

Using the Excel Filter to Sift out the Exact Information Needed

Basics of Excel Filter

You can select one column or multiple columns to activate the Excel filter. Next, select the Data menu and then Filter. When the filter is activated, you will see down arrows in the selected column(s) and you can click on one of these at a time to check or uncheck single or multiple boxes to filter out all information other than the desired row(s). If multiple columns are selected, you can filter out information from each and progressively target and decrease the number of desired rows in your spreadsheet.

To de-select all filters, press the Filter button again.

The screenshot shows the Microsoft Excel ribbon with the 'DATA' tab selected. The 'Filter' button is highlighted in the 'Sort & Filter' group. Below the ribbon, the spreadsheet is visible with columns A, B, C, and D, and rows 1 through 5. The data in the spreadsheet is as follows:

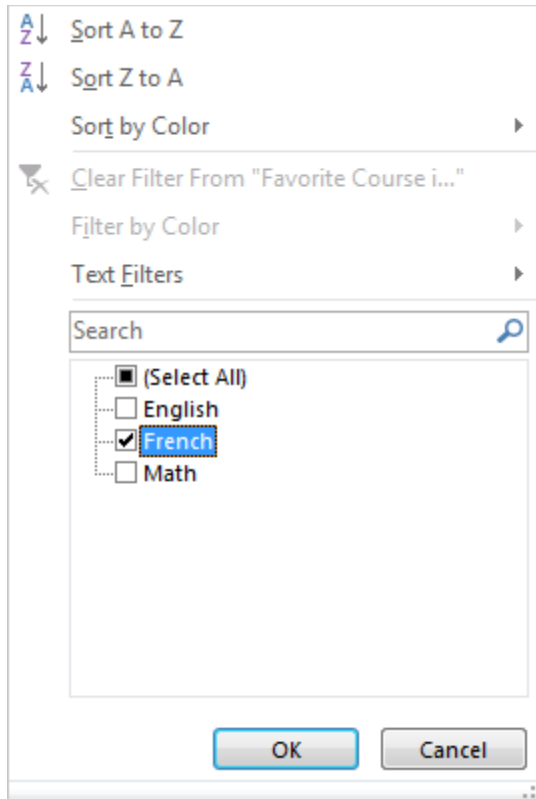
	A	B	C	D	E
1	Name	Age	Favorite Sport	Favorite Course in School	
2	Bill	22	Baseball	Math	
3	Cindy	45	Tennis	French	
4	Dennis	19	Tennis	English	
5	Ralph	67	Running	French	

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More Advanced Excel Filtering

When the Filter down arrow is held down for a single column, there are three additional advanced features you can use:

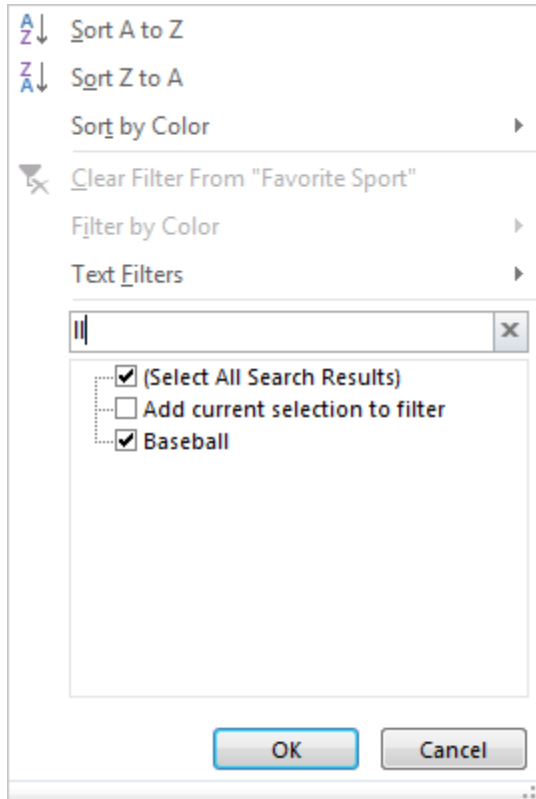
1. **Search Box** – To find the term(s) you wish to retain. You can search on any part of a term. For example, you can search for Baseball by searching “Ba” or “ll” if it is the only word in the filter list with these letter combinations.

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2. Filter by format of term

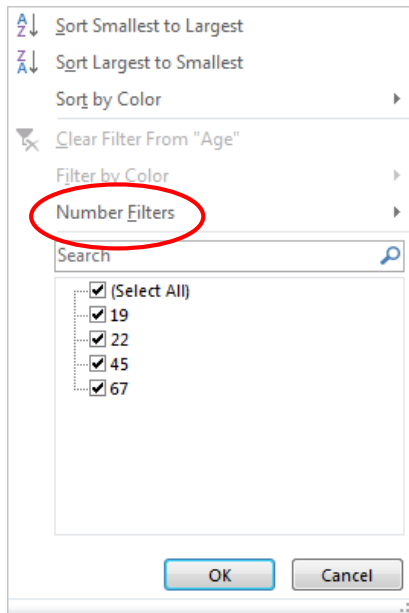
- a. **Text Filter** - Equals, Does Not Equal ..., Begins With ..., Ends With ..., Contains ..., Does not Contain ..., Custom Filter
- b. **Number Filter** – Equals, Does Not Equal ..., Greater Than ..., Greater Than Or Equal To ..., Less Than ..., Less Than Or Equal To ..., Between ..., Top 10..., Above Average ..., Below Average, Custom Filter
- c. **Date Filter** – Equals ... , Before ..., After ..., Between ..., Tomorrow, Today Yesterday, Next Week, This Week, Last Week, Next Month, This Month, Last Month, Next Quarter, This Quarter, Last Quarter, Next Year, This Year, Last Year, Year To Date, All Dates in the Period [many sub-choices], Custom Filter

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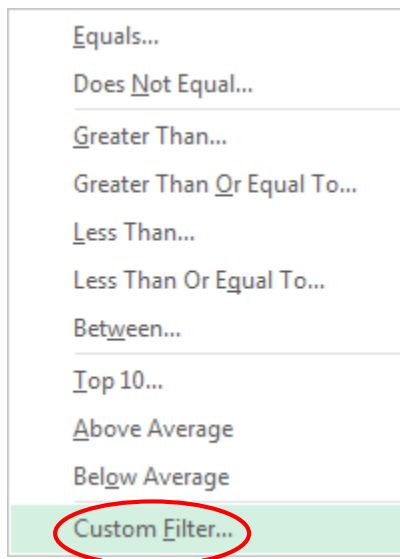


3. **Custom Filter (referenced in 2a. – 2c.)** - Can search for **two different criteria in a single column** using mathematical operators, Boolean Connectors (AND, OR) and truncation symbols (? – single character and * - multiple characters)

Ex. Column (Age): >55 AND >22

Ex. Column (Age): >55 OR <22

Ex. Column (Sport): =Baseball OR =Running

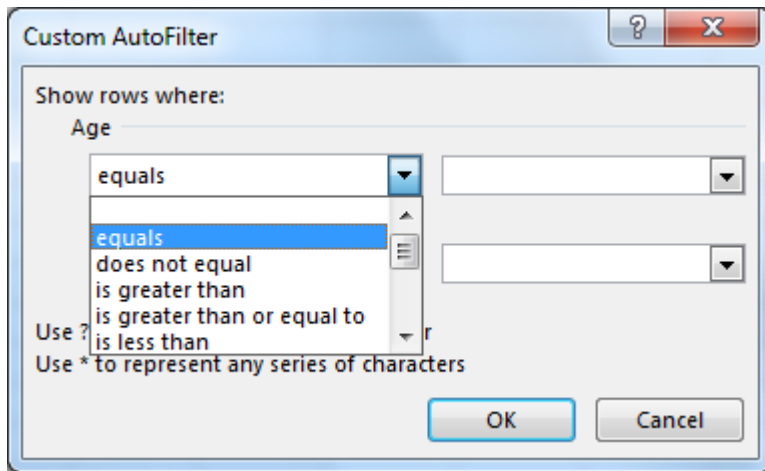


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Advanced Filter – Can search for **multiple criteria in several columns** simultaneously that goes beyond the scope of this handout. There are a number of good tutorials including <http://www.excelfunctions.net/ExcelAdvancedFilter.html> .

For assistance with your organization’s research needs, please contact Roger Magnus, Owner of Roger Magnus Research at roger@rogermagnusresearch.com

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