

Tables - DIY vs Excel

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James Tobin Consulting, LLC

Do It Yourself (DIY)

The more you use Excel you'll find that tables can be very useful. That said, there are basically two types of tables, Do It Yourself Tables (DIY) and Excel Tables.

The DIY Tables are most used by new users to the table world.

Typically, the DIY table contains data and might (read: should) include a header row. Within the DIY table there are ranges of data that can be assigned names and you can format the rows for easier reading. You can place filters and totals/subtotals in a DIY

Below you'll find a few examples of DIY tables.

Critical Tables																													
Products Sold					Distance Runners					APL 12 Conference										Insurance Premiums									
PB	Tons		First Name	Hair Color	Eyes	Weight	Institution	State	Mascot	Division	Head FB Coach	Premium Type	Member Name	Member ID	Effective Date	Reason	Location	Voluntary AD&D Family Indicator	Voluntary Term Life Family Indicator	Basic Term Life Premium	Dental Premium	Ltd Premium	Vision Premium	Voluntary AD&D Premium	Voluntary Term Life Premium	Basic Term Life Volume	Voluntary AD&D Volume	Voluntary Term Life Volume	Total Premium
Creamy	120.00		Pat	Red	Green	140.00	Arizona	AZ	Wildcats	South	Sumlin, Kevin	Continuation	Simpson, Marge	88888800			Continued Coverage			157.94									157.94
Chunky	99.00		Tracy	Blond	Blue	145.00	Arizona State	AZ	Son Devils	South	Edwards, Herm	Premium Adjustment	Krabappel, Edna	88888801	06/01/2015	COVERAGE CHANGE	Continued Coverage			114.88		26.98							137.85
Large Chunky	72.00		Terry	Brown	Bloodshot	142.00	California	CA	Bears	North	Wilcox, Justin	Premium Adjustment	Flanders, Ned	88888802	08/01/2014	TERMINATED EMPLOYEE	Continued Coverage			156.60		74.40							231.00
we'reilly	78.00		Kerly	Pink	Brown	148.00	Colorado	CO	Ruffaloes	South	McClintock, Mike	Premium	NathanademetageEllen, Agv	88888803					33.06		108.00					102,000.00			367.45
we/Nutella	70.00		Chris	Lime Green	Purple	150.00	Oregon	OR	Ducks	North	Cristobal, Mario	Premium	Brockman, Kent	88888804					34.18		110.01					109,000.00			144.19
Low Fat/Low Sugar	0.50						Oregon State	OR	Beavers	North	Smith, Jonathan	Premium	Bouvier, Selma	88888805					29.06	157.94	100.50	68.45	24.75	48.19	77,000.00	42,000.00	42,000.00	429.89	
							Stanford	CA	Cardinal	North	Shaw, David	Premium	Burns, Charles M.	88888806					25.96	157.94	105.00	68.45	25.20	160.74	57,650.00	57,000.00	57,000.00	543.29	
							UCIA	CA	Brulins	South	Alford, Steve	Premium	Largo, Dewey	88888807					21.38	157.94	86.04	68.45			29,000.00			333.81	
							USC	CA	Trojans	South	Holton, Clay	Premium Adjustment	Largo, Dewey	88888807					15.84		75.42				29,000.00			91.86	
							Utah	UT	Utes	South	Whittingham, Kyle	Premium	Memo, Otto	88888808	07/14/2015	SALARY CHANGE			23.30	157.94	89.52	68.45			41,000.00			339.21	
							Washington	WA	Huskies	North	Peterson, Chris	Premium	Lumpkin, Lurleen	88888809					23.14	157.94	89.18	68.45	26.25	52.69	40,000.00	92,000.00	92,000.00	417.65	
							Washington State	WA	Cougars	North	Leach, Mike	Premium	Smithers, Wayne	88888812					34.66	241.94	111.00	79.51	27.75	72.69	112,000.00	142,000.00	142,000.00	507.55	
											Premium	Spuckler, Cletus	88888823					41.06	241.94	123.00	79.51	24.00	56.44	152,000.00	17,000.00	17,000.00	565.95		
											Premium	Syclack, Moe	88888841					30.50	157.94	103.18	73.08	29.25	101.69	86,000.00	192,000.00	192,000.00	495.64		
											Premium	Tatum, Dredrick	88888867					25.14	208.24	93.90	79.51	26.25	63.69	55,000.00	92,000.00	92,000.00	497.13		
											Premium	Wiggum, Ralph	88888885					1,892.00	Emp	98.18				63.69	70,000.00	92,000.00	92,000.00	216.06	
											Premium	Ziff, Arlie	88888889					26.82	Emp	96.09				59.69	63,000.00	42,000.00	42,000.00	484.04	
											Premium	Van Housen, Mithouse	88888896					22.66	Emp	88.50				50.94	37,000.00	67,000.00	67,000.00	187.60	
											Premium	McDougal, William	88888923					26.66	208.24	96.00	73.08	34.75	54.69	62,000.00	42,000.00	42,000.00	483.42		
											Premium	Snyder, Ray	88888929					23.30	208.24	89.47	73.08	24.75	51.19	41,000.00	42,000.00	42,000.00	470.03		
											Premium	Skinner, Seymour	88888931					20.97	157.94	90.64	72.85	23.74	74.45	26,450.00	8,250.00	8,250.00	440.59		
											Premium	Simpson, Abraham	88888933					36.90	241.94	115.17	68.45	24.75	54.69	126,000.00	42,000.00	42,000.00	541.90		
											Premium	Revere, Nick	88888951					20.26	208.24	83.74					22,000.00			312.24	
											Premium	Quimby, Joseph	88888954					20.10	157.94	83.67	68.45				21,000.00			330.16	
											Premium	Pennacandy, Luis	88888955					25.22	241.94	90.02	79.51	27.75	56.19	53,000.00	142,000.00	142,000.00	523.63		
											Premium	Powell, Herbert	88888956					19.94	157.94	83.11	68.45	27.75	56.19	20,000.00			329.44		
											Premium	Pye, Annie	88888957					23.46	Emp	89.83				26.25	88.69	42,000.00	92,000.00	92,000.00	226.23
											Premium	Mauris, Nelson	88888970					22.34	241.94	87.67	79.51			54.44	35,000.00	117,000.00	117,000.00	512.90	
											Premium	McClure, Troy	88888971					20.26	191.58	83.93	79.51	26.25	88.69	22,000.00	92,000.00	92,000.00	490.22		
											Premium	McCaillister, Horatio	88888940					20.90	208.24	85.05	73.08	24.00	52.69	26,000.00	17,000.00	17,000.00	493.96		
											Premium	Lovesly, Timothy	88888949					28.58		99.41					74,000.00			127.99	

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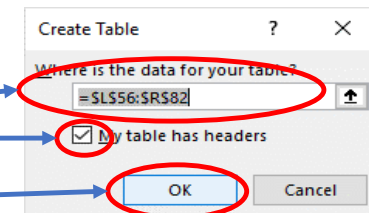
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Excel Tables

Creating and a few Features of the Excel Table

- 1 Select any cell within the data, ensuring that there are no completely blank rows and press Ctrl+T or from the Insert ribbon, select Table.

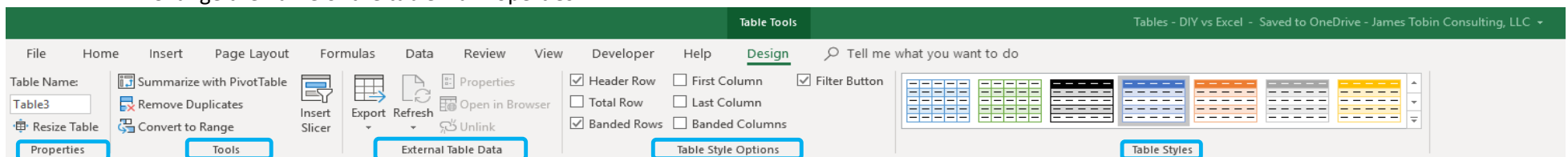
- 2 The Create Table dialogue box will appear and will ask you for the data range to be converted and ask if the data has headers.



- 3 Press the OK button. After you hit the OK button, Excel will:
 - Format the table with "Banded Rows";
 - Insert Filters in the Header Row;
 - Place a "Sizing Handle" in the last cell in the lower right-hand part of the table;
 - Assign a name for the table; and,
 - Assign a name for each of the columns in the table.

145.00	362,500.00
122.00	1,830.00

- 4 With the table created, via the contextual tab call "Table Tools" you can:
 - Change the formatting of the table (default, preset or custom) via Table Styles;
 - Add "Total/Subtotal" rows at the bottom of the table, via Table Style Options;
 - Insert "Slicers" or remove duplicates or convert the table into a pivot table via Tools; and,
 - Change the name of the table via Properties.



- 5 The default formula syntax is different than the normal/regular structure. For tables, the syntax is called Structured Reference and more akin to using Named Ranges rather than A1 or R1C1 syntax. Know that you can force the normal/regular syntax, but the default syntax for tables will load as Structured References.
- 6 Another feature that beats the DIY table is that for each Excel Table, the filters in the header row is unique to that table.

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- 7 The Total row is a toggle that can be changed from Sum to Average, Count, Max, Min etc. Also, the Total row can be detached from the table and still function as if it were still attached.
- 8 Adding additional rows or columns can be accomplished by clicking and dragging the "Sizing Handle" or by adding data in the first row after the table's bottom row or adding data in the column to the right of the far right column.
- 9 The data can be sorted and/or filtered independent of other tables in the worksheet.
- 10 Slicers can be used to provide easier visuals for filtering the data.

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Excel Table Excercise

Region	Cust Name	Date	Product #	Qty	Price Point	Extension
East	ABC	1/15/2018	123	1,087.00	125.00	135,875.00
West	WER	3/20/2018	456	1,459.00	145.00	211,555.00
West	TNT	7/25/2018	789	1,500.00	150.00	225,000.00
North	TNT	1/31/2018	789	1,423.00	146.00	207,758.00
South	UPP	4/5/2018	741	1,107.00	149.00	164,943.00
East	QAZ	2/16/2018	852	1,152.00	145.00	167,040.00
West	ABC	4/21/2018	963	1,256.00	149.00	187,144.00
North	WER	3/4/2018	753	1,042.00	127.00	132,334.00
East	WER	5/8/2018	789	1,025.00	131.50	134,787.50
South	TNT	5/7/2018	951	1,288.00	153.00	197,064.00
East	UPP	3/20/2018	123	1,350.00	127.00	171,450.00
West	QAZ	5/23/2018	456	1,018.00	138.00	140,484.00
North	ABC	4/5/2018	789	1,318.00	152.00	200,336.00
South	WER	6/8/2018	741	1,142.00	127.00	145,034.00
West	UPP	6/24/2018	963	1,403.00	141.00	197,823.00
North	QAZ	5/7/2018	753	1,020.00	136.00	138,720.00
South	ABC	7/10/2018	951	1,118.00	153.00	171,054.00
East	WER	5/23/2018	123	1,494.00	136.00	203,184.00
West	TNT	7/26/2018	456	1,352.00	150.00	202,800.00
North	UPP	6/8/2018	789	1,352.00	144.00	194,688.00
South	QAZ	8/11/2018	741	1,368.00	134.00	183,312.00
West	YAM	9/15/2018	123	1,000.00	137.00	137,000.00
South	QAZ	9/30/2018	123	1,500.00	136.00	204,000.00
North	YAM	10/1/2018	456	2,500.00	145.00	362,500.00
West	ASU	2/28/2018	456	15.00	122.00	1,830.00