AUTOMATE THE ROUTINE, FOCUS ON THE RISK: USING EXCEL

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Agenda

- Data Cleaning
- Essential Formulas
- Tables & Analysis
- Efficiency Tips

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✅ Benefits of Excel Tables

- **Automatic Expansion**: Tables automatically include new rows and columns when you add data.

- **Structured References**: Formulas use clear names like =SUM(tblSales[Total Sales]) instead of =SUM(G2:G121).

- **Built-in Filtering & Sorting**: Drop-down arrows appear on headers for quick analysis.

- **Consistent Formatting**: Tables apply alternating row colors and can be styled with one click.

- **Easy Aggregations**: Built-in **Total Row** quickly calculates SUM, AVERAGE, COUNT, etc.

- **Dynamic Charts & Pivots**: Charts and PivotTables linked to a Table automatically update when data changes.

- **Slicer Compatibility**: Tables support slicers for interactive filtering (like PivotTables).

- **Improved Readability**: Named Table headers make large datasets easier to navigate.

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✅ Benefits of Spill Formulas

•**Dynamic results** → one formula can return multiple values.

•**Automatic resizing** → results expand/contract when data changes.

•**No copying down** → eliminates the need to drag formulas or use Ctrl+Shift+Enter.

•**Cleaner formulas** → simpler than older array formulas.

•**Works with Tables** → structured references adjust as tblSales grows.

•**Supports advanced analysis** → combine with UNIQUE, FILTER, SORT, SEQUENCE.

•**Easy referencing** → use the # operator to point at all spilled results.

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✅ **Benefits of SUMIFS**

•**Multiple conditions** → allows summing values based on more than one criterion (e.g., Region = North *and* Date in January).

•**Dynamic analysis** → works with Excel Tables, so totals update automatically when data grows.

•**Replaces helper columns** → no need to build extra "flags" or filtered totals.

•**Flexible criteria** → supports numbers, text, dates, and wildcards (*, ?).

•**Cleaner reporting** → one formula can summarize by Department, Category, Region, etc., without a PivotTable.

•**Spill compatible** → can be combined with UNIQUE to create dynamic summaries.

•**Faster than manual filters** → instantly recalculates totals without reapplying filters.

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✅ Benefits of XLOOKUP

•**Replaces VLOOKUP & HLOOKUP** → one function works both vertically and horizontally.

•**Lookup in any direction** → no more "lookup column must be on the left" limitation.

•**Exact match by default** → safer and more accurate than VLOOKUP's default approximate match.

•**Simpler syntax** → no need to count column numbers; just reference the return column.

•**Handles missing values gracefully** → built-in "if not found" argument (e.g., "Not Found").

•**Flexible match modes** → supports exact, next smaller, next larger, or wildcards.

•**Dynamic range friendly** → works seamlessly with Tables and spill functions.

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