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Excel & PeopleSoft

Excel Functions and Additional Resources

Excel Functions

Listed below is a brief summary description of several commonly used Excel functions. You can use *Google* or a similar Internet search engine to find more information about any of the available Excel functions. You can also use Excel help to learn more about the different functions.

Subtotaling

The Subtotal function performs a specified calculation (the sum, product, average, etc.) for a supplied set of values. Unlike other Excel functions that are designed to do only one specific thing, SUBTOTAL can perform different arithmetic and logical operations such as counting cells, calculating average, finding the minimum or maximum value, and more.

Pivot table

A pivot table gathers all the data in an Excel spreadsheet (or range of a spreadsheet) and presents a summary of this data in a table. This table allows you to see, at a glance, information such as:

- The number of items of each type;
- The sum of a data column, broken down into data types;
- The average of a data column, broken down into data types.

Vlookup

VLOOKUP is an Excel function to lookup and retrieve data from a specific column in a table. Using VLOOKUP is similar to looking up a person's name in a telephone book to get a telephone number. VLOOKUP looks at a value in one column, and finds its corresponding value on the same row in another column.

Macros

If you have tasks in Microsoft Excel that you do repeatedly, you can record a macro to automate those tasks. A macro is an action or a set of actions that you can run as many times as you want. When you create a macro, you are recording your mouse clicks and keystrokes. After you create a macro, you can edit it to make minor changes to the way it works. Suppose that every month, you create a report for your manager. You want to format the names of encumbrances in red, and also apply bold formatting. You can create and then run a macro that quickly applies these formatting changes to the cells you select.

Conditional Formatting

Conditional Formatting is a tool that allows you to apply formats to a cell or range of cells, and have that formatting change depending on the value of the cell or the value of a formula. For example, you can have a cell appear bold only when the value of the cell is greater than 100. You can also use it to easily identify duplicate values.

Text-to-Columns

Text-to-Columns can be used to separate data in a single column into multiple columns, such as if you have full names in one column and need a column with first names and a column with last names.

Concatenate

The word concatenate is just another way of saying "*to combine*" or "*to join together*". The CONCATENATE function allows you to combine text from different cells into one cell. For example, you can use it to combine the first name in Column A, a space separator, and the last name in Column B to create a combined full name in a new column.

Other Functions

- **PROPER**: Sets the first character in each word to uppercase and the rest to lowercase.
- **UPPER**: Convert text to all uppercase.
- **TRIM**: Returns a text value with the leading and trailing spaces removed.
- **LEFT**: Extract a substring from a string, starting from the left-most character.
- **RIGHT**: Extracts a substring from a string starting from the right-most character.
- **TODAY**: Returns the current system date.
- **COUNT**: Counts the number of cells that contain numbers as well as the number of arguments that contain numbers.
- **COUNTA**: Counts the number of cells that are not empty as well as the number of value arguments provided.
- **COUNTBLANK**: Counts the number of empty cells in a range.
- **COUNTIF**: Counts the number of cells in a range, that meets a given criteria.
- **COUNTIFS**: Counts the number of cells in a range, that meets a single or multiple criteria.
- **DATEDIF**: Returns the difference between two date values, based on the interval specified.
- **FIND**: Returns the location of a substring in a string. The search is case-sensitive.
- **IF**: Returns one value if the condition is TRUE, or another value if the condition is FALSE.
- **LEN**: Returns the length of the specified string.
- **MID**: Extracts a substring from a string (starting at any position).
- **TEXT**: Converts a value to text in a specific number format. For example, the leading zeros will fall off, such as Fund 0100 becomes 100. To convert it back to 4-digits, use the formula =TEXT(cell location,"0000").
- **MATCH**: Returns the relative position of an item in an array that matches a specified value in a specified order. You can use this when comparing two columns to ensure that the values in the columns match.

Mail Merge (into MS Word)

Mail merge is used to create multiple documents at once. These documents have identical layout, formatting, text, and graphics. Only specific sections of each document varies and is personalized. The documents Word can create with mail merge include bulk labels, letters, envelopes, and emails. There are three documents involved in the mail merge process:

- Your main document (Word document)
- Your data source (your PeopleSoft query exported to Excel)
- Your merged document (The final product)

Additional Resources

Listed below are a few good resources for information about Excel functions.

How to Excel for PeopleSoft
- *http://www.sdcoe.net/business-services/Pages/psexcel.aspx*
- This webpage was created by SDCOE Business Services and is specific to using Excel with PeopleSoft. It includes video tutorials, detailed reference guides and recorded webinars of trainings.

Microsoft Office Excel Help Center
- *https://support.office.com/en-IN/Excel*
- This is Microsoft Office's support page for Excel.

Excel Exposure
- *https://excelexposure.com*
- A free online Excel class with video tutorials.

Formulas and Functions - Listed by Category
- *https://www.techonthenet.com/excel/formulas/index.php*
- A list of formulas and functions and their descriptions.
- The *https://www.techonthenet.com* website is an excellent source of information for many other types of software technologies.

The 100+ Excel 2016 Shortcuts You Need to Know, Updated for Windows and Mac
- *https://www.wallstreetprep.com/knowledge/excel-shortcuts*
- This resource is for Excel 2016 users.

15 Excel Formulas, Keyboard Shortcuts & Tricks That'll Save You Lots of Time
- *https://blog.hubspot.com/marketing/excel-formulas-keyboard-shortcuts*
- This resource has great visual examples.

How to Create a Pivot Table in Excel: A Step-by-Step Tutorial (With Video)
- *https://blog.hubspot.com/marketing/how-to-create-pivot-table-tutorial-ht*
- Scroll down the page to the "*How to Create Pivot Tables in Excel*" section and there is a video with step-by-step instructions.