
Excel Filtering Tips

Autofilter by Example

While you're viewing a large Excel list, you can scroll to a row that contains data of interest and then quickly filter the list to display all rows that have values matching the value in the selected cell. To do this, you must first add the special "Autofilter" button to a toolbar.

How to:

1. Choose *View, Toolbars, Customize* to open the "Customize" dialog.
2. Click the "Commands" tab to bring it to the fore.
3. Scroll down the list of Categories (at left) and select "Data".
4. Then scroll down the list of "Commands" (at right) and select "Autofilter".
5. Drag this command to any existing toolbar (your Standard toolbar for example) and drop it to add a button to the toolbar that looks like the one in the illustration at right.



Now: You need not have the Autofilter turned on to use the Autofilter button. Select any cell in the list that has a value of interest. Click the "Autofilter" button you just added to a toolbar. Excel automatically turns on the Autofilter and filters using the value in the selected cell.

If you want to apply multiple filters to the list, continue in the same way. That is, select a cell in the now-filtered list that contains a value you want to use to filter the list further. Then click the "Autofilter" button. Excel restricts the data view by that additional criteria.

When you're finished, toggle off the Autofilter in the usual way (*Data, Filter, Autofilter*).

Advanced Filter

Remember that the Advanced Filter allows you more flexibility in setting criteria than does the Autofilter. You can use the Advanced Filter to apply multiple criteria to a single column (more than the 2 allowed by the Autofilter's Custom option), apply multiple criteria to multiple columns, or create criteria that result from a formula.

Examples of advanced filter criteria

Multiple conditions in a single field (column)

If you have two or more conditions you want to use to filter a single field in the data, type the criteria directly below each other in separate rows. For example, the following criteria range displays the rows that contain "Albany" *or*

“Baltimore” or “Boston” or “Charlotte” in the Market column.

Market
Albany
Baltimore
Boston
Charlotte

One condition in two or more fields

To find data that satisfies criteria in two or more record fields, enter all the criteria in the *same row* of the criteria range. For example, the following criteria range displays all rows that contain “Charlotte” in the Market column, “Dole” in the Brand column, and “46” in the Size column.

Market	Brand	Size
Charlotte	Dole	46

Note that you can also use the Autofilter in this case. You can specify multiple conditions for different columns and display only the rows that meet all the conditions using the AutoFilter.

One condition in one field or another

To find data that meets *either* a condition in one field *or* a condition in another field, enter the criteria in different rows of the criteria range. For example, the following criteria range displays all rows that contain "Charlotte" in the Market column *or* "Dole" in the Brand column *or* values greater than 33 in the Size column.

Market	Brand	Size
Charlotte		
	Dole	
		>33

One of two sets of conditions for two fields

To find rows that meet one of two or more sets of conditions, where each set includes conditions for more than one field, type the criteria in separate rows. For example, the following criteria range displays the rows that contain "Charlotte" for Market and "JCYJC" for Brand and "46" for Size. It also displays rows where "Baltimore" is Market and "Dole" is Brand and "33" is Size. And it

also displays rows where “Raleigh” is Market, any value is Brand, and Size is greater than 33.

Market	Brand	Size
Charlotte	JCYJC	46
Baltimore	Dole	33
Raleigh		>33

Conditions created as the result of a formula

You can use a calculated value that’s the result of a formula as a criterion. When you use a formula to create a criterion, you must *not* use a column label from the list as the criteria label; either keep the criterion label blank or use a label that’s not a column label from the list. Your formula – in the criterion range – will evaluate to TRUE or FALSE.

Other tips:

- If your criterion formula references a field in the list, write the formula in the criterion to use a *relative* reference to that value in the first row of the list.
- If your criterion formula uses values in the list to derive some other value that’s *not* in the list (for example, gets the average of “Sales Rate” values in the list), you must use *absolute* references in the average calculation to refer to the Sales Rate values. Special Note: If you neglect to use an absolute reference in this case, Excel 2000 *will* return values (unlike Excel 97, which gave an error) and you may think your filter has worked. However, chances are that not all valid values will be returned.
- If your criterion formula refers to a value outside the list, use an *absolute* reference to that value.

For example, the criteria range below finds records that have “Charlotte” as Market, “JCYJC” as Brand, and whose Sales Rate is greater than the average Sales Rate for all records in the list.

Market	Brand	Calc
Charlotte	JCYJC	TRUE

The part of the formula that calculates the average references all the values in the Sales Rate column using an absolute reference. E.g., =average(\$K\$8:\$K\$1096).

For More Information

See Excel’s online help. Also, don’t neglect the power of experimentation. Find out how Excel’s filters work by trying out several examples using a small list so you can easily test your results.