

Custom Sorting in Excel

BY BILL JELEN

You asked. We listened. Here, by popular demand, is *Strategic Finance's* new column that offers tips and techniques on using Excel.

Do you think that Excel only offers the ability to sort ascending or descending? Think again! Excel offers a variety of sorting options.

Custom Sort Order

Say that your company has model numbers M600, M800, and M1000. Every time that you sort your product sales reports, Excel sorts M1000 before M600. You can override Excel's default sort sequence by using a custom list. Perform these steps once to set up the list.

1. Type the correct sequence for the models in a blank column in Excel.
2. Select the entire range containing the list.
3. From the menu, choose Tools, Options. On the Custom Lists tab, click the Import button. (In Excel 2007, use Office Icon, Excel Options, Popular, Edit Custom Lists, Import.) You've now added your custom list to Excel.

To sort a data set into a sequence specified by the custom list, you need to use the Sort dialog instead of the AZ or ZA buttons. Follow these steps for Excel 2003 and earlier:

1. Select a cell within your data set.
2. From the menu, choose Data, Sort.
3. Choose the model field as the first sort key.
4. Click the Options button in the lower left corner of the Sort dialog.
5. In the Sort Options, change the

First key sort order from Normal to the M600, M800, M1000 custom list.

6. Click OK to close Sort Options.
7. Click OK to perform the sort.

The sorting process has changed in Excel 2007:

1. Select a cell within your data set.
2. From the Data tab of the ribbon, choose the Sort Icon.
3. In the Sort By dropdown, choose Model.
4. In the Order dropdown, choose Custom List.
5. In the Custom List dialog, choose your M600, M800, M1000 list.
6. Click OK to close the Custom List dialog.

7. Click OK to perform the sort.

Note: In Excel 2007, every field can be sorted by a different custom list. In Excel 2003, only the first sort field can be sorted by a custom list.

Sorting into Monday, Tuesday, Wednesday...

If your data set has text columns that contain days of the week or months of the year, you can easily sort them so

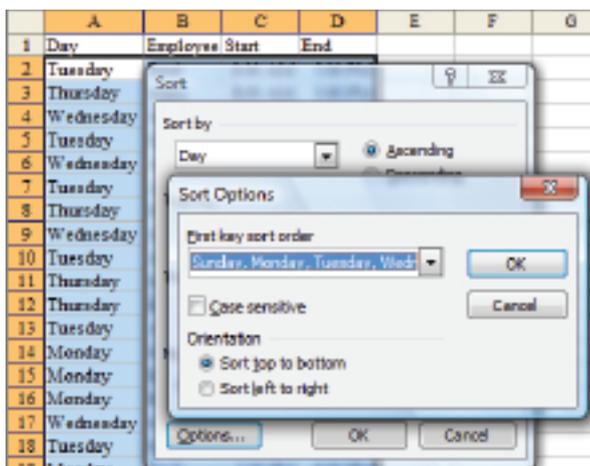
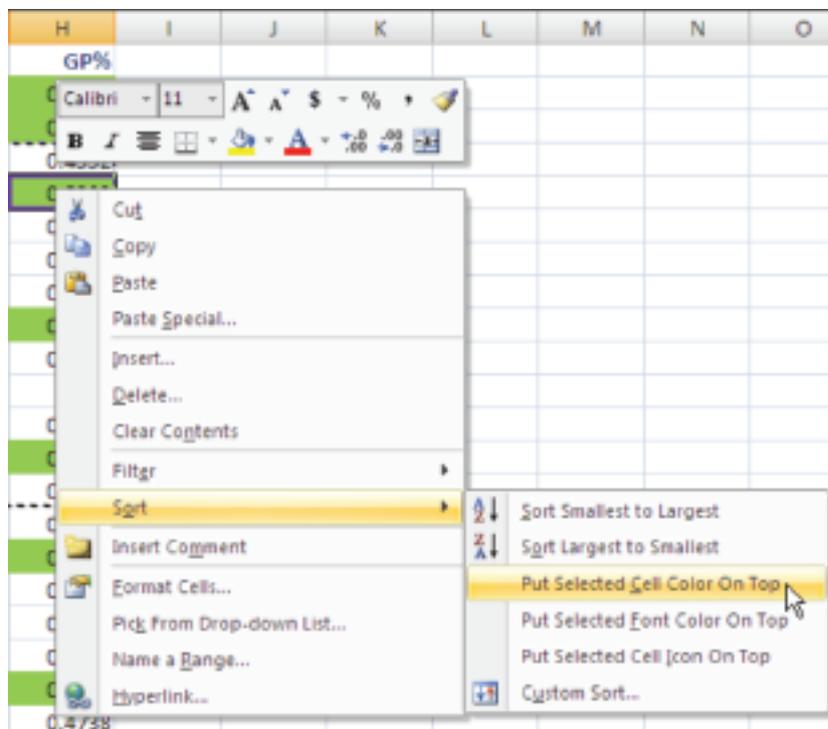


Figure 1



Figure 2



Monday comes first and Friday comes last. Every copy of Excel has built-in lists with days, months, day abbreviations, and month abbreviations. Follow the steps above, but choose one of the built-in lists instead of your custom list (see Figure 1).

Random Sort Order

Perhaps you need to randomly choose invoices for compliance testing. Have Excel sort the data into a random sequence. Follow these steps:

1. Enter a new heading of Random in the first blank column next to your data.
2. In the first row of the new column, enter the =RAND() function. Re-select this cell.
3. Double-click the fill handle to copy the formula down to all rows in your data set.
4. Choose one cell in the Random column.
5. Click the AZ button to sort ascending.

Excel will sort the data into a random sequence. Note that, immediately after sorting, Excel recalculates the random numbers so they won't appear to be in order. I once heard of a local board of elections where

the parties in a dispute finally agreed that they would randomly sort three times and accept the third sort. This is not like shuffling cards in Las Vegas—one random sort should be sufficient!

Sorting Left to Right

Do you need to rearrange columns? Rather than inserting new blank columns and doing multiple cut and pastes, you can rearrange the columns using a left-to-right sort. Follow these steps:

1. Insert a new blank row above your data.
2. In the blank row, type numbers that represent the proper sequence for the columns. Perhaps 5 in Column A, 1 in column B, 4 in Column C, 2 in Column D, and 3 in Column E.
3. Select your entire data set, including the new row of numbers.
4. Open the Sort dialog. Click Options. Check the box for Sort Left

to Right. Close Sort Options. In the Sort By field, choose Row 1. Click OK to Sort.

Excel will rearrange the columns into the sequence that you specified.

New in Excel 2007:

Sorting by Color

In Excel 2007, you can now sort all of the red cells to the top of the data set. This sort can be based on the font color, the fill color, or the cell's icon (more on icon sets in a future issue). To bring all of the red cells to the top, right-click one red cell. From the menu, choose Sort, and then Put Selected Cell Color on Top (see Figure 2).

For greater control, use the Sort dialog box, and change the Sort On dropdown from Values to Cell Color, Font Color, or Cell Icon. ■

Bill Jelen is the host of MrExcel.com and the author of 18 books about Excel. Send questions for future columns to IMA@MrExcel.com.