

# Microsoft Excel - MS Query



## Ms Query.

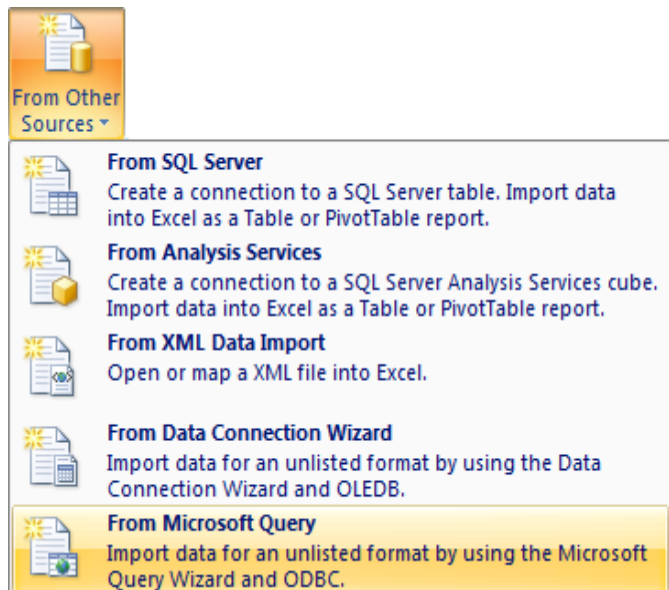
Use the *Query Wizard* to create a simple query, sorting and filtering the data before it is returned to Excel or you can use, *Query* to create more complex query. There are three steps: first you set up a data source to connect to your database, then you can use the *Query Wizard* to select the data and finally you can return the data to Excel.

## Creating a Query.

Select from the **Data** tab → **From**

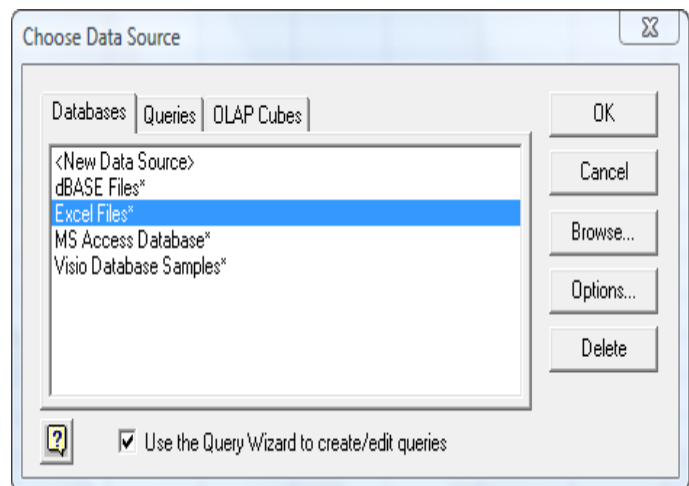
**Other Sources** → **From**

**Microsoft Query.**

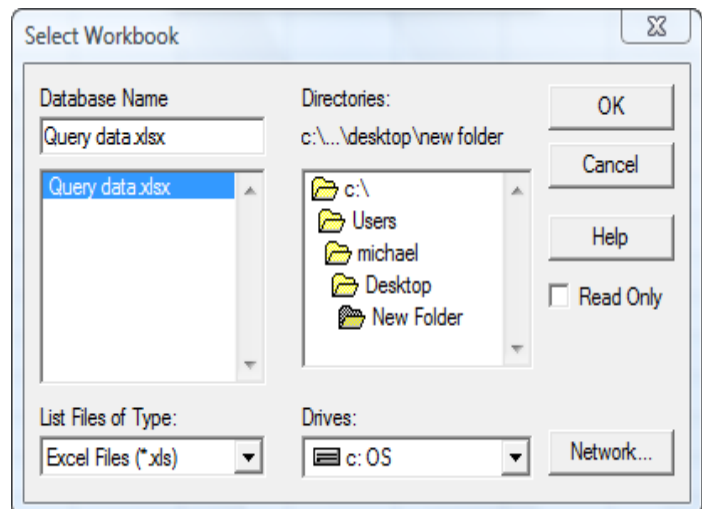


**Select** the Source data type.

In this example we are using Excel as the data source.



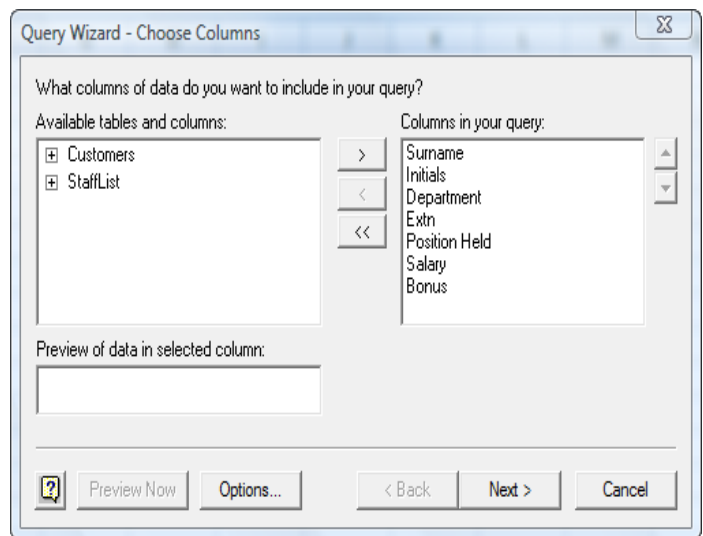
**Select** the Excel file containing the source data you wish to query.



After selecting the data source you can start to define the subset of data required.

You can specify data from more than one data object.

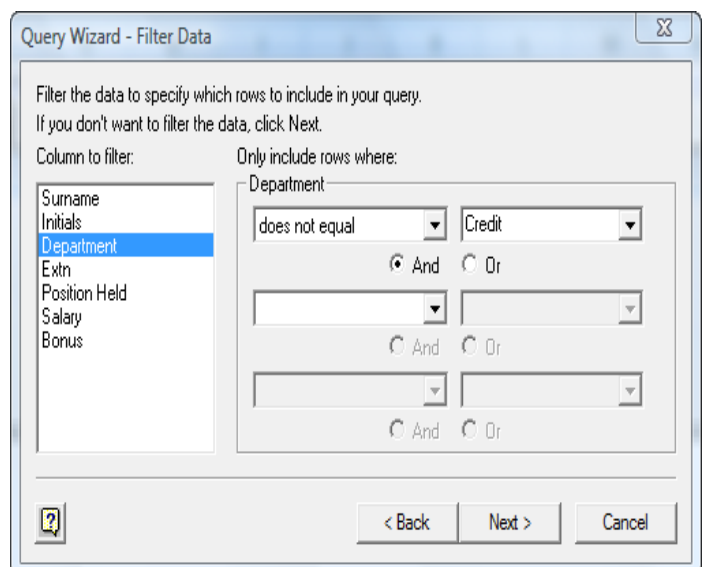
**Click** the arrows to bring the required fields across to the right hand side.



The next step you can filter the data if required.

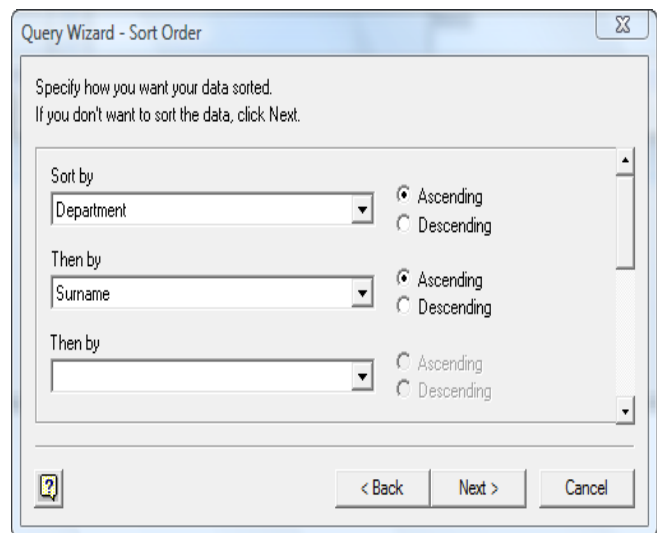
Examine the expressions in the drop down lists to create the required filter.

You can filter on as many fields as required.



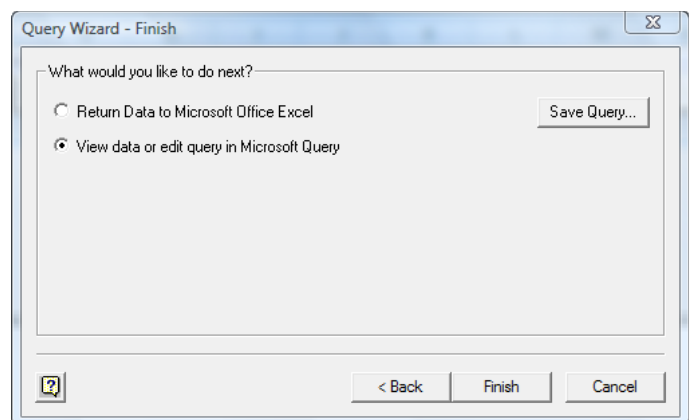
If you require the query results to be sorted select the priority field order that is required.

If the source data is updated and the query is refreshed the query results will automatically be resorted.



### Final stage.

Either return the data to the cells in the worksheet where it will be an external range or select '**View data or edit query in Microsoft Query**' to create a more complex query.



The Query screen is displayed, there are three key areas:

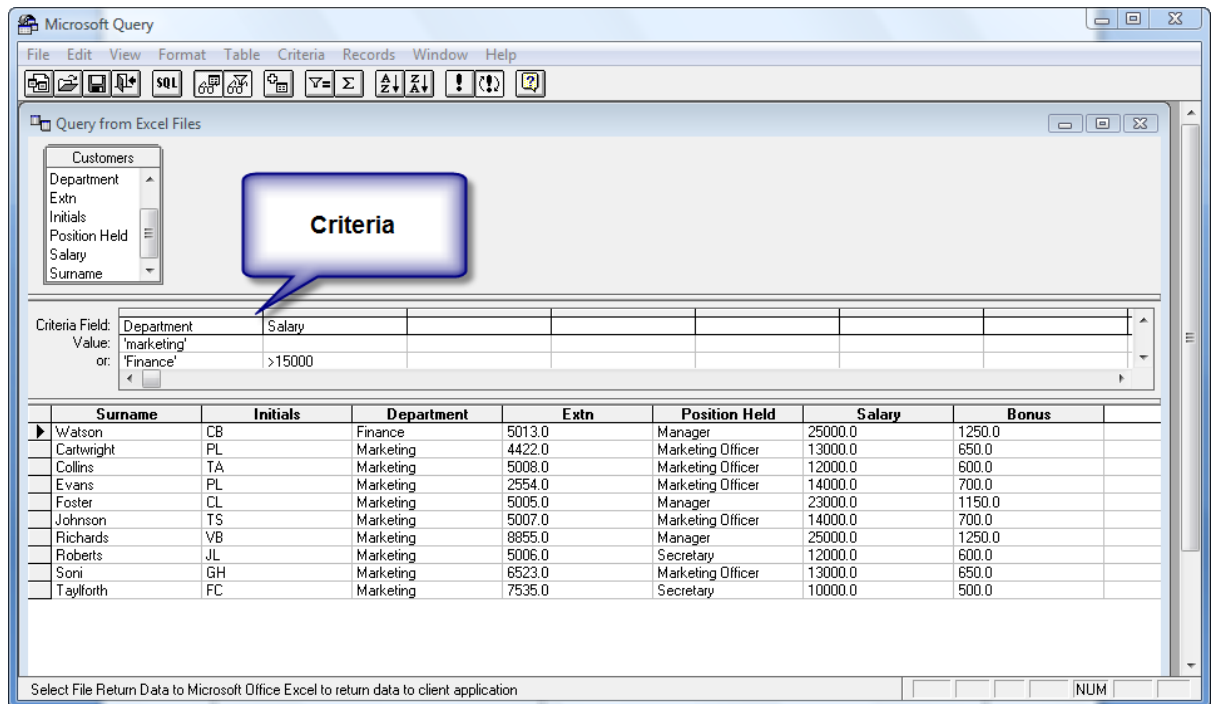
1. **Table pane:** displays the table / range (source data) selected in the query wizard.
2. **Criteria pane:** To select the query criteria pane select **View** → **Criteria**.

Once the criteria pane is displayed select the field headings that you wish to filter by, in the example below we have selected two field headings, 'department & salary'.

**Enter** the field values under the relevant field headings.

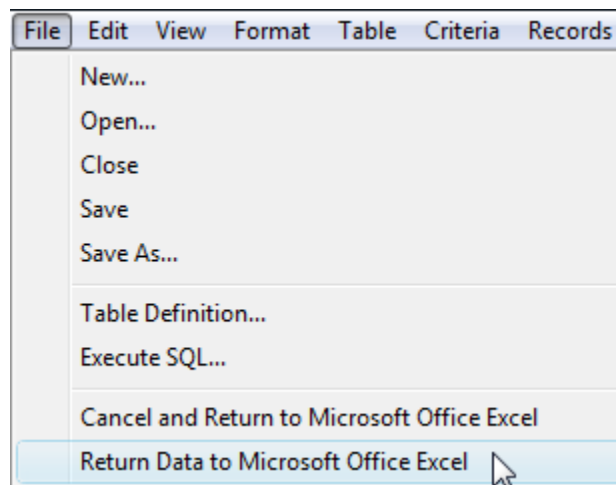
The query will execute as you click onto another cell and the filter will be displayed in the Query results pane.

3. **The query results pane:** displays the results of the query.



Once all of the Criteria's have been entered it is possible to display the results back onto a spreadsheet or the basis of a PivotTable.

Select **File** → **Return data to Microsoft Excel**.



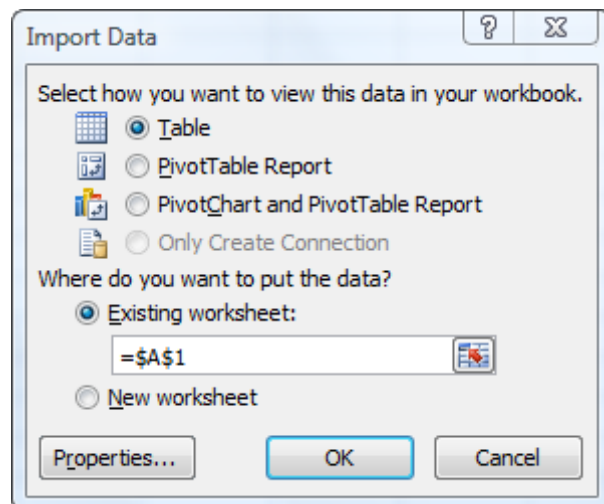
**Select** where you wish to place the query results:

**Either**

Table (worksheet)

**or**

The source for a PivotTable.



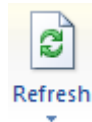
**Results:** Below an example of the query data exported into a Table in a worksheet.

Surname	Initials	Department	Extn	Position Held	Salary	Bonus
Watson	CB	Finance	5013	Manager	25000	1250
Cartwright	PL	Marketing	4422	Marketing Officer	13000	650
Collins	TA	Marketing	5008	Marketing Officer	12000	600
Evans	PL	Marketing	2554	Marketing Officer	14000	700
Foster	CL	Marketing	5005	Manager	23000	1150
Johnson	TS	Marketing	5007	Marketing Officer	14000	700
Richards	VB	Marketing	8855	Manager	25000	1250
Roberts	JL	Marketing	5006	Secretary	12000	600
Soni	GH	Marketing	6523	Marketing Officer	13000	650
Taylforth	FC	Marketing	7535	Secretary	10000	500

## Updating the Query results.

If the source data changes it is possible to update the Query extract that was exported into the Table.

1. **Place** your cursor into the Table (query extract) range.
2. **Select** from the Ribbon **Table Tools** → **Design**.
3. **Click** on the **Refresh** icon.



## Changing the Query Criteria's and Values.

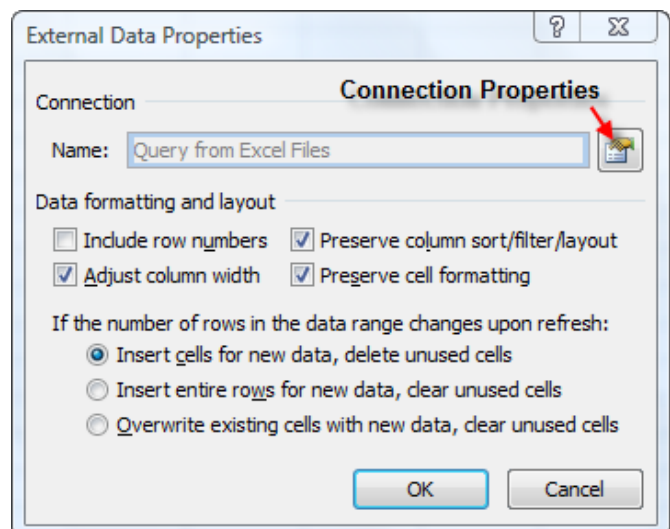
Once you have created the Query and exported the results to a worksheet it is possible to amend the query criteria's and values.

1. **Place** your cursor into the Table (query extract) range.
2. **Select** from the Ribbon **Table Tools** → **Design**.
3. From the Ribbon **Select** → **External Data properties** → **Properties**.

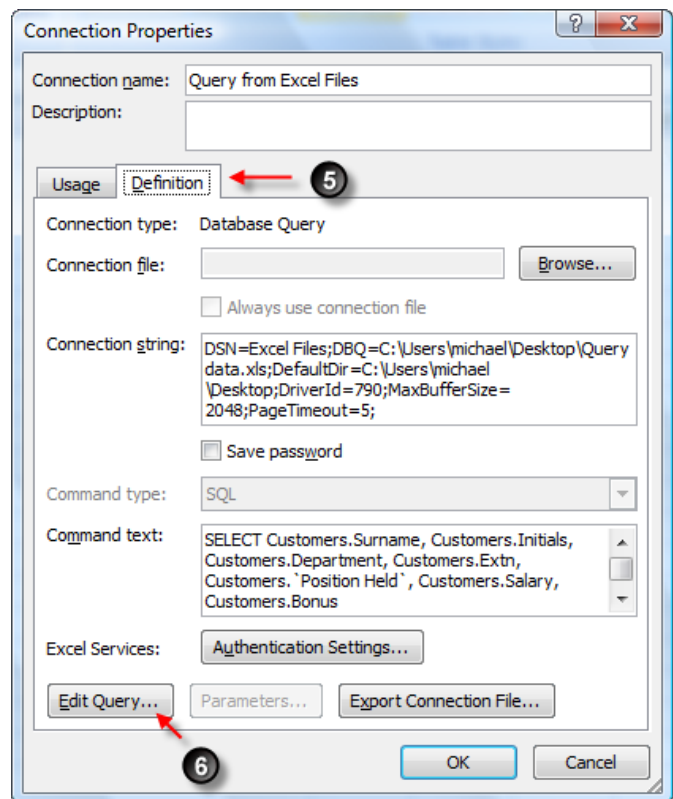


4. The external data properties dialog box is displayed.

**Select** Connection Properties.



5. From **Connection Properties** dialog box → select **Definition**.



6. Click **Edit Query**.

The query wizard will be displayed, step through the wizard changing the required settings and values returning the results back to the spreadsheet as before.

**Tip:** A dialog box displaying a message informing that the query cannot be updated may be displayed, ignore this message by clicking **ok** to the message the query wizard should still work fine.