

BENEFITFOCUS® UNIVERSITY

Excel Tips and Tricks

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Excel Tips and Tricks

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Disclaimer

This resource includes images containing sample data to better illustrate the functionality of our software within the context of this course. All sample data displayed in the figures throughout this document is simulated, non-personal data.

Getting Started

This guide is meant to serve as a reference for Excel Tips and Tricks and some of the most commonly used formulas. This guide is not an all-inclusive list of formulas in Excel. Please note that the images used throughout the guide may vary slightly from your screen depending on your version of Excel.

Executing formulas

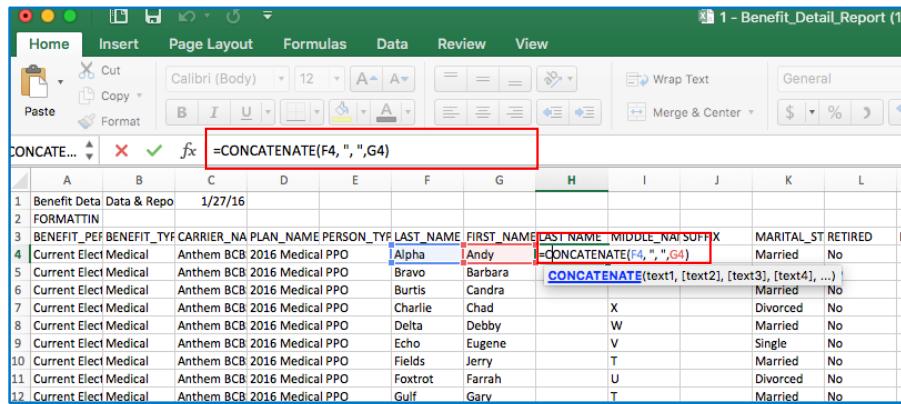
A formula always starts with an equal sign (=), which can be followed by numbers, math operators (like a + or - sign for addition or subtraction), and built-in Excel functions, which can really expand the power of a formula.

A formula can contain any or all of the following: functions, references, operators, and constants:

1. Functions: performs predefined calculations using specific values. *Example: =SUM*
2. References: a cell or range of cells on a worksheet *Example: A2 or A1:A10*
3. Constants: A number or text value that is not calculated. *Example: 10*
4. Operators: Performs a calculation. *Example: + (plus sign)*

You can execute formulas using several methods:

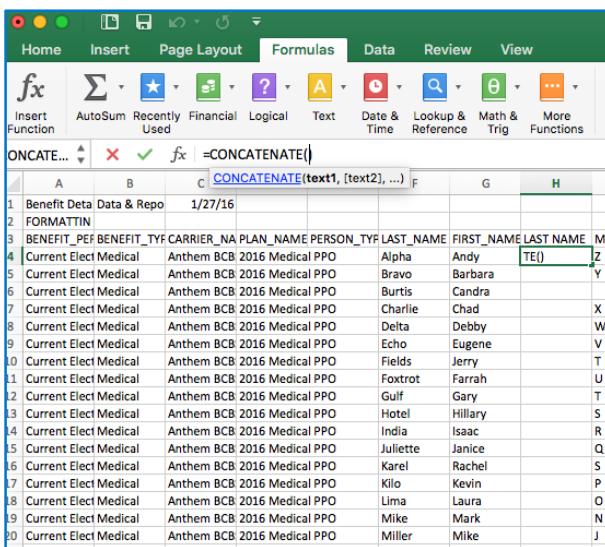
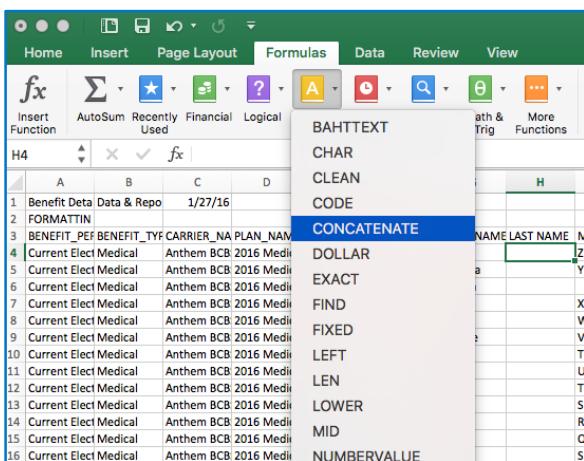
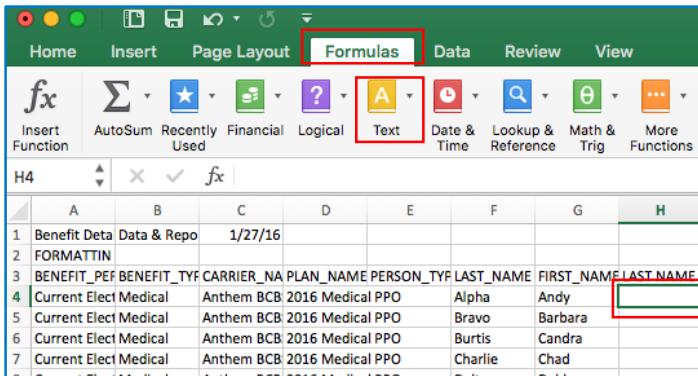
1. Select the cell you wish to execute the formula and type the function directly into the cell or formula bar.
If you are comfortable with the formula you are using and the components, this is the quickest way to enter a formula.



The screenshot shows a Microsoft Excel spreadsheet titled "1 - Benefit_Detail_Report (1)". The formula bar at the top contains the formula "=CONCATENATE(F4, ", ",G4)". The cell H4 contains the formula itself, while the cells F4 and G4 contain the names "Alpha" and "Andy" respectively. The rest of the table shows various benefit plan details for different individuals.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Benefit Data	Data & Repo	1/27/16									
2	FORMATTIN											
3	BENEFIT_PEF	BENEFIT_TYP	CARRIER_NA	PLAN_NAME	PERSON_TYP	LAST_NAME	FIRST_NAME	LAST_NAME_MIDDLE_NAME_SUFFIX	MARITAL_ST	RETIRIED		
4	Current Elect Medical	Anthem BCB 2016	Medical PPO		Alpha	Andy	=CONCATENATE(F4, ", ",G4)	X	Married	No		
5	Current Elect Medical	Anthem BCB 2016	Medical PPO		Brave	Barbara	=CONCATENATE(F4, ", ",G4)		Married	No		
6	Current Elect Medical	Anthem BCB 2016	Medical PPO		Burtis	Candra	=CONCATENATE(F4, ", ",G4)		Divorced	No		
7	Current Elect Medical	Anthem BCB 2016	Medical PPO		Charlie	Chad	X		Divorced	No		
8	Current Elect Medical	Anthem BCB 2016	Medical PPO		Delta	Debby	W		Married	No		
9	Current Elect Medical	Anthem BCB 2016	Medical PPO		Echo	Eugene	V		Single	No		
10	Current Elect Medical	Anthem BCB 2016	Medical PPO		Fields	Jerry	T		Married	No		
11	Current Elect Medical	Anthem BCB 2016	Medical PPO		Foxtrot	Farrah	U		Divorced	No		
12	Current Elect Medical	Anthem BCB 2016	Medical PPO		Gulf	Gary	T		Married	No		

2. Another way you can enter a formula is by selecting the cell you wish to execute the formula and click on the *Formulas* tab. Then select the specific formula type and click on the function. In this example, we will place our cursor in H2 and select *Text* and *CONCATENATE*. This is useful if you don't know a function off the top of your head and if you need to look through all the functions available.



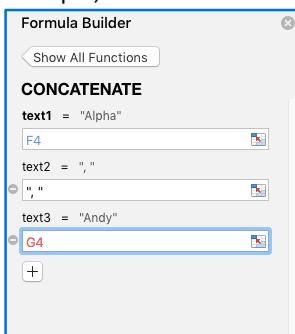
3. If needed, you can also use the Formula Builder to help breakdown a specific function and walk you through unfamiliar functions. You can access it by clicking on the *Insert Function* icon on the formula bar.

BENEFIT_TYF	CARRIER_NA	PLAN_NAME	PERSON_TYP	LAST_NAME	FIRST_NAME	LAST_NAME	MIDDLE_NAM	SUFFIX
Medical	Anthem BCB	2016 Medical	PPO	Alpha	Andy	Z		
Medical	Anthem BCB	2016 Medical	PPO	Bravo	Barbara	Y		
Medical	Anthem BCB	2016 Medical	PPO	Burtis	Candra			

Search for the function and click *Insert Function*.



The Formula Builder will breakdown each component of the formula and you can add the cells. In this example, we need to include 3 text components: text1=F4 "Alpha", text2= ", ", and text3=G4 "Andy"



Inserting rows and columns

To insert a row, select either the whole row or a cell in the row above which you want to insert the new row. For example, to insert a new row above row 3, click a cell in row 3.

	A	B	C	D	E	F
1	Basic Work R Data & Repo	1/26/16				
2	LAST_NAME	FIRST_NAME	MIDDLE_NA	SUFFIX	SSN	DATE_HIRED TERM
3	Alpha	Andy	Z		123-32-1001	6/1/13
4	Bravo	Barbara	Y		123-32-1002	9/17/12
5	Burts	Candra			123-32-1096	5/1/15
6	Charlie	Chad	X		123-32-1003	6/24/13
7	Delta	Debby	W		123-32-1004	9/15/08
8	Echo	Eugene	V		123-32-1005	6/1/13
9	Fields	Jerry	T		123-32-1097	1/1/16
10	Foxtrot	Farrah	U		123-32-1006	9/17/12
11	Gulf	Gary	T		123-32-1007	6/24/13
12	Hotel	Hillary	S		123-32-1008	9/15/08
13	India	Isaac	R		123-32-1009	6/1/13
14	Juliette	Janice	Q		123-32-1010	9/17/12
15	Karel	Rachel	S		123-32-1091	1/1/14
16	Kilo	Kevin	P		123-32-1011	6/24/13
17	Lima	Laura	O		123-32-1012	9/15/08
18	Mike	Mark	N		123-32-1013	6/1/13
19	Miller	Mike	J		123-32-1098	1/18/16
20	November	Noel	M		123-32-1014	9/17/12
21	Oscar	Oliver	L		123-32-1015	6/24/13
22	Papa	Paula	K		123-32-1016	9/15/08
23	Quebeck	Quintin	J		123-32-1017	6/1/13
24	Romeo	Rachel	I		123-32-1018	9/17/12
25	Sierra	Sam	H		123-32-1019	6/24/13
26	Tango	Theresa	G		123-32-1020	9/15/08
27	Uniform	Uziel	F		123-32-1021	6/1/13
28	Victor	Victoria	E		123-32-1022	4/5/03
29	Whiskey	Wesley	D		123-32-1023	8/14/05
30	Xray	Xandria	C		123-32-1024	9/17/12
31	Yankee	Youssef	B		123-32-1025	6/24/13
32	Zebra	Zigana	A		123-32-1026	9/15/08
33						
34						

Right-click the selected row and select *Insert*.

	A	B	C	D	E	F
1	Basic Work R Data & Repo	1/26/16				
2	LAST_NAME	FIRST_NAME	MIDDLE_NA	SUFFIX	SSN	DATE_HIRED TERM
3	+ ia	Andy	Z		123-32-1001	6/1/13
4	Bravo	Barbara	Y		123-32-1002	9/17/12
5	Burts	Candra			123-32-1096	5/1/15
6	Charlie	Chad	X		123-32-1003	6/24/13
7	Delta	Debby	W		123-32-1004	9/15/08
8	Echo	Eugene	V		123-32-1005	6/1/13
9	Fields	Jerry	T		123-32-1097	1/1/16
10	Foxtrot	Farrah	U		123-32-1006	9/17/12
11	Gulf	Gary	T		123-32-1007	6/24/13
12	Hotel	Hillary	S		123-32-1008	9/15/08
13	India	Isaac	R		123-32-1009	6/1/13
14	Juliette	Janice	Q		123-32-1010	9/17/12
15	Karel	Rachel	S		123-32-1091	1/1/14
16	Kilo	Kevin	P		123-32-1011	6/24/13
17	Lima	Laura	O		123-32-1012	9/15/08
18	Mike	Mark	N		123-32-1013	6/1/13
19	Miller	Mike	J		123-32-1098	1/18/16
20	November	Noel	M		123-32-1014	9/17/12
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						
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To insert multiple rows, select the rows above which you want to insert rows. Select the same number of rows as you want to insert. For example, to insert three new rows, select three rows.

	A	B	C	D	E	F	G	H	I
1	Basic Work R Data & Repo	1/26/16							
2	LAST_NAME	FIRST_NAME	MIDDLE_NAM_SUFFIX	SSN	DATE_HIRED	TERMINATE_DATE	PHONE	CELL	V
3	Andy	Z		123-32-1001	6/1/13				
4	Bravo	Barbara	Y	123-32-1002	9/17/12				
5	Burtis	Candra		123-32-1096	5/1/15				
6	Charlie	Chad	X	123-32-1003	6/24/13				
7	Delta	Debby	W	123-32-1004	9/15/08				
8	Echo	Eugene	V	123-32-1005	6/1/13				
9	Fields	Jerry	T	123-32-1097	1/1/16				
10	Footrot	Farrah	U	123-32-1006	9/17/12				
11	Gulf	Gary	T	123-32-1007	6/24/13				
12	Hotel	Hillary	S	123-32-1008	9/15/08				
13	India	Isaac	R	123-32-1009	6/1/13				
14	Juliette	Janice	Q	123-32-1010	9/17/12				
15	Karel	Rachel	S	123-32-1005	1/1/14				
16	Kilo	Kevin	P	123-32-1011	6/24/13				
17	Lima	Laura	O	123-32-1012	9/15/08				
18	Mike	Mark	N	123-32-1013	6/1/13				
19	Miller	Mike	J	123-32-1098	1/18/16				
20	November	Noel	M	123-32-1014	9/17/12				
21	Oscar	Oliver	L	123-32-1015	6/24/13				
22	Papa	Paula	K	123-32-1016	9/15/08				
23	Quebeck	Quintin	J	123-32-1017	6/1/13				
24	Romeo	Rachel		123-32-1018	9/17/12				
25	Sierra	Sam	H	123-32-1019	6/1/13				
26	Tango	Theresa	G	123-32-1020	9/15/08				
27	Uniform	Uziel	F	123-32-1021	6/1/13				
28	Victor	Victoria	E	123-32-1022	4/5/03				
29	Whiskey	Wesley	D	123-32-1023	8/14/05				
30	Xray	Xandra	C	123-32-1024	9/17/12				
31	Yankee	Youssef	B	123-32-1025	6/24/13				
32	Zebra	Zigana	A	123-32-1026	9/15/08				
33									
34									
35									
36									

Right-click the selected cell rows and select *Insert*.

	A	B	C	D	E	F	G
1	Basic Work R Data & Repo	1/26/16					
2	LAST_NAME	FIRST_NAME	MIDDLE_NAM_SUFFIX	SSN	DATE_HIRED	TERMINATE_DATE	PHONE
3	Andy	Z		123-32-1001	6/1/13		
4	Bravo	Barbara	Y	123-32-1002	9/17/12		
5	Burtis	Candra		123-32-1096	5/1/15		
6	Charlie	Chad	X	123-32-1003	6/24/13		
7	Delta	Debby	W	123-32-1004	9/15/08		
8	Echo	Eugene	V	123-32-1005	6/1/13		
9	Fields	Jerry	T	123-32-1097	1/1/16		
10	Footrot	Farrah	U	123-32-1006	9/17/12		
11	Gulf	Gary	T	123-32-1007	6/24/13		
12	Hotel	Hillary	S	123-32-1008	9/15/08		
13	India	Isaac	R	123-32-1009	6/1/13		
14	Juliette	Janice	Q	123-32-1010	9/17/12		
15	Karel	Rachel	S	123-32-1091	1/1/14		
16	Kilo	Kevin	P	123-32-1011	6/24/13		
17	Lima	Laura	O	123-32-1012	9/15/08		
18	Mike	Mark	N	123-32-1013	6/1/13		
19	Miller	Mike	J	123-32-1098	1/18/16		
20	November	Noel	M	123-32-1014	9/17/12		
21	Oscar	Oliver	L	123-32-1015	6/24/13		
22	Papa	Paula	K	123-32-1016	9/15/08		
23	Quebeck	Quintin	J	123-32-1017	6/1/13		
24	Romeo	Rachel		123-32-1018	9/17/12		
25	Sierra	Sam	H	123-32-1019	6/24/13		
26	Tango	Theresa	G	123-32-1020	9/15/08		
27	Uniform	Uziel	F	123-32-1021	6/1/13		
28	Victor	Victoria	E	123-32-1022	4/5/03		
29	Whiskey	Wesley	D	123-32-1023	8/14/05		
30	Xray	Xandra	C	123-32-1024	9/17/12		
31	Yankee	Youssef	B	123-32-1025	6/24/13		
32	Zebra	Zigana	A	123-32-1026	9/15/08		
33							
34							
35							
36							

To insert a single column, select the column or a cell in the column immediately to the right of where you want to insert the new column. For example, to insert a new column to the left of column A, select column A.

Basic Work Report	Data & Repo	1/26/16	SSN	DATE_HIRED	TERMINATE_DATE	PHONE_NUMBER
LAST_NAME	FIRST_NAME	MIDDLE_NAME	SUFFIX			
Alpha	Andy	Z		123-32-1001	6/1/13	
Bravo	Barbara	Y		123-32-1002	9/17/12	
Burts	Candra			123-32-1096	5/1/15	
Charlie	Chad	X		123-32-1003	6/24/13	
Delta	Debby	W		123-32-1004	9/15/08	
Echo	Eugene	V		123-32-1005	6/1/13	
Fields	Jerry	T		123-32-1097	1/1/16	
Foxtrot	Farrah	U		123-32-1006	9/17/12	
Gulf	Gary	T		123-32-1007	6/24/13	
Hotel	Hillary	S		123-32-1008	9/15/08	
India	Isaac	R		123-32-1009	6/1/13	
Juliette	Janice	Q		123-32-1010	9/17/12	
Karel	Rachel	S		123-32-1091	1/1/14	
Kilo	Kevin	P		123-32-1011	6/24/13	
Lima	Laura	O		123-32-1012	9/15/08	
Mike	Mark	N		123-32-1013	6/1/13	
Miller	Mike	J		123-32-1098	1/18/16	
November	Noel	M		123-32-1014	9/17/12	
Oscar	Oliver	L		123-32-1015	6/24/13	
Papa	Paula	K		123-32-1016	9/15/08	
Quebeck	Quintin	J		123-32-1017	6/1/13	
Romeo	Rachel	I		123-32-1018	9/17/12	
Sierra	Sam	H		123-32-1019	6/24/13	
Tango	Theresa	G		123-32-1020	9/15/08	
Uniform	Uziel	F		123-32-1021	6/1/13	
Victor	Victoria	E		123-32-1022	4/5/03	
Wiskey	Wesley	D		123-32-1023	8/14/05	
Xray	Xandra	C		123-32-1024	9/17/12	
Yankee	Youssef	B		123-32-1025	6/24/13	
Zebra	Zigana	A		123-32-1026	9/15/08	

Right-click the selected cell columns and select *Insert*.

Basic Work Report	Data & Repo	1/26/16	SSN	DATE_HIRED	TERMINATE_DATE	PHONE_NUMBER
LAST_NAME	FIRST_NAME	MIDDLE_NAME	SUFFIX			
Alpha	Andy	Z		123-32-1001	6/1/13	
Bravo	Barbara	Y		123-32-1002	9/17/12	
Burts	Candra			123-32-1096	5/1/15	
Charlie	Chad	X		123-32-1003	6/24/13	
Delta	Debby	W		123-32-1004	9/15/08	
Echo	Eugene	V		123-32-1005	6/1/13	
Fields	Jerry	T		123-32-1097	1/1/16	
Foxtrot	Farrah	U		123-32-1006	9/17/12	
Gulf	Gary	T		123-32-1007	6/24/13	
Hotel	Hillary	S		123-32-1008	9/15/08	
India	Isaac	R		123-32-1009	6/1/13	
Juliette	Janice	Q		123-32-1010	9/17/12	
Karel	Rachel	S		123-32-1091	1/1/14	
Kilo	Kevin	P		123-32-1011	6/24/13	
Lima	Laura	O		123-32-1012	9/15/08	
Mike	Mark	N		123-32-1013	6/1/13	
Miller	Mike	J		123-32-1098	1/18/16	
November	Noel	M		123-32-1014	9/17/12	
Oscar	Oliver	L		123-32-1015	6/24/13	
Papa	Paula	K		123-32-1016	9/15/08	
Quebeck	Quintin	J		123-32-1017	6/1/13	
Romeo	Rachel	I		123-32-1018	9/17/12	
Sierra	Sam	H		123-32-1019	6/24/13	
Tango	Theresa	G		123-32-1020	9/15/08	
Uniform	Uziel	F		123-32-1021	6/1/13	
Victor	Victoria	E		123-32-1022	4/5/03	
Wiskey	Wesley	D		123-32-1023	8/14/05	
Xray	Xandra	C		123-32-1024	9/17/12	
Yankee	Youssef	B		123-32-1025	6/24/13	
Zebra	Zigana	A		123-32-1026	9/15/08	

To insert multiple columns, select the columns immediately to the right of where you want to insert the columns. Select the same number of columns as you want to insert. For example, to insert three new columns, select three columns.

	A	B	C	D	E	F
1	Basic Work R Data & Repo		LAST_NAME FIRST_NAME MIDDLE_NA	1/26/16	SUFFIX	SSN DATE_HIRED
2	Alpha	Andy	Z			123-32-1001 6/1/13
3	Bravo	Barbara	Y			123-32-1002 9/17/12
4	Burtis	Candra				123-32-1096 5/1/15
5	Charlie	Chad	X			123-32-1003 6/24/13
6	Delta	Debby	W			123-32-1004 9/15/08
7	Echo	Eugene	V			123-32-1005 6/1/13
8	Field	Jerry	T			123-32-1097 1/1/16
9	Foxtrot	Farrah	U			123-32-1006 9/17/12
10	Gulf	Gary	T			123-32-1007 6/24/13
11	Hotel	Hillary	S			123-32-1008 9/15/08
12	India	Isaac	R			123-32-1009 6/1/13
13	Juliette	Janice	Q			123-32-1010 9/17/12
14	Karel	Rachel	S			123-32-1091 1/1/14
15	Kilo	Kevin	P			123-32-1011 6/24/13
16	Lima	Laura	O			123-32-1012 9/15/08
17	Mike	Mark	N			123-32-1013 6/1/13
18	Miller	Mike	J			123-32-1098 1/18/16
19	November	Noel	M			123-32-1014 9/17/12
20	Oscar	Oliver	L			123-32-1015 6/24/13
21	Papa	Paula	K			123-32-1016 9/15/08
22	Quebeck	Quintin	J			123-32-1017 6/1/13
23	Romeo	Rachel	I			123-32-1018 9/17/12
24	Sierra	Sam	H			123-32-1019 6/24/13
25	Tango	Theresa	G			123-32-1020 9/15/08
26	Uniform	Uziel	F			123-32-1021 6/1/13
27	Victor	Victoria	E			123-32-1022 4/5/03
28	Whiskey	Wesley	D			123-32-1023 8/14/05
29	Xray	Xandra	C			123-32-1024 9/17/12
30	Yankee	Youssef	B			123-32-1025 6/24/13
31	Zebra	Zigana	A			123-32-1026 9/15/08
32						
33						
34						
35						
36						

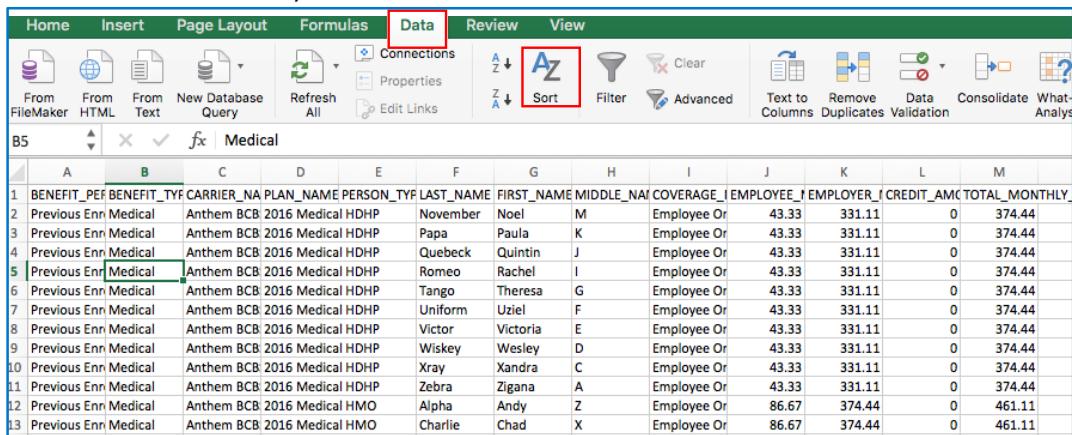
Right-click the selected cell columns and select *Insert*.

	A	B	C	D	E	F	G	H	I	J
1				Basic Work R Data & Repo	LAST_NAME FIRST_NAME MIDDLE_NA	SUFFIX	1/26/16	SSN	DATE_HIRED TERMINATED	
2								123-32-1001	6/1/13	
3								123-32-1002	9/17/12	
4								123-32-1096	5/1/15	
5								123-32-1003	6/24/13	
6								123-32-1004	9/15/08	
7								123-32-1005	6/1/13	
8								123-32-1097	1/1/16	
9								123-32-1018	9/17/12	
10								123-32-1006	6/24/13	
11								123-32-1007	6/24/13	
12								123-32-1008	9/15/08	
13								123-32-1009	6/1/13	
14								123-32-1010	9/17/12	
15								123-32-1011	1/1/14	
16								123-32-1012	9/15/08	
17								123-32-1013	6/1/13	
18								123-32-1014	1/18/16	
19								123-32-1015	6/24/13	
20								123-32-1016	9/15/08	
21								123-32-1017	6/1/13	
22								123-32-1018	9/17/12	
23								123-32-1019	6/24/13	
24								123-32-1020	9/15/08	
25								123-32-1019	6/24/13	
26								123-32-1020	9/15/08	
27								123-32-1021	6/1/13	
28								123-32-1022	4/5/03	
29								123-32-1023	8/14/05	
30								123-32-1024	9/17/12	
31								123-32-1025	6/24/13	
32								123-32-1026	9/15/08	
33										
34										
35										
36										

Sorting data

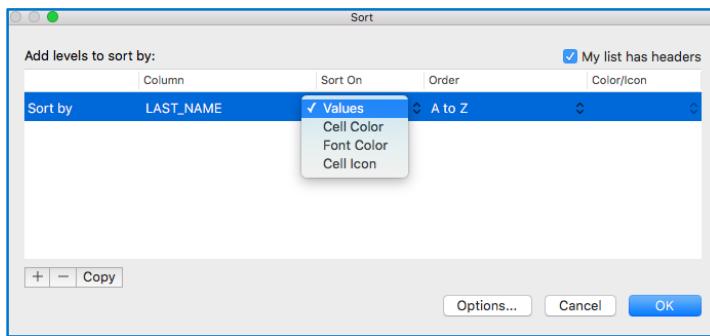
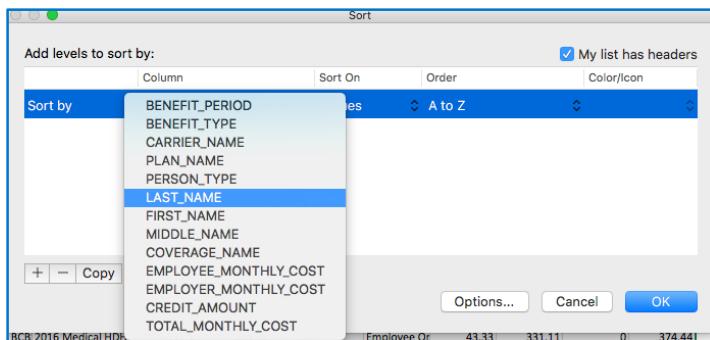
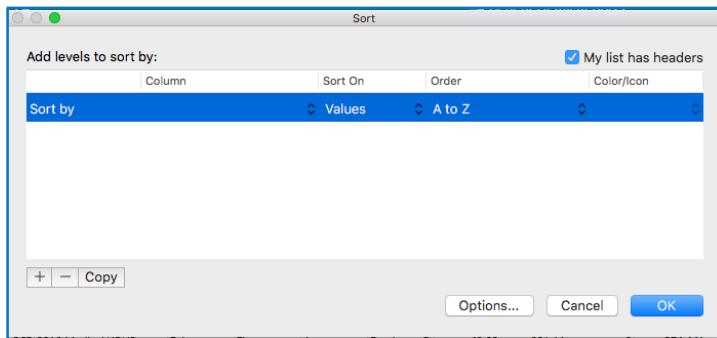
You can sort data by text (A to Z or Z to A), numbers (smallest to largest or largest to smallest), and dates and times (oldest to newest and newest to oldest) in one or more columns.

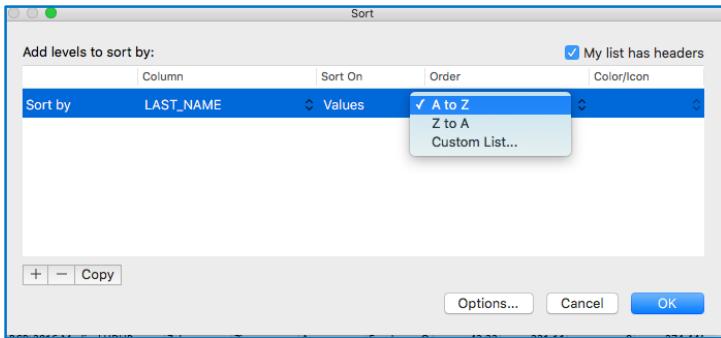
- Select a cell in the column you want to sort. Select Sort on the Data Tab.



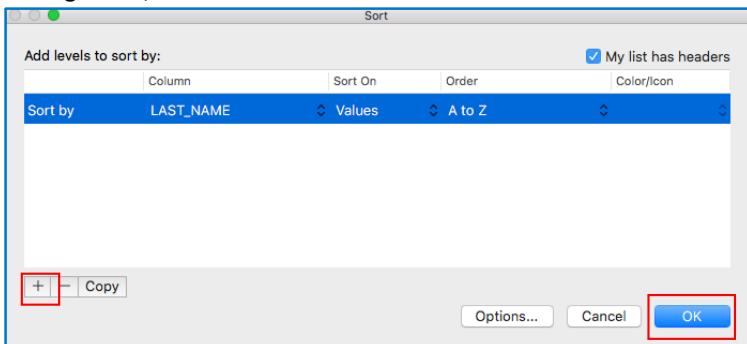
A screenshot of a Microsoft Excel spreadsheet titled "Medical". The Data tab is selected at the top. A red box highlights the "Sort" icon in the toolbar, which is located next to the "AZ" button. The spreadsheet contains 13 rows of data with columns labeled from A to M. Column A is the primary key, and columns B through M contain various benefit and employee details.

- Select a Column to sort. In this example, sort by last name. Select whether to Sort On the column values, cell color, font color or cell icon. Select whether to sort ascending or descending. In this example, sort by last name, on the values, and from A to Z.





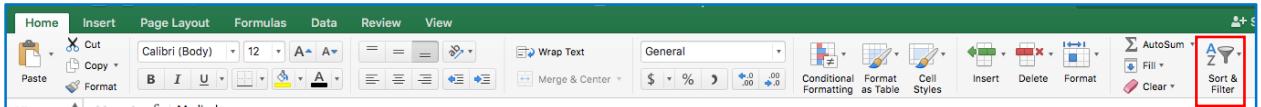
3. If applicable, you can add another level to sort by and repeat steps 1-2. Once you have added all the sorting levels, click *OK*



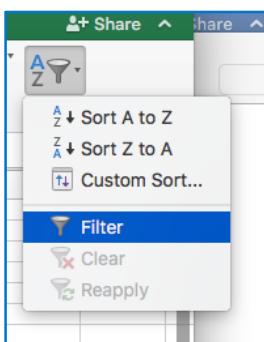
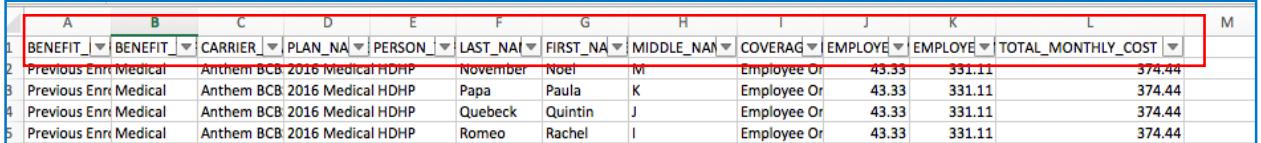
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	BENEFIT_PEF	BENEFIT_TYF	CARRIER_NA	PLAN_NAME	PERSON_TYP	LAST_NAME	FIRST_NAME	MIDDLE_NAM	COVERAGE_I	EMPLOYEE_I	EMPLOYER_I	CREDIT_AMC	TOTAL_MONTHLY_C	
2	Previous Enr Medical		Anthem BCB	2016 Medical HMO		Alpha	Andy	Z	Employee Or	86.67	374.44	0	461.11	
3	Current Elect Medical		Anthem BCB	2017 Medical HMO		Alpha	Andy	Z	Employee an	368.33	720.94	0	1089.27	
4	Open Enroll Medical		Anthem BCB	2018 Medical HMO		Alpha	Andy	Z	Employee Or	86.67	374.44	0	461.11	
5	Previous Enr Medical		Anthem BCB	2016 Medical PPO		Bravo	Barbara	Y	Employee Or	130	242.84	0	372.84	
6	Current Elect Medical		Anthem BCB	2017 Medical PPO		Bravo	Barbara	Y	Employee an	433.33	631.24	0	1064.57	
7	Open Enroll Medical		Anthem BCB	2018 Medical HDHP		Bravo	Barbara	Y	Employee Or	43.33	331.11	0	374.44	
8	Previous Enr Medical		Anthem BCB	2016 Medical PPO		Burris	Candra		Employee Or	130	242.84	0	372.84	
9	Current Elect Medical		Anthem BCB	2017 Medical PPO		Burris	Candra		Employee an	433.33	631.24	0	1064.57	
10	Open Enroll Medical		Anthem BCB	2018 Medical PPO		Burris	Candra		Employee Or	130	242.84	0	372.84	
11	Previous Enr Medical		Anthem BCB	2016 Medical HMO		Charlie	Chad	X	Employee Or	86.67	374.44	0	461.11	
12	Current Elect Medical		Anthem BCB	2017 Medical HMO		Charlie	Chad	X	Employee an	368.33	720.94	0	1089.27	
13	Open Enroll Medical		Anthem BCB	2018 Medical HMO		Charlie	Chad	X	Employee Or	86.67	374.44	0	461.11	
14	Previous Enr Medical		Anthem BCB	2016 Medical HMO		Delta	Debby	W	Employee Or	86.67	374.44	0	461.11	
15	Current Elect Medical		Anthem BCB	2017 Medical HMO		Delta	Debby	W	Employee an	368.33	720.94	0	1089.27	
16	Open Enroll Medical		Anthem BCB	2018 Medical HMO		Delta	Debby	W	Employee Or	86.67	374.44	0	461.11	
17	Previous Enr Medical		Anthem BCB	2016 Medical PPO		Echo	Eugene	V	Employee Or	130	242.84	0	372.84	
18	Current Elect Medical		Anthem BCB	2017 Medical PPO		Echo	Eugene	V	Employee an	433.33	631.24	0	1064.57	
19	Open Enroll Medical		Anthem BCB	2018 Medical PPO		Echo	Eugene	V	Employee Or	130	242.84	0	372.84	
20	Previous Enr Medical		Anthem BCB	2016 Medical PPO		Fields	Jerry	T	Employee Or	130	242.84	0	372.84	
21	Current Elect Medical		Anthem BCB	2017 Medical PPO		Fields	Jerry	T	Employee an	433.33	631.24	0	1064.57	
22	Open Enroll Medical		Anthem BCB	2018 Medical PPO		Fields	Jerry	T	Employee Or	130	242.84	0	372.84	
23	Previous Enr Medical		Anthem BCB	2016 Medical PPO		Foxtrot	Farrah	U	Employee Or	130	242.84	0	372.84	
24	Current Elect Medical		Anthem BCB	2017 Medical PPO		Foxtrot	Farrah	U	Employee an	433.33	631.24	0	1064.57	
25	Open Enroll Medical		Anthem BCB	2018 Medical PPO		Foxtrot	Farrah	U	Employee Or	130	242.84	0	372.84	
26	Previous Enr Medical		Anthem BCB	2016 Medical HMO		Gulf	Gary	T	Employee Or	86.67	374.44	0	461.11	
27	Current Elect Medical		Anthem BCB	2017 Medical HMO		Gulf	Gary	T	Employee an	368.33	720.94	0	1089.27	
28	Open Enroll Medical		Anthem BCB	2018 Medical HMO		Gulf	Gary	T	Employee Or	86.67	374.44	0	461.11	
29	Previous Enr Medical		Anthem BCB	2016 Medical PPO		Hotel	Hillary	S	Employee Or	130	242.84	0	372.84	
30	Current Elect Medical		Anthem BCB	2017 Medical PPO		Hotel	Hillary	S	Employee an	433.33	631.24	0	1064.57	
31	Open Enroll Medical		Anthem BCB	2018 Medical PPO		Hotel	Hillary	S	Employee Or	130	242.84	0	372.84	
32	Previous Enr Medical		Anthem BCB	2016 Medical PPO		India	Isaac	R	Employee Or	130	242.84	0	372.84	
33	Current Elect Medical		Anthem BCB	2017 Medical PPO		India	Isaac	R	Employee an	433.33	631.24	0	1064.57	
34	Open Enroll Medical		Anthem BCB	2018 Medical PPO		India	Isaac	R	Employee Or	130	242.84	0	372.84	
35	Previous Enr Medical		Anthem BCB	2016 Medical PPO		Juliette	Janice	Q	Employee Or	130	242.84	0	372.84	
36	Current Elect Medical		Anthem BCB	2017 Medical PPO		Juliette	Janice	Q	Employee an	433.33	631.24	0	1064.57	

Filtering data

- Select Sort & Filter from the Data tab and click Filter.



A screenshot of Microsoft Excel showing a data table. The ribbon at the top has the 'Data' tab selected. In the bottom right corner of the ribbon, there is a 'Sort & Filter' icon, which is highlighted with a red box. The data table below contains 15 rows of information, including columns for Benefit Period, Carrier, Plan Name, Person Type, Last Name, First Name, Middle Name, Coverage, Employee ID, Employee Name, and Total Monthly Cost.

A screenshot of the data table after applying a filter. Only the first five rows (rows 2 through 6) are visible. The columns are labeled A through L. The 'BENEFIT_PERIOD' column is highlighted with a red box. The data shows various employee names and their corresponding benefit details.

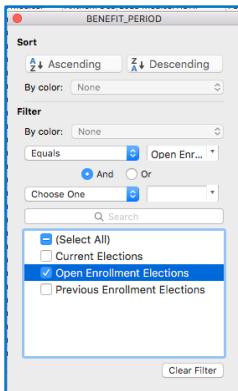


A drop-down arrow means that filtering is enabled but not applied to the column.



The Filter button means that filter is applied to a column.

- To apply a filter, click on the drop-down arrow and select the items you wish to filter. In this example, filter the Benefit Detail Report to only show *Open Enrollment Elections* in the *BENEFIT_TYPE* column.



BENEFIT_TYF	BENEFIT	CARRIER	PLAN_NA	PERSON	LAST_NAM	FIRST_NAM	MIDDLE_NAM	COVERAG	EMPLOYEE	TOTAL_MONTHLY_COST
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Bravo	Barbara	Y		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	November	Noel	M		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Papa	Paula	K		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Quebeck	Quintin	J		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Romeo	Rachel	I		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Sierra	Sam	H		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Tango	Theresa	G		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Uniform	Uziel	F		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Victor	Victoria	E		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Wiskey	Wesley	D		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Xray	Xandra	C		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Yankee	Youssef	B		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HDHP	Zebra	Zigana	A		Employee Or	43.33	331.11
Open Enrolin	Medical	Anthem BCB	2018 Medical HMO	Alpha	Andy	Z		Employee Or	86.67	374.44
Open Enrolin	Medical	Anthem BCB	2018 Medical HMO	Charlie	Chad	X		Employee Or	86.67	374.44
Open Enrolin	Medical	Anthem BCB	2018 Medical HMO	Delta	Debby	W		Employee Or	86.67	374.44
Open Enrolin	Medical	Anthem BCB	2018 Medical HMO	Gulf	Gary	T		Employee Or	86.67	374.44
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Burtis	Candra			Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Echo	Eugene	V		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Fields	Jerry	T		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Foxtrot	Farrah	U		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Hotel	Hillary	S		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	India	Isaac	R		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Juliette	Janice	Q		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Karel	Rachel	S		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Kilo	Kevin	P		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Lima	Laura	O		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Mike	Mark	N		Employee Or	130	242.84
Open Enrolin	Medical	Anthem BCB	2018 Medical PPO	Miller	Mike	J		Employee Or	130	242.84

Conditional Formatting

Conditional formatting allows you to apply formatting automatically to one or more cells based on the cell value. To apply conditional formatting, a rule needs to be created.

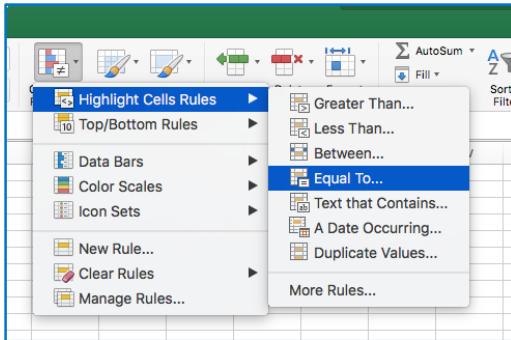
Example:

Highlight in red all of the dependents that are 26 years old.

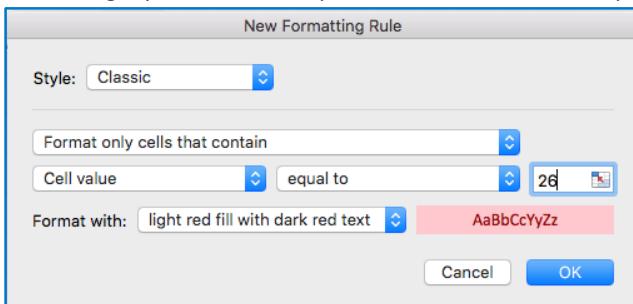
- Select the range of cells you want to apply conditional formatting to.

EMPLOYEE_ID	DEPENDENT_ID	DEPENDENT	DEPENDENT	DATE_OF_BIRTH	AGE	DEPENDENT	BENEFIT_TYF	HAS_COVER	DEPENDENT_TAXABILITY
Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18	Dental	Yes	
Alpha	Andy	Child	Alpha	Avery	4/12/99	26	Medical	Yes	
Charlie	Chad	Child	Charlie	Charlene	4/3/99	23	Medical	Yes	
Delta	Debby	Child	Delta	Devon	4/9/99	26	Medical	Yes	
Gulf	Gary	Child	Gulf	Grey	4/20/99	18	Medical	Yes	
Mike	Mark	Child	Mike	Miles	4/2/99	18	Medical	Yes	
Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18	Medical	Yes	
Sierra	Sam	Child	Sierra	Samantha	4/8/99	26	Medical	Yes	
Yankee	Youssef	Child	Yankee	Lorie	4/19/99	26	Medical	Yes	
Gulf	Gary	Child	Gulf	Grey	4/20/99	18	Vision	Yes	
Mike	Mark	Child	Mike	Miles	4/2/99	18	Vision	Yes	
Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18	Vision	Yes	

- On the Home tab, click the Conditional Formatting drop-down menu and hover over the desired conditional formatting type. In this example, select *Highlight Cell Rules* and *Equal To...*



3. Enter the desired values into the blank field. In this example, enter 26 in the value field. Select the formatting style from the drop-down menu. In this example, select *light red fill with dark red text*.



4. Click *OK* to apply the conditional formatting to the selected cells.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	EMPLOYEE_ID	EMPLOYEE_FNAME	EMPLOYEE_MNAME	DEPENDENT_ID	DEPENDENT_FNAME	DEPENDENT_MNAME	DATE_OF_BIRTH	AGE	DEPENDENT_GENDER	BENEFIT_TYPE	HAS_COVERAGE	DEPENDENT_TAXABILITY		
2	Oliver	Oscar	Child	Oscar	Olivia		4/11/99	18	F	Dental	Yes			
3	Alpha	Andy	Child	Alpha	Avery		4/12/91	26	M	Medical	Yes			
4	Charlie	Chad	Child	Charlie	Charlene		4/3/94	23	F	Medical	Yes			
5	Delta	Debby	Child	Delta	Devon		4/9/91	26	M	Medical	Yes			
6	Gulf	Gary	Child	Gulf	Grey		4/20/99	18	M	Medical	Yes			
7	Mike	Mark	Child	Mike	Miles		4/2/99	18	M	Medical	Yes			
8	Oliver	Oscar	Child	Oscar	Olivia		4/11/99	18	F	Medical	Yes			
9	Sierra	Sam	Child	Sierra	Samantha		4/8/91	26	F	Medical	Yes			
10	Yankee	Youssef	Child	Yankee	Lorie		4/19/91	26	F	Medical	Yes			
11	Gulf	Gary	Child	Gulf	Grey		4/20/99	18	M	Vision	Yes			
12	Mike	Mark	Child	Mike	Miles		4/2/99	18	M	Vision	Yes			
13	Oliver	Oscar	Child	Oscar	Olivia		4/11/99	18	F	Vision	Yes			

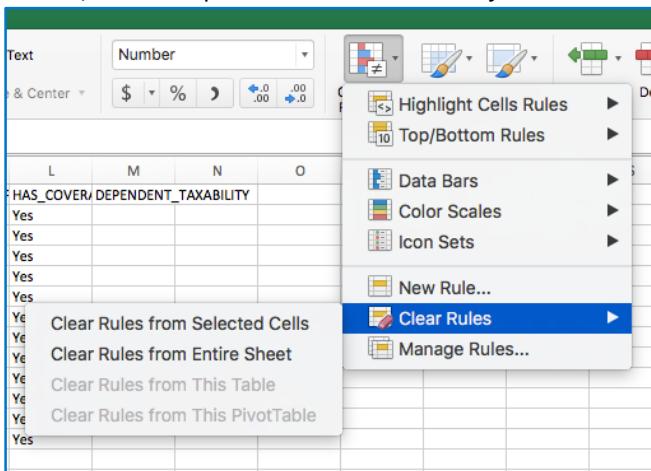


You can apply multiple conditional formatting rules to a cell range or worksheet. This can allow you to visualize trends and patterns in your data.

	A	B	C	D	E	F	H	I	J	K	L	M	N
1	EMPLOYEE_ID	EMPLOYEE_FNAME	DEPENDENT_ID	DEPENDENT_FNAME	DATE_OF_BIRTH	AGE	DEPENDENT_BENEFIT_TYPE	HAS_COVERAGE	DEPENDENT_TAXABILITY				
2	Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18 F	Dental	Yes				
3	Alpha	Andy	Child	Alpha	Avery	4/12/91	26 M	Medical	Yes				
4	Charlie	Chad	Child	Charlie	Charlene	4/3/94	23 F	Medical	Yes				
5	Delta	Debby	Child	Delta	Devon	4/9/91	26 M	Medical	Yes				
6	Gulf	Gary	Child	Gulf	Grey	4/20/99	18 M	Medical	Yes				
7	Mike	Mark	Child	Mike	Miles	4/2/99	18 M	Medical	Yes				
8	Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18 F	Medical	Yes				
9	Sierra	Sam	Child	Sierra	Samantha	4/8/91	26 F	Medical	Yes				
10	Yankee	Youssef	Child	Yankee	Lorie	4/19/91	26 F	Medical	Yes				
11	Gulf	Gary	Child	Gulf	Grey	4/20/99	18 M	Vision	Yes				
12	Mike	Mark	Child	Mike	Miles	4/2/99	18 M	Vision	Yes				
13	Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18 F	Vision	Yes				

Clear Conditional Formatting Rules

1. Select the cells that have the conditional formatting that you want to remove
2. On the *Home* tab, click *Conditional Formatting* and select *Clear Rules*. Depending on what needs to be cleared, click the option to either *Clear Rules from the Selected Cells* or *Clear Rules from Entire Sheet*.

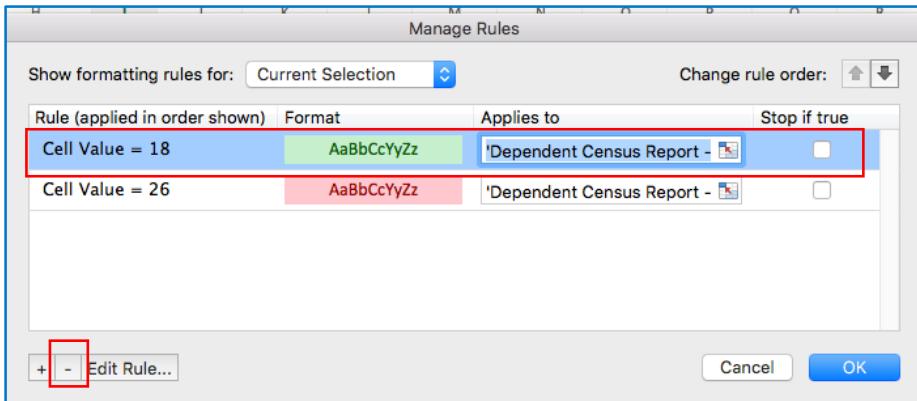


Change or delete a conditional formatting rule

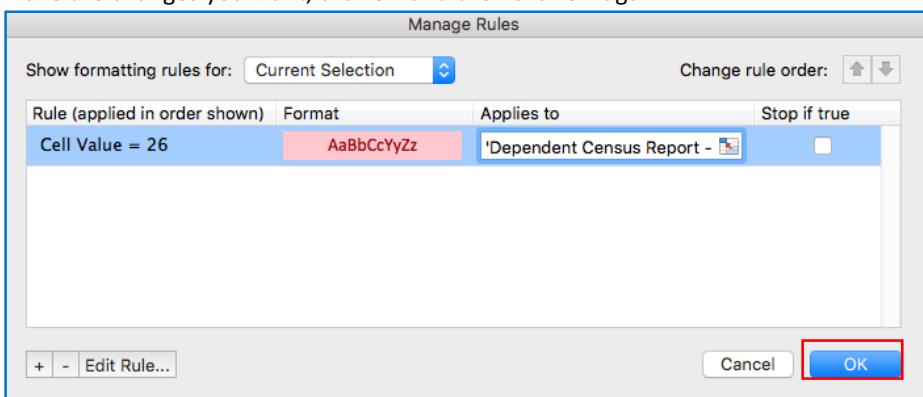
1. Select the range that contains the conditional formatting rule that you want to change.
2. On the *Home* tab, click *Conditional Formatting* and then click *Manage Rules...*

	A	B	C	D	E	F	H	I	J	K	L	M	N	O
1	EMPLOYEE_ID	EMPLOYEE_FNAME	DEPENDENT_ID	DEPENDENT_FNAME	DATE_OF_BIRTH	AGE	DEPENDENT_BENEFIT_TYPE	HAS_COVERAGE	DEPENDENT_TAXABILITY					
2	Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18 F	Dental	Yes					
3	Alpha	Andy	Child	Alpha	Avery	4/12/91	26 M	Medical	Yes					
4	Charlie	Chad	Child	Charlie	Charlene	4/3/94	23 F	Medical	Yes					
5	Delta	Debby	Child	Delta	Devon	4/9/91	26 M	Medical	Yes					
6	Gulf	Gary	Child	Gulf	Grey	4/20/99	18 M	Medical	Yes					
7	Mike	Mark	Child	Mike	Miles	4/2/99	18 M	Medical	Yes					
8	Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18 F	Medical	Yes					
9	Sierra	Sam	Child	Sierra	Samantha	4/8/91	26 F	Medical	Yes					
10	Yankee	Youssef	Child	Yankee	Lorie	4/19/91	26 F	Medical	Yes					
11	Gulf	Gary	Child	Gulf	Grey	4/20/99	18 M	Vision	Yes					
12	Mike	Mark	Child	Mike	Miles	4/2/99	18 M	Vision	Yes					
13	Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18 F	Vision	Yes					

3. Select the rule and then click either *Edit Rule* or *Delete*. In this example, we want to delete the conditional formatting of the dependents that are 18.



4. Make the changes you want, click **OK** and then click **OK** again.



	A	B	D	E	F	H	I
1	EMPLOYEE	EMPLOYEE	DEPENDENT	DEPENDENT	DEPENDENT	DATE_OF_BIRTH	AGE
2	Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18
3	Alpha	Andy	Child	Alpha	Avery	4/12/91	26
4	Charlie	Chad	Child	Charlie	Charlene	4/3/94	23
5	Delta	Debby	Child	Delta	Devon	4/9/91	26
6	Gulf	Gary	Child	Gulf	Grey	4/20/99	18
7	Mike	Mark	Child	Mike	Miles	4/2/99	18
8	Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18
9	Sierra	Sam	Child	Sierra	Samantha	4/8/91	26
10	Yankee	Youssef	Child	Yankee	Lorie	4/19/91	26
11	Gulf	Gary	Child	Gulf	Grey	4/20/99	18
12	Mike	Mark	Child	Mike	Miles	4/2/99	18
13	Oliver	Oscar	Child	Oscar	Olivia	4/11/99	18

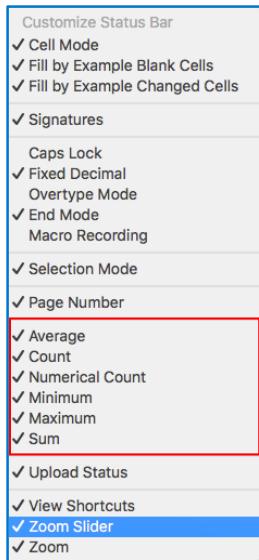
Status Bar

The status bar in Excel is helpful for analyzing data at a quick glance. It displays information regarding the selected cells, whether it's a single cell or multiple cells. If you right-click on the status bar, you can select additional display options.

BENEFIT_PEF_BENEFIT_TYF	CARRIER_NA_PLAN_NAME_PERSON_TYF	LAST_NAME	FIRST_NAME	MIDDLE_NAME	TOTAL_MONTHLY_COST
1 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	November	Noel	M	374.44
2 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	October	Julie	K	374.44
3 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	Quebeck	Quintin	J	374.44
4 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	Romeo	Rachel	I	374.44
5 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	Tango	Theresa	G	374.44
6 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	Uniform	Uziel	F	374.44
7 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	Victor	Victoria	E	374.44
8 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	Wiskey	Wesley	D	374.44
9 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	Xray	Xandra	C	374.44
10 Previous Enr Medical	Anthem BCB 2016 Medical HDHP	Zigana	Ziggy	A	374.44
11 Previous Enr Medical	Anthem BCB 2016 Medical HMO	Alpha	Avery	Z	461.11
12 Previous Enr Medical	Anthem BCB 2016 Medical HMO	Charlie	Chad	X	461.11
13 Previous Enr Medical	Anthem BCB 2016 Medical HMO	Delta	Debby	W	461.11
14 Previous Enr Medical	Anthem BCB 2016 Medical HMO	Gulf	Gary	T	461.11
15 Previous Enr Medical	Anthem BCB 2016 Medical HMO	Mike	Mark	N	461.11
16 Previous Enr Medical	Anthem BCB 2016 Medical HMO	Sierra	Sam	H	461.11
17 Previous Enr Medical	Anthem BCB 2016 Medical HMO	Yankee	Yoseph	B	461.11
18 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Beta	Barbara	Y	372.84
19 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Burtis	Candra	Z	372.84
20 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Echo	Eugene	V	372.84
21 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Fields	Jerry	T	372.84
22 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Foxtrot	Farrah	U	372.84
23 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Hotel	Hillary	S	372.84
24 Previous Enr Medical	Anthem BCB 2016 Medical PPO	India	Isaac	R	372.84
25 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Jazzete	Jackson	Q	372.84
26 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Marcel	Rachel	P	372.84
27 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Kilo	Kevin	O	372.84
28 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Lima	Laura	N	372.84
29 Previous Enr Medical	Anthem BCB 2016 Medical PPO	Miller	Mike	J	372.84
30 Previous Enr Medical	Anthem BCB 2017 Medical HDHP	November	Noel	M	1045.94
31 Current Elect Medical	Anthem BCB 2017 Medical HDHP	Papa	Paula	K	1045.94
32 Current Elect Medical	Anthem BCB 2017 Medical HDHP	Quebeck	Quintin	J	1045.94
33 Current Elect Medical	Anthem BCB 2017 Medical HDHP	Romeo	Rachel	I	1045.94
34 Current Elect Medical	Anthem BCB 2017 Medical HDHP	Sierra	Sam	H	1045.94
35 Current Elect Medical	Anthem BCB 2017 Medical HDHP	Tango	Theresa	G	1045.94

Benefit Detail Reports

Average: 614.0642529 Count: 87 Numerical Count: 87 Min: 372.84 Max: 1089.27 Sum: 53423.59



Common Formulas

SUM

The SUM function adds all numbers together in a range of cells. You can also use the SUM function with non-contiguous cell by adding ranges.

=SUM(number1, number2...)

- Number1: number1, number2,... are 1 to 255 numbers to sum. Logical values and text are ignored in cells and are only included if typed as arguments.

Example:

A screenshot of Microsoft Excel showing a formula being entered into cell C2. The formula is =SUM(A2:A61). The cell A2 contains the text "TOTAL_MONTHLY_COST". The formula bar at the top shows the formula =SUM(A2:A61). The cell C2 is highlighted with a red border.

	A	B	C	D
1	TOTAL_MONTHLY_COST			
2	372.84		=SUM(A2:A61)	
3	372.84			
4	372.84			
5	372.84			
6	372.84			
7	372.84			
8	372.84			
9	372.84			
10	372.84			
11	372.84			
12	372.84			
13	372.84			
14	372.84			
15	372.84			
16	372.84			
17	372.84			
18	372.84			
19	372.84			
20	372.84			
21	372.84			
22	372.84			
23	372.84			
24	372.84			
25	372.84			
26	372.84			
27	372.84			
28	372.84			
29	372.84			
30	372.84			
31	372.84			
32	75.92			
33	75.92			
34	75.92			
35	75.92			
36	75.92			
37	75.92			
38	75.92			
39	75.92			
40	75.92			
41	75.92			
42	75.92			

A screenshot of Microsoft Excel showing the result of the formula =SUM(A2:A61) in cell C2. The result is 13462.8. The cell C2 is highlighted with a red border.

	A	B	C	D	E	F
1	TOTAL_MONTHLY_COST					
2	372.84		13462.8			
3	372.84					
4	372.84					
5	372.84					
6	372.84					
7	372.84					
8	372.84					
9	372.84					
10	372.84					
11	372.84					
12	372.84					
13	372.84					
14	372.84					

You can also use the SUM function to sum together several ranges. The ranges can also exist on different worksheets.

A screenshot of a Microsoft Excel spreadsheet. The formula bar at the top shows the formula =SUM(A2:A88,B2:B88). The spreadsheet has two columns of data: Column A labeled 'EMPLOYEE_MONTHLY_COST' and Column B labeled 'EMPLOYER_MONTHLY_COST'. Both columns contain numerical values. The formula =SUM(A2:A88,B2:B88) is highlighted with a red box in the formula bar.

	A	E	F	
1	EMPLOYEE_MONTHLY_COST	EMPLOYER_MONTHLY_COST		
2	43.33	331.11	=SUM(A2:A88,B2:B88)	
3	43.33	331.11		
4	43.33	331.11		
5	43.33	331.11		
6	43.33	331.11		
7	43.33	331.11		
8	43.33	331.11		
9	43.33	331.11		
10	43.33	331.11		
11	43.33	331.11		
12	86.67	374.44		
13	86.67	374.44		
14	86.67	374.44		
15	86.67	374.44		
16	86.67	374.44		
17	86.67	374.44		
18	86.67	374.44		
19	130	242.84		
20	130	242.84		
21	130	242.84		
22	130	242.84		
23	130	242.84		
24	130	242.84		
25	130	242.84		
26	130	242.84		
27	130	242.84		
28	130	242.84		
29	130	242.84		
30	130	242.84		
31	281.67	764.27		

AVERAGE

The AVERAGE function returns the average (arithmetic mean) of its arguments, which can be numbers or names, arrays or references that contain numbers. If a range or cell reference argument contains text, logical values, or empty cells, those values are ignored; however, cell with the value zero are included.

=AVERAGE(number1, number2...)

- Number1: number1,number2,...are 1 to 255 numeric arguments for which you want the average.

A screenshot of a Microsoft Excel spreadsheet. The formula bar at the top shows the formula =AVERAGE(A2:A61). The spreadsheet has one column of data labeled 'TOTAL_MONTHLY_COST'. The formula =AVERAGE(A2:A61) is highlighted with a red box in the formula bar.

	A	B	C	D
1	TOTAL_MONTHLY_COST			
2	372.84		=AVERAGE(A2:A61)	
3	372.84			
4	372.84			
5	372.84			
6	372.84			
7	372.84			
8	372.84			
9	372.84			
10	372.84			
11	372.84			
12	372.84			
13	372.84			
14	372.84			
15	372.84			
16	372.84			
17	372.84			
18	372.84			
19	372.84			
20	372.84			
21	372.84			
22	372.84			
23	372.84			
24	372.84			
25	372.84			
26	372.84			
27	372.84			
28	372.84			
29	372.84			
30	372.84			
31	372.84			
32	75.92			

A screenshot of Microsoft Excel showing a formula bar with the formula `=AVERAGE(A2:A61)`. Below the formula bar is a table with one row of data. The first column contains the header `TOTAL_MONTHLY_COST` and the value `372.84` repeated five times. The second column contains the value `$ 224.38`.

	A	B	C	D	E
1	TOTAL_MONTHLY_COST				
2		372.84	\$ 224.38		
3		372.84			
4		372.84			
5		372.84			

COUNT

The COUNT function counts the number of cells that contain numbers and also the numbers within the list of arguments. Use COUNT to get the number of entries in a number field that's in a selected range.

= COUNT(value1,value2, ...)

- Arguments that are numbers, dates, or text representations of numbers are counted; arguments that are error values or text that cannot be translated into numbers are ignored.
- If an argument is an array or reference, only numbers in the array or reference are counted. Empty cells, logical values, text, or error values in the array or reference are ignored. If you need to count logical values, text, or error values, use the COUNTA function.

Example:

A screenshot of Microsoft Excel showing a large data table titled "Basic Work R Data & Report" dated 3/6/16. The table has columns for LAST_NAME, FIRST_NAME, MIDDLE_NAME, Wellness, Pay Group, Status, Location, and Company. A formula bar at the top shows the formula `=COUNT(G3:G32)`. Several cells in the table are highlighted with red boxes, showing formulas like `=COUNT(G3:G32)` and `=COUNT(G3:G32)` in different cells, indicating the use of COUNT functions to count entries in specific columns.

	A	B	C	F	G	H	I	J	K	L	M	N
1	Basic Work R Data & Report	3/6/16										
2	LAST_NAME	FIRST_NAME	MIDDLE_NAME	Wellness	Pay Group	Status	Location	Company				
3	Alpha	Andy	Z	Y	K	A	8	1				
4	Bravo	Barbara	Y	N	D	A	11	2				
5	Burts	Candra		N	S	A	11	5				
6	Charlie	Chad	X	N	H	A	17	1				
7	Delta	Debby	W	Y	S	A	11	4				
8	Echo	Eugene	V	Y	K	A	3	5				
9	Fields	Jerry	T	Y	K	A	11	5				
10	Foxtrot	Farrah	U	N	X	A	4	1				
11	Gulf	Gary	T	Y	D	A	7	2				
12	Hotel	Hillary	S	N	X	A	3	2				
13	India	Isaac	R	N	K	A	5	4				
14	Juliette	Janice	Q	Y	S	A	14	5				
15	Kare	Rachel	S	N	H	A	14	1				
16	Kilo	Kevin	P	Y	H	A	12	1				
17	Lima	Laura	O	Y	D	A	2	2				
18	Mike	Mark	N	Y	H	A	13	4				
19	Miller	Mike	J	Y	D	A	1	1				
20	November	Noel	M	N	X	A	6	4				
21	Oscar	Oliver	L	N	S	A	14	5				
22	Papa	Paula	K	N	K	A	19	1				
23	Quebeck	Quintin	J	Y	D	A	15	2				
24	Romeo	Rachel	I	N	H	A	20	5				
25	Sierra	Sam	H	Y	X	A	21	4				
26	Tango	Theresa	G	Y	S	A	22	5				
27	Uniform	Uziel	F	N	K	A	23	1				
28	Victor	Victoria	E	Y	D	A	24	2				
29	Wiskey	Wesley	D	Y	X	A	18	2				
30	Xray	Xandra	C	N	S	A	16	4				
31	Yankee	Youssef	B	Y	H	A	15	5				
32	Zebra	Zigana	A	Y	D	A	4	1				

The screenshot shows an Excel spreadsheet titled "Basic". The formula bar at the top displays the formula =COUNTA(G3:G32). The cell J3 contains the value 30, which is highlighted with a red border. The spreadsheet has a header row with columns A through J. Data rows 3 through 10 show various names and their corresponding values across the columns. The formula =COUNTA(G3:G32) is applied to the range G3:G32.

A	B	C	D	E	F	G	H	I	J
1	Basic Work R Data & Repo	3/6/16							
2	LAST_NAME	FIRST_NAME	MIDDLE_NAM	Wellness	Pay Group	Status	Location	Company	
3	Alpha	Andy	Z	Y	K	A	8	1	30
4	Bravo	Barbara	Y	N	D	A	11	2	
5	Burtis	Candra		N	S	A	11	5	
6	Charlie	Chad	X	N	H	A	17	1	
7	Delta	Debby	W	Y	S	A	11	4	
8	Echo	Eugene	V	Y	K	A	3	5	
9	Fields	Jerry	T	Y	K	A	11	5	
10	Foxtrot	Farrah	U	N	X	A	4	1	

COUNTA

The COUNTA function counts the number of cells that are not empty and the values within the list of arguments. Use COUNTA to count the number of cells that contain data in a selected range or array.

= COUNTA(value1,value2,...)

- **value:** is any type of information, including error values and empty text ("").
 - If an argument is an array or reference, only values in that array or reference are used. Empty cells and text values in the array or reference are ignored.
 - Empty cells are not counted
 - If you do not want to include error values, logical values, and text representations of numbers in a reference as part of a calculation, use the COUNT function

Example:

The screenshot shows an Excel spreadsheet titled "Workbook2". The formula bar at the top displays the formula =COUNTA(E2:E31). The cell G31 contains the value 30, which is highlighted with a red border. The spreadsheet has a header row with columns A through I. Data rows 2 through 31 show survey responses for various individuals. The formula =COUNTA(E2:E31) is applied to the range E2:E31.

A	B	C	D	E	F	G	H	I
1	SURVEY_NM	QUESTION_TEXT	FIRST_NM	LAST_NM	RESPONSE			
2	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Andy	Alpha	Strongly Agree			
3	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Barbara	Bravo	Agree			
4	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Candra	Burtis	Agree			
5	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Chad	Charlie	Strongly Agree			
6	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Debby	Delta	Agree			
7	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Eugene	Echo	Agree			
8	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Jerry	Fields	Agree			
9	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Farrah	Foxtrot	Agree			
10	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Gary	Gulf	Agree			
11	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Hillary	Hotel				
12	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Isaac	India	Agree			
13	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Janice	Juliette	Agree			
14	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Rachel	Karel	Agree			
15	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Kevin	Kilo	Strongly Agree			
16	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Laura	Lima				
17	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Mark	Mike	Agree			
18	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Mike	Miller	Strongly Agree			
19	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Noel	November	Strongly Agree			
20	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Oliver	Oscar	Agree			
21	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Paula	Papa	Strongly Agree			
22	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Quintin	Quebeck				
23	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Rachel	Romeo	Agree			
24	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Sam	Sierra	Strongly Agree			
25	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Theresa	Tango	Strongly Agree			
26	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Uziel	Uniform				
27	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Victoria	Victor	Agree			
28	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Wesley	Wiskey				
29	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Xandra	Xray	Agree			
30	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Youssef	Yankee	Agree			
31	Open Enrollment 2016	You received adequate notice about the Open Enrollment	Zigana	Zebra	Strongly Agree			
32								
33								
34								

Workbook3

SURVEY_NM	QUESTION_TEXT	FIRST_NM	LAST_NM	RESPONSE	G
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Andy	Alpha	Strongly Agree	25
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Barbara	Bravo	Agree	
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Candra	Burtis	Agree	
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Chad	Charlie	Strongly Agree	
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Debby	Delta	Agree	
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Eugene	Echo	Agree	
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Jerry	Fields	Agree	
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Farrah	Foxtrot	Agree	
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Gary	Gulf	Agree	
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Hillary	Hotel	Agree	
Open Enrollment 2016	You received adequate notice about the Open Enrollment deadline	Ike	India	Agree	

COUNTIF

The COUNTIF function counts the number of cells within a selected range that meet the given criteria

=COUNTIF(range,criteria)

- range: The range of cells from which you want to count
- criteria: The criteria in the form of a number, expression, cell reference or text that defines which cells will be counted. For example, criteria can be expressed as 32, "32", ">32", "apples", or B4.

Example:

3 - Basic_Work_Report

LAST_NAME	FIRST_NAME	MIDDLE_NAM_SUFFIX	SSN	DATE_HIRED	Wellness	Pay Group	Status	Location	Company	U
Alpha	Andy	Z	123-32-1001	6/1/13 Y	K	A	8	1		=COUNTIF(P3:P32,"K")
Bravo	Barbara	Y	123-32-1002	9/17/12 N	D	A	11	2		
Burtis	Candra		123-32-1096	5/1/15 N	S	A	11	5		
Charlie	Chad	X	123-32-1003	6/24/13 N	H	A	17	1		
Delta	Debby	W	123-32-1004	9/15/08 Y	S	A	11	4		
Echo	Eugene	V	123-32-1005	6/1/13 Y	K	A	3	5		
Foxtrot	Jerry	T	123-32-1097	1/1/16 Y	K	A	11	5		
Gulf	Farrah	U	123-32-1006	9/17/12 N	X	A	4	1		
Hotel	Gary	T	123-32-1007	6/24/13 Y	D	A	7	2		
Hillary	S		123-32-1008	9/15/08 N	X	A	3	2		
India	Isaac	R	123-32-1009	6/1/13 N	K	A	5	4		
Juliette	Janice	Q	123-32-1010	9/17/12 Y	S	A	14	5		
Karel	Rachel	S	123-32-1091	1/1/14 N	H	A	14	1		
Kilo	Kevin	P	123-32-1011	6/24/13 Y	H	A	12	1		
Lima	Laura	O	123-32-1012	9/15/08 Y	D	A	2	2		
Mike	Mark	N	123-32-1013	6/1/13 Y	H	A	13	4		
Miller	Mike	J	123-32-1098	1/18/16 Y	D	A	1	1		
November	Noel	M	123-32-1014	9/17/12 N	X	A	6	4		
Oscar	Oliver	L	123-32-1015	6/24/13 N	S	A	14	5		
Papa	Paula	K	123-32-1016	9/15/08 N	K	A	19	1		
Quebeck	Quintin	J	123-32-1017	6/1/13 Y	D	A	15	2		
Romee	Rachel	I	123-32-1018	9/17/12 N	H	A	20	5		
Sierra	Sam	H	123-32-1019	6/24/13 Y	X	A	21	4		
Tango	Theresa	G	123-32-1020	9/15/08 Y	S	A	22	5		
Uniform	Uziel	F	123-32-1021	6/1/13 N	K	A	23	1		
Victor	Victoria	E	123-32-1022	4/5/03 Y	D	A	24	2		
Wiskey	Wesley	D	123-32-1023	8/14/05 Y	X	A	18	2		
Xray	Xandra	C	123-32-1024	9/17/12 N	S	A	16	4		
Yankee	Youssef	B	123-32-1025	6/24/13 Y	H	A	15	5		
Zebra	Zigana	A	123-32-1026	9/15/08 Y	D	A	4	1		

	A	B	C	D	E	F	O	P	Q	R	S	T	U	V
1	Basic Work R Data & Repo	1/26/16												
2	LAST_NAME	FIRST_NAME	MIDDLE_NA	I	SUFFIX	SSN	DATE_HIRED	Wellness	Pay Group	Status	Location	Company		
3	Alpha	Andy	Z			123-32-1001	6/1/13	Y	K	A	8	1	6	
4	Bravo	Barbara	Y			123-32-1002	9/17/12	N	D	A	11	2		
5	Burtis	Candra				123-32-1096	5/1/15	N	S	A	11	5		
6	Charlie	Chad	X			123-32-1003	6/24/13	N	H	A	17	1		
7	Delta	Debby	W			123-32-1004	9/15/08	Y	S	A	11	4		
8	Echo	Eugene	V			123-32-1005	6/1/13	Y	K	A	3	5		
9	Fields	Jerry	T			123-32-1097	1/1/16	Y	K	A	11	5		
10	Foxtrot	Farrah	U			123-32-1006	9/17/12	N	X	A	4	1		
11	Gulf	Gary	T			123-32-1007	6/24/13	Y	D	A	7	2		
12	Hotel	Hillary	S			123-32-1008	9/15/08	N	X	A	3	2		



The COUNTIF function can be used to figure out the number of cells which do not contain (<>) a specific text string in a specific range in Excel. In a blank cell enter the formula =COUNTIF(A1:A40,"<>*count*") and then press the Enter key.

Example:

	A	B	C	D	E	F	O	P	Q	R	S	T	U	V
1	Basic Work R Data & Repo	1/26/16												
2	LAST_NAME	FIRST_NAME	MIDDLE_NA	I	SUFFIX	SSN	DATE_HIRED	Wellness	Pay Group	Status	Location	Company		
3	Alpha	Andy	Z			123-32-1001	6/1/13	Y	K	A	8	1		
4	Bravo	Barbara	Y			123-32-1002	9/17/12	N	D	A	11	2	=COUNTIF(P3:P32, "<>*K*")	
5	Burtis	Candra				123-32-1096	5/1/15	N	S	A	11	5		
6	Charlie	Chad	X			123-32-1003	6/24/13	N	H	A	17	1		

	A	B	C	D	E	F	O	P	Q	R	S	T	U	V
1	Basic Work R Data & Repo	1/26/16												
2	LAST_NAME	FIRST_NAME	MIDDLE_NA	I	SUFFIX	SSN	DATE_HIRED	Wellness	Pay Group	Status	Location	Company		
3	Alpha	Andy	Z			123-32-1001	6/1/13	Y	K	A	8	1		
4	Bravo	Barbara	Y			123-32-1002	9/17/12	N	D	A	11	2		
5	Burtis	Candra				123-32-1096	5/1/15	N	S	A	11	5		
6	Charlie	Chad	X			123-32-1003	6/24/13	N	H	A	17	1	24	



Wildcard characters, question mark (?) and asterisk (*) can be used in the criteria. A question mark matches any single character; an asterisk matches any sequence of character. If you want to find an actual question mark or asterisk, type a tilde (~) before the character.

Example:

The screenshot shows a Microsoft Excel spreadsheet titled "Sheet1". The formula bar at the top displays the formula `=COUNTIF(A2:A43,"*RUP*")`. The cell A1 contains the text "REASON_CD". Cells A2 through A43 contain various codes such as "INA", "RUPEML", "LEVCDTWAI", etc. Cell B2 contains the formula `=COUNTIF(A2:A43,"*RUP*")`, which has been copied from cell A1. The result of the formula, "9", is displayed in cell B2.

This screenshot shows a smaller portion of the Excel spreadsheet. The formula bar displays `=COUNTIF(A2:A43,"*RUP*")`. The cell A1 contains "REASON_CD". Cells A2 through A43 contain "INA", "RUPEML", and "LEVCDTWAI". The formula is entered into cell B2, and the result "9" is displayed in cell B2.

MIN

The MIN function returns the smallest number in a set of values. Ignores logical values and text.

=MIN(number1,number2,...)

- *Number1: number1,number2,...are 1 to 255 numbers, empty cells, logical values, or text number for which you want the minimum.*

Example:

The MIN function can find the earliest date.

1. Place the cursor in the first cell of the first empty column where you would like the result of the formula to appear (B2 in this example).
2. Enter the formula as follows:
=MIN(A2:A191)

A screenshot of a Microsoft Excel spreadsheet. The formula bar at the top shows '=MIN(A2:A191)'. The spreadsheet has two columns, A and B. Column A contains the header 'LAST_EXTRACTED_TIME' in row 1 and various dates from '1-Apr-17' to '8-Apr-17' in rows 2 through 26. Column B contains the formula '=MIN(A2:A191)' in row 2, which is highlighted with a red box. The rest of the cells in column B are empty.

3. If needed, format the cell in B2 to the date format.

A screenshot of the same Microsoft Excel spreadsheet. The formula bar still shows '=MIN(A2:A191)'. In column B, the date '1-Apr-17' is now displayed in cell B2, and it is also highlighted with a red box. The other cells in column B remain empty.

MAX

The MAX function returns the largest number in a set of values. Ignores logical values and text.

=MAX(number1,number2,...)

- *Number1: number1,number2,...are 1 to 255 numbers, empty cells, logical values, or text number for which you want the maximum.*

Example:

The MAX function can find the latest date.

1. Place the cursor in the first cell of the first empty column where you would like the result of the formula to appear (B2 in this example).

2. Enter the formula as follows:

=MAX(A2:A191)

A screenshot of a Microsoft Excel spreadsheet. The ribbon at the top shows 'Home', 'Insert', 'Page Layout', and 'Formulas'. The 'Formulas' tab is selected. The formula bar shows '=MAX(A2:A191)'. Cell A1 contains 'LAST_EXTRACTED_TIME'. Cell B2 contains the formula '=MAX(A2:A191)', which is highlighted with a red box. The rest of the cells in column A from row 2 to 30 contain various dates such as '1-Apr-17', '13-Apr-17', and '8-Apr-17'.

3. If needed, format the cell in B2 to the date format.

A screenshot of the same Microsoft Excel spreadsheet. The formula '=MAX(A2:A191)' is still in the formula bar. Cell B2 now displays the value '29-Apr-17', which is highlighted with a red box. The rest of the cells in column A remain the same as in the previous screenshot.

VLOOKUP

The VLOOKUP function searches for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify in the table. It searches for and pulls data from one table by matching a unique identifier on another table.

=VLOOKUP(lookup_value,table_array,col_index_num,range_lookup)

- *Lookup_value*: The unique identifier or identical value in both worksheets. This is also the value to be found in the first column of the table array. The *lookup_value* argument can be a value, a reference or text string.
- *Table array*: The table of information in which data is looked up. You can use a reference to a range or range name.
- *Col_index_number*: The specified column (by number, not letter) in the table array from which the matching value must be returned.
 - A *col_index_num* of 1 returns the value in the first column in *table_array*; a *col_index_num* of 2 returns the value in the second column in *table_array*, and so on.
- *Range_lookup*: A logical value that specifies whether you want this function to find an exact match or an approximate match.
 - If TRUE or omitted, an approximate match is returned. In other words, if an exact match is not found, the next largest value that is less than the *lookup_value* is returned.
 - If FALSE, this function will find an exact match. If one is not found, the error value #N/A is returned

Example:

An Administrator wants to know if members were satisfied with the medical plan offerings during Open Enrollment. VLOOKUP would allow that Administrator to pull survey question responses from a Survey Detail report for each member and analyze that data against his or her plan selection. In this example, we are concerned about each member's selections and survey responses. Excel needs to know how to match those data points – and to do so, it needs a unique identifier. This could be something that is unique to the person such as an OID or SSN, or an identifier that you create and assign.



Tip: If you are working with data from two workbooks, drag and drop the worksheets into the same workbook.

29	Current Elect Medical	Anthem BCB 2016 Medical PPO	Victor	Victoria	E
30	Current Elect Medical	Anthem BCB 2016 Medical PPO	Wiskey	Wesley	D
31	Current Elect Medical	Anthem BCB 2016 Medical PPO	Xray	Xandra	C
32	Current Elect Medical	Anthem BCB 2016 Medical PPO	Yankee	Youssef	B
33	Current Elect Medical	Anthem BCB 2016 Medical PPO	Zebra	Zigana	A
34	Current Elect Dental	Reliance Star 2016 Dental	Alpha	Andy	Z
35	Current Elect Dental	Reliance Star 2016 Dental	Bravo	Barbara	Y
36	Current Elect Dental	Reliance Star 2016 Dental	Burtis	Candra	

Benefit_Detail_Report Employee_Survey_Detail_Report +

1. There are two conditions that must be met before combining data using VLOOKUP. First there must be a field included in both reports to tie the two records together. It is recommended to use a unique identifier such as Social Security Number (SSN) or OID. Second, the unique identifier used to tie the records together must exist in the first column on both worksheets.

To move the unique identifier to Column A, select the entire unique identifier column, right click and select *Cut*. In this example, that is the SSN on the *Benefit Detail Report*. Right-click on Column A and select *Insert Cut Cells*.

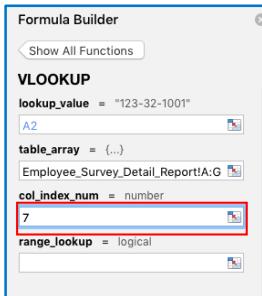
2. Repeat step 1 to relocate the unique identifier on the worksheet you are merging data from. In this example, that is the SSN column on the *Employee Survey Detail Report*.
3. Return to the spreadsheet you are merging data into (here, the *Benefit Detail Report*), insert a new column where you would like to pull data into from the second spreadsheet and name the column.

4. Select the cell you wish to pull data into using VLOOKUP (here, cell F2 in the *Benefit Detail Report*).
5. Click the *Formula Builder* button, search for the VLOOKUP function and click *Insert Function*.

6. Place your cursor in the *lookup_value* field and select cell A2. This is telling the formula to look for the unique identifiers or values in cell A2, which in this example are the SSNs.
7. Place your cursor in the *table_array* field, and then click on the other worksheet (in this example, *Employee Survey Detail Report*). There will be a dashed line that appears around the table that is selected. Since we want to include the employee's response to the survey question on the *Benefit Detail Report*, select Column A (SSN) through G (Answer).

A	B	C	D	E	F	G
SSN	SURVEY_NM	QUESTION_NM	QUESTION_T	FIRST_NM	LAST_NM	ANSWER
1	123-32-1001 Open Enrollr	1 You received Andy		Alpha	Strongly Agree	
2	123-32-1002 Open Enrollr	1 You received Barbara		Bravo	Agree	
3	123-32-1096 Open Enrollr	1 You received Candra		Burtis	Agree	
4	123-32-1003 Open Enrollr	1 You received Chad		Charlie	Strongly Agree	
5	123-32-1004 Open Enrollr	1 You received Debby		Delta	Agree	
7	123-32-1005 Open Enrollr	1 You received Eugene		Echo	Agree	
8	123-32-1097 Open Enrollr	1 You received Jerry		Fields	Agree	
9	123-32-1006 Open Enrollr	1 You received Farrah		Foxtrot	Agree	
10	123-32-1007 Open Enrollr	1 You received Gary		Gulf	Agree	
11	123-32-1008 Open Enrollr	1 You received Hillary		Hotel	No Opinion	
12	123-32-1009 Open Enrollr	1 You received Isaac		India	Agree	
13	123-32-1010 Open Enrollr	1 You received Janice		Juliette	Agree	
14	123-32-1091 Open Enrollr	1 You received Rachel		Karel	Agree	
15	123-32-1011 Open Enrollr	1 You received Kevin		Kilo	Strongly Agree	
16	123-32-1012 Open Enrollr	1 You received Laura		Lima	No Opinion	
17	123-32-1013 Open Enrollr	1 You received Mark		Mike	Agree	
18	123-32-1098 Open Enrollr	1 You received Mike		Miller	Strongly Agree	
19	123-32-1014 Open Enrollr	1 You received Noel		November	Strongly Agree	
20	123-32-1015 Open Enrollr	1 You received Oliver		Oscar	Agree	
21	123-32-1016 Open Enrollr	1 You received Paula		Papa	Strongly Agree	
22	123-32-1017 Open Enrollr	1 You received Quintin		Quebeck	No Opinion	

8. Place your cursor back in the *Formula Builder* and in the **col_index_num** field. This is the number (not letter) of the column containing the data you would like returned by the formula. For example, the first column (Column A), would be 1. In this example, we want the *Answers* returned, which are contained in the seventh column.



9. Place your cursor back in the *Formula Builder* and in the **range_lookup** field. Set to *FALSE*. This tells the formula to return only exact matches to our criteria (in this example, SSN). Click *Done*.

A	B	C	D	E	F	G	H	
1	SSN	BENEFIT_PEF	BENEFIT_TYP	CARRIER_NA	PLAN_NAME	Survey Answer #1	LAST_NAME	FIRST_NAME
2	123-32-1001	Current Elect Medical		Anthem BCB:2016	Medical PPO	Strongly Agree	Alpha	Andy
3	123-32-1002	Current Elect Medical		Anthem BCB:2016	Medical PPO		Bravo	Barbara
4	123-32-1096	Current Elect Medical		Anthem BCB:2016	Medical PPO		Burtis	Candra
5	123-32-1003	Current Elect Medical		Anthem BCB:2016	Medical PPO		Charlie	Chad
6	123-32-1004	Current Elect Medical		Anthem BCB:2016	Medical PPO		Delta	Debby

10. Select the cell in which you executed the formula. Hover over the bottom right of the highlighted cell until a black crossbar appears. Double click to apply the formula to the following cells.

	A	B	C	D	E	F	G	H
1	SSN	BENEFIT_TYPE	CARRIER_NAME	PLAN_NAME		Survey Answer #1	LAST_NAME	FIRST_NAME
2	123-32-1001	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Alpha	Andy	Z
3	123-32-1002	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Bravo	Barbara	Y
4	123-32-1096	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Burtis	Candra	
5	123-32-1003	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Charlie	Chad	X
6	123-32-1004	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Delta	Debby	W
7	123-32-1005	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Echo	Eugene	V
8	123-32-1097	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Fields	Jerry	T
9	123-32-1006	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Foxtrot	Farrah	U
10	123-32-1007	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Gulf	Gary	T
11	123-32-1008	Current Elect Medical	Anthem BCB:2016	Medical PPO	No Opinion	Hotel	Hillary	S
12	123-32-1009	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	India	Isaac	R
13	123-32-1010	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Juliette	Janice	Q
14	123-32-1091	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Karel	Rachel	S
15	123-32-1011	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Kilo	Kevin	P
16	123-32-1012	Current Elect Medical	Anthem BCB:2016	Medical PPO	No Opinion	Lima	Laura	O
17	123-32-1013	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Mike	Mark	N
18	123-32-1098	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Miller	Mike	J
19	123-32-1014	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	November	Noel	M
20	123-32-1015	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Oscar	Oliver	L
21	123-32-1016	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Papa	Paula	K
22	123-32-1017	Current Elect Medical	Anthem BCB:2016	Medical PPO	No Opinion	Quebeck	Quintin	J
23	123-32-1018	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Romeo	Rachel	I
24	123-32-1019	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Sierra	Sam	H

Note

VLOOKUP only returns the value from the first match. In this scenario, we had several survey questions and answers are only pulled over the first question of the survey responses. If you would like to pull over more columns of survey answers:

1. On the Benefit Detail Report, copy Column F and Paste Special (Values) into Column F. This removes the formula.
2. Delete the rows with Question 1 responses from the Employee Survey Detail Report (rows 2-31).
3. On the Benefit Detail Report, insert a new column and run the VLOOKUP again.

	A	B	C	D	E	F	G	H	I	J
1	SSN	BENEFIT_TYPE	CARRIER_NAME	PLAN_NAME		Survey Answer #1	Survey Answer #2	Survey Answer #3	LAST_NAME	FIRST_NAME
2	123-32-1001	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Yes	Agree	Alpha	Andy	
3	123-32-1002	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Yes	Strongly Disagree	Bravo	Barbara	
4	123-32-1096	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Yes	Disagree	Burtis	Candra	
5	123-32-1003	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Yes	Agree	Charlie	Chad	
6	123-32-1004	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Yes	Disagree	Delta	Debby	
7	123-32-1005	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Yes	Strongly Disagree	Echo	Eugene	
8	123-32-1097	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	No	Agree	Fields	Jerry	
9	123-32-1006	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	No	No Opinion	Foxtrot	Farrah	
10	123-32-1007	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Yes	Agree	Gulf	Gary	
11	123-32-1008	Current Elect Medical	Anthem BCB:2016	Medical PPO	No Opinion	No	Disagree	Hotel	Hillary	
12	123-32-1009	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	Yes	Strongly Agree	India	Isaac	
13	123-32-1010	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	No	Agree	Juliette	Janice	
14	123-32-1091	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	No	Disagree	Karel	Rachel	
15	123-32-1011	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Yes	Agree	Kilo	Kevin	
16	123-32-1012	Current Elect Medical	Anthem BCB:2016	Medical PPO	No Opinion	Yes	Disagree	Lima	Laura	
17	123-32-1013	Current Elect Medical	Anthem BCB:2016	Medical PPO	Agree	No	No Opinion	Mike	Mark	
18	123-32-1098	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	Yes	Agree	Miller	Mike	
19	123-32-1014	Current Elect Medical	Anthem BCB:2016	Medical PPO	Strongly Agree	No	Disagree	November	Noel	

CONCATENATE

The CONCATENATE function joins several text strings into one text string.

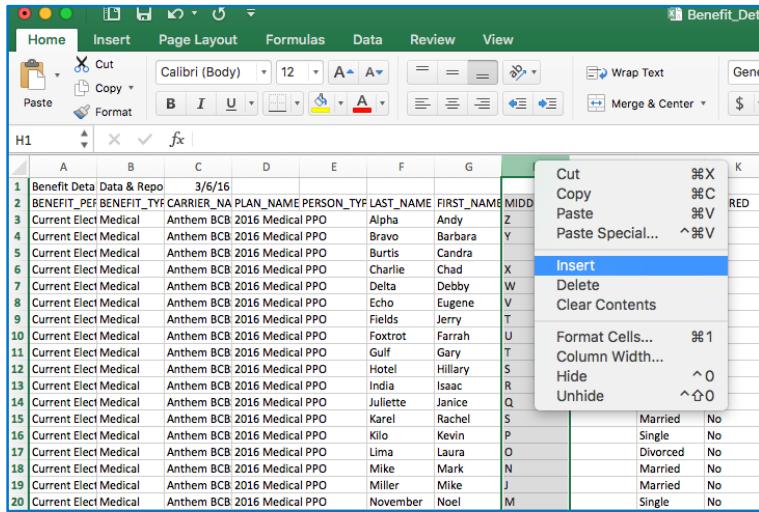
=CONCATENATE(text1, text2,...)

- *Text1, text2,...: Text items to be joined into a single text item. The text items can be text strings numbers or single-cell references*

Example:

The CONCATENATE function can be used to combine First Name and Last Name fields, so it reads: Last Name, First Name.

1. Insert a new column by selecting the head of the column to the right of which you want to insert the new column.

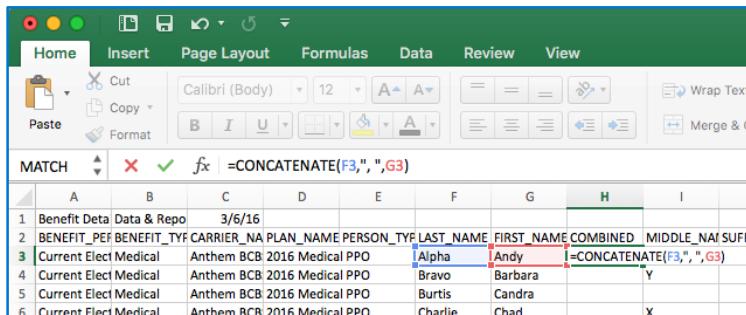


A screenshot of Microsoft Excel showing a table with 20 rows of data. The columns are labeled A through G. A context menu is open over the first row, with the 'Insert' option highlighted. The menu also includes options like Cut, Copy, Paste, and Format Cells.

Benefit Data	Data & Repo	3/6/16				
BENEFIT_PEF	BENEFIT_TYF	CARRIER_NA	PLAN_NAME	PERSON_TYF	LAST_NAME	FIRST_NAME
Current Elect Medical	Anthem BCB 2016	Medical PPO	Alpha	Andy	Z	MIDDLE_NA/ SUFF
Current Elect Medical	Anthem BCB 2016	Medical PPO	Bravo	Barbara	Y	
Current Elect Medical	Anthem BCB 2016	Medical PPO	Burtis	Candra	X	
Current Elect Medical	Anthem BCB 2016	Medical PPO	Charlie	Chad	W	
Current Elect Medical	Anthem BCB 2016	Medical PPO	Delta	Debby	V	
Current Elect Medical	Anthem BCB 2016	Medical PPO	Echo	Eugene	T	
Current Elect Medical	Anthem BCB 2016	Medical PPO	Fields	Jerry	U	
Current Elect Medical	Anthem BCB 2016	Medical PPO	Foxtrot	Farrah	S	Married No
Current Elect Medical	Anthem BCB 2016	Medical PPO	Gulf	Gary	P	Single No
Current Elect Medical	Anthem BCB 2016	Medical PPO	Hotel	Hillary	O	Divorced No
Current Elect Medical	Anthem BCB 2016	Medical PPO	India	Isaac	N	Married No
Current Elect Medical	Anthem BCB 2016	Medical PPO	Juliette	Janice	J	Married No
Current Elect Medical	Anthem BCB 2016	Medical PPO	Karel	Rachel	M	Single No
Current Elect Medical	Anthem BCB 2016	Medical PPO	Kilo	Kevin		
Current Elect Medical	Anthem BCB 2016	Medical PPO	Lima	Laura		
Current Elect Medical	Anthem BCB 2016	Medical PPO	Mike	Mark		
Current Elect Medical	Anthem BCB 2016	Medical PPO	Miller	Mike		
Current Elect Medical	Anthem BCB 2016	Medical PPO	November	Noel		

2. Name the new column. In this example, we will call the column *Combined*.
3. In this example, we want the new column to be made up of Last Name (Cell F3) and First Name (Cell G3), with a comma and a space separating the two fields. To add a comma and space, house those characters in quotation marks and enter the formula as:

=CONCATENATE(F3," ",G3)



A screenshot of Microsoft Excel showing a table with 6 rows of data. A formula, '=CONCATENATE(F3, " ", G3)', is entered into cell H3. The formula is highlighted with red boxes around the cell reference 'F3', the space character ' ', and the cell reference 'G3'. The formula bar also displays the formula '=CONCATENATE(F3, " ", G3)'.

Benefit Data	Data & Repo	3/6/16					
BENEFIT_PEF	BENEFIT_TYF	CARRIER_NA	PLAN_NAME	PERSON_TYF	LAST_NAME	FIRST_NAME	COMBINED MIDDLE_NA/ SUFF
Current Elect Medical	Anthem BCB 2016	Medical PPO	Alpha	Andy	I=CONCATENATE(F3, " ", G3)		Y
Current Elect Medical	Anthem BCB 2016	Medical PPO	Bravo	Barbara			X
Current Elect Medical	Anthem BCB 2016	Medical PPO	Burtis	Candra			
Current Elect Medical	Anthem BCB 2016	Medical PPO	Charlie	Chad			

4. Select the cell in which you executed the formula. Hover over the bottom right of the highlighted cell until a black crossbar appears. Double click to apply the formula to the following cells.

A	B	C	D	E	F	G	H
1	nefit Data	Data & Repo	3/6/16				
2	NEFIT_PEF	BENEFIT_TYP	CARRIER_NA	PLAN_NAME	PERSON_TYP	LAST_NAME	FIRST_NAME COMBINED
3	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Alpha	Andy Alpha, Andy
4	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Bravo	Barbara Bravo, Barbara
5	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Burtis	Candra Burtis, Candra
6	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Charlie	Chad Charlie, Chad
7	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Delta	Debby Delta, Debby
8	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Echo	Eugene Echo, Eugene
9	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Fields	Jerry Fields, Jerry
10	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Foxtrot	Farrah Foxtrot, Farrah
11	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Gulf	Gary Gulf, Gary
12	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Hotel	Hillary Hotel, Hillary
13	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	India	Isaac India, Isaac
14	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Juliette	Janice Juliette, Janice
15	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Karel	Rachel Karel, Rachel
16	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Kilo	Kevin Kilo, Kevin
17	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Lima	Laura Lima, Laura
18	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Mike	Mark Mike, Mark
19	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Miller	Mike Miller, Mike
20	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	November	Noel November, Noel
21	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Oscar	Oliver Oscar, Oliver
22	rrrent Elect	Medical	Anthem BCB	2016 Medical	PPO	Papa	Paula Papa, Paula

Text to Columns Wizard

The Text to Columns Wizard can be used to separate data in a single column into multiple columns.

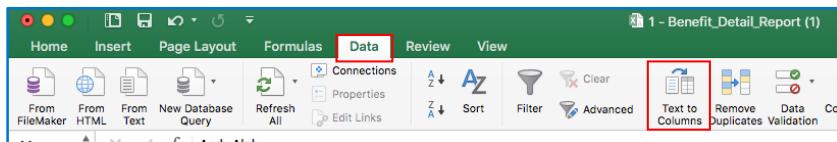
Example:

The wizard can be used to separate full names in one column to a column with first names and a second column with last names.

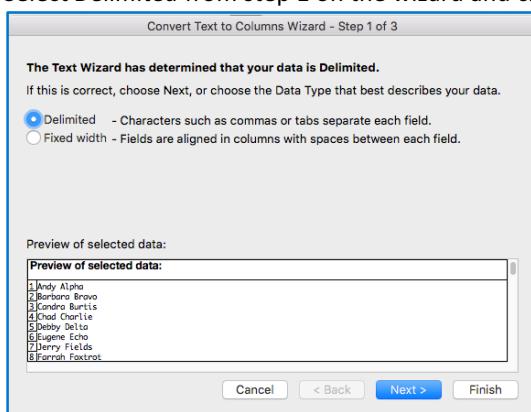
1. Highlight the range of cells that includes text to be separated.

A	B	C	D	E	F	G	H	I	J
1 Andy Alpha									
2 Barbara Bravo									
3 Candra Burtis									
4 Chad Charlie									
5 Debby Delta									
6 Eugene Echo									
7 Jerry Fields									
8 Farrah Foxtrot									
9 Gary Gulf									
10 Hilary Hotel									
11 Isaac India									
12 Janice Juliette									
13 Rachel Karel									
14 Kevin Kilo									
15 Laura Lima									
16 Mark Mike									
17 Mike Miller									
18 Noel November									
19 Oliver Oscar									

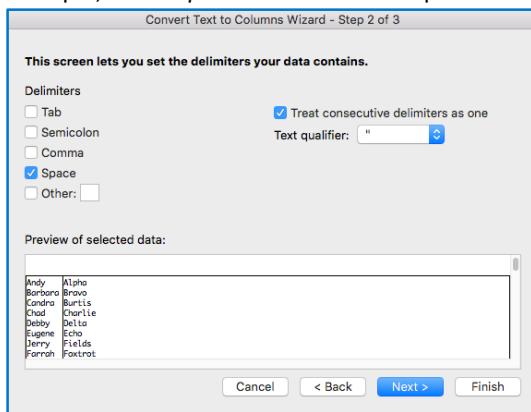
2. Select the Data ribbon and *Text to Columns*. The Text to Columns Wizard will open.



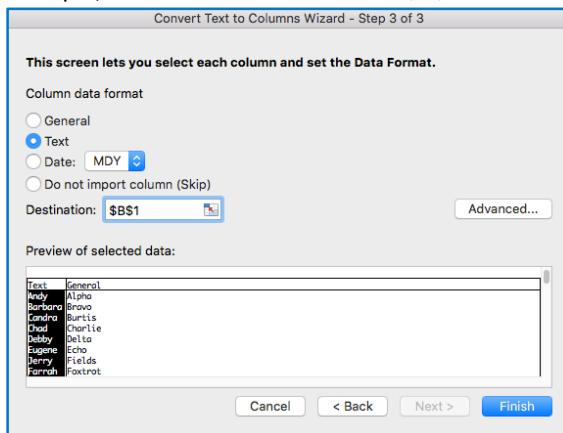
3. Select *Delimited* from step 1 on the wizard and click *Next*.



4. In step 2 of the wizard, select one or more delimiters used by the grouped text and click *Next*. In this example, check *Space* since there is a space between the first and last name.



5. In step 3 of the wizard, set the format of each column and the destination cell of the output. In this example, select *Text* and Destination *\$B\$1*. Click *Finish*.



	A	B	C
1	Andy Alpha	Andy	Alpha
2	Barbara Bravo	Barbara	Bravo
3	Candra Burtis	Candra	Burtis
4	Chad Charlie	Chad	Charlie
5	Debby Delta	Debby	Delta
6	Eugene Echo	Eugene	Echo
7	Jerry Fields	Jerry	Fields
8	Farrah Foxtrot	Farrah	Foxtrot
9	Gary Gulf	Gary	Gulf
10	Hillary Hotel	Hillary	Hotel
11	Isaac India	Isaac	India
12	Janice Juliette	Janice	Juliette
13	Rachel Karel	Rachel	Karel
14	Kevin Kilo	Kevin	Kilo
15	Laura Lima	Laura	Lima
16	Mark Mike	Mark	Mike
17	Mike Miller	Mike	Miller
18	Noel November	Noel	November
19	Oliver Oscar	Oliver	Oscar
20	Paula Papa	Paula	Papa
21	Quintin Quebec	Quintin	Quebeck
22	Rachel Romeo	Rachel	Romeo
23	Sam Sierra	Sam	Sierra
24	Theresa Tango	Theresa	Tango
25	Uziel Uniform	Uziel	Uniform
26	Victoria Victor	Victoria	Victor
27	Wesley Wiskey	Wesley	Wiskey
28	Xandra Xray	Xandra	Xray
29	Youssef Yankee	Youssef	Yankee
30	Zigana Zebra	Zigana	Zebra
31	Andy Alpha	Andy	Alpha
32	Barbara Bravo	Barbara	Bravo
33	Candra Burtis	Candra	Burtis

Note

If data exists in the columns to the right of the column you are separating, Excel overwrites the data. Be sure to insert enough blank columns to not overwrite your existing data before beginning Text to Columns.

IF

The IF function checks whether a condition is met, and returns one value if TRUE, and another value if FALSE. In the simplest form IF (something is true, then do something, otherwise do something else).

=IF(logical_test,value_if_true,value_if_false)

- *logical_test*: is any value or expression that can be evaluated to TRUE or FALSE
- *value_if_true*: is the value that is returned if Logical_test is TRUE. If omitted, TRUE is returned.
- *value_if_false*: is the value that is returned if Logical_test is FALSE. If omitted, FALSE is returned.

Example:

You can use the IF function to indicate anyone that has answered a survey question with the response "Strongly Disagree". The word *FLAG* will be placed next to any row with that response, otherwise, the field will be left blank.

1. Place the cursor in the first cell of the first empty column where you would like the result of the formula to appear (G2 in this example).
2. Enter the formula as follows:

=IF(F2="STRONGLY DISAGREE", "FLAG", "")

The screenshot shows a Microsoft Excel spreadsheet titled "Employee_". The formula bar at the top displays the formula `=IF(F2="STRONGLY DISAGREE","FLAG","")`. The formula is being typed into cell G2. The cell G2 contains the value "Strongly Disagree". A red box highlights the formula in the formula bar and the cell G2.

SURVEY_NM	QUESTION_N	QUESTION_T	FIRST_NM	LAST_NM	ANSWER	G
Open Enrollr	1	You received Andy	Alpha	Strongly Disagree	=IF(F2="STRONGLY DISAGREE","FLAG","")	
Open Enrollr	1	You received Barbara	Bravo	Agree		
Open Enrollr	1	You received Candra	Burtis	Agree		
Open Enrollr	1	You received Chad	Charlie	Strongly Disagree		
Open Enrollr	1	You received Debby	Delta	Agree		
Open Enrollr	1	You received Eugene	Echo	Agree		
Open Enrollr	1	You received Jerry	Fields	Agree		
Open Enrollr	1	You received Farrah	Foxtrot	Agree		
Open Enrollr	1	You received Gary	Gulf	Agree		
Open Enrollr	1	You received Hillary	Hotel	No Opinion		
Open Enrollr	1	You received Isaac	India	Agree		

- Select the cell in which you executed the formula. Hover over the bottom right of the highlighted cell until a black crossbar appears. Double click to apply the formula to the following cells.

The screenshot shows the same Microsoft Excel spreadsheet. The formula `=IF(F2="STRONGLY DISAGREE","FLAG","")` has been copied from cell G2. The formula is now applied to the range G2:G33. A red box highlights the formula in the formula bar and the entire column G.

SURVEY_NM	QUESTION_N	QUESTION_T	FIRST_NM	LAST_NM	ANSWER	G
Open Enrollr	1	You received Andy	Alpha	Strongly Disagree	FLAG	
Open Enrollr	1	You received Barbara	Bravo	Agree		
Open Enrollr	1	You received Candra	Burtis	Agree		
Open Enrollr	1	You received Chad	Charlie	Strongly Disagree	FLAG	
Open Enrollr	1	You received Debby	Delta	Agree		
Open Enrollr	1	You received Eugene	Echo	Agree		
Open Enrollr	1	You received Jerry	Fields	Agree		
Open Enrollr	1	You received Farrah	Foxtrot	Agree		
Open Enrollr	1	You received Gary	Gulf	Agree		
Open Enrollr	1	You received Hillary	Hotel	No Opinion		
Open Enrollr	1	You received Isaac	India	Agree		
Open Enrollr	1	You received Janice	Juliette	Agree		
Open Enrollr	1	You received Rachel	Karel	Agree		
Open Enrollr	1	You received Kevin	Kilo	Strongly Disagree	FLAG	
Open Enrollr	1	You received Laura	Lima	No Opinion		
Open Enrollr	1	You received Mark	Mike	Agree		
Open Enrollr	1	You received Mike	Miller	Strongly Disagree	FLAG	
Open Enrollr	1	You received Noel	November	Strongly Agree		
Open Enrollr	1	You received Oliver	Oscar	Agree		
Open Enrollr	1	You received Paula	Papa	Strongly Disagree	FLAG	
Open Enrollr	1	You received Quintin	Quebeck	No Opinion		
Open Enrollr	1	You received Rachel	Romeo	Agree		
Open Enrollr	1	You received Sam	Sierra	Strongly Agree		
Open Enrollr	1	You received Theresa	Tango	Strongly Agree		
Open Enrollr	1	You received Uziel	Uniform	No Opinion		
Open Enrollr	1	You received Victoria	Victor	Agree		
Open Enrollr	1	You received Wesley	Wiskey	No Opinion		
Open Enrollr	1	You received Xandra	Xray	Agree		
Open Enrollr	1	You received Youssef	Yankee	Agree		
Open Enrollr	1	You received Zigana	Zebra	Strongly Agree		
Open Enrollr	2	How satisfied Barbara	Bravo	Strongly Disagree	FLAG	
Open Enrollr	2	How satisfied Candra	Burtis	Disagree		

PivotTables

PivotTables are a great way to summarize, analyze, explore, and present your data. They are highly flexible and can be quickly adjusted depending on how you need to display your results.

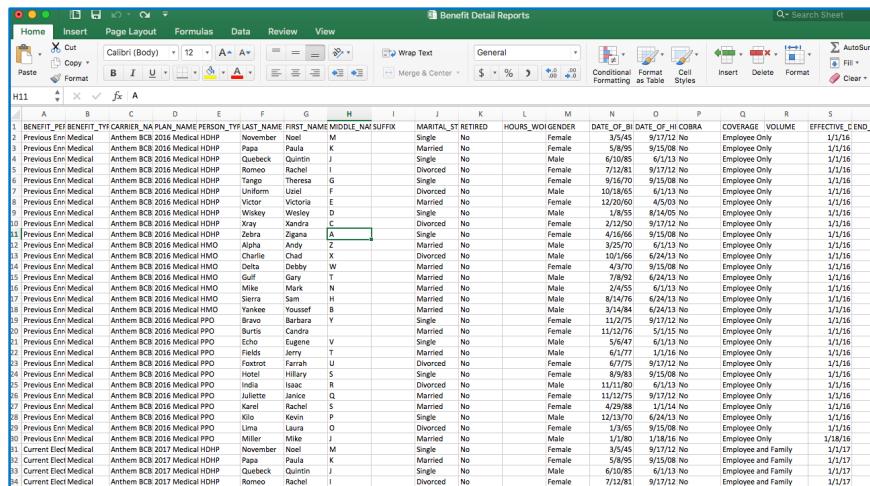
Example:

You want to create a PivotTable to better summarize 2016-2018 data on the Benefit Detail Report.

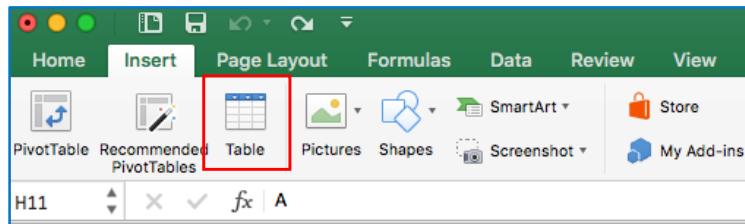
Organizing your data

Before creating a PivotTable, your data should be organized in tabular format and not have any blank rows or columns. Data types in columns should be the same. For example, you shouldn't mix dates and text in the same column. It's helpful to use an Excel table because rows added to a table are automatically included in the PivotTable when you refresh the data and any new columns will be included in the PivotTable Fields. Otherwise, you need to manually update the data source range. This can be done by:

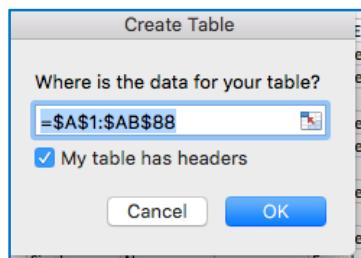
1. Select the *Insert* ribbon and click *Table*.



A screenshot of the Microsoft Excel ribbon. The 'Insert' tab is highlighted in blue. Below the ribbon, the formula bar shows 'H11'. The main area of the screen displays a large table with approximately 88 rows and 17 columns. The columns are labeled A through T. The first few rows contain headers such as 'BENEFIT_PEF BENEFIT_TY_CARRIER_NA_PAN_NAME_PERSON_TYP_LAST_NAME', 'FIRST_NAME_MIDDLE_NAT_SUFFIX', 'MARRITAL_ST RETIRED', 'HOURS_WO_GENDER', 'DATE_OF_BI_DATE_OF_HI_COBRA', 'COVERAGE_VOLUMN', and 'EFFECTIVE_CEND_D'. The data includes names like 'November Noel M', 'Rachel K', 'Quentin J', 'Romeo I', 'Theresa G', 'Tango F', 'Victoria E', 'Wesley D', 'Xray X', and 'Zigana A'. The last few rows are labeled 'Current Elect Medical' and 'Current Elect Medical'.



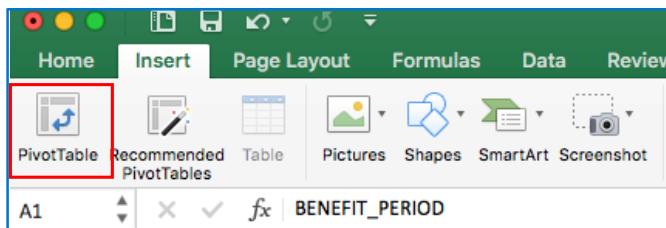
2. A *Create Table* window will appear and will automatically populate where the data for the table exists. If this isn't accurate, update the range for the table. Check *My Table has headers*, if applicable and then click OK.



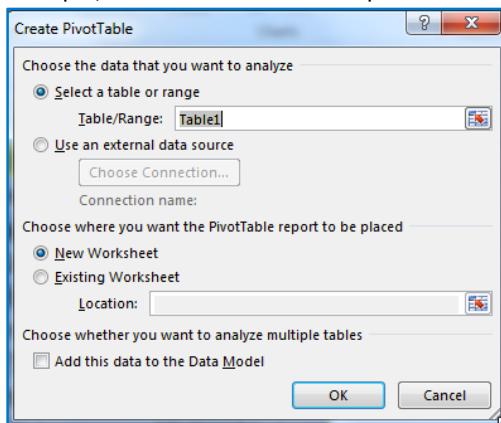
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	BENEFIT_PERIOD	BENEFIT_TYPE	CARRIER_NAME	PLAN_NAME	PERSON_TYPE	LAST_NAME	FIRST_NAME	MIDDLE_NAME	SUFFIX	MARITAL_STATUS	RETIRED	HOURS_WORKED	GENDER	DATE_OF_BIRTH
2	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	November	Noel	M	Single	No	Female	3/5/45			
3	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	Papa	Paula	K	Married	No	Female	5/8/95			
4	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	Quebeck	Quintin	J	Single	No	Male	6/10/85			
5	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	Romeo	Rachel	I	Divorced	No	Female	7/12/81			
6	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	Tony	Theresa	G	Single	No	Female	9/20/00			
7	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	Uniform	Uziel	F	Divorced	No	Male	10/18/65			
8	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	Victor	Victoria	E	Married	No	Female	12/20/60			
9	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	Weskey	Wesley	D	Single	No	Male	1/8/55			
10	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	Xray	Xandra	C	Divorced	No	Female	2/12/50			
11	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HDHP	Zebra	Zigana	A	Single	No	Female	4/16/66			
12	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HMO	Alpha	Andy	Z	Married	No	Male	3/25/70			
13	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HMO	Charlie	Chad	X	Divorced	No	Male	10/1/66			
14	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HMO	Delta	Debbie	W	Married	No	Female	11/20/00			
15	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HMO	Echo	Gary	T	Married	No	Male	7/9/92			
16	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HMO	Emile	Mike	N	Married	No	Male	2/4/55			
17	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HMO	India	Isaac	R	Divorced	No	Male	8/14/76			
18	Previous Enrollment	Medical	Anthem BCBS	2016 Medical HMO	Juliette	Janice	Q	Married	No	Female	11/1/80			
19	Previous Enrollment	Medical	Anthem BCBS	2016 Medical PPO	Karen	Rachel	S	Married	No	Female	3/14/84			
20	Previous Enrollment	Medical	Anthem BCBS	2016 Medical PPO	Kilo	Kevin	P	Single	No	Male	11/2/75			
21	Previous Enrollment	Medical	Anthem BCBS	2016 Medical PPO	Laura	Laure	O	Divorced	No	Female	11/27/76			
22	Previous Enrollment	Medical	Anthem BCBS	2016 Medical PPO	Miller	Mike	J	Married	No	Male	8/17/77			
23	Current Elections	Medical	Anthem BCBS	2017 Medical HDHP	November	Noel	M	Single	No	Female	3/5/45			
24	Current Elections	Medical	Anthem BCBS	2017 Medical HDHP	Papa	Paula	K	Married	No	Female	5/8/95			
25	Current Elections	Medical	Anthem BCBS	2017 Medical HDHP	Quebeck	Quintin	J	Single	No	Male	6/10/85			

Manually create a PivotTable

1. Click a cell in the table range.
2. Select the *Insert* ribbon and click *PivotTable*.



3. A *Create PivotTable* window will appear and will automatically populate where the data for the table exists. If this isn't accurate, update the range for the table. In this example, we created an Excel Table, so it automatically populated *Table 1*. Choose where you want the PivotTable report to be placed. In this example, we want the data to be placed in a *New Worksheet*.





If you want to include multiple tables or data sources in your PivotTable, click *Add this data to the Data Model*. If you need to count unique values (distinct count function) in your PivotTable, this needs to be checked. This option currently isn't available on Mac versions of Excel.

- Click **OK**. Excel will create a blank PivotTable, and display the PivotTable Fields list/PivotTable Builder.

The screenshot shows the Microsoft Excel ribbon with the 'PivotTable Analyze' tab selected. A PivotTable is visible in the worksheet area, and the 'PivotTable Builder' dialog box is open. The 'FIELD NAME' list contains four items: BENEFIT_PERIOD, BENEFIT_TYPE, CARRIER_NAME, and PLAN_NAME. The 'Filters' section is empty. The 'Columns' section is empty. The 'Rows' section is empty. The 'Values' section is empty. A note in the main Excel window says 'To build a report, choose fields from the PivotTable Field List'.

- The *Field Name* in the *PivotTable Builder* lists all of the column headers in the Excel table. You can manually drag-and-drop any of the Field values into the *Filter*, *Columns*, *Rows*, and *Values* areas. If you no longer want an item in your PivotTable, simply drag it out of the *Fields* list or uncheck it. Being able to rearrange Field items is one of the features that makes it so easy to quickly change its appearance.
 - Filters:** Show top-level report filters above the PivotTable.
 - Columns:** Fields are shown as Column Labels at the top of the PivotTable.
 - Rows:** Fields are shown as Row Labels on the left side of the PivotTable. Depending on the hierarchy of the fields, rows may be nested inside rows that are higher in position.
 - Values:** Contains the fields that determine which data are presented in the cells of the PivotTable. They are the values that are summarized in the last column.

In this example, you want to show the Employer Monthly Cost by Benefit Type as well as a count of the number of enrollees in each plan. You also want to be able to filter by Benefit Period.

6. Drag-and-drop the *PLAN_NAME* field to the *Rows* section.

The screenshot shows the PivotTable Builder dialog box in Excel. The 'Rows' section is selected, containing the field 'PLAN_NAME'. The main data area displays a list of plan names: 2016 Medical HDHP, 2016 Medical HMO, 2016 Medical PRO, 2017 Medical HDHP, 2017 Medical HMO, 2017 Medical PRO, 2018 Medical HDHP, 2018 Medical HMO, 2018 Medical PRO. A red box highlights the 'Row Labels' column in the data area.

7. Drag-and-drop the *EMPLOYER_MONTHLY_COST* field to the *Values* section. By default, the PivotTable builder automatically uses the SUM function. You can change the default calculation by right-clicking on *Sum of EMPLOYER_MONTHLY_COST* in the Values field and selecting *Field Settings*.

The screenshot shows the PivotTable Builder dialog box in Excel. The 'Values' section is selected, containing the field 'Sum of EMPLOYER_MONTHLY_COST'. The main data area displays a list of monthly costs: 3311.1, 2621.08, 2914.08, 8406.97, 3604.7, 8206.12, 4304.43, 1487.76, 2914.08, 37780.32. A red box highlights the 'Sum of EMPLOYER_MONTHLY_COST' entry in the data area.

8. Drag-and-drop the *PLAN_NAME* field to the *Values* section. Since *PLAN_NAME* is a text field, the PivotTable builder automatically displays the COUNT function and adds Values as a Column. You can change the default calculation by right-clicking on *Count of PLAN_NAME* in the Values field and selecting *Field Settings*.

9. Drag-and-drop the *BENEFIT_PERIOD* field to the *Filters* section.

Edit a PivotTable

To edit the fields in a PivotTable after it is created, click anywhere in a PivotTable. Click on the *PivotTable Analyze* and click *Field List*.

The screenshot shows a Microsoft Excel spreadsheet titled "Benefit Detail Report". The PivotTable is named "PivotTable1". The "PivotTable Analyze" tab is selected in the ribbon. The PivotTable data is displayed in columns A-D, showing benefit periods and their monthly costs. The PivotTable Builder pane on the right shows the field names: CARRIER_NAME, PLAN_NAME, PERSON_TYPE, and LAST_NAME. The "Filters" section contains the BENEFIT_PERIOD field. The "Rows" section contains the PLAN_NAME field. The "Values" section contains the "Sum of EMPLOYER_MONTHLY_COST" field.

Refresh a PivotTable

If you add new data to your PivotTable data source (in this example, Table 1), you will need to refresh the PivotTable. To refresh you can right-click anywhere in the PivotTable range, then select *Refresh Data*.

The screenshot shows a Microsoft Excel spreadsheet with a PivotTable. A context menu is open over a cell in the PivotTable, specifically over the "Sum of EMPLOYER_MONTHLY_COST" value in row 5. The menu options include Refresh Data, Sort, Select, Group and Outline, Formulas, Move, Field Settings, PivotTable Options, and Show Report Filter Pages... The "Refresh Data" option is highlighted with a blue box.