

Using the Vlookup function

WHAT WOULD I USE IT FOR?

- TO **LINK** TWO DATA SETS TOGETHER E.G. YOU HAVE STAFF ID AND NAMES IN ONE FILE. YOU WANT TO LINK IT TO A FILE THAT HAS STAFF ID AND SALARIES.
- TO **COMPARE** TWO SETS OF DATA E.G. FROM LAST MONTH TO THIS MONTH TO SEE WHAT IS NEW/MISSING

FIRST STEP – WHAT’S THE LINK?

- IDENTIFY WHAT IS THE LINKING COLUMN
- ASK YOURSELF WHAT THAT COLUMN IS IN BOTH DATA SETS...

SECOND STEP – HAVE THEM BOTH VISIBLE

- IF THEY ARE IN SEPARATE FILES, HAVE THEM BOTH OPEN.
- YOU CAN VIEW THEM SIDE BY SIDE BY CLICKING ON **VIEW | ARRANGE ALL | OK**
- IF THEY ARE WORKSHEETS IN THE SAME FILE, CLICK ON **VIEW | NEW WINDOW** FIRST.
- YOU CAN THEN VIEW THE SHEETS SIDE BY SIDE BY CLICKING ON **VIEW | ARRANGE ALL | OK**
- MAKE SURE THE BOX FOR **WINDOWS OF ACTIVE WORKBOOK** IS TICKED

THIRD STEP: POSITION YOUR COLUMNS.

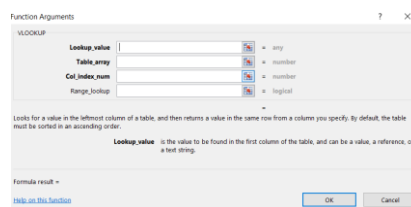
- IN THE WORKSHEET THAT HAS YOUR FORMULA, MAKE SURE WHAT YOU ARE STARTING I.E. THE LINKING DATA IS TO THE **LEFT** OF YOUR FUNCTION.
- IT CAN BE **ABOVE** IT OR **BELOW** IT
- IT **CANNOT** BE TO THE **RIGHT** OF IT – THE FORMULA WON’T WORK.

- WE’LL CALL THIS THE **DESTINATION FILE**
- LET’S CALL THE FILE YOU ARE PULLING THE DATA FROM THE **SOURCE FILE**.

FOURTH STEP: FIND THE VLOOKUP FUNCTION

- MAKE SURE YOU ARE IN THE CELL WHERE YOU WANT TO ENTER THE FORMULA
- CLICK ON **FORMULAS | LOOKUP AND REFERENCE | VLOOKUP**

YOUR VLOOKUP FORMULA LOOKS LIKE THIS AND HAS 4 PARTS:



LOOKUP VALUE

- THIS IS THE CELL IN THIS FILE (**DESTINATION**) TO THE LEFT THAT HAS THE MATCHING DATA YOU WANT TO PULL TOGETHER/DO A COMPARISON ON.

TABLE_ARRAY

- THIS IS THE RANGE OF DATA IN YOUR **SOURCE** FILE THAT YOU WANT TO PULL IN/COMPARE YOUR DESTINATION FILE TO
- THE FIRST COLUMN IN THIS SELECTION MUST HAVE THE MATCHING DATA
- TRY AND INCLUDE ALL THE COLUMNS E.G. A:C TO HIGHLIGHT COLUMNS A TO C INCLUSIVELY.

COL_INDEX_NUM

- **WHEN YOU LOOK AT THE TABLE_ARRAY**, IT WILL HAVE A NUMBER OF COLUMNS
- **THE COL_INDEX_NUM IS** THE NUMBER OF THE COLUMN THAT HAS THE DATA YOU WANT E.G. IF YOU WANTED TO REFERENCE

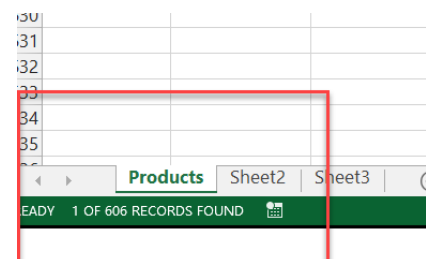
COLUMN C ABOVE, YOU WOULD ENTER 3.

RANGE_LOOKUP

- THIS IS AN OPTIONAL FIELD BUT ENTER **FALSE** IF YOU WANT THERE TO BE AN EXACT MATCH BETWEEN THE TWO COMPARISON FIELDS AND/OR THE FIRST COLUMN FOR THE **TABLE_ARRAY** IS NOT SORTED IN ALPHABETICAL ORDER. (A-Z)
- USE **TRUE** OR LEAVE BLANK IF YOU WANT TO USE THE VLOOKUP TO FIND THE CLOSEST MATCH AND/OR YOUR **TABLE_ARRAY** IS SORTED IN ALPHABETICAL ORDER
- CLICK **OK**

FIFTH STEP: COPY DOWN THE FORMULA

- COPY DOWN THE FORMULA
- YOU SHOULD SEE A LIST OF MATCHING ENTRIES



TROUBLESHOOTING

The N/As have it.

- THIS MEANS THAT YOU NOW HAVE IDENTIFIED THE ENTRIES THAT ARE NOT IN THE MISSING LIST I.E. THE ENTRY IS IN THE DESTINATION FILE BUT NOT IN THE SOURCE FILE.
- THE N/As ARE THE MISSING ENTRIES
- YOU COULD THEN USE THE **IFERROR()** FUNCTION TO SHOW SOMETHING OTHER THAN N/A (SEE PAGE OVER)

Using the Vlookup function

- APPLY A FILTER TO PICK THESE OUT

IFERROR() FUNCTION

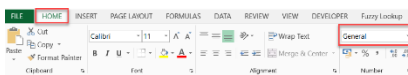
IF YOU WOULD RATHER SEE SOMETHING OTHER THAN N/A, USE THE **IFERROR()** FUNCTION

1. CREATE YOUR FORMULA AS USUAL
2. IN THE FORMULA BAR, CLICK BETWEEN THE = AND THE START OF THE FUNCTION/ FORMULA
3. TYPE IN **IFERROR()**
4. NAVIGATE TO THE END OF THE FUNCTION YOU WANT TO WRAP YOUR **IFERROR()** AROUND
5. ENTER A , (COMMA)
6. TYPE IN WHAT YOU WANT TO SEE INSTEAD OF THE ERROR E.G. "NO MATCH".
7. IF IT'S A NUMBER ENTER WITHOUT QUOTATION MARKS.
8. IF IT'S TEXT, ADD QUOTATION MARKS AROUND THE TEXT.

YOU COULD ALSO USE **CONDITIONAL FORMATTING** TO IDENTIFY THESE ENTRIES.

They are all N/As!

- CHECK THE MATCHING COLUMNS HAVE THE SAME DATA TYPE E.G. IF THE DATA IN THE LOOKUP VALUE IS TEXT AND THE MATCHING COLUMN **data** TYPE IS **NUMBER** – THAT WON'T WORK.
- CHECK ON THE HOME RIBBON UNDER **NUMBER**
- CHANGE THE DATA TYPE AND SEE IF THAT WORKS.
- YOU MAY NEED TO SAVE, CLOSE AND REOPEN THE FILE TO GET IT TO WORK.



VLOOKUPS CAN BE STRANGE SOMETIMES. I'VE HAD CASES WHERE A VLOOKUP() DIDN'T WORK BECAUSE THEY HAD DIFFERENT FONTS...GO FIGURE!

I HAVE OPENED THE FILE AND I JUST SEE REF!

- CHECK THAT THE FILE THE VLOOKUP REFERS TO IS OPEN.
- IF YOU GO TO **DATA | EDIT LINKS** AND THEN CLICK ON **OPEN SOURCE**, THIS WILL OPEN THE FILE AND YOUR ANSWERS SHOULD APPEAR

I CAN SEE BOTH ENTRIES BUT EXCEL IS NOT RECOGNISING THEM

IF YOU HAVE EXTRA SPACES, EXCEL WILL SEE THOSE TWO ENTRIES AS DIFFERENT – EVEN IF THEY LOOK THE SAME.

IF YOU CLICK ON THE ENTRY AND THEN LOOK AT IT IN THE FORMULA BAR, SEE IF THE CURSOR IS RIGHT BESIDE THE ENTRY OR THERE IS A GAP. THAT MEANS THERE ARE EXTRA SPACES WHICH WILL HAVE TO BE CLEANED UP

- USE THE **TRIM()** FUNCTION COMBINED WITH **COPY | PASTE VALUES** TO REMOVE TRAILING SPACES
- ON ANOTHER PART OF THE SHEET, TYPE IN **=TRIM(**
- CLICK ON THE TOP OF THE COLUMN THAT YOU THINK HAS ENTRIES WITH EXTRA SPACES.
- A CELL REFERENCE WILL APPEAR IN THE FORMULA
- PRESS **ENTER**
- COPY DOWN THE FORMULA
- HIGHLIGHT THESE ENTRIES
- CLICK ON **COPY**
- CLICK BACK WHERE YOU WANT THE ENTRIES TO GO.
- CLICK ON **HOME | PASTE | PASTE VALUES**

- (THIS MEANS IT WILL PASTE THE ACTUAL CLEANED DATA, NOT THE FORMULA)

SPEEDING UP YOUR VLOOKUPS

IF YOU NEED TO USE THE SAME LOOKUP VALUE FOR A NUMBER OF VLOOKUPS, TWEAK THE **LOOKUP VALUE** ENTRY TO READ AS FOLLOWS:

1. **\$A1** (THIS WILL ENSURE THE COLUMN WILL NOT MOVE BUT THE ROW WILL CHANGE AS YOU COPY IT ACROSS)
2. IN THE **SOURCE** FILE, ENTER THE NUMBER OF THE COLUMN ACROSS THE TOP E.G. 1 ABOVE COLUMN 1, 2 ABOVE COLUMN 2 ETC.
3. IN THE **COL_INDEX_NUM** PART OF THE FORMULA, INSTEAD OF ENTERING A NUMBER , REFERENCE THE CELL THAT HAS THE NUMBER AND TWEAK IT (USING F4) TO READ AS FOLLOWS: **B\$2**. THIS ENSURES THE COLUMN WILL CHANGE AS YOU COPY IT BUT THE ROW REFERENCE WILL REMAIN THE SAME. THIS MAKES IT EASY TO COPY ACROSS

YOUR EXCEL SURVIVAL KIT: A GUIDE TO SURVIVING AND THRIVING IN AN EXCEL WORLD.



A FULL CHAPTER OF THE BOOK IS DEVOTED TO USING THE VLOOKUP FUNCTION IF YOU WOULD LIKE TO READ MORE.

YOU CAN PURCHASE THE BOOK AT AMAZON – JUST SEARCH FOR "EXCEL SURVIVAL KIT".

YOU CAN GET A SIGNED COPY FOR €10 PLUS P&P FROM ME BY EMAILING anne@the-excel-expert.com . I