



SPOTLIGHT EXCEL TABLES



Taught by Shir Aviv



Who am I?



Who I've Worked With

Publicis
LifeBrands
Medicus

SAATCHI
&
SAATCHI

diadeis 
creating brand efficiency

HUGE

Bloomberg

J.P.Morgan

Donors**Choose**.org

About.com

NYIT
NEW YORK INSTITUTE OF TECHNOLOGY

RENT THE RUNWAY

L'OCCITANE
EN PROVENCE

 **Prudential**

vimeo



**AMERICAN
EXPRESS**

REBAG









 **ExcelShir**
You'll see.

Quick Questions

1. Why do you want to learn about Excel Tables?
2. What would you do with an extra 2 hours per week?



Session Overview

#	Type	Activity
1		Tables – <i>What, Why, & When?</i>
2		How to create a Table.
3		Create your own Tables.
4		Daily Micro Habits.
5		Common mistakes to avoid.
6		Advanced Table topics.
7		Recap key topics.
8		End-Training survey.
9	?	Q&A.



What is a Table?

- **Table** = *Structured* range of data *with* built-in features (e.g. improved formulas, formatting, and analysis).
- **Standard Range** = *Regular* range of data with *no* built-in features (i.e. plain cells in rows & columns).
- **Table** is an *enhanced* range of data, whereas a **Standard Range** is a *basic* range of data.



Why Use a Table?



Benefits:

1. Dynamic Ranges.
2. Calculated Columns.
3. Improved formatting.
4. Structured References (a.k.a. “Table Syntax”).
5. Head start for basic analysis.



Why NOT Use a Table?



Drawbacks:

1. Incompatible features.
2. Painful re-ordering of columns.
3. Tables built for standard layouts.
4. Non-seamless relative references for columns.
5. Unfamiliar & verbose Table Syntax.



When to Use a Table?



DO use a Table when...

1. Incompatible features NOT required.
2. Non-Standard layouts NOT required.
3. Data is an entity.
4. Dropdown list values.
5. Leverage Table benefits.



When NOT to Use a Table?



Do NOT use a Table when...

1. Incompatible features ARE required.
2. Non-Standard layouts ARE required.
3. Data is NOT an entity.
4. Sharing with Table-averse folks.
5. Table is overkill.

Let's Take a Closer Look...



What is an Entity?

- **Entity** = a group of related data.
- An entity is as a noun (person, place, or thing).
- An entity has columns & rows.

Entity Columns & Rows

Columns				
ID	First Name	Last Name	Job Title	Date Hired
10138	Darla	Thompson	Manager	03/23/20
10272	Fred	Jones	Associate	11/04/18
10303	Stewart	Smith	Intern	04/18/19
10412	Sarah	Rogers	Specialist	10/31/21

Rows {

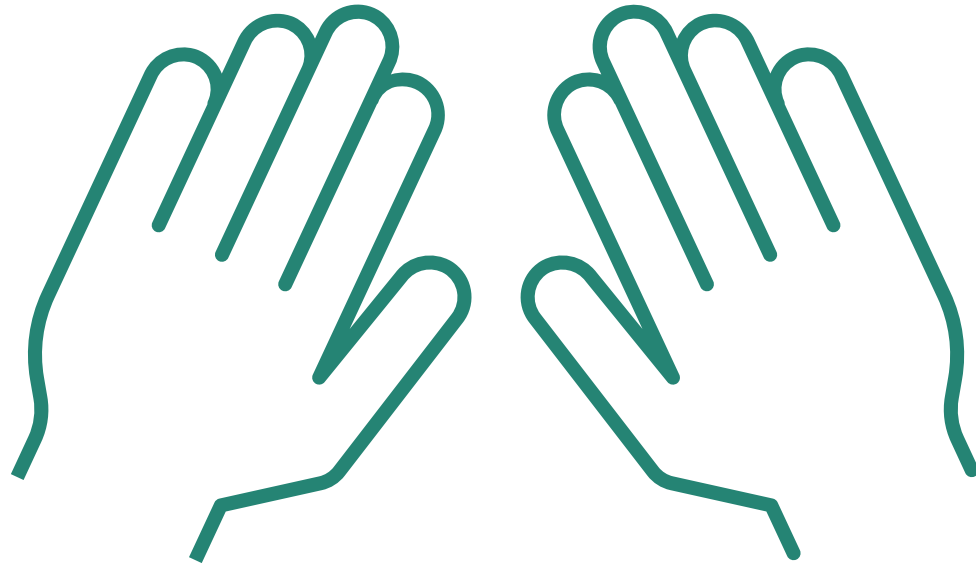
- **Column** = Type of data / attribute / field / category.
- **Row** = Individual record / particular instance of a specific member of the table.

How to Create a Table?

1. **P**rep data.
2. **S**elect data & insert Table.
3. **N**ame Table.
4. **F**ormat Table.
5. **L**everage Table benefits.

*Memory Trick: “**P**.**S**. **N****F****L**” as in “Post Script, National Football League.”*

Create Your Own Tables



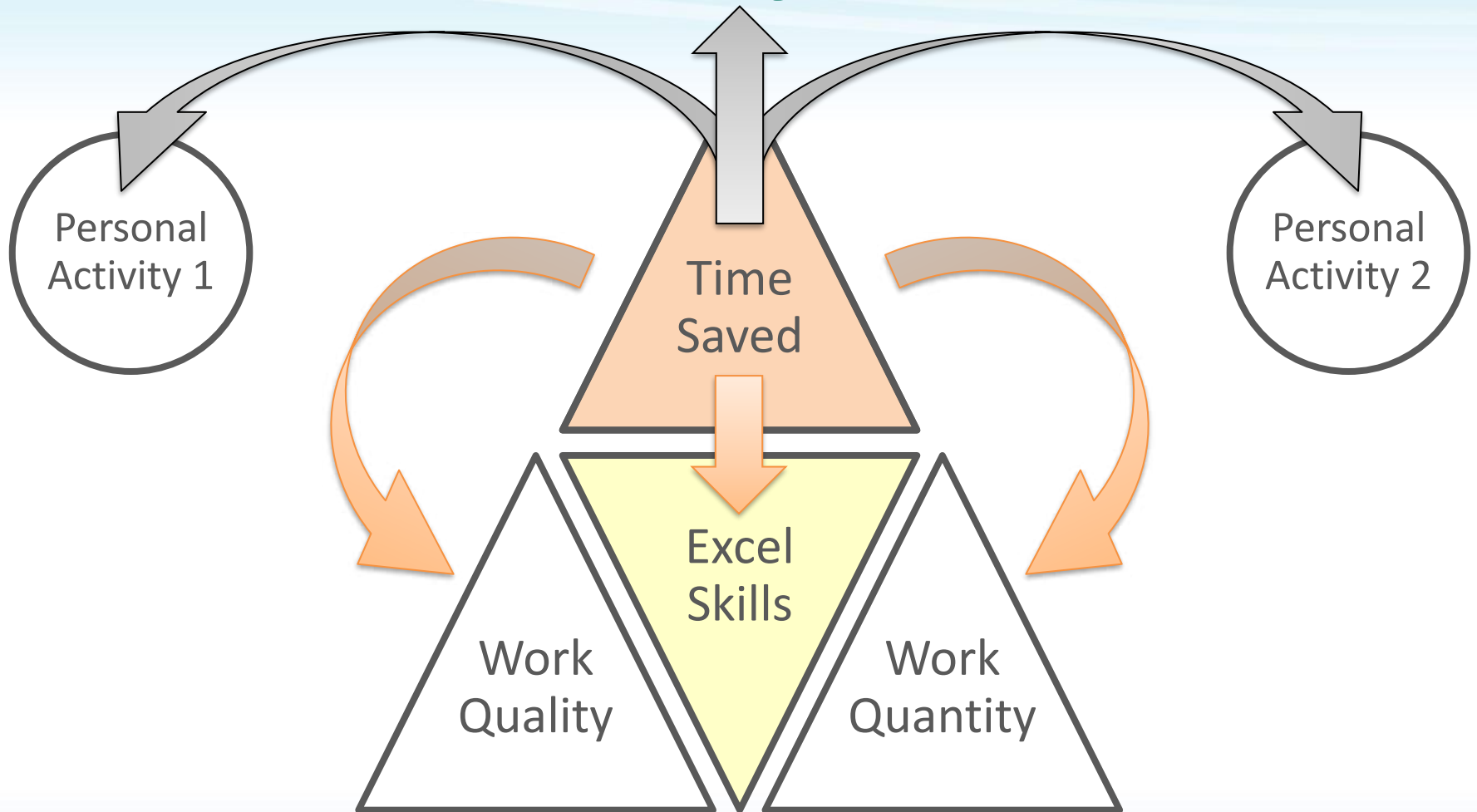
Questions, Comments, Learnings



Daily Micro Habits (DMH's)



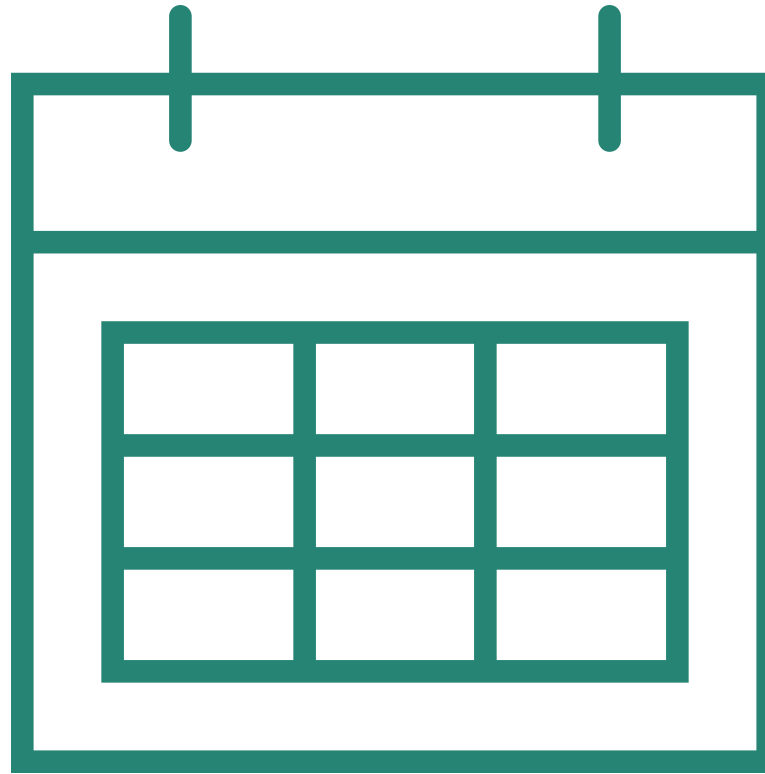
Why?



Example Check-In



Project + Group Debrief Session



Common Mistakes to Avoid



Common Mistake



How to Avoid/Fix

1. Not leveraging Tables.

Leverage Tables.

2. Disorganized Table names.

Naming Conventions.

3. Column widths *before* Table.

Column widths *after* Table.

4. Clunky adding rows & cols.

Smooth adding rows & cols.

5. Inconsistent columns.

Consistent columns.



Look Ahead: Advanced Topics

1. Auto-Number Column.
2. Custom Table Styles.
3. Custom Cell Styles.
4. Advanced Conditional Formatting.
5. Scalable Dependent Dropdown Lists.

Let's Recap



What is a Table?

- **Table** = *Structured* range of data *with* built-in features (e.g. improved formulas, formatting, and analysis).
- **Standard Range** = *Regular* range of data with *no* built-in features (i.e. plain cells in rows & columns).
- **Table** is an *enhanced* range of data, whereas a **Standard Range** is a *basic* range of data.

Why Use a Table?

Benefits:

1. Dynamic Ranges.
2. Calculated Columns.
3. Improved formatting.
4. Structured References (a.k.a. “Table Syntax”).
5. Head start for basic analysis.

Why NOT Use a Table?

Drawbacks:

1. Incompatible features.
2. Painful re-ordering of columns.
3. Tables built for standard layouts.
4. Non-seamless relative references for columns.
5. Unfamiliar & verbose Table Syntax.

When to Use a Table?

DO use a Table when...

1. Incompatible features NOT required.
2. Non-Standard layouts NOT required.
3. Data is an entity.
4. Dropdown list values.
5. Leverage Table benefits.

When NOT to Use a Table?

 Do NOT use a Table when...

1. Incompatible features ARE required.
2. Non-Standard layouts ARE required.
3. Data is NOT an entity.
4. Sharing with Table-averse folks.
5. Table is overkill.

How to Create a Table?

1. **P**rep data.
2. **S**elect data & insert Table.
3. **N**ame Table.
4. **F**ormat Table.
5. **L**everage Table benefits.

Memory Trick: “P.S. N F L” as in “Post Script, National Football League.”

Common Mistakes to Avoid



Common Mistake



How to Avoid/Fix

1. Not leveraging Tables.

Leverage Tables.

2. Disorganized Table names.

Naming Conventions.

3. Column widths *before* Table.

Column widths *after* Table.

4. Clunky adding rows & cols.

Smooth adding rows & cols.

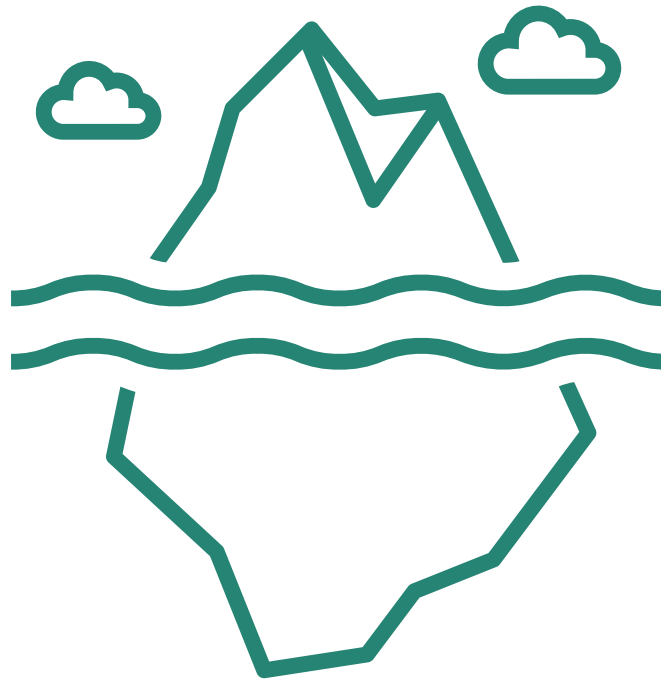
5. Inconsistent columns.

Consistent columns.

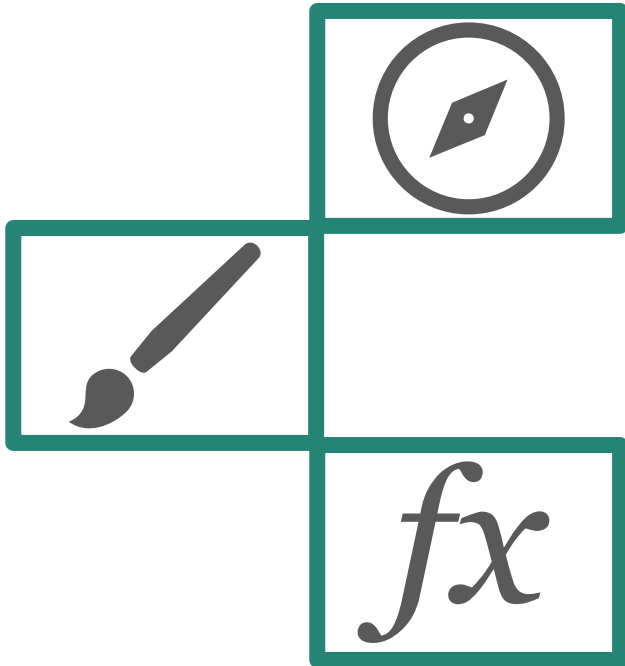
End-Training Survey



There's More...



Excel Cornerstones



1. Navigation.

2. Formatting.

3. Formulas.

Questions?



Thank You!



Appendix





How to Create a Table?

1. Prep data.
2. Select data & insert Table.
3. Name Table.
4. Format Table.
5. Leverage Table benefits.

Memory Trick: “P.S. N F L” as in “Post Script, National Football League.”



How to Create a Named Range?

1. Select cell(s).
2. Name Manager (CTRL + F3).
3. Add a “New” name.
4. Close Name Manager.
5. Keep leveraging Table benefits.

Memory Trick: “S N A C K” as in “Grab yourself a snack before dinner.”



How to Create Data Validation?

1. Select cell(s).
2. Data Validation (ALT + A + V + V).
3. Choose validation criteria.
4. Error Alert custom message.
5. OK button & leverage Data Validation.

Memory Trick: “S D C E O” as in “Standard Definition Chief Executive Officer.”



How to Create a Dynamic Dropdown List?

1. Identify dropdown list values.
2. Table for dropdown list values (P S N F L).
3. Named Range for dropdown list values (S N A C K).
4. Data Validation with validation criteria of “List” (S D C E O).
5. Leverage benefits of Dynamic Dropdown List.

Memory Trick: “I T N D L” as in “IT dept plays in National Dodgeball League.”



Why Use Named Ranges for Dynamic Dropdown Lists?

1. **Compatible:** Older versions of Excel.
2. **Scalable:** Dynamic Ranges with OFFSET Function.
3. **Clear:** Intuitive Data Validation “Source” box.
4. **Consistent:** Always works & easier to troubleshoot.
5. **Best Practice:** Stay organized & maintain familiarity.