



Summarize your data activity

 By the end of this activity, you will be able to: <ul style="list-style-type: none"> • Prepare your data to place in your dashboard • Create Sheet Summary fields • Create a metric sheet to calculate data using cross sheet references 	 Follow these steps to get the course activity assets <ol style="list-style-type: none"> 1. Go to the Get the Course Activity Assets lesson on the left 2. Click the appropriate link for your region 3. Open the following sheet: 04_Dashboards Course Assets > 12_Summarize Your Data Activity > Department - Status Summary
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Finish summarizing data

In the interactive lesson you set up a few sheet summary fields and started a metric sheet. In this activity you will finish the Department - Status Summary sheet, create the urgent request report and set up one more metric sheet that sums the total budget, actual budget, and variance for each department.

Finish department - status summary

1. Open the Department - Status Summary sheet	
2. In the Requested column for the Legal row start typing a COUNTIFS formula	=COUNTIFS(
3. For the first range, you need to reference the Department reference that is already on the sheet. You created this in the interactive lesson. Type {Department}, for the range.	=COUNTIFS({Department}, <i>Remember that ranges you defined can be reused throughout the same sheet.</i>

4. After the comma, click the cell with the word Legal in it since you want to find any row in the range where the department is Legal.	=COUNTIFS({Department},Department1,
5. The next range can also be typed in because you defined it in the interactive lesson. Type {Status},	=COUNTIFS({Department},Department1,{Status},
6. For this column you want to count the number of times Requested is found. Type "Requested" in quotes. Close your formula with a parenthesis.	=COUNTIFS({Department},Department1,{Status},"Requested")
7. Your formula is done and should be calculating the number of Legal requests that are in requested status. Click and drag the bottom right corner of the cell to fill your formula down the column.	

Create urgent request report

Open the Urgent Requests report and use the following information to adjust the report criteria through the report builder:

- Source Sheets: Marketing Request Tracker - Summarize Your Data
- Filter Criteria: URGENT is checked
- Columns: % Complete, Assigned To, Status, Budget Variance, Date Started, Estimated Completion Date
- Change the Primary column header name to "Request Description"

Create a budget metric sheet

One additional requirement from your leadership team is to see budget by department in a chart. To do this, you'll need to create a metric sheet by department that sums the budget column, actual budget column, and calculates the total budget variance. Follow these instructions to do that:

1. Open the Budget Summary sheet

2. In the Budget column in the Legal row type =SUMIF(

SUMIF is similar to COUNTIF except it adds values together instead of counting instances of criteria. You need to define three pieces of information, the range which is the group of cells to evaluate, the criteria to evaluate against, and then the range to add together.

3. Select Reference another sheet.

4. Find and select the Marketing Request Tracker - Summarize Your Data sheet in the Summarize your Data Activity folder

5. Find the department column and select the column header.

6. Name the range "Department" and select Insert Reference

=SUMIF({Department},

7. The criteria you want to evaluate against is the department name. Make sure there's a comma after the department range and select the cell that has Legal in it.

=SUMIF({Department},Department1

8. Add a comma after the Department1

=SUMIF({Department},Department1,

9. Select Reference another sheet to define the cells to add together if the criteria is met

10. Find the budget column and select the column header.

11. Name the range "Budget" and select Insert Reference

12. Add a closing parentheses if there isn't already one at the end of your formula

=SUMIF({Department},Department1,{Budget})

13. We're going to make the Department1 cell reference an absolute reference. Double click inside the formula and add a dollar sign in front of the word Department

=SUMIF({Department},\$Department1,{Budget})

A cell reference has a column and row location. When you drag fill a formula Smartsheet will automatically update cell references for both rows and columns unless you make them absolute references by adding a dollar sign in front of the row and/or column. In this case, we added an absolute reference in front of the column, but not the row number. This will lock the column in place as you drag fill the formula across other columns.

14. Drag fill the formula across the Actual Budget column. Your sheet will look like this

Department	Budget	Actual Budget
Legal	1200	1200

15. The same formula is now in the Actual Budget and Budget Variance columns. Double-click in the Actual Budget column and Legal row cell to edit the formula.

Department	Budget	Actual Budget	Budget Variance
Legal	1200	=SUMIF({Department}, \$Department1, {Budget})	
HR	2000		

16. Delete the {Budget} reference

Department	Budget	Actual Budget	Budget Variance
Legal	1200	=SUMIF({Department}, \$Department1,)	
HR	2000	SUMIF(range, criterion, [sum_range])	
Operations	18080	Reference Another Sheet	

17. Select Reference Another Sheet

18. Search for your sheet if it doesn't pull up. Find the Actual Budget

column and select the column header.

19. Name the range “ Actual Budget” and select Insert Reference

20. The Actual Budget formula is now updated.

Department	Budget	Actual Budget	Budget Variance
Legal	1200	=SUMIF((Department), \$Department1, {Actual Budget})	
HR	2000	SUMIF(range, criterion, {sum_range})	

21. For the Budget Variance column, create a formula that subtracts the Actual Budget from the Budget.

Department	Budget	Actual Budget	Budget Variance
Legal	1200	350	=Budget1 - {Actual Budget}1
HR	2000		

22. Highlight all three cells in the first row, select the bottom right corner and drag down the formula through all rows with a department listed.

23. Format all three columns in dollars. Highlight Budget, Actual Budget, and Budget Variance and select the \$ (Currency format) button in the formatting bar.

Great job! You reached the end of the activity!