

# M365 Excel Basics Video 06: Types of Formulas and Excel Table Feature

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## Topics covered in the M365 Excel Basics Video 6:

### ❖ **Types of Formulas**

- Traditional Formulas (Single-Input, Single-Output Formulas)
- Dynamic Spilled Array Formulas
- Excel Table Formulas

### ❖ **Excel Table Feature**

- Naming the Table
- Advantages of using Excel Tables
- Define Names and Data Validation

### ❖ **Calculations**

- SUMIFS
- AVERAGEIFS
- COUNTIFS

*Please note: For this class, we will use F12 to save our files for the first time and CTRL +S to save the changes we make to our files.*

## Types of Formula

### Traditional Formulas (Single Input-Output Formulas)

These are formulas that operate on single inputs and deliver a single answer. This type of formula has single values entered in a function argument or has single values on either side of an operator. For example: =A1+B1, here the operator is an addition operator.

Formula Requirements:

- The type of cell references (relative, absolute, mixed) to use in the formula.
- Formula is entered in one cell and if the formula must be copied, you must manually copy the formula to other cells.
- To edit the formula, you edit the cell and re-copy the formula to other cells if necessary.
- You use this formula if you will have to send the solution to someone without the Office 365 (M365) Excel.

### Dynamic Spilled Array Formulas (DSAF).

These are formulas that deliver a spilled array to the worksheet (neighboring cells) as the final answer. The Dynamic Spilled Array Formulas spill from the top cell to the neighboring cells but only live in the top cell. When you want to add the values that are in the spilled array, you refer to the spilled array with the spilled range operator # for example for the SUM it will be =SUM(G9#)

*Array Formulas are formulas that contain one or more array operations that deliver an array of answers rather than a single answer. The array operation can involve multiple values entered into a function argument, e.g. =FORMULATEXT(G9:G12), or there can be multiple values on one or more sides of an operator, for example: =F9:F14\*G6. Array formula is the general term used to describe both types of array formulas.*

### Excel Table Formulas

These are formulas that use the table formula nomenclature, rather than cell references.

Excel Tables Formulas are dynamic because if you add rows or columns, anything pointing to table will update with new data. You use this formula when you will add new records to your table, the formulas are automatically copied down the column, but you must remember to Lock the Cell Reference.

*Some of the other items that will update in Excel automatically are formulas and Charts. The Pivot Tables will not update automatically if new data is added you must remember to refresh the Pivot Tables.*

Do not use the Dynamic Spilled Array Formulas in Excel Tables as they are not allowed.

Excel Table Formulas		
Commission Rate		0.0573
<b>Sales Amount</b>	<b>Commission Amount</b>	
\$20,345.98	\$1,165.82	=ROUND([@[Sales Amount]]*\$L\$6,2)
\$52,345.49	\$2,999.40	
\$37,235.80	\$2,133.61	
\$49,541.12	\$2,838.71	

**Table Formula nomenclature:**

**From the above Table – the references to the Table objects**

Table Name: = SalesCommission

Field Name in the Excel Table: = SalesCommission[Sales Amount]

Relative Cell Reference: = [@[salesAmount]] or [=@sales]

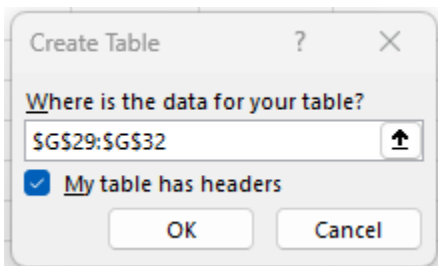
@ is the Implicit Intersection Operator. It allows to get a corresponding item in the current row of a column or a parallel column.

## Excel Table Feature

To use an Excel Table feature you must have a proper Dataset. If your table is a proper dataset you can easily convert it to an Excel Table. Excel Table makes it easier to manage and analyze your data.

A table includes a Header Row. The columns on the table has filtering enabled in the header row which helps to efficiently sort and filter data quickly. You can turn on and off the filter button using the Filter button in the Sort and Filter group on your Data Tab on the Ribbon. We will cover the Sort and Filter at a later video in this class.

When converting your proper dataset to an Excel Table be sure to check the box “My table has headers”. This helps to avoid Excel creating for your default headers for the table labeled as Column 1; Column 2



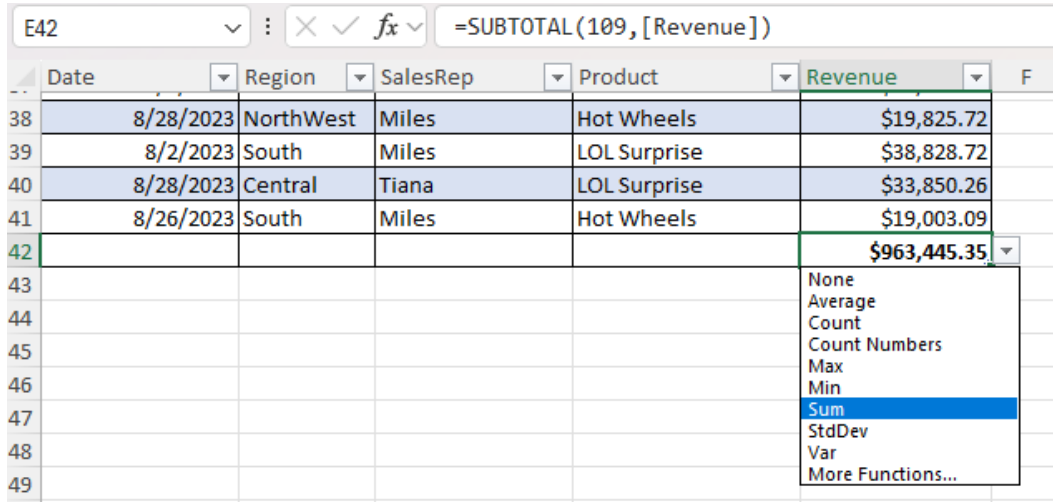
B	C	D
Qtr 1	Qtr 2	Grand Total

If you do not check the ‘My table has headers’ box Excel will default the column headers as seen below

A	B	C
Column1	Column2	Column3

The Excel Table has shading in rows to help distinguish the data. When you enter a formula in one cell Excel creates a calculated column where the formula is instantly applied to all the other cells in that table column.

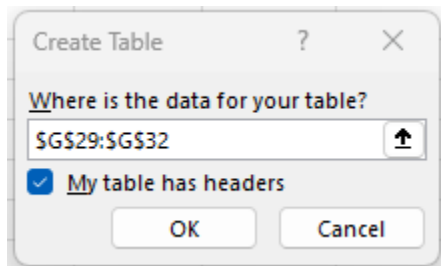
Once you add the Total Rows, Excel gives you an Auto Sum drop-down list to select functions from. When you select one of the options, Excel will automatically convert them to a SUBTOTAL function. See the picture below.



You can turn a range of cells or a proper dataset to an Excel table by following these steps:

**Option 1:**

1. Click on one cell in your table
2. Go to the Home Tab of the Ribbon, and in the Styles group, click the Format as Table button arrow to show the different table styles .
3. Pick a table style.
4. In the Format as Table (Create a Table) dialog box, select the checkbox next to My table as headers if you want the first row of the range to be the header row, and then click OK



**Option 2:**

1. Click on one cell in your table
2. Go to the Insert Tab of the Ribbon, and in the Tables group, click the Table button.
3. In the Format as Table (Create a Table) dialog box, select the checkbox next to My table as headers if you want the first row of the range to be the header row, and then click OK

**Option 3:** *(This is the fastest one as you are using the keyboard shortcut).*

1. Click on one cell in your table
2. Press CTRL + T on your keyboard.
3. In the Format as Table (Create a Table) dialog box, select the checkbox next to My table as headers if you want the first row of the range to be the header row, and then click OK

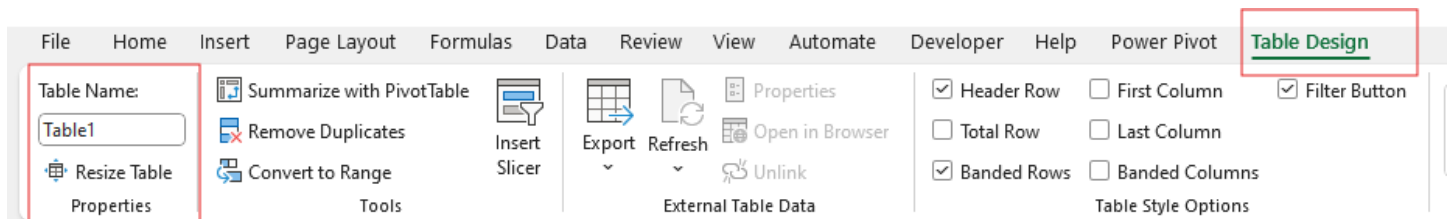
## Naming the Excel Table

When you convert your proper dataset to an Excel Table the first thing that you need to make sure to do is name the Table. Once you have created your Excel Table, you will see a contextual Tab on your Ribbon named Table Design.

If you can recall from the File Explorer video lessons, contextual tabs are hidden tabs on the Ribbon and they appear when objects like images and Tables are selected in Microsoft programs.

### To Name your Excel Table:

Go to the Table Design tab of the Ribbon, and on the Properties group, on the Table Name: change the default 'Table1' name and name your table to reflect the data that is in your Excel table.



**Note:** *If you do not see the contextual tab on your Ribbon, it is because you have selected a cell outside of your table. You need to select inside your Excel Table to see the contextual Tab – Table Design.*

*When naming the Excel Table do not include any spaces for the name of the Table. Space or character isn't allowed.*

A picture of a proper dataset that has been converted to an Excel Table

	A	B	C	D	E
10					
11	<b>Date</b>	<b>Region</b>	<b>SalesRep</b>	<b>Product</b>	<b>Revenue</b>
12	8/24/2023	Central	Miles	Hot Wheels	\$23,935.30
13	8/23/2023	Central	Cinderelli	LOL Surprise	\$46,241.84
14	8/7/2023	South	Tiana	LOL Surprise	\$20,003.13
15	8/11/2023	South	Tiana	Hot Wheels	\$24,148.61
16	8/26/2023	Central	Miles	Hot Wheels	\$43,173.32
17	8/22/2023	NorthWest	Miles	LOL OMG Surprise	\$23,553.65
18	8/26/2023	South	Tiana	Hot Wheels	\$26,863.98
19	8/15/2023	North	Miles	LOL OMG Surprise	\$35,320.76
20	8/6/2023	South	Cinderelli	Hot Wheels	\$15,196.59
21	8/11/2023	South	Tiana	LOL Surprise	\$48,533.17
22	8/19/2023	NorthWest	Cinderelli	LOL Surprise	\$30,517.67
23	8/10/2023	NorthWest	Tiana	LOL OMG Surprise	\$22,962.38
24	8/5/2023	South	Cinderelli	LOL OMG Surprise	\$26,230.06
25	8/11/2023	North	Cinderelli	LOL Surprise	\$34,445.91
26	8/10/2023	North	Cinderelli	LOL OMG Surprise	\$41,175.59
27	8/18/2023	South	Tiana	LOL OMG Surprise	\$28,456.15
28	8/30/2023	Central	Miles	Hot Wheels	\$46,883.49
29	8/14/2023	South	Miles	Hot Wheels	\$48,675.77
30	8/6/2023	NorthWest	Tiana	LOL Surprise	\$19,604.95
31	8/20/2023	NorthWest	Miles	LOL Surprise	\$48,922.29
32	8/31/2023	South	Tiana	Hot Wheels	\$42,727.99
33	8/2/2023	Central	Cinderelli	LOL OMG Surprise	\$21,408.69
34	8/3/2023	Central	Cinderelli	LOL Surprise	\$24,455.63
35	8/8/2023	North	Tiana	Hot Wheels	\$28,107.26
36	8/26/2023	Central	Cinderelli	Hot Wheels	\$45,728.49
37	8/8/2023	North	Miles	Hot Wheels	\$34,664.89
38	8/28/2023	NorthWest	Miles	Hot Wheels	\$19,825.72
39	8/2/2023	South	Miles	LOL Surprise	\$38,828.72
40	8/28/2023	Central	Tiana	LOL Surprise	\$33,850.26
41	8/26/2023	South	Miles	Hot Wheels	\$19,003.09

## Advantages of using Excel Table Feature

The advantage of using the Excel Table Feature is that if you need to add new records to the table everything will update automatically.

### Advantages of Excel Table Formulas

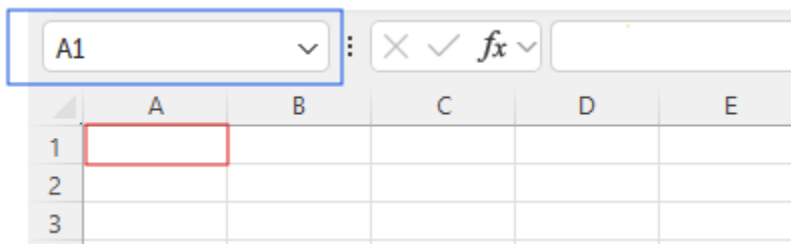
- Formulas will automatically copy down the column
- Formulas will update automatically
- Use Excel Tables when you will need to add new records to your Table

## Define Names

You can define names for a cell range, a table, or a single cell reference. Using the names can make the formulas easier to understand and/or maintain.

### How to name a cell:

1. Select the cell
2. In the Name box, type a name
3. Press Enter

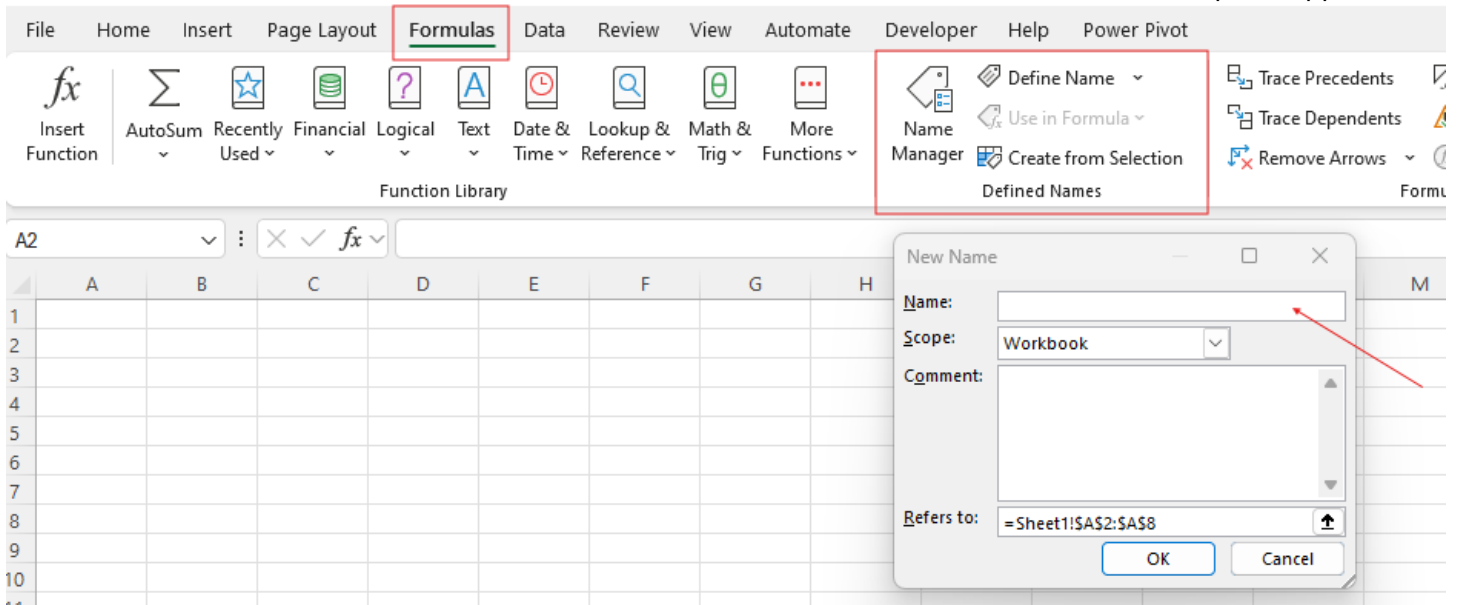


To reference the name the value of the cell you named in your formula, type the equal sign (=) and enter a formula and then type the first letter of the name, and select the name from the list that appears.

### Define names for a selected range

1. Select the range you want to name, including the column and row labels
2. Go to Formulas tab of the Ribbon and in the Define Names group click on the Define Name button.
3. A New Name dialog box appears with a reference of the selected range. On the Name Box type the name that you would like to name your selected range.





Use the Name Manager on the Define Names group to create, edit, delete and find all the names used in the workbook

## Data Validation

Data Validation List feature lets you add a drop-down list to a cell to allow a user to select from a valid list of names. The feature shows an error message if the user types something that is not in the validation list.

UNIQUE array function allows you to look through a column and deliver a unique list of values without any duplicates. We then use the unique list of values to validate or for our data validation list.

PS. For more on Data validation, refer to the M365 Excel Basics Video 05 notes.

# Calculations and Formulas

the

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1															
2	<b>Goal:</b> Calculate the Commission Amount using 3 different Types of Formulas.														
3															
4	<b>Traditional Formula (Single-Input, Single-Output Formulas)</b>				<b>Dynamic Spilled Array Formulas</b>				<b>Excel Table Formulas</b>						
5															
6	Commission Rate	0.0573				Commission Rate	0.0573				Commission Rate	0.0573			
7															
8	<b>Sales Amount</b>	<b>Commission Amount</b>				<b>Sales Amount</b>	<b>Commission Amount</b>				<b>Sales Amount</b>	<b>Commission Amount</b>			
9	\$20,345.98	\$1,165.82	=ROUND(A9*\$B\$6,2)			\$20,345.98	\$1,165.82	=ROUND(F9:F12*G6,2)			\$20,345.98	\$1,165.82	=ROUND([@[Sales Amount]]*\$L\$6,2)		
10	\$52,345.49	\$2,999.40				\$52,345.49	\$2,999.40				\$52,345.49	\$2,999.40			
11	\$37,235.80	\$2,133.61				\$37,235.80	\$2,133.61				\$37,235.80	\$2,133.61			
12	\$49,541.12	\$2,838.71				\$49,541.12	\$2,838.71				\$49,541.12	\$2,838.71	=ROUND([@[Sales Amount]]*\$L\$6,2)		
13															
14															
15	<b>Notes - When to use:</b>				<b>Notes - Advantages:</b>				<b>Notes - When to use:</b>						
16	You use this formula when you will have to				Do not need to Lock the Cell References				You use this formula when you will add new records to your table						
17	send a solution to someone without				Do not need to manually copy the formula				Formulas are automatically copied down the column but you						
18	Microsoft Office 365 (M365) Excel				Editing a formula is easier and faster				still need to remember to Lock the Cell Reference.						
19															
20															
21															

Example 1:

COUNTIFS

**Ex. 1**

**GOAL: COUNTIFS** Counts Matches

Convert Proper Dataset into an Excel Table and Name the Table

Count how many products were sold by which SalesRep

Count how many products were sold by which SalesRep in each Region

Create a Sorted Unique Lists for the Products and SalesRep

Add Data Validation to the Criteria Product and Sales Rep in the cells G7 and H7 from the Unique lists that you created.

**AND Logical Test:** The Product Field, SalesRep Field and Region Field must contain the specified fields

Criteria	
Product	SalesRep
Hot Wheels	Miles
Count	7

**Sorted Unique List**

Product	SalesRep	Region
Hot Wheels	Cinderelli	Central
LOL OMG Surprise	Miles	North
LOL Surprise	Tiana	NorthWest
		South

**Excel Table Formulas**

Region	Count
Central	3
North	1
NorthWest	1
South	2

**Advantages of Excel Table Formulas**

Formulas will automatically copy down the column

Formulas will update automatically

Use Excel Tables when you will need to add new records to your Table

\*\*\*When using Excel Tables you still must lock the cell references

Date	Region	SalesRep	Product	Revenue
8/24/2023	Central	Miles	Hot Wheels	\$23,935.30
8/23/2023	Central	Cinderelli	LOL Surprise	\$46,241.84
8/7/2023	South	Tiana	LOL Surprise	\$20,003.13
8/11/2023	South	Tiana	Hot Wheels	\$24,148.61
8/26/2023	Central	Miles	Hot Wheels	\$43,173.32
8/22/2023	NorthWest	Miles	LOL OMG Surprise	\$23,553.65
8/26/2023	South	Tiana	Hot Wheels	\$26,863.98
8/15/2023	North	Miles	LOL OMG Surprise	\$35,320.76
8/6/2023	South	Cinderelli	Hot Wheels	\$15,196.59
8/11/2023	South	Tiana	LOL Surprise	\$48,533.17
8/19/2023	NorthWest	Cinderelli	LOL Surprise	\$30,517.67
8/10/2023	NorthWest	Tiana	LOL OMG Surprise	\$22,962.38
8/5/2023	South	Cinderelli	LOL OMG Surprise	\$26,230.06
8/11/2023	North	Cinderelli	LOL Surprise	\$34,445.91
8/10/2023	North	Cinderelli	LOL OMG Surprise	\$41,175.59
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8/30/2023	Central	Miles	Hot Wheels	\$46,883.49
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8/6/2023	NorthWest	Tiana	LOL Surprise	\$19,604.95
8/20/2023	NorthWest	Miles	LOL Surprise	\$48,922.29
8/31/2023	South	Tiana	Hot Wheels	\$42,727.99
8/2/2023	Central	Cinderelli	LOL OMG Surprise	\$21,408.69
8/3/2023	Central	Cinderelli	LOL Surprise	\$24,455.63
8/8/2023	North	Tiana	Hot Wheels	\$28,107.26

**Formulas:**

=COUNTIFS(ProductCntans[Product],G7,ProductCntans[SalesRep],H7)

=COUNTIFS(ProductCntans[Region],[@Region],ProductCntans[Product],\$G\$7,ProductCntans[SalesRep],\$H\$7)

COUNTIFS counts with two or more criterias/conditions

Example 2:

COUNTIFS

**Ex. 2**

**GOAL:**

Convert Proper Dataset into an Excel Table and Name the Table **AND Logical Test:** The Product Field, SalesRep Field and Region Field must contain the specified fields

Count how many sales are GREATER THAN \$40,000

Count how many sales are GREATER THAN \$40,000 in each Region

<b>COUNTIFS</b>	Counts Matches	Sales Hurdle	>40000	
		Count	9	=COUNTIFS(RegionSalesCntans[Revenue],H7)

**Excel Table Formulas**

Date	Region	SalesRep	Product	Revenue	Region	Count
8/24/2023	Central	Miles	Hot Wheels	\$23,935.30	Central	4
8/23/2023	Central	Cinderelli	LOL Surprise	\$46,241.84	North	1
8/7/2023	South	Tiana	LOL Surprise	\$20,003.13	NorthWest	1
8/11/2023	South	Tiana	Hot Wheels	\$24,148.61	South	3
8/26/2023	Central	Miles	Hot Wheels	\$43,173.32		
8/22/2023	NorthWest	Miles	LOL OMG Surprise	\$23,553.65		
8/26/2023	South	Tiana	Hot Wheels	\$26,863.98		
8/15/2023	North	Miles	LOL OMG Surprise	\$35,320.76		
8/6/2023	South	Cinderelli	Hot Wheels	\$15,196.59		
8/11/2023	South	Tiana	LOL Surprise	\$48,533.17		
8/19/2023	NorthWest	Cinderelli	LOL Surprise	\$30,517.67		
8/10/2023	NorthWest	Tiana	LOL OMG Surprise	\$22,962.38		
8/5/2023	South	Cinderelli	LOL OMG Surprise	\$26,230.06		
8/11/2023	North	Cinderelli	LOL Surprise	\$34,445.91		
8/10/2023	North	Cinderelli	LOL OMG Surprise	\$41,175.59		
8/18/2023	South	Tiana	LOL OMG Surprise	\$28,456.15		
8/30/2023	Central	Miles	Hot Wheels	\$46,883.49		
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8/20/2023	NorthWest	Miles	LOL Surprise	\$48,922.29		
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8/3/2023	Central	Cinderelli	LOL Surprise	\$24,455.63		

**Advantages of Excel Table Formulas**

- Formulas will automatically copy down the column
- Formulas will update automatically
- Use Excel Tables when you will need to add new records to your Table

\*\*\*When using Excel Tables you still must lock the cell references

\*\*\* In an example like this, a PivotTable might be harder to create because for our condition "Greater Than" We are using a comparative operator condition for the sales greater than condition/criteria

Example 3:

AVERAGEIFS

EX. 3																																																																																																																																		
<b>GOAL:</b>																																																																																																																																		
Convert Proper Dataset into an Excel Table and Name the Table																																																																																																																																		
Average Sales for each Product in each Region																																																																																																																																		
Create a Sorted Unique List for the Products																																																																																																																																		
Add Data Validation for the Products on Cell G8 from the Range O5:O7																																																																																																																																		
AND Logical Test: The Product Field, and Region Field must contain the specified fields																																																																																																																																		
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Example 4:

SUMIFS

**Ex. 4**

**GOAL:**  
 Convert Proper Dataset into an Excel Table and Name the Table  
 Add Total Revenue for a product for the Sales Rep Specified  
 Add the Total Revenue for the specified product in each region for a specified SalesRep

**SUMIFS** Add Numbers with one or more criterias/conditions

**AND Logical Test:** The Product Field, SalesRep Field and Region Field must contain the specified fields

Criteria	
Product	SalesRep
Hot Wheels	Miles
Total Revenue	\$236,161.58

**Sorted Unique List**

Products	SalesRep
Hot Wheels	Cinderelli
LOL OMG Surprise	Miles
LOL Surprise	Tiana

**Excel Table Formulas**

Date	Region	SalesRep	Product	Revenue
8/24/2023	Central	Miles	Hot Wheels	\$23,935.30
8/23/2023	Central	Cinderelli	LOL Surprise	\$46,241.84
8/7/2023	South	Tiana	LOL Surprise	\$20,003.13
8/11/2023	South	Tiana	Hot Wheels	\$24,148.61
8/26/2023	Central	Miles	Hot Wheels	\$43,173.32
8/22/2023	NorthWest	Miles	LOL OMG Surprise	\$23,553.65
8/26/2023	South	Tiana	Hot Wheels	\$26,863.98
8/15/2023	North	Miles	LOL OMG Surprise	\$35,320.76
8/6/2023	South	Cinderelli	Hot Wheels	\$15,196.59
8/11/2023	South	Tiana	LOL Surprise	\$48,533.17
8/19/2023	NorthWest	Cinderelli	LOL Surprise	\$30,517.67
8/10/2023	NorthWest	Tiana	LOL OMG Surprise	\$22,962.38
8/5/2023	South	Cinderelli	LOL OMG Surprise	\$26,230.06
8/11/2023	North	Cinderelli	LOL Surprise	\$34,445.91
8/10/2023	North	Cinderelli	LOL OMG Surprise	\$41,175.59
8/18/2023	South	Tiana	LOL OMG Surprise	\$28,456.15
8/30/2023	Central	Miles	Hot Wheels	\$46,883.49
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8/31/2023	South	Tiana	Hot Wheels	\$42,727.99
8/2/2023	Central	Cinderelli	LOL OMG Surprise	\$21,408.69
8/3/2023	Central	Cinderelli	LOL Surprise	\$24,455.63

**Region** | **Total Revenue**

Central	\$113,992.11
North	\$34,664.89
NorthWest	\$19,825.72
South	\$67,678.86

**Advantages of Excel Table Formulas**  
 Formulas will automatically copy down the column  
 Formulas will update automatically  
 Use Excel Tables when you will need to add new records to your Table

\*\*\*When using Excel Tables you still must lock the cell references

**Formula Examples:**  
 =SUMIFS(MonthlyRevans[Revenue],MonthlyRevans[Product],G9,MonthlyRevans[SalesRep],H9)  
 =SUMIFS(MonthlyRevans[Revenue],MonthlyRevans[Region],[@Region],MonthlyRevans[Product],\$G\$9,MonthlyRevans[SalesRep],\$H\$9)  
 SUMIFS Add Numbers with one or more criterias/conditions

\*\*\* In an example like this, a PivotTable might be easier but you have to remember to "REFRESH" if source data changes since PivotTables will not update automatically.

Example 5:

Defined Names and Data Validation

**Ex. 5**

**GOAL: SUMIFS** Add Numbers with one or more criterias/conditions

Create Define Names for each Field

Create Define Names for each of the Criteria to calculate

Add Total Revenue for a product for the Sales Rep Specified

Add the Total Revenue for the specified product in each region for a specified SalesRep

**AND Logical Test:** The Product Field, SalesRep Field and Region Field must contain the specified fields  
We will use the Define Names in our formulas.

Criteria	
Product	SalesRep
Hot Wheels	Tiana
Total Revenue	\$121,847.84

=SUMIFS(RevenueDNans,ProductDNans,ProductCriteriaDNans,SalesRepDNans,SalesRepCriteriaDNans)

Date	Region	SalesRep	Product	Revenue
8/24/2023	Central	Miles	Hot Wheels	\$23,935.30
8/23/2023	Central	Cinderelli	LOL Surprise	\$46,241.84
8/7/2023	South	Tiana	LOL Surprise	\$20,003.13
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8/3/2023	Central	Cinderelli	LOL Surprise	\$24,455.63
8/8/2023	North	Tiana	Hot Wheels	\$28,107.26

**Excel Table Formulas**

Region	Total Revenue
Central	\$0.00
North	\$28,107.26
NorthWest	\$0.00
South	\$93,740.58

=SUMIFS(RevenueDNans,ProductDNans,ProductCriteriaDNans,SalesRepDNans,SalesRepCriteriaDNans,RegionDNans,[@Region])

**Advantages of Excel Table Formulas**

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Formulas will update automatically

Use Excel Tables when you will need to add new records to your Table

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**SUMIFS Add Numbers with one or more criterias/conditions**

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