



Microsoft Excel Level 3 - PivotTables and VLOOKUP

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CMG Training
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TIME	TOPIC
09:00	Introductions
	Naming Ranges Tables
10:30	Break
	Vlookup, Trim Data Validation Index and Match XLOOKUP
12:30	Lunch
	Pivot Tables Slicers
14:30	Break
	SUMPRODUCT Formula auditing
16:00	Q&A

Plan

- What you will need
- Files sent by email
- MS Excel

Naming Ranges and Tables

WCM Analytics Employee Database										
Employee ID	First Name	Last Name	Hire Date	Years of Service	Birth Date	Age	Store	Job Status	Current Salary	
1102	Vanesa	Allen	7/10/2012	3.48	4/11/1961	55	Portland	FT	\$	106,010
1106	Elizabeth	Allen	11/6/2015	2.15	11/23/1991	25	Seattle	FT	\$	42,182
1110	James	Anderson	12/4/2015	2.08	10/15/1966	50	Portland	FT	\$	92,254
1114	Katherine	Baker	3/24/2003	14.78	12/8/1964	52	Seattle	FT	\$	69,250
1118	Ina	Baker	5/23/2009	6.61	2/15/1962	54	Portland	FT	\$	102,567
1122	Brandon	Barnes	8/12/2002	15.40	10/15/1968	48	San Francisco	FT	\$	94,517
1126	Paul	Benham	11/6/2015	2.15	3/20/1973	43	San Diego	FT	\$	51,791
1130	Santos	Bennett	6/10/2010	7.56	4/20/1966	50	San Diego	FT	\$	32,530
1134	James	Bennett	1/20/2016	1.95	3/21/1957	59	Seattle	FT	\$	94,502
1138	June	Bennett	5/4/2012	5.66	6/28/1967	49	Portland	PT	\$	45,671
1142	Gregory	Blackshear	7/16/2009	6.47	2/8/1986	30	Seattle	FT	\$	70,346
1146	Thomas	Bradley	4/12/2008	9.73	7/13/1986	30	San Diego	FT	\$	34,685
1150	Linda	Brown	3/13/2012	5.81	7/8/1949	67	Portland	FT	\$	96,944
1154	Santina	Bryant	8/8/2015	2.40	12/1/1956	60	Portland	FT	\$	92,091
1158	Charlotte	Burgess	7/17/2015	2.46	7/12/1959	57	San Diego	FT	\$	30,150
1162	Patricia	Butler	1/8/2015	2.98	3/6/1970	46	Portland	FT	\$	81,536
1166	Ramon	Cannon	10/4/2013	4.24	10/25/1959	57	San Francisco	FT	\$	85,934
1170	Antolin	Casas	9/7/2012	5.32	3/11/1961	55	San Francisco	FT	\$	85,934

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Lookups

IF				=VLOOKUP(A5,\$E\$5:\$F\$16,2,FALSE)				
	A	B	C	D	E	F	G	H
1	VLOOKUP							
2								
3								
4	Value		Returns		Name	Sales		
5	Cortana		=VLOOKUP(A5,\$E\$5:\$F\$16,2,FALSE)					
6	Drago		VLOOKUP(lookup_value, table_array, col_index_num, [range_lookup])					
7	Sara				Cortana	798		
8	Evi				Robin	541		
9					Drago	483		
10					Smarti	661		
11					Vokul	178		
12					Tolt	275		
13					Evi	888		
14					Jeannie	321		
15					Sara	654		
16					Donna	987		
17								

Pivot Tables

	A	B	C	D	E	F	G	H	I	J	K	L
2												
3	Sum of Total	Column Labels										
4	Row Labels	Central	East	West	Grand Total							
5	Binder	5762,63	2535,66	1279,36	9577,65							
6	Desk	875		825	1700							
7	Pen	539,73	1354,25	151,24	2045,22							
8	Pen Set	2421,39	1748,48		4169,87							
9	Pencil	1540,32	363,7	231,12	2135,14							
10	Grand Total	11139,07	6002,09	2486,72	19627,88							
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PivotTable Builder

FIELD NAME

Search fields

☐ OrderDate
 ☒ Region
 ☐ Rep
 ☒ Item

Filters

Columns

: Region

Rows

: Item

Values

: Sum of Total

Drag fields between areas

SUMPRODUCT

1	Product	Sales	Quantity	Price	Cost	Revenue	Total Cost
2	Laptop	Andi	4	€300.00	100		
3	Phone	Ben	3	€200.00	70		
4	Laptop	Ben	6	€300.00	100		
5	Phone	Andi	1	€200.00	70		
6	Printer	Ben	4	€210.00	110		
7	Printer	Andi	2	€210.00	110		
8							
9					Total		
10							
11							
12							
13							
14	Product	Sales	Quantity	Price	Cost	Revenue	Total Cost
15	Laptop	Andi	4	€300.00	100	1200	400
16	Phone	Ben	3	€200.00	70	600	210
17	Laptop	Ben	6	€300.00	100	1800	600
18	Phone	Andi	1	€200.00	70	200	70
19	Printer	Ben	4	€210.00	110	840	440
20	Printer	Andi	2	€210.00	110	420	220
21							
22					Total	5060	1940
23							

Data Validation

Data Validation [?] [X]

Settings | Input Message | Error Alert

Validation criteria

Allow:
List [v] ☒ Ignore blank
☒ In-cell dropdown

Data:
between [v]

Source:
=INDIRECT(\$A\$11) [icon]

☐ Apply these changes to all other cells with the same settings

[Clear All] [OK] [Cancel]