



Spice Up Your Excel Skills

Practical Techniques For Scrubbing Your Data

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Agenda

Working With Your Employee Roster

- Verify data set up
- Keyboard shortcuts
- Text formulas
- Sorting data
- Filter for specific data
- Using VLOOKUP for consistency
- Calculating with dates
- Additional cleanup techniques

Working With Your Applicant Flow

- Working with duplicates
- Pivot Tables
 - Creating
 - Formulas
 - Filters
 - Options





Working With Your Employee Roster

Verify Data Setup

- Each column is a “field”
- Each row is a “record”
- Must have unique column headings
- **NO** blank rows
- **NO** blank columns
- Consistent field type data (number vs. text)



Keyboard Shortcuts

- Shift with keyboard movements to select data
- Shift-drag to move and insert columns
- Use fill handle to quickly copy data & formulas
- Drag with right mouse button for quick option to convert formulas to values
- **CTRL - ;** Current date
- **CTRL - ‘** Duplicates cell above
- **CTRL - `** Alternates between cell value and formula
- See all keyboard shortcuts in *Help – Keyboard Shortcuts*



Text Formulas

- Use **Trim** function to get rid of leading, trailing and multiple spaces
 - *=trim(text)*
- Use **Text** functions to convert to consistent case
 - *=proper(text)*
 - *=lower(text)*
 - *=upper(text)*
- Convert census codes to 4 characters of text
 - *=right("0000"&C2,4)*



Sorting Data

- Click a cell in the range you want to sort
 - NO blank rows or columns!!!
- On the **Data** tab, **Sort & Filter** group click **Sort** for a multiple level sort
- Or use the **A-Z Button** for a single sort
- You may sort by cell color and font color!



Filter For Specific Data

- Click a cell in the range you want to filter
- On the **Data** tab, **Sort & Filter** group, click on **Filter**
- Click the arrow in the column heading to display the filter options
- Take some time to explore the variety of choices based upon the type of field:
 - Text
 - Number
 - Date
- If you need to find text values that share some characters but not others, use a wildcard character in the custom filter



Using VLOOKUP For Consistency

- Setup a master file with standard information such as:
 - Job Code, Job Title, Census Code, Job Group; or
 - Employee ID, Race, Gender, IWD, PV
- Function looks in the first column of a table for a matching value and moves across the row to return the value of another cell
- *=VLOOKUP(lookup value, Masterfile table, Col_index_num, exact_match)*



Calculating With Dates

- Dates should be formatted correctly
 - *=left(cell,10)*
 - *=datevalue(cell)*
- Time in company
 - *=(Date to compare-Date of hire)/365.25*
 - *=ROUND((\$J\$1-K4)/365.25,1)*
- Time in job
 - *=(Date to compare-Date in position)/365.25*
 - *=ROUND((\$J\$1-M4)/365.25,1)*





Working With Your Applicant Flow

Working With Duplicates

- Using Conditional Formatting
- Using Remove Duplicates
 1. Number all records in the file
 2. Create a backup copy of the file
 3. Use **Remove Duplicates** (Data Tab) to remove duplicates from the backup file
 4. Use **VLOOKUP** from the original file to the backup file to note which records were removed
 5. Copy all N/A records to a separate sheet
 6. Delete all records with N/A from original file



Creating Pivot Tables

- Run **Pivot Table** from the **Insert** tab, **Tables** group
- Select the source data
- The wizard then provides you with a new worksheet for the report
- Drag the fields from the list window to the outlined areas
- Excel summarizes and calculates the report for you automatically



Formulas In Pivot Tables

- Right click on field in **Pivot Table** and choose **Show Values As**
- Subtotal and/or Grand Total Row and Column fields
- Create a Calculated field



Using Filters In Pivot Tables

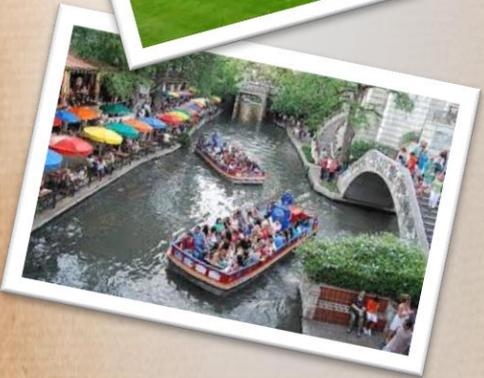
- Report Filters
 - Pivot Tables Tools Options
 - Options – Show Report Filter Pages
- Item Filters
 - Use drop down boxes





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