

BC Analytics – Exploring Data with Excel

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Once a report has been run, especially shelf list type reports, people often want to do some data-mining to better explore/understand their data. One great way to do this quickly and easily is to export the report into Excel then utilizing Excel’s Filter option.

Quick Excel Filter Facts (Google “Excel Filter” for more info):

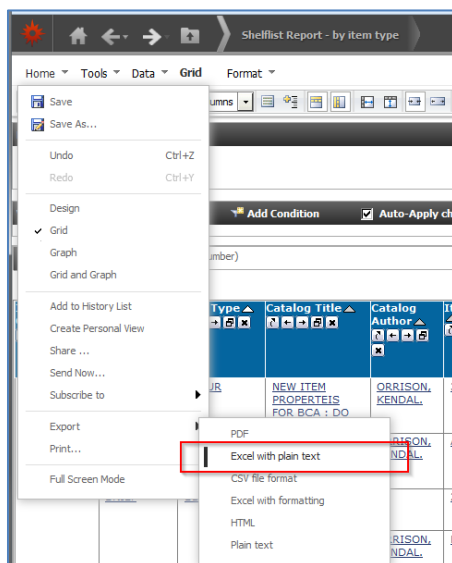
Filtered data displays only the rows that meet criteria that you specify and hides rows that you do not want displayed. After you filter data, you can copy, find, edit, format, chart, and print the subset of filtered data without rearranging or moving it.

You can also filter by more than one column. Filters are additive, which means that each additional filter is based on the current filter and further reduces the subset of data. This allows you to filter down quite deeply once you understand how the filters work.

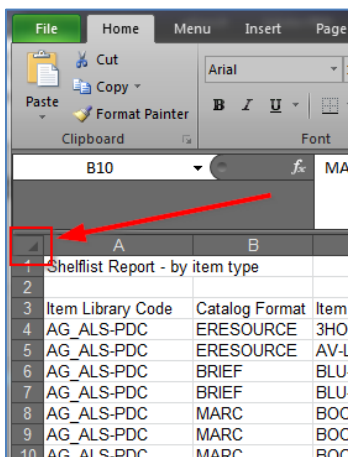
Note: When you use the Find dialog box to search filtered data, only the data that is displayed is searched; data that is not displayed is not searched. To search all the data, clear all filters.

How to turn on Excel Filters:

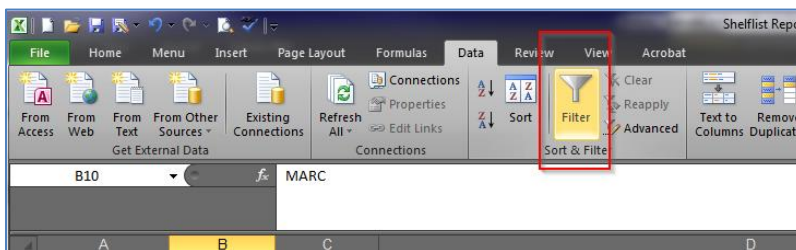
Export your report from BCA into Excel using the Export with No Formatting option.



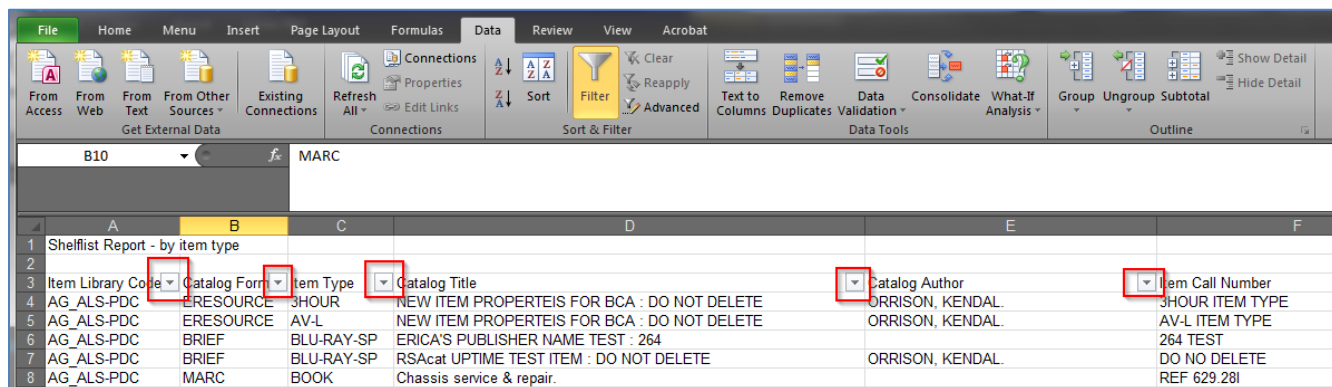
Once the report is in Excel, click the uppermost left square (to the left of column A) to highlight the entire report, then double-click the divider line between column A and column B to auto-format the entire report. This will stretch out the columns to fit their content. Clicking the upper left cell is the 'select all cells' shortcut. After doing the auto-format, click inside any cell to remove the highlighting/cell selection. Continue to adjust the column widths until you are happy with them.



Now that you can see all your data, you can make it easier to understand by applying Excel's default filter. In the Excel ribbon or menu, click the Data tab, then click the Filter button. There are additional shortcuts to this feature in some versions of Excel as well.

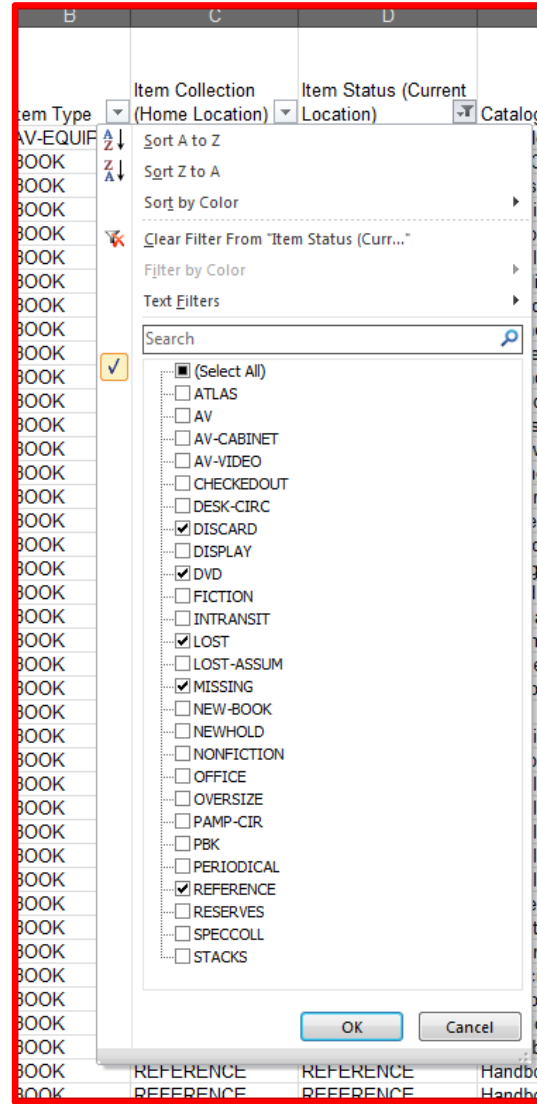
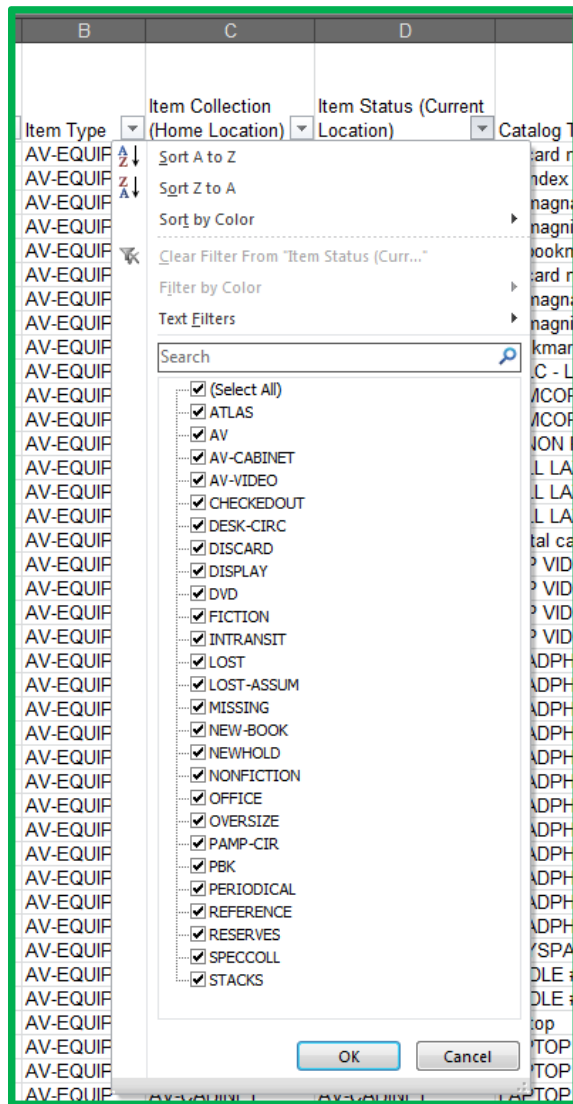


After applying the filter you will see down arrows in the header row of your data. These are your primary source of data manipulation using the filters.



How to use Excel Filters:

Click one of the down arrows in a header to expand the filter options for that column.



In the examples above, I clicked the Item Status (Current Location) dropdown arrow. The green outlined screenshot (left) shows the default no filtering applied view. The red outlined screenshot (right) shows checks next to some of the home locations. The checked locations will be the only ones displayed after clicking the OK button.

Turning on the filter option adds the small down arrow next to each column header. Setting a sort option changes the small arrow to an arrow with a long up/down arrow to show which direction the sort is. Selecting one or more checkboxes changes the arrow to a filter looking icon for that column. You can see this filter icon in the red boxed screenshot header.

These screenshots show several things. With no other filtering applied, each drop down will show all the possible selections (up to 1,000) in that column. The header drop downs will only show the data in the report; things like Item type, Home Location, and other columns only show actual cataloged data. The full shelflist report shown in the screenshots will show only the home locations used by this library as well as the system locations like lost, checked out, etc. However, if any other filter had been applied to another column, opening a second column header filter drop down will only show the contents AFTER the first filter is applied, and so on. This allows you to closely examine other data after making one limited selection.

For example, you could use the Item Type filter to limit to just DVD item types. The displayed results will be limited to just DVD items. If you were to click the filter drop down for location now, you would only see locations where DVD item type items are, not the list of ALL locations used in your library. Again, this is an excellent way to visualize your data after running reports.

You'll also notice you have Sort A to Z and Sort Z to A options. These sort the displayed data in accordance with the selections made in the bottom of the drop down.

You can filter for blank or non-blank fields in the drop down menu as well. If a column contains blank cells, you'll see a "(Blanks)" checkbox at the bottom of the values list. You can check or uncheck this box to filter to just the blanks or remove lines with blanks. Filtering on the blanks is probably the best use as it allow you to quickly get a list of items with data missing in that column. To filter to just rows with blank data in that column, click the Select All box to clear all the checkboxes for the data values, then scroll to the bottom of the list and click only the (Blanks) checkbox. This will show every row with a blank value for that column.

If you save the spreadsheet with a filter in effect, opening the spreadsheet will not clear the filter. The same filter will be applied when you reopen a filter. This is the first thing to check if you think you are missing data in the Excel report.

You can clear individual column filters using the "Clear Filter From XXXX" drop down menu option. To clear all filters and start over, go to the Data tab, and click the "Clear" option just to the right of the big filter button/icon. This resets all the filters to showing everything.