



## USING A SPREADSHEET TO TRACK INFORMATION

Although a spreadsheet is often used with numeric information, it also is useful for organizing textual information.

You can arrange information in a table with a row for each item and a column for each attribute. A useful example might be to track your contacts with the parents/guardians of your students. Each row would be for one of your students. The attributes tracked might include their name, date, method of contact, who you contacted, the purpose, and notes about what was said.

Excel has a number of features that save you time when you enter information. The **auto-complete** function will match the letters you type with what you have already typed into that column. Once it finds a single match, it will complete the cell for you. You can accept the match or continue typing a new entry. Thus you will only have to type each student name once.

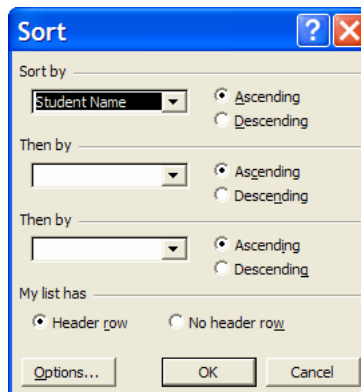
You can **Copy** cell values and **Paste** them anywhere else. The **Fill-> Down** and **Fill-> Right** commands in the **Edit** menu will copy the first selected cell down or right as many cells as you have selected. This way you can fill in the date for all the contacts on a particular day.

There are three important functions of a database, sorting and searching and subtotals. Sorting puts items that are similar near each other. Searching

allows you to find subsets of the items in the database. Subtotals allow you to count or total the subsets of items.

The **Data** menu in Excel has these functions available in easy to follow dialog boxes. **Before selecting functions in the Data menu, it is important that a single cell within the table of items be selected.** This allows Excel to identify the table you want to work with. If you have more than one cell selected, Excel assumes the selected cells constitute the table – which may not be what you intended.

It is a good idea to save your spreadsheet in its original form before using any of the Data functions. That way you can always return to the original entry of the information. **Save** overwrites the last saved version of the current file. **Save As** allows you to keep the previously saved version and give the current version a new file name and/or location.



The **Sort** function under the Data menu allows you to sort by up to 3 columns. For example you could sort by student name and then by date of contact. Excel assumes that the first row of the table contain labels describing the contents of each column. This is referred to as the header row of the table.

The labels for each column are displayed in the popup menu under **Sort by**. For each column you

### WEBSITES OF INTEREST

- [www.openoffice.org](http://www.openoffice.org)  
Free software to view change or create Microsoft Word, Excel or Powerpoint documents.
- [www.chtu.org](http://www.chtu.org)  
Cleveland Heights Teachers Union

### FREE SOFTWARE (OPEN SOURCE)

You don't have to purchase Microsoft Excel Software to use the spreadsheet file described in this newsletter.

A free spreadsheet is available at OpenOffice.org. This is part of a complete package of software tools that duplicate and add to those in Microsoft Office. It is developed and

supported by the Internet community for the public good.

When you install the software it will ask you whether you want to automatically open Microsoft Office documents using Open Office. This will allow you to double click to open Microsoft Office documents.

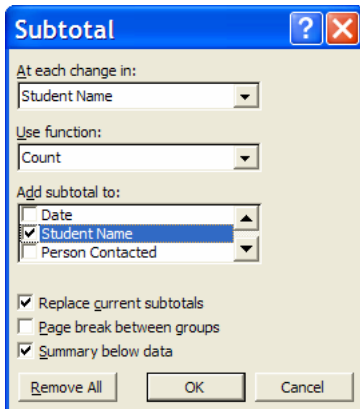
The download of Open Office is very large. If you don't have a fast Internet connection, you can borrow a CD installer from the Union Office. Call Monica at 321-0020 or e-mail: [office@chtu.org](mailto:office@chtu.org)

This is part of a growing collection of collaboratively supported software.

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can sort in Ascending (smallest to largest) or Descending (largest to smallest) order. Excel will sort the column based on the type of information defined for that column. Sometimes you may need to format the column to make sure Excel sorts correctly. For example the numbers 1, 2, 10, 300, 1000 would be sorted by their first digit if defined as text rather than number. Sorted, the list would be 1, 10, 1000, 2, 300. You can select a column and then choose **Cells** from the **Format** Menu. The **Numbers** tab will list the various number formats you can choose from.

**Sorting Tip:** If you accidentally select multiple cells rather than an individual cell before sorting, only the selected cells will sort. This will cause the cells in a row to no longer refer to the correct student. Choose **Undo** from the **Edit** menu to restore the table. Or, if you saved the spreadsheet before sorting, you can close the spreadsheet without saving it and reopen the last saved version.



The Subtotal function allows you to count or subtotal similar items based on the way the table has been sorted. For example, if you first sorted by Student Name, you could have Excel count the number of times you contacted each student. From the Data menu, choose **Subtotal...** The dialog box will allow you to set the parameters for a subtotal. First, **At each change in:** select the column label that you sorted the database by and want to create subtotal for. Second, select the **Function** to Subtotal. **Count** will count the rows with something in the cell. It is useful for text based columns. Third, select the column(s) to **Add subtotal to:** in this case the columns you want count. By default **Replace current**

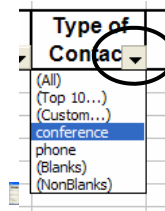
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Date	Student Name	Person Contacted	Type of Contac
4/1/2005	Doe, Jane	mother	phone
4/3/2005	Doe, Jane	father	conference
<b>Doe, Jane</b>		2	
4/2/2005	Smith, John	father	phone
4/4/2005	Smith, John	father	conference
<b>Smith, John</b>		2	
4/3/2005	Smith, Tony	father	conference
<b>Smith, Tony</b>		1	
<b>Count</b>			
<b>Grand Count</b>		5	

**subtotals** is checked. Uncheck it, if you want to subtotal more than one column. Also by default, **Summary below data** is checked. If you uncheck it, the summary will be above the rows it summarizes. Click **OK** to insert the subtotals. Click **Remove All** to clear any subtotals you already inserted.

As the number of items gets larger, it is helpful to look at only those items that you are currently interested in. Finding subsets of items in Excel is called a **filter**. You can select items based on matching content or by defining a range of matching values.

The simplest way to filter items in Excel is to use the **filter->auto-filter** command in the **Data** menu. This creates pop-up menus to the right of each column label in your database. When you click on the pop-up arrow you will see a list of possible ways to filter the column. You can select a specific value such as "conference", to view only rows of type "conference." The **Custom filter** allows you to create advanced filters. To remove a filter from a particular column, click on the auto-filter button for that column and choose (All). To remove the filters from all columns, choose **Filter->Show All** from the **Data** menu. Or you could also uncheck **Auto Filter**.



Databases are powerful tools for organizing information to follow trends and make decisions. Showing your students how to track and analyze data will help them understand the impact of the choices they have to make. Excel's database tools make the process fast as easy.

Most features are also available in the free spreadsheet that is part of Open Office or Star Office.

**CLEVELAND HEIGHTS TEACHERS UNION**

Fairmount Office Building  
3473 Fairmount Boulevard  
Cleveland Hts, Ohio 44118

Phone: 216-321-0020  
Fax: 216-321-0786  
Email: office@chtu.org  
Web: www.chtu.org

**Editor**  
Stephen Titchenal  
S\_Titchenal@chtu.org