

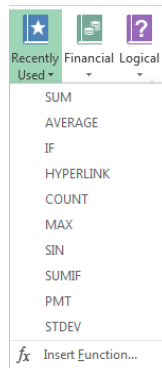
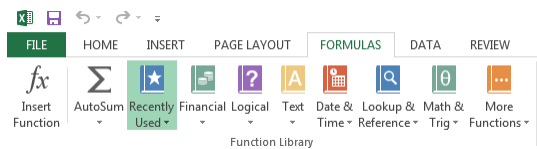
## Spreadsheets: Part 2

You will learn about some important features of Excel.

Online MS-Office information source:

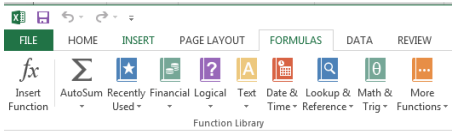
<https://support.office.com/>

## Pre-Created Excel Formulas



## What Function Is Right For Your Situation?

- Excel provides reminders.
- Built in functions are grouped into the ‘formulas’ tab on the ribbon



- Also Excel provides “name completion” and “tool tips”

	A	B	C	D	E	F	G	H	I	J	K
1	Student	Assignment grade point	Exam grade point	Term grade point		Component	Weight				
2	1	4.2	3.3	3.66		Assignment	0.4				
3	2	3.3	3.7	3.54		Exam	0.6				
4	3	2.3	1	1.52							
5	4	4	4	4							
6	AVERAGES	3.45	3								
7											
8											
9											
10											
11											
12											

A tooltip is displayed over the cell containing the formula `=AVERAGE(D2:D5)`. The tooltip text reads: "Returns the average of the absolute deviations of data points from their mean. Arguments must contain numbers." The tooltip is enclosed in a blue dashed border.

## Input Format For Excel Functions

- Required input is typically a **range of cells**
  - **Format:**  
=FUNCTION(<start cell> : <end cell>)
  - **Example:**  
=AVERAGE(A1:A3)
- Alternatively input may be **fixed inputs** (type data directly into the brackets)
  - =AVERAGE(20,30,10)

For the exam you can see either form
- **Optional function inputs (“arguments”)**  
Distinguished by the use of square brackets [optional argument]  
=IF (<condition to check>,  
    <return value: condition true>,  
    [<return value: condition false>])

## Basic Statistics

- **Example spreadsheet:**
  - 10\_basic\_statistics
- Example formulas: SUM(), AVERAGE(), MIN(), MAX()
- General usage:
  - Each formula requires as input a sequence of numbers
  - E.g., formula(1,2,3):
    - Sum = 6 , =SUM(1,2,3)
    - Average = 2 , =AVERAGE(1,2,3)
    - Min = 1 , =MIN(1,2,3)
    - Max = 3 , =MAX(1,2,3)

## Basic Statistics (2)

- Referring to a range of cells

	A	B	C
1			Sales
2			Chinook
3	Sales person	Manager	\$105,000.00
4		Assistant	\$117,000.00
5		Employee1	\$66,000.00
6		Employee2	\$75,000.00
7		Employee3	\$55,500.00
8			
9		STORE STATISTICS	
10	Store: total sales	\$418,500.00	=SUM(C3:C7)
11	Store averages	\$83,700.00	=AVERAGE(C3:C7)
12	Store: highest	\$117,000.00	=MAX(C3:C7)
13	Store: lowest	\$55,500.00	=MIN(C3:C7)

## Basic Statistics (3)

- FYI: Ranges can span multiple rows and columns

	A	B	C	D	E	F	G	H
1		Sales At Each Location						
2	Sales person		Chinook	Market Mall	Sunridge			
3		Manager	\$105,000.00	\$136,500.00	\$100,000.00			
4		Assistant	\$117,000.00	\$125,000.00	\$50,000.00			
5		Employee1	\$66,000.00	\$64,000.00	\$500,000.00			
6		Employee2	\$75,000.00	\$85,000.00				
7		Employee3	\$55,500.00					
8								
9		STORE STATISTICS				OVERALL STATISTICS		
10	Store: total sales	\$418,500.00	\$410,500.00	\$650,000.00		Calgary: total sales	\$1,479,000.00	
11	Store averages	\$83,700.00	\$102,625.00	\$216,666.67		Calgary: employee average	\$123,250.00	
12	Store: highest	\$117,000.00	\$136,500.00	\$500,000.00		Calgary: highest employee	\$500,000.00	
13	Store: lowest	\$55,500.00	\$64,000.00	\$50,000.00		Calgary: lowest employee	\$50,000.00	

=SUM(C3:E7)

## Counting Functions

- All of these functions tally up the number of cells that do or do not contain a certain type of data e.g., numbers, blank cells...
- General usage:  
FUNCTION(<start cell range> : <end cell range>)  
  - An array (list) of inputs can be the function argument but this is rare except for illustration or examination purposes e.g., =COUNT(1, "A", 2)

## Counting Functions: COUNT ( )

- Counts the number of cells within the specified range that contain a numeric value.
- <https://support.office.com/en-US/article/COUNT-function-A59CD7FC-B623-4D93-87A4-D23BF411294C>

	Col C
13	0
14	2
15	"A"
16	
COUNT	=COUNT(C13:C16)

Q: What is the result?

## Counting Functions: COUNTA ( )

- Counts the number of cells within the specified range that *aren't empty*
- <https://support.office.com/en-US/article/COUNTA-function-7DC98875-D5C1-46F1-9A82-53F3219E2509>

	Col C
13	0
14	2
15	"A"
16	
COUNTA	=COUNTA(C13:C16)

Q: What is the result?

## Counting Functions: COUNTBLANK ( )

- Counts the number of empty cells within the specified range
- <https://support.office.com/en-US/article/COUNTBLANK-function-6A92D772-675C-4BEE-B346-24AF6BD3AC22>

	Col C
13	0
14	2
15	"A"
16	
COUNTBLANK	=COUNTBLANK(C13:C16)

## Counting Functions: Spreadsheet Example

- Example spreadsheet: 11\_counting\_functions**

	B	C	D	E	F
1		Sales At Each Location			
2		Sunridge	Market Mall	Chinook	Future location
3	Manager	\$100,000.00	\$136,500.00	\$105,000.00	
4	Assistant	\$50,000.00	\$125,000.00	\$117,000.00	
5	Employee1	\$50,000.00	\$64,000.00	\$66,000.00	
6	Employee2		\$85,000.00	\$75,000.00	
7	Employee3			\$55,500.00	
8					
9	<b>Counting functions</b>				
10	Number employees	3	4	5	0
11	Number unstaffed positions	2	1	0	5
12					
13	Employee slots filled	12			
14	Employee slots vacant	3			

=COUNT(C3:E7)  
 =COUNTBLANK(C3:E7)

- COUNT ( ) : Also used in Row 10
- COUNTBLANK ( ) : Also used in Row 11

## Counting Functions: Spreadsheet Example (2)

- COUNTA(): Number of cases where the employee name has been entered into the system.
  - That is, blank cells can be either for unstaffed positions or cases where the name of the staff member has not yet been entered.

	A	B	C	D	E
1		Sales At Each Location			
2		Sunridge	Market Mall	Chinook	Future location
3	Manager	Ron Ridge	Dean Perkins	Don Torrie	
4	Assistant		James Tam	2cool Person	
5	Employee1		Dave Meek		
6	Employee2				
7	Employee3				
8					
9	<b>Counting functions</b>				
10	Current staffing	1	3	2	0
11	Vacancies	4	2	3	5

**=COUNTA(B3:B7)**

## Lookup Functions

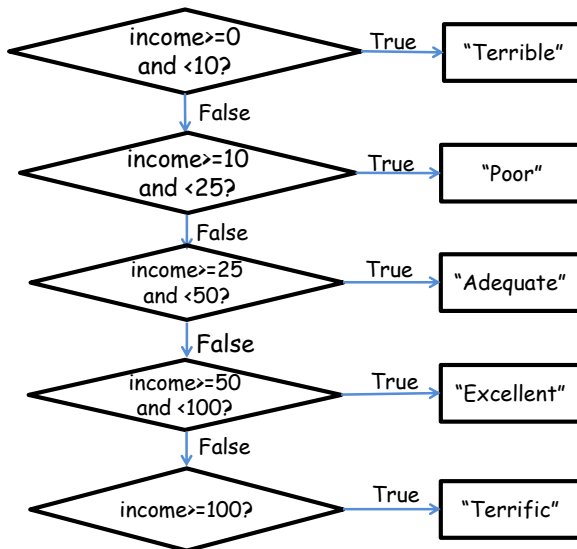
- One common use of a lookup function is to determine which category that some numeric value resides.
- Membership in a category is often determined by ranges:
  - Mapping raw scores to a letter grade.
  - Determining your 'tax bracket'.
  - Evaluating your "FICO" credit score.

## Lookup Tables

- Lookup functions require a 'lookup table' that specifies the ranges.
  - Example: for your given grade in a course, a lookup table specifies the various cutoffs for the different letter grades.
  - Similar to a lookup table containing constants but these examples are for a range of values (there are strict requirements in the format) rather than a single value.
- **Important format requirements** for the **first column** of the lookup table examples covered this term:
  - table values must be in **ascending order**,
  - column values can only be **numeric**.
- In the example the data in cells **D11 – D15** follow these requirements.

	D	E
10	Min income	Comment
11	0	Terrible
12	10	Poor
13	25	Adequate
14	50	Excellent
15	100	Terrific

### Example: Specifying Conditions



Min income	Comment
0	Terrible
10	Poor
25	Adequate
50	Excellent
100	Terrific

According to the values in this table: a numeric value < 0 is an error condition

## VLOOKUP

- Official link for help

- <https://support.office.com/en-US/article/VLOOKUP-function-0BBC8083-26FE-4963-8AB8-93A18AD188A1>

- **Format:**

VLOOKUP(<Lookup value>,  
 <Lookup table Start : End>,  
 <Lookup table Column specifying the return value>)

- **Example:**

=VLOOKUP(B2, D11:E15, 2)

Cell:  
 Contains value to find in  
 table e.g., a grade point

Lookup table:  
 Start : End  
 cell coordinates

Lookup table:  
 Column value to return, for  
 this example:  
 (1 = first col. = 'D',  
 2 = second col. = 'E')

## VLOOKUP: Investments

- **Example spreadsheet: 12\_vlookup**

	A	B	C
1	Stock	Net income (millions of \$)	Invest?
2	PEAR	\$1,000.00	Terrific
3	TAM	\$50.00	Excellent
4	SCAM	\$1.00	Terrible

=VLOOKUP(B2,D11:E15,2)

	Col D (1 <sup>st</sup> )	Col E (2 <sup>nd</sup> )
	Min income	Comment
11	0	Terrible
12	10	Poor
13	25	Adequate
14	50	Excellent
15	100	Terrific

## VLOOKUP: Multi-Column (3+) Lookup Table

- Name of example spreadsheet:  
13\_vlookup\_multiple\_columns

### Lookup function

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D
1	Stock	Net income (millions of \$)	Invest?	
2	PEAR	\$1,000.00	Terrific	
3	TAM	\$50.00	Excellent	

The formula bar shows: `=VLOOKUP(B3,$C$11:$E$15,3)`

### Lookup table

	Col 1	Col 2	Col 3
10	Min income	Max income	Comment
11	0	Less than 10	Terrific
12	10	Less than 25	Poor
13	25	Less than 50	Adequate
14	50	Less than 100	Excellent
15	100	None	Terrific

## Conditional Counting Function

- Increases a tally count if one or conditions have been met
- COUNTIF ( )

## Conditional Counting Function: COUNTIF ( )

- Counts the number of cells that meets a particular requirement
  - How many employees of a multi-national corporation are Canadian?
  - How many students in a class were awarded an “A+” grade?
  - Example below: Count the number of cells within the range that contain a positive numeric value.

	A
1	0
2	2
3	A
4	=COUNTIF(A1:A3,">0")

– <https://support.office.com/en-US/article/COUNTIF-function-E0DE10C6-F885-4E71-ABB4-1F464816DF34>

## Conditional Counting Function: COUNTIF ( ), 2

	A
1	0
2	2
3	A
4	=COUNTIF(A1:A3, "B")

## COUNTIF ( ): Full Example

- **Example spreadsheet: 14\_countif**
- Conditions tallied
  - Which employees met quota? (If the cell contains “Yes”)
  - Which employees had sales that were deemed as high (above \$100,000)

	A	B	C
	Employee	2017 sales quota met?	2017 sales in \$
1			
2	James	Yes	\$100,000
3	Dave	Yes	\$123,456
4	Ernie		\$55,000
5	Ron		\$66,000
6	Don	Yes	\$118,000
7	Lucie		\$75,000

	A	B
9	# Met quota	3
10	High sales	2

=COUNTIF (B2 :B7, "YES")

=COUNTIF (C3 :C8, ">100000")

## Recall: From Word Mail Merge Filters

- Example Mail merge filters covered previously
  - Filter rule based on age:
    - 65 and over: “You get a seniors discount.”
    - Under 65: “No seniors discount.”
- The If-Then-Else filter checks if a condition has been met e.g. a field in the spreadsheet data source was equal to some value.
  - If the condition has been met (**condition = true**) then display a message.
  - If the condition has not been met (**condition = false**) then display another message.

Insert Word Field: IF

IF

Field name: Age Comparison: Greater than or equal Compare to: 65

Insert this text: You get a seniors discount.

Otherwise insert this text: No seniors discount.

## New Terminology

- **A Boolean expression** takes a condition (a comparison such as degree being equal to 'B.Sc.')
- The conditions must be specified to yield either a Boolean result.
- **Boolean / Boolean value:** must be either true or false

The screenshot shows a dialog box titled "Insert Word Field: IF". Inside, there are three fields: "Field name:" with a dropdown menu showing "Age", "Comparison:" with a dropdown menu showing "Greater than or equal", and "Compare to:" with a text input field containing "65".

The result of this comparison is Boolean (the condition can only be met or not met).

- Examples of statements that must be true or false:
  - A job applicant has been awarded a B.A. degree.
  - The customer is a senior citizen.
  - It is below freezing [freezing point of water] today.

## Format: IF - ELSE

- **Format:**

```
=if (<Boolean expression>,
    <Boolean return value: condition true>,
    [<Boolean return value: condition false>])
```

  - Reminder: square brackets [] is the notation used by Microsoft for optional arguments
- **Example:**

```
=IF (B2>=100, "GO!", "Don't waste your $")
```
- **Official help link**
  - <https://support.office.com/en-US/article/IF-function-69aed7c9-4e8a-4755-a9bc-aa8bbf73be2?CorrelationId=6aeb3056-a94b-47ac-af6e-90dff250a029>

## Excel IF-Function: Investing Example

- In column 'C' the sheet will display "GO!" if net income is 100 (millions of \$) or greater "Don't waste your \$" otherwise.
- **Example spreadsheet:** 15\_if\_invest\_or\_not

**Boolean expression**

=IF (B2>100, "GO!", "Don't waste your \$")

Return: condition true Return: condition false - "else case"

	A	B	C
		Net income (millions of \$)	Invest?
1	Stock		
2	PEAR	\$1,000.00	GO!
3	TAM	\$888.00	GO!
4	POOR	\$1.00	Don't waste your \$
5	Average	\$629.67	GO!

## Comparators

Mathematical representation	Excel representation	Meaning
<	<	Less than
>	>	Greater than
=	=	Equal to
≤	<=	Less than, equal to
≥	>=	Greater than, equal to
≠	<>	Not equal to

## Example Return Values

Type of return value	Example return value	Example use
Text	"GO"	=IF (B2>100,"GO!", "No go")
Numeric	4, 4.0	=IF (C3="A+", 4.3, -1)
Cell reference	A2, A3	=IF(A1>0,A2,A3)
Boolean	True, False	=IF(1>2,True,False)

## IF: Specifying Only The True Case (Poor Approach)

- **Example spreadsheet:**  
16\_if\_else\_invest\_or\_not\_NO\_FALSE\_return
- If only a return value for the true case has been specified:
  - When the condition has not been met (False result from the Boolean expression)...literally the text "FALSE" will be displayed.

	A	B	C
1	Stock	Net income (millions of \$)	Invest?
2	PEAR	\$1,000.00	GO!
3	TAM	\$888.00	GO!
4	POOR	\$1.00	FALSE
5	Average	\$629.67	

=IF(B4>100,"GO!")



## Logical AND: All Restrictions

- Used when **all conditions** / Boolean expressions (BE) must be true
- Example:
  - Prerequisites for CPSC 233: Introductory programming course as well as discrete math (“as well as” = AND in this case).
  - Intro programming grade  $\geq$  C- AND Math grade  $\geq$  C-
 

**Condition 1 /  
BE 1**

**Condition II  
/ BE 2**
  - If either course grade is not satisfactory it’s false that the requirement is met.
    - With Logical-AND if *any Boolean Expression* is false then the **entire compound condition is made false**.
  - Only if all course grades satisfactory will it be true that the pre-requisites have been met.
    - With Logical-AND only if *all conditions are true* will the **entire compound condition be true**.

## Logical AND: Many Conditions

- To evaluate the result just extend the general rule:
  - Multiple AND-expressions **must all be true** for the overall **result** to be **true**.
  - If **at least one** expression is **false** then the overall **result** is **false**.
- Example:
  - Internet search: “**James Tam**” **CPSC Calgary**
    - Before a webpage appears as a search result, all three conditions must be met (the three text phrases must appear in that page).
      - The more search phrases that you include, the more narrow will be your results (fewer).
  - A course with 3 or more prerequisites.
  - Job applicants must meet 3 or more requirements e.g. Applicant must be an adult, awarded a university undergraduate degree (or a superior degree), overall grade point from that degree must be at least 3.0.

## Logical OR: At least One Restriction

- Used when **at least one** condition / Boolean expression (BE) must be met (true).
- Example:
  - Prerequisites for CPSC 233: One of CPSC 217 or 231
  - CPSC 231 GPA  $\geq$  C- OR CPSC 217 GPA  $\geq$  A-
 

**Condition 1**  
**/ BE 1**

**Condition 2 /**  
**BE 2**
  - If at least one of: CPSC 217, 231 was completed satisfactorily, then the intro programming requirement was met.
    - With Logical-OR if *any* condition / Boolean Expression is true then the **entire compound condition is made true**.
  - Only if no courses were completed satisfactorily then the programming requirement has not been met.
    - With Logical-OR only if *all* conditions are false will the **entire compound condition be false**.

## Logical OR: Many Conditions

- As was the case with Logical-AND to evaluate the result just extend the general rule:
  - If **at least one** expression is true then the overall **result is true**.
  - Multiple OR-expressions **must all be false** for the overall **result** to be **false**.
- Example:
  - Internet search: “Wayne Gretzky” **OR** “The Great One” **OR** “Number 99” **OR** “Number ninety nine”
    - A website that includes at least one of the text phrases will be shown as a search result.
      - Increasing the number of OR-expressions will broaden (increase) the number of search results.
  - A course with a choice of prerequisites.
  - Job applicants can be awarded one of a number of degrees e.g. B.A., B.Comm, B.Sc. etc.

## Mixed Logical Expressions

- AND, OR conditions can be combined in actual usage.
- Example:
  - Internet search: “Wayne Gretzky” **OR** “The Great One” **OR** “Number 99” **OR** “Number ninety nine” **AND** “Edmonton Oilers”
    - A website will show as a search result if it contains at least one of the three ‘names’ as well as containing the text “Edmonton Oilers”.
  - Course prerequisites: CPSC 233 requires one of: CPSC 217, 231 as well as Math 271
    - In actual usage logical operators may be implicit so you should be able to interpret plain English descriptions in an assignment or during an examination.
    - CPSC 217 OR CPSC 231 AND MATH 271
    - With logic and software ‘AND’ is a higher order precedence than OR so the above is not evaluated left-right, the above is the same as:
      - CPSC 217 OR (CPSC 231 AND MATH 271)
    - (CPSC 217 OR CPSC 231) AND MATH 271 (To avoid confusion bracket expressions to make things explicit).

## Logical Functions In Excel

- The basic logical operations: AND, OR can be invoked as functions in Excel
  - Similar to evaluating logical expressions on paper, all Excel logical function inputs can only be a True or False value.
  - Function inputs can be:
    - Boolean **constant** e.g. AND(**True**, **False**, **False**)
    - Boolean **expression** e.g. OR(A1>0, A2>0, 3>2)
    - A **cell** that contains a Boolean value e.g. AND(A1, A2), OR(B1, Z2)
- **Format:**
  - AND(<True or False>, <True or False>...)
  - OR(<True or False>, <True or False>...)

## Types Of Inputs: Logic Functions

- **Examples** (spreadsheet name: 18\_logic)  
`AND(C1>=45,D1="John Smith")`  
`OR(C1>=0,D2>=0)`

## New Terminology: **Nested Calculation**

- Nested calculation: one calculation is nested within another second calculation when the **result of the first calculation is used to determine the result of the second calculation.**
- Simple example:
  - *Calories expended* = (**height + 7**) \* 100
- More complex example:
  - First calculation: determine the total cost of salaries and other expenditures for each Canadian province.
  - Second calculation: determine total for all sources of revenue for each province.
  - Third calculation: calculate the surplus (of deficit) for each province  
 = (**sum all provincial revenues**) - (**total provincial expenditures**)
  - The calculations for revenues and expenditures are nested within (part of) the calculation for the surplus (or deficit)



## Logic And IF's: Example

- Being on the Dean's list requires: a grade point of 3.7 or higher and a full load 5 or more courses.
- AND Excel example: Dean's list
  - Signify when a student has made the Dean's list requirements with an "D", blank cell otherwise.

```
=IF(AND(B4>=3.7,C4>=5),"D","")
```

	A	B	C	D
2	Student	Overall GPA	Number courses	Dean's list
3	1	4	1	
4	2	3.9	5	D
5	3	2.3	5	
6	4	3.7	5	D

- **Example spreadsheet:** 19\_if\_with\_logic

## Logic And IF's: Example (2)

- OR Example: Hired if at least one requirement has been met:
  - work experience of 5+ years,
  - grade 3.7 or higher
  - (Same spreadsheet as previous example)

E12

Total work experience
7

G16

Overall GPA
3.6

```
=IF(OR(E12>=5,G16>=3.7),"1+ requirement met","")
```

## Conditional Formatting

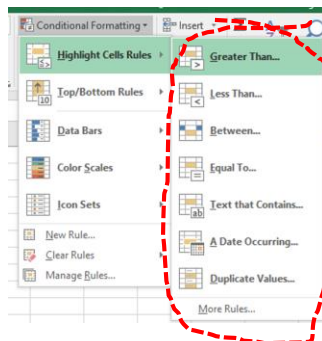
- **Example spreadsheet:** 20\_conditional\_formatting
- It can be used to visually highlight data which has met a certain condition.

	A	B
1	<b>Employee</b>	<b>2017 sales in \$</b>
2	James	\$100,000
3	Dave	\$123,456
4	Ernie	\$55,000
5	Ron	\$66,000
6	Don	\$118,000
7	Lucie	\$75,000

Highlight if sales exceeds 100,000

## Setting Conditional Formatting

- Home Tab-> (Styles group: Conditional formatting)



If you don't know much about visual design then keep it simple, stick to the basics!

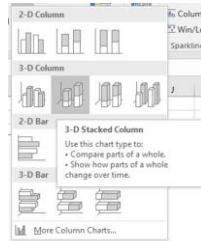
- With the previous example select:
  - “Greater Than”
  - Enter 99999.99 with “Light Red Fill with Dark Red Text”

## Ways Of Graphically Representing Information

- Pie chart



- Bar graph
  - Excel: Column (vertical), bar (horizontal)



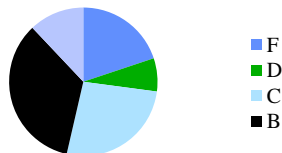
- Line graph



## Pie Charts

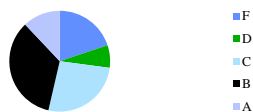
- Good for showing proportions, how much of the whole does each item contribute.

**Grade distribution**



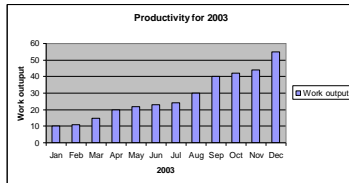
- It's poor for showing exact numeric values.

**# of students receiving each grade**

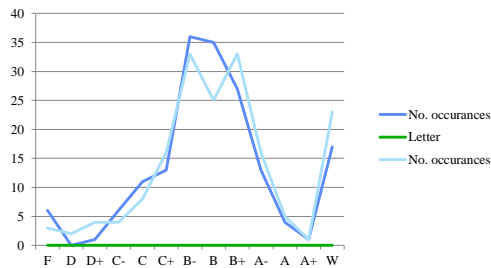


## Bar And Line Graphs

- For showing trends



- Comparing functions



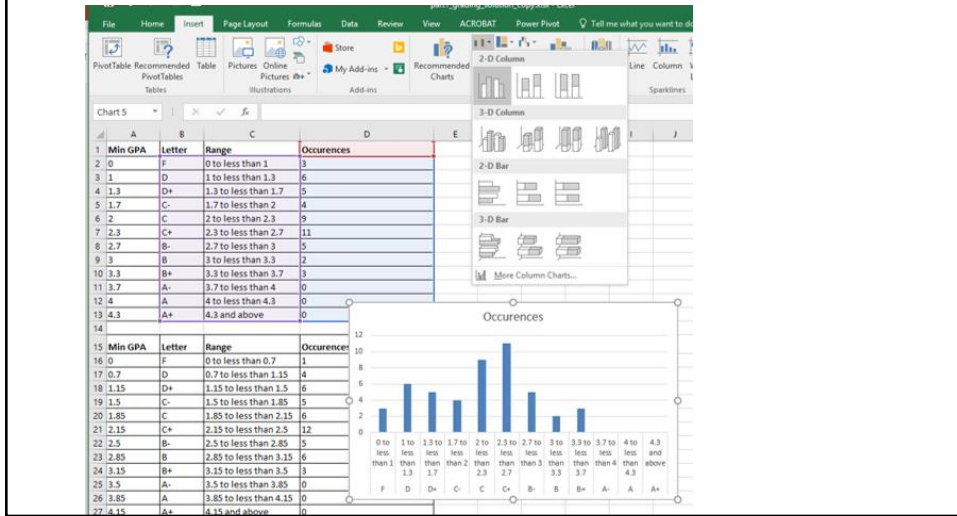
## Creating Graphs Using Excel: Specifying Data

- Select the range of cells

Letter	Range	Occurences
F	0 to less than 1	3
D	1 to less than 1.3	6
D+	1.3 to less than 1.7	5
C-	1.7 to less than 2	4
C	2 to less than 2.3	9
C+	2.3 to less than 2.7	11
B-	2.7 to less than 3	5
B	3 to less than 3.3	2
B+	3.3 to less than 3.7	3
A-	3.7 to less than 4	0
A	4 to less than 4.3	0
A+	4.3 and above	0

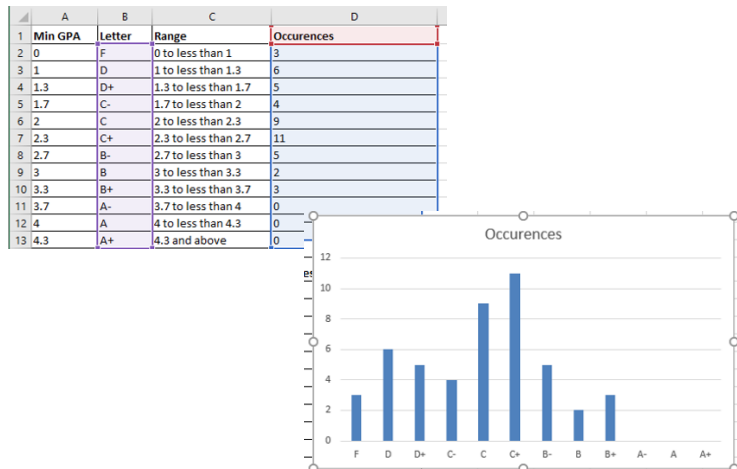
## Creating Graphs Using Excel: Inserting Graph

- Insert-> (Charts Group: Type of graph e.g. 2D Column)

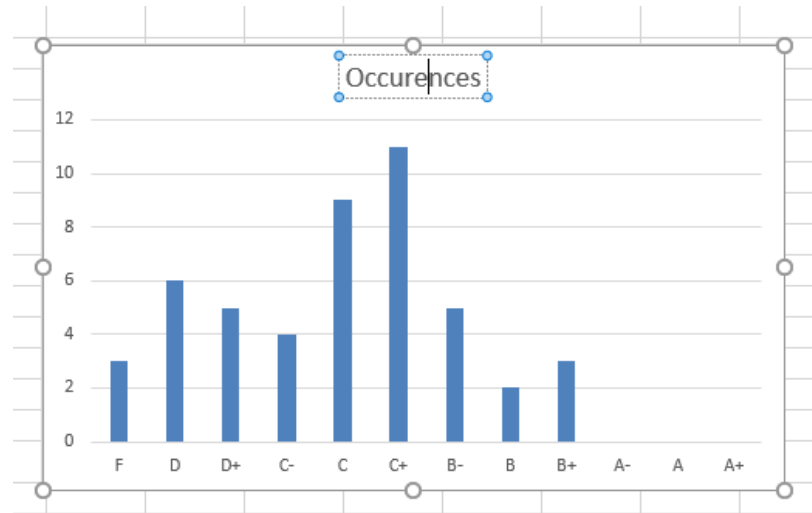


## Creating Graphs Using Excel: Choosing Specific Data

- To select non-adjacent columns select the first column, press and don't release control and then select the next column.



## Editing The Graph Title (And Other Parts)



## Rules Of Thumb For Graphs

1. What type of graph to use:
  - a) Bar graphs are used to plot non-continuous data e.g., the number of patients that go to different hospitals.
  - b) Line graphs are used to plot continuous data e.g., mortality trends over time.
2. JT: Avoid or minimize the use 3D graphics! Keep things simple.

### After This Section You Should Now Know

- How to use basic statistical formulas: `sum()`, `average()`, `min()`, `max()`
- How to use counting functions: `count()`, `counta()`, `countblank()`, `countif()`
- How to use the lookup function: `vlookup()` and how to properly define lookup tables
- A conditional counting function: `countif()`
- The 'if-else' function
- Logic functions: `and`, `or`

### After This Section You Should Now Know (2)

- What is a nested function: Using the output of one function become the input of another function, example: `and`, `or` in conjunction with `if-else`
- How to apply conditional formatting to a spreadsheet
- When to use pie charts vs. bar graphs vs. line graphs
- How to use graphs in Excel

## Images

- “Unless otherwise indicated, all images were produced by James Tam

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