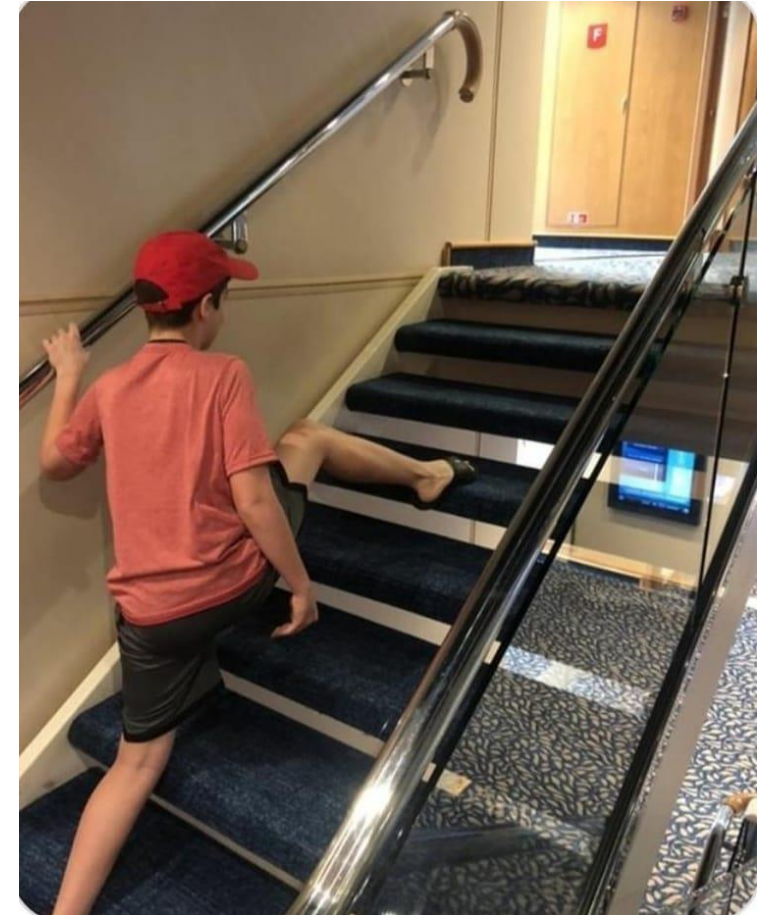


# Data Analysis Steps in Excel

1. Data Formatting ( to make it readable)
2. Data Study (using filters)
3. Listing the Requirement (we will cover this shortly))
4. Analysis
  - i) Using Functions
  - ii) Using Pivots
5. Data Presentation





# Excel Formulae

- Simple Mathematical operators
- Complex Formulas
- Performing calculations in Excel
- What is Range and how to fix it?

# Formulas

- Simple Formulas – Mathematical Operators

<b>=A1+A2</b>	<b>Adds cells A1 and A2</b>
<b>=C4-3</b>	<b>Subtracts 3 from cell C4</b>
<b>=E7/J4</b>	<b>Divides cell E7 by J4</b>
<b>=N10*1.05</b>	<b>Multiplies cell N10 by 1.05</b>
<b>=R5^2</b>	<b>Finds the square of cell R5</b>

# Formulas

- Complex Formulas – Mathematical Operators

SUM    ✕    ✓ <i>fx</i> $= (D2 + D3) * 0.075$				
	A	B	C	D
1	Menu Item	Price	Quantity	Total
2	Item 1	\$2.29	20	\$45.80
3	Item 2	\$2.29	30	\$68.70
4	Tax			$= (D2 + D3) * 0.075$
5	Total			

# Formulas (Order of Operations)

The Order of Operations tells Excel which **operation** to calculate first.

The order follows **BODMAS** rule.

1. Bracket
2. Operator (Exponents)
3. Division
4. Multiplication
5. Addition
6. Subtraction

$$36 \div 6 \times 3 + 2^2 - (3 + 5)$$

$$= 36 \div 6 \times 3 + 2^2 - \underline{8} \longleftrightarrow \text{Brackets: } (3 + 5)$$

$$= 36 \div 6 \times 3 + \underline{4} - 8 \longleftrightarrow \text{Order of Powers: } 2^2$$

$$= \underline{6} \times 3 + 4 - 8 \longleftrightarrow \text{Division: } 36 \div 6$$

$$= \underline{18} + 4 - 8 \longleftrightarrow \text{Multiplication: } 6 \times 3$$

$$= \underline{22} - 8 \longleftrightarrow \text{Addition: } 18 + 4$$

$$= 14 \longleftrightarrow \text{Subtraction: } 22 - 8$$

# Range

Range is a continuous collection/group of cells. Its address is given by providing the first and last cell.

In the below example, the range is C2:C8. It means the all the data from C2 to C8 is being selected.

	A	B	C	D
1	<b>Sr No</b>	<b>Sales Person</b>	<b>Jan-21</b>	<b>Feb-21</b>
2	1	Abhishek Y	242	247
3	2	Ajit Sharma	124	157
4	3	Amrendra Kumar	126	300
5	4	Arun Shetty	498	443
6	5	Birender Singh	214	201
7	6	Chandan R	420	482
8	7	Dharmendra Yadav	405	450
9	<b>Total Sales</b>		<b>=SUM(C2:C8)</b>	

# Fixing of Range

- Absolute cell reference contains a \$ in a Row and/or Column
- Done by pressing F4 key
- Do not change when copied or filled.
- Use when you want to consistently refer to a certain cell, range, column or table array.

<b>A1</b>	<b>Relative (Both row and column are not fixed)</b>
<b>A\$1</b>	<b>Column is relative; Row is fixed (constant)</b>
<b>\$A1</b>	<b>Row is relative; Column is fixed</b>
<b>\$A\$1</b>	<b>BOTH are fixed</b>



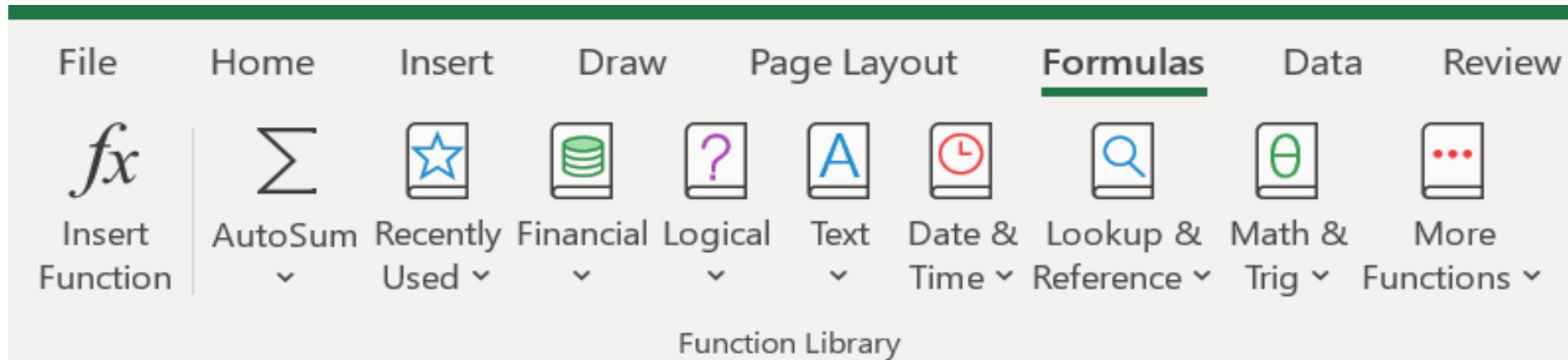
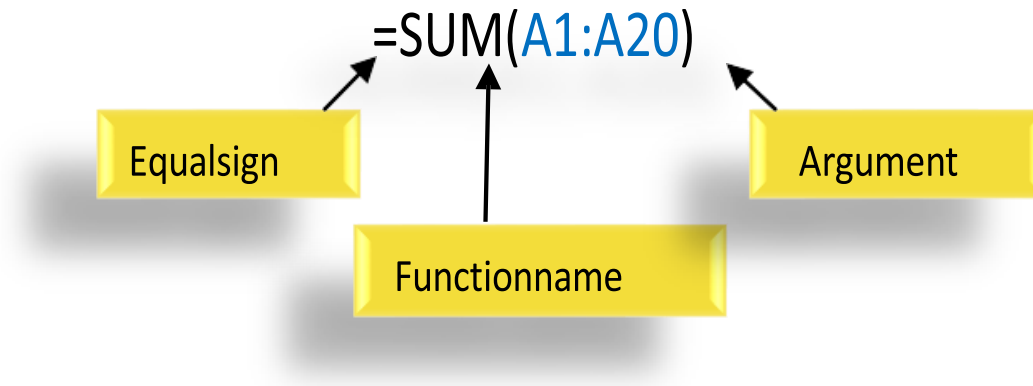
# Excel Functions

- Introduction to Excel Functions
- Basic functions: SUM, AVERAGE, MAX, MIN COUNT etc
- List of commonly used functions
- Application of most important functions – IF, VLOOKUP, SUMIFS, COUNTIFS etc



# Functions

A function is a predefined formula that performs calculations using specific values in a particular order



# Basic Excel Functions

```
=SUM(A2:A10)
```

Adds its arguments. Here, the function will add the data present in cells from A2 to A10

```
=AVERAGE(A2:A10)
```

Returns the average of its arguments. Here, the function will give the average of the data present in cells from A2 to A10

```
=MAX(B2:B10)
```

Returns the maximum value in a list of arguments

```
=MIN(B2:B10)
```

Returns the minimum value in a list of arguments

```
=COUNT(A1:B10)
```

Counts how many numbers are in the list of arguments

# Commonly Used Functions

Below is the list of some of the most common and important Excel functions:

S/No	Function name	Category	Description
1	SUM	Math and trigonometry	Adds its arguments
2	AVERAGE	Statistical	Returns the average of its arguments
3	MAX	Statistical	Returns the maximum value in a list of arguments
4	MIN	Statistical	Returns the minimum value in a list of arguments
5	SUBTOTAL	Math and trigonometry	Returns a subtotal in a list or database
6	SUMIF	Math and trigonometry	Adds the cells specified by a given criteria
7	SUMIFS	Math and trigonometry	Adds the cells in a range that meet multiple criteria

# Commonly Used Functions

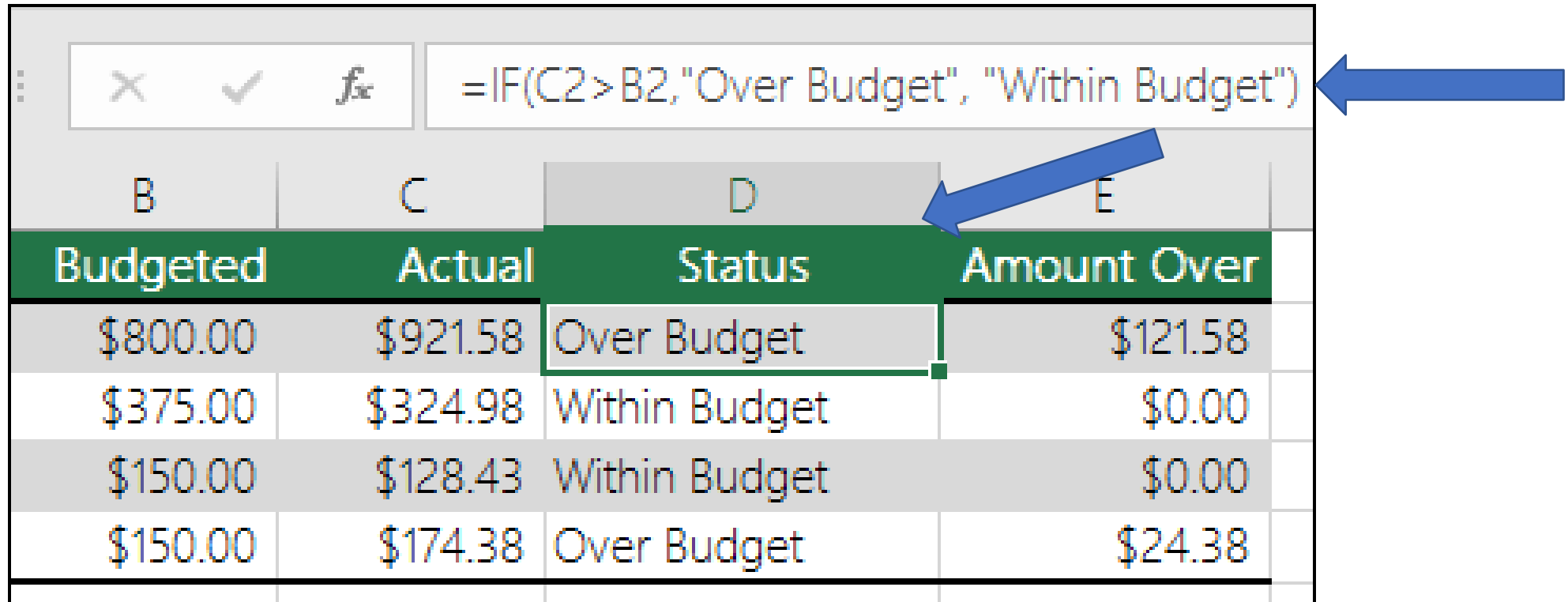
S/No	Function name	Category	Description
8	COUNT	Statistical	Counts how many numbers are in the list of arguments
9	COUNTA	Statistical	Counts how many values are in the list of arguments
10	COUNTIF	Statistical	Counts the number of cells within a range that meet the given criteria
11	COUNTIFS	Statistical	Counts the number of cells within a range that meet multiple criteria
12	ABS	Math and trigonometry	Returns the absolute value of a number
13	VLOOKUP	Lookup and reference	Looks in the first column of an array and moves across the row to return the value of a cell
14	HLOOKUP	Lookup and reference	Looks in the top row of an array and returns the value of the indicated cell
15	MATCH	Lookup and reference	Looks up values in a reference or array
16	INDEX	Lookup and reference	Uses an index to choose a value from a reference or array
17	COLUMN	Lookup and reference	Returns the column number of a reference
18	ROW	Lookup and reference	Returns the row number of a reference
19	IF	Logical	Specifies a logical test to perform
20	IFERROR	Logical	Returns a value you specify if a formula evaluates to an error; otherwise, returns the result of the formula
21	IFNA	Logical	Returns the value you specify if the expression resolves to #N/A, otherwise returns the result of the expression
22	IFS	Logical	Checks whether one or more conditions are met and returns a value that corresponds to the first TRUE condition.
23	AND	Logical	Returns TRUE if all of its arguments are TRUE
24	OR	Logical	Returns TRUE if any argument is TRUE

# Commonly Used Functions

S/No	Function name	Category	Description
25	ROUND	Math and trigonometry	Rounds a number to a specified number of digits
26	ROUNDDOWN	Math and trigonometry	Rounds a number down, toward zero
27	ROUNDUP	Math and trigonometry	Rounds a number up, away from zero
28	TODAY	Date and time	Returns the serial number of today's date
29	DATE	Date and time	Returns the serial number of a particular date
30	DAY	Date and time	Converts a serial number to a day of the month
31	DAYS	Date and time	Returns the number of days between two dates
32	DAYS360	Date and time	Calculates the number of days between two dates based on a 360-day year
33	EDATE	Date and time	Returns the serial number of the date that is the indicated number of months before or after the start date
34	EOMONTH	Date and time	Returns the serial number of the last day of the month before or after a specified number of months
35	TEXT	Text	Formats a number and converts it to text
36	CONCATENATE	Text	Joins several text items into one text item
37	LEN,	Text	Returns the number of characters in a text string
38	LEFT,	Text	Returns the leftmost characters from a text value
39	RIGHT,	Text	Returns the rightmost characters from a text value
40	PROPER	Text	Capitalizes the first letter in each word of a text value
41	LOWER	Text	Converts text to lowercase
42	UPPER	Text	Converts text to uppercase
43	ISBLANK	Information	Returns TRUE if the value is blank
44	ISERROR	Information	

# Important Functions: IF

The **IF** function runs a logical test and returns one value for a TRUE result, and another for a FALSE result.



B	C	D	E
Budgeted	Actual	Status	Amount Over
\$800.00	\$921.58	Over Budget	\$121.58
\$375.00	\$324.98	Within Budget	\$0.00
\$150.00	\$128.43	Within Budget	\$0.00
\$150.00	\$174.38	Over Budget	\$24.38

# Important Functions: IFERROR

You can use the **IFERROR** function to trap and handle errors in a formula. IFERROR returns a value you specify if a formula evaluates to an error; otherwise, it returns the result of the formula.

Formula  
↓




D2	✕	✓	<i>f<sub>x</sub></i>	=IFERROR(A2/B2, "")
	A	B	C	D
1	Sales	Orders	Avg Order	Avg Order
2	7000	6	1167	1167
3	5000		#DIV/0!	
4	9000	4	2250	2250
5	2000	10	200	200
6	8300		#DIV/0!	




↑ Formula without using IFERROR FUNCTION

↑ Blank cell using IFERROR FUNCTION

# Important Functions: SUMIFS

SUMIFS is a function to sum cells that meet multiple criteria. SUMIFS can be used to sum values when corresponding cells meet criteria based on dates, numbers, and text. SUMIFS also supports logical operators (>,<,<>=)

F3	:				<code>=SUMIFS(C2:C9, A2:A9, "apples", B2:B9, "Pete")</code>	
	A	B	C	D	E	F
1	Product	Supplier	Qty.		Product:	Apples
2	Cherries	John	200		Supplier:	Pete
3	Bananas	Mike	350		Qty.:	290
4	Apples	Pete	180			
5	Oranges	Mike	400			
6	Bananas	John	250			
7	Apples	Mike	120			
8	Cherries	John	330			
9	Apples	Pete	110			

 criteria\_range1    criteria\_range2    sum\_range

Apples supplied by Pete:  
180+110=290



# Important Functions: SUMIFS

- We want to know how many HP Laser Jet Printers we have.
- =sumif(a2:a14,"HP Laser Jet",c2:c14)
- Which equals 11
- We want to know how many HP Laser Jet Printers the POLICE have.
- =sumifs(c2:c14,a2:14,"HP Laser Jet",b2:b14,"Police")
- Which equals 3

= sums the cells with the value of "10"		
Color Printers	Dept	Quantity
HP Laser Jet	Admin	4
HP M553	Construction	5
HP Laser Jet	Construction	1
Epson WF2750	Police	4
HP Laser Jet Pro	Fire Prevention	1
Canon MF634	Human Svcs	2
HP Laser Jet	Police	3
Canon MF634	Recreation	3
HP Laser Jet	Parks	1
HP M553	Clerk	1

# Important Functions: VLOOKUP

**VLOOKUP** is an **Excel function** to get data from a table organized vertically. Lookup values must appear in the first column of the table passed into **VLOOKUP**.

The screenshot shows an Excel spreadsheet with a table of student data. The formula bar at the top displays `=VLOOKUP(F3,$A$3:$D$8,3,FALSE)`. The table has columns labeled 1 (ID), 2 (Name), 3 (Math), and 4 (Chemistry). Row 6 is highlighted in yellow, showing the student Hedy with a Math score of 92. To the right, a smaller table shows the result of the VLOOKUP: for ID C1004, the Math score is 92. Below this, a diagram explains the formula components: `F3` is the lookup value, `$A$3:$D$8` is the search range, `3` is the column index to return a match from, and `FALSE` specifies an exact match.

	1	2	3	4
2	ID	Name	Math	Chemistry
3	A1001	Emily	49	70
4	A1002	James	78	58
5	B1003	Nicol	100	96
6	C1004	Hedy	92	98
7	C1005	Mario	61	79
8	D1006	Akash	85	90

ID	Math
C1004	92

**=VLOOKUP(F3,\$A\$3:\$D\$8,3,FALSE)**

- Lookup value
- search in this range
- return a match from this column
- exact match

# Important Functions: VLOOKUP

- In the Formula Bar, type =VLOOKUP().
- In the parentheses, enter your lookup value, followed by a comma.
- Enter your table array or lookup table, the range of data you want to search, and a comma.
- Enter column index number.
- Enter the range lookup value, either TRUE or FALSE.

VLOOKUP Examples in Excel							
VLOOKUP				=VLOOKUP(E2,A:C,3,0)			
	A	B	C	D	E	F	G
1	First Name	Last Name	Runs		First Name	Last Name	Runs
2	Rahul	Dravid	50		Virat	Kohli	=VLOOKUP(E2,A:C,3,0)
3	Sachin	Tendulkar	52				
4	Mahendra	Dhoni	54				
5	Sourav	Ganguly	56				
6	Virat	Kohli	58				
7	Hardik	Pandya	60				
8	Rushabh	Pant	62				
9							

# Important Functions: COUNTIFS

The **Excel COUNTIFS function** returns the count of cells that meet one or more criteria. COUNTIFS can be used with criteria based on dates, numbers, text, etc.

## COUNTIFS in Excel

COUNTIFS		✕ ✓ fx		=COUNTIFS(B2:B11,">85",C2:C11,">85")	
	A	B	C	D	E
1	Student	Marks in Q1	Marks in Q2	COUNTIFS Result	
2	Raj	80	75	=COUNTIFS(B2:B11,">85",C2:C11,">85")	
3	Sheena	90	92		
4	Rohit	92	88		
5	Yash	65	67		
6	Anchal	57	60		
7	Shivam	78	80		
8	Aakriti	87	84		
9	Neha	95	93		
10	Sakshi	63	68		

=COUNTIFS(

COUNTIFS(criteria\_range1, criteria1, ...)



# Important Functions: COUNTIFS

- The COUNTIFS function is a premade function in Excel, which counts cells in a range based on one or more true or false condition.
- It is typed =COUNTIFS : =COUNTIFS(criteria\_range1, criteria1, [criteria\_range2, criteria2], ...)

The screenshot shows an Excel spreadsheet with the following data:

Fruit	Price
apple	12
peach	19
apple	15
banana	5
apple	9

Criteria1	Criteria2	Count
apple	>10	2

The formula bar shows: `=COUNTIFS(B3:B7,F2,C3:C7,F3)`

Also can use this formula  
`=COUNTIFS(B2:B7,"apple",C3:C7,">10")`

# IF (Nested)

You can use multiple **ifs** inside **IF** function.

## IF Function in Excel

I2									<b>=IF(H2&gt;=80,"A",IF(H2&gt;=70,"B",IF(H2&gt;=60,"C")))</b>
	B	C	D	E	F	G	H	I	J
1	English	Science	Maths	Hindi	SST	Total Marks	%	Grades	
2	72	94	98	67	64	395	79	B	
3	67	72	54	62	65	320	64	C	
4	62	82	90	59	59	352	70.4	B	
5	78	89	98	79	82	426	85.2	A	
6	67	62	78	64	60	331	66.2	C	



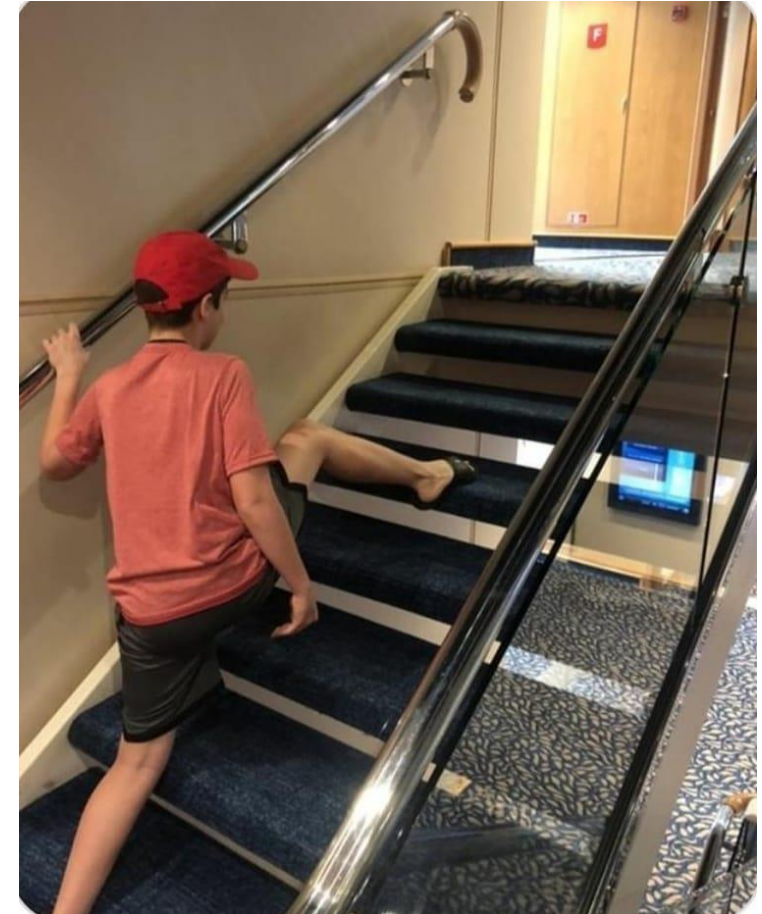
**=IF(**

**IF(logical\_test, [value\_if\_true], [value\_if\_false])**

**Checks whether a condition is met, and returns one value if TRUE, and another value if FALSE**

# Data Analysis Steps in Excel

1. Data Formatting ( to make it readable)
2. Data Study (using filters)
3. Listing the Requirement (we will cover this shortly))
4. Analysis
  - i) Using Functions
  - ii) Using Pivots
5. Data Presentation





# Pivot Tables

- What is a pivot table and why we need it?
- How to create Pivot Table



# Excel Pivot Tables (Why We Need Pivot Tables?)

- As per the business requirement, PivotTables summarize and analyze large amounts of data into useful business insights and summary reports.
- A pivot table is an incredibly powerful tool in Excel that can be used to analyze, explore and summarize your data.

	A	B	C	D	E
1	Product	Price	Qty Sold	Total	Date
2	511115	\$283	135	\$38,205	1/3/2015
3	392219	\$172	77	\$13,244	1/3/2015
4	392219	\$305	112	\$34,160	1/3/2015
5	933592	\$729	193	\$140,697	1/3/2015
6	933592	\$588	9	\$5,292	1/27/2015
7	933592	\$599	28	\$16,772	1/27/2015
8	511115	\$10	156	\$1,560	1/27/2015
9	833987	\$54	42	\$2,268	1/30/2015
10	392219	\$527	124	\$65,348	1/30/2015
11	933592	\$224	186	\$41,664	1/30/2015
12	392219	\$776	142	\$110,192	2/6/2015
13	933592	\$69	49	\$3,381	2/6/2015
14	392219	\$381	32	\$12,192	2/6/2015
15	231771	\$75	25	\$1,875	2/6/2015
16	933592	\$635	120	\$76,200	2/6/2015
17	392219	\$332	96	\$31,872	2/13/2015
18	511115	\$411	166	\$68,226	2/13/2015
19	933592	\$641	166	\$106,406	2/13/2015
20	392219	\$616	131	\$80,696	2/13/2015
21	511115	\$734	143	\$104,962	2/13/2015
22	933592	\$783	43	\$33,669	2/26/2015
23	231771	\$438	125	\$54,750	2/26/2015
24	392219	\$283	106	\$29,998	2/26/2015
25	511115	\$52	82	\$4,264	2/26/2015
26	392219	\$114	198	\$22,572	3/20/2015



Sum of Qty Sold				
	+ Jan	+ Feb	+ Mar	Grand Total
231771		150		150
392219	313	507	198	1018
511115	291	391	80	762
833987	42		263	305
933592	416	378		794
Grand Total	1062	1426	541	3029

# Excel Pivot Tables (Let's create our first Pivot table.)

1. Select all cells, including header row.
2. Insert tab > PivotTable (most left side)
3. Click "OK" on pop-up window
4. Automatically directed to new sheet, with PivotTable controls.

The screenshot shows the Excel interface with the 'Insert' tab selected. The 'PivotTable' button in the 'Tables' group is circled in orange. The 'Create PivotTable' dialog box is open on the right, with the following settings:

- Choose the data that you want to analyze:
  - ☒ Select a table or range
  - Table/Range: Sheet1!\$A\$1:\$E\$29
  - ☐ Use an external data source
  - ☐ Use this workbook's Data Model
- Choose where you want the PivotTable report to be placed:
  - ☒ New Worksheet
  - ☐ Existing Worksheet
- Choose whether you want to analyze multiple tables:
  - ☐ Add this data to the Data Model

An orange arrow points from the 'Table/Range' field in the dialog box to the data table below.

	A	B	C	D	E
1	Product	Price	Qty Sold	Total	Date
2	511115	\$283	135	\$38,205	1/3/2015
3	392219	\$172	77	\$13,244	1/3/2015
4	392219	\$305	112	\$34,160	1/3/2015
5	933592	\$729	193	\$140,697	1/3/2015
6	933592	\$588	9	\$5,292	1/27/2015
7	933592	\$599	28	\$16,772	1/27/2015
8	511115	\$10	156	\$1,560	1/27/2015
9	833987	\$54	42	\$2,268	1/30/2015
10	392219	\$527	124	\$65,348	1/30/2015
11	933592	\$224	186	\$41,664	1/30/2015
12	392219	\$776	142	\$110,192	2/6/2015
13	933592	\$69	49	\$3,381	2/6/2015
14	392219	\$381	32	\$12,192	2/6/2015
15	231771	\$75	25	\$1,875	2/6/2015
16	933592	\$635	120	\$76,200	2/6/2015
17	392219	\$332	96	\$31,872	2/13/2015
18	511115	\$411	166	\$68,226	2/13/2015
19	933592	\$641	166	\$106,406	2/13/2015
20	392219	\$616	131	\$80,696	2/13/2015
21	511115	\$734	143	\$104,962	2/13/2015
22	933592	\$783	43	\$33,669	2/26/2015
23	231771	\$438	125	\$54,750	2/26/2015
24	392219	\$283	106	\$29,998	2/26/2015
25	511115	\$52	82	\$4,264	2/26/2015
26	392219	\$114	198	\$22,572	3/20/2015
27	511115	\$425	80	\$34,000	3/20/2015
28	833987	\$794	150	\$119,100	3/20/2015
29	833987	\$140	113	\$15,820	3/20/2015

**Selected Data  
including column  
headings**

# Excel Pivot Tables (Parts of Pivot table.)

The screenshot shows an Excel PivotTable titled "Sum of Qty Sold" with columns for months (Jan, Feb, Mar) and a Grand Total. The data is summarized in the following table:

	Jan	Feb	Mar	Grand Total
231771	150			150
392219	313	507	198	1018
511115	291	391	80	762
833987	42		263	305
933592	416	378		794
<b>Grand Total</b>	<b>1062</b>	<b>1426</b>	<b>541</b>	<b>3029</b>

Annotations in the image explain the parts of the PivotTable:

- Field list - Drag & Drop to task pane:** A green arrow points from the "Months" field in the "Columns" area of the PivotTable Fields task pane to the month headers in the table.
- Field list - Drag & Drop to task pane:** An orange arrow points from the "Product" field in the "Rows" area of the PivotTable Fields task pane to the product list in the table.
- Field list - Drag & Drop to task pane:** A red arrow points from the "Sum of Qty Sold" field in the "Values" area of the PivotTable Fields task pane to the "Grand Total" column in the table.

The PivotTable Fields task pane on the right shows the following configuration:

- Choose fields to add to report:** Product, Qty Sold, Date, Month.
- Drag fields between areas below:**
- FILTERS:** (Empty)
- COLUMNS:** Months, Date
- ROWS:** Product
- VALUES:** Sum of Qty Sold
- Defer Layout Update:** (Unchecked)
- UPDATE:** (Button)