

Tables in Excel

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1 About Tables

Tables were introduced in Excel 2007.

Tables are backbone of following six components of Modern Excel.



Data Model



Power Pivot

Power Query

Power BI

Slicers, Data Model, Measures, Power Pivot, Power Query, and Power BI work only when data is in Tables.

Adopt them. **Get addicted to them.** You will say why did I not know about them all these days!

2 Why “shift to” Tables?

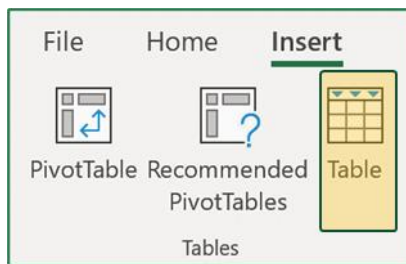
1. With data in a Table, the **Pivot Table** is for life. Add new row / columns of data. The Table expands automatically. Refresh your Pivot. The new data gets added to all the reports. You will not have to readjust the range when data is added or removed.
2. Downloaded data runs into hundreds, if not thousands, of rows. You filter them the traditional way. You can filter data sets with thousands of rows very conveniently using **Slicers**. But Slicers work only when the data is in a Table!
3. Do you want to forget “Double-Click” to copy your formula? If Yes, convert data into Tables. The formulas automatically fill up and down!
4. You would not have to keep formatting your dates and numbers “your way” when you use Tables. Formatting, including Conditional Formatting, fill down automatically.

3. A few “not show-stopper” limitations

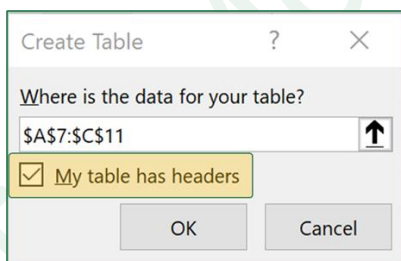
1. You cannot copy or move multiple sheets in one go if any sheet contains a Table.
2. Tables do not expand automatically on protected sheets, even if the cells below the table are unlocked.
3. Custom Views are not allowed in a workbook that has one or more Tables.

4. How to Insert / Create a Table

1. Ensure your cursor is in a cell within the range you want to convert to Table.
2. Click on Insert tab. Click on Table icon.



3. If your data has column heading, Excel intellisense will automatically select the checkbox. If it is not ticked automatically, you need to manually select it.



5. Short-cut to Insert a Table

1. Keep cursor in a cell that has data. Use CTRL + T to insert Table.
2. The “My Table has Heading” button must be checked if your data has column headings.

6. Three “good-to-do” Steps after inserting Table

1. Freeze Rows with your cursor below the “Headings” row of tables. Else, while scrolling, the column headings of Table overwrite the column names (A, B, C, etc.) of Excel.

	Invoice No	Invoice Date	Amount	D	E	F
7	N04	7-Aug-2021	130			
8	N05	5-Aug-2021				
9	N06	3-Aug-2021				

2. Name the Tables. Ideally, start the Table name with “Tbl_”.

Table Name:
Tbl_Invoices
<input type="checkbox"/> Resize Table
Properties

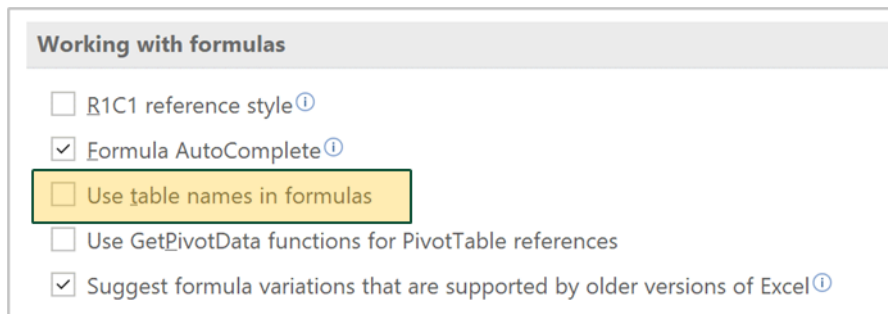
3. Insert a few rows above the Column Title row. These can be used to keep Slicers, use functions like =SUBTOTAL(), =COLUMN(), Grouped Column Titles, etc.

	A	B	C	D
1				
2				
3				
4				
5				
6				
7	Invoice No	Invoice Date	Amount	
8	N01	13-Aug-2021	100	
9	N02	11-Aug-2021	110	

7. My Formulas have Column Name instead of Cell Name?

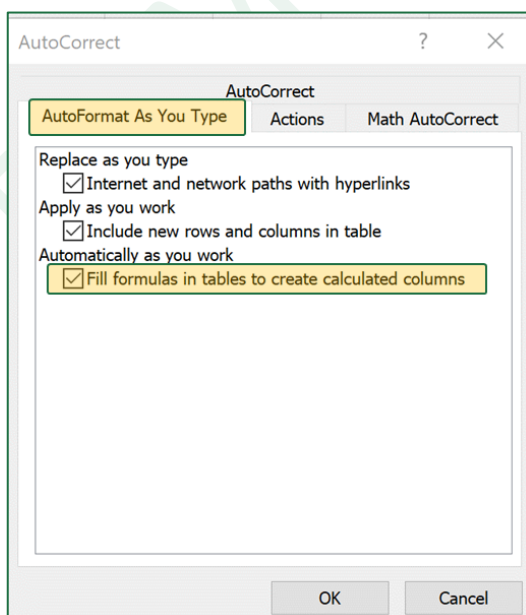
In the initial few months, it is better to switch off column names in the formulas. You can change the default setting by here:

File >> Options >> Formulas >> Working with Formulas. Un-tick “Use table names in formulas”



8. My formulas are not copying automatically

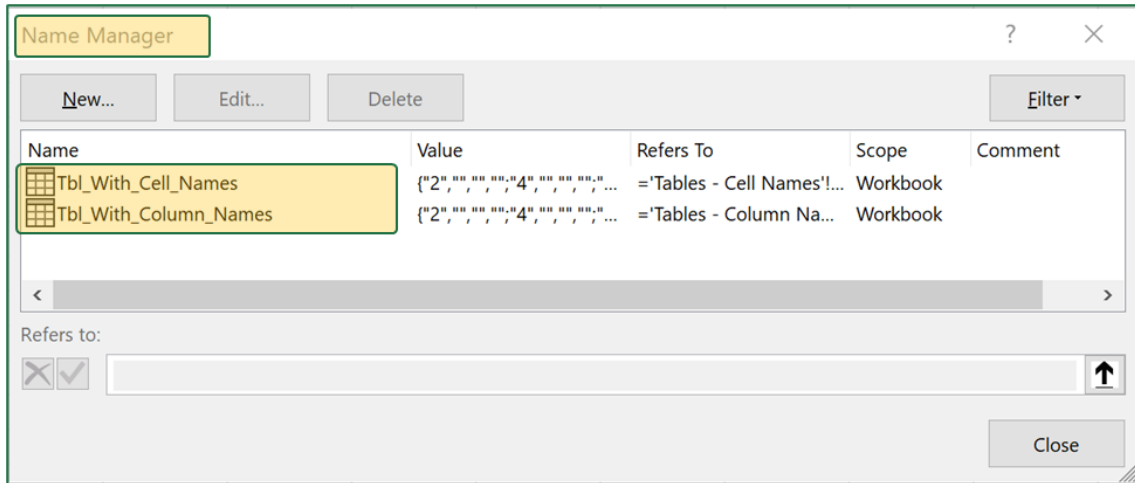
1. If we type any data in a cell, it is not automatically copied across all rows. Thus, the automatic Formula Fill gets disabled. To solve,
 - a. Delete all the data in the column, then write the formula.
 - b. If challenge persists, delete the column, and insert new column!
2. The default settings have been altered. Change them.



File >> Options >> Proofing >> “AutoFormat as You Type” tab. Ensure “Fill Formulas in tables to create calculated columns” is selected.

9. How do I see list of all Tables in my workbook?

See list of all tables in your workbook: Formulas >> Name Manager >>



10. Why it is a good practice to insert SIX blank rows above the Table

We use these rows for, inter alia, following data.:

1. Row 1: Increase row height to 100, for Slicers.

2. Row 2: For =COLUMN() function to get column number.

3. Row 3: For =SUBTOTAL() with function_num =3, for COUNT of all rows, even after filtering.

	A	B	C	D
1				
2				
3				
4				
5				
6				
7	Invoice No	Invoice Date	Amount	
8	N01	13-Aug-2021	100	
9	N02	11-Aug-2021	110	

4. Row 4: For =SUBTOTAL() with function_num =9, for SUM of all rows, even after filtering.

5. Row 5: For ABSOLUTE reference data like, Dates (in budgets), Commission Rates, etc.

6. Row 6: For MERGING cells of columns pertaining to same measure. Like FY in budgets, etc.



11. A few more +ves of Tables

1. Table Naming helps in identifying data source in Formulas, Pivot Tables, Power Query, etc.
2. Cannot delete rows inadvertently if there are two tables on the same row but different columns.
3. No Duplicate Headings ensures referenced column names are always unique and easy to identify / understand in formulas.

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