Sort and Filter Group**, click the **Advanced** button (see illustration below left).

![Advanced Filter dialog box](image)

✦ The **Advanced Filter** dialog box will display (see illustration above right).
✦ The **List Range** and **Criteria Range** boxes will contain the information from the previous filter.
✦ Make sure that **Copy to another location** is selected.
✦ In the **Criteria range** box, change the number 4 to a 5.
✦ In the **Copy to** box, click the **Collapse** button.
✦ Select cell H38.
✦ Click the **Expand** button to return to the dialog box.
✦ Click the **Unique Records Only** check box.
✦ Click **OK** to run the filter.
✦ This filter should display:
   ✫ The employees in the Production or Marketing Departments.
   ✫ The Salary for the Employees in the Production Department should be greater than or equal to $40,000.
   ✫ All Salary ranges for the Marketing Department should be displayed.