



2026

FGFOA Annual Conference

June 13-17, 2026

Loews Sapphire Falls Resort
at Universal



FGFOA **2026** Annual Conference

June 13-17, 2026

Loews Sapphire Resort at Universal Orlando

Speaker



Rebecca Schnirman

Director, Financial & Support Services Division
Palm Beach County Parks & Recreation Department



Palm Beach County
Board of County
Commissioners





Excel Tips & Tricks

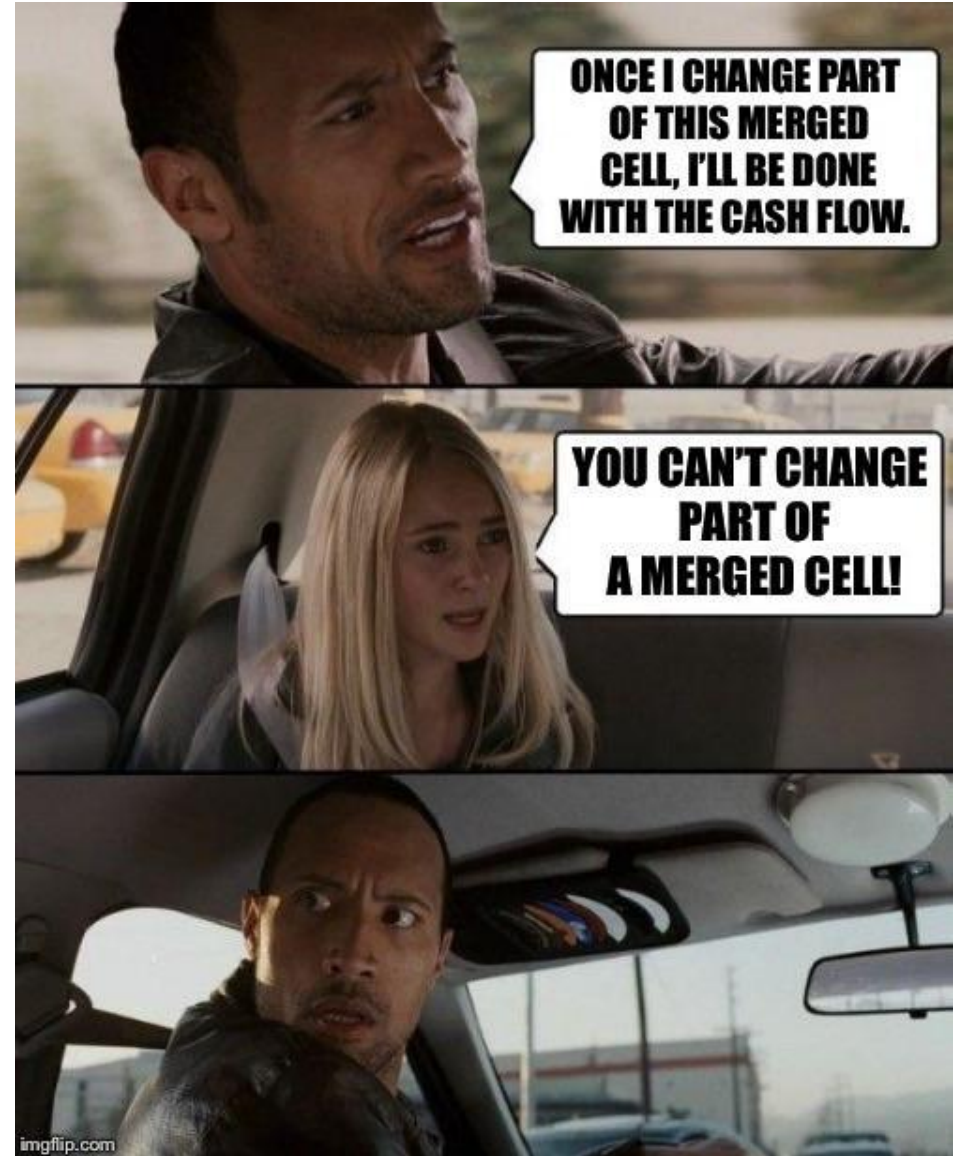
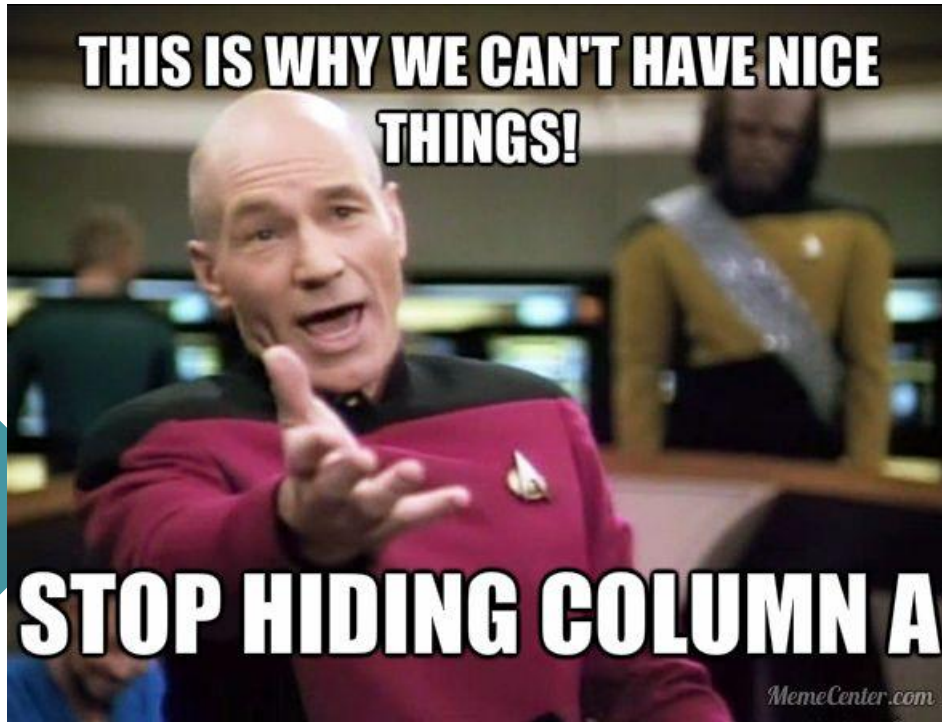
Boost Your Productivity and Master Key Features

Agenda

- Best practices
- Time-saving shortcuts
- Modern Excel formulas (Office 365)
- Data analysis tools
- Real-world examples



Best Practices



Best Practices

Use Consistent Formatting

- Makes reports easier to read
- Helps users quickly identify totals, headers, and key data
- Reduces confusion when sharing files

Avoid Hardcoding in Formulas

- Use cell references instead of typing numbers directly into formulas
- Makes formulas easier to update
- Reduces errors when assumptions change

Use Clear Sheet Names

- Helps users navigate the workbook
- Makes linked formulas easier to understand
- Better than leaving tabs as Sheet1, Sheet2, Sheet3

Keep Raw Data Separate

- Store raw data on one sheet and reports or summaries on another
- Protects source data from accidental changes
- Makes the workbook easier to troubleshoot

Use Data Validation

- Creates dropdowns for consistent entries
- Reduces typos and inconsistent coding
- Helpful for departments, funds, object codes, or status fields

Document Key Assumptions

- Add notes for formulas, rates, dates, or source data
- Helps others understand how the workbook was built
- Makes future updates easier

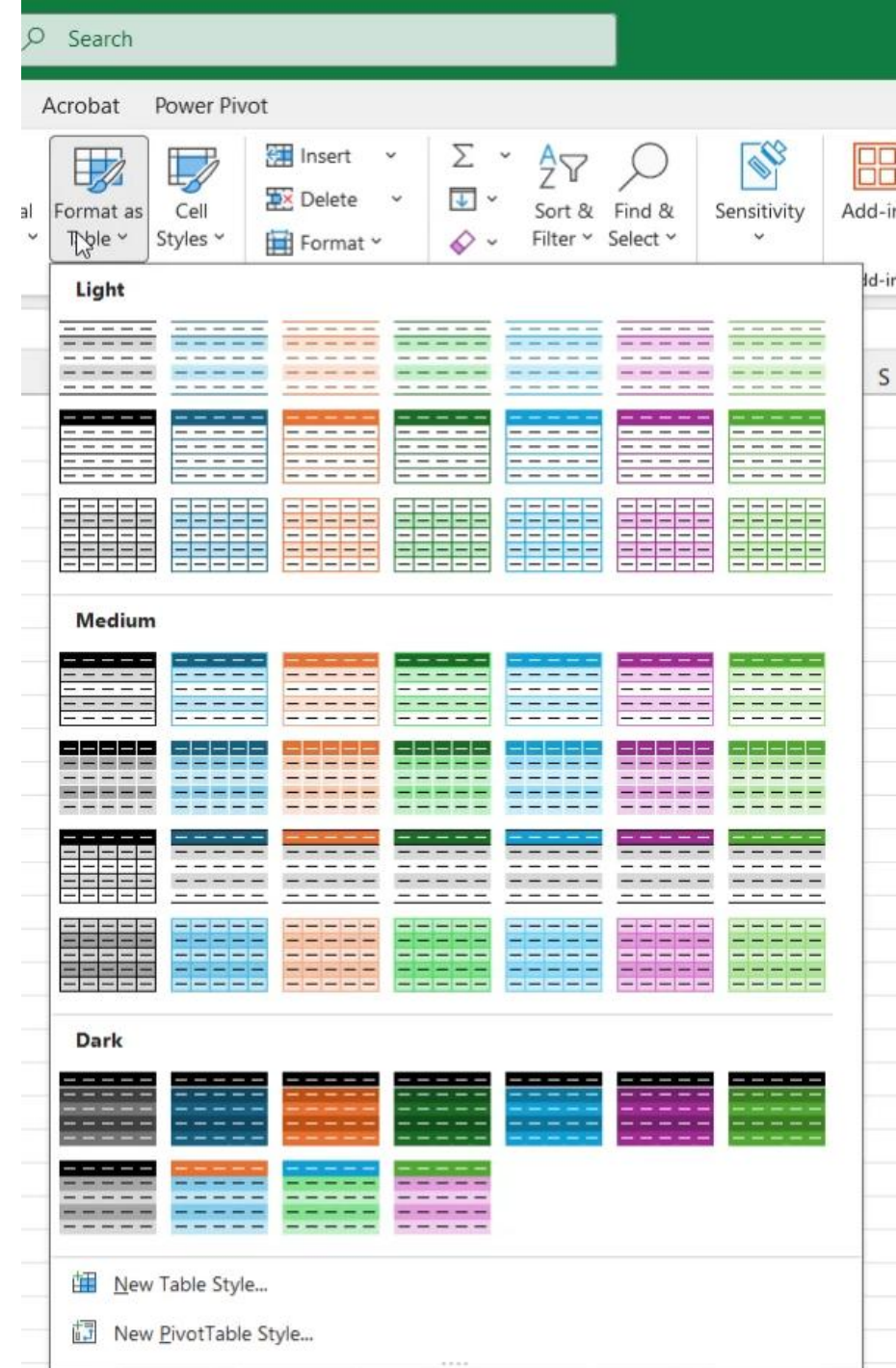
Format as Table

Benefits

- Expands automatically when new data is added
- Formulas are easier to read
- Works well with PivotTables, charts, and Power Query
- Built-in filters and totals row

Reminders

- Structured references can be confusing at first
- Less flexible for custom formatting
- Some formulas or copy/paste actions may behave differently
- Large tables may slow down the file



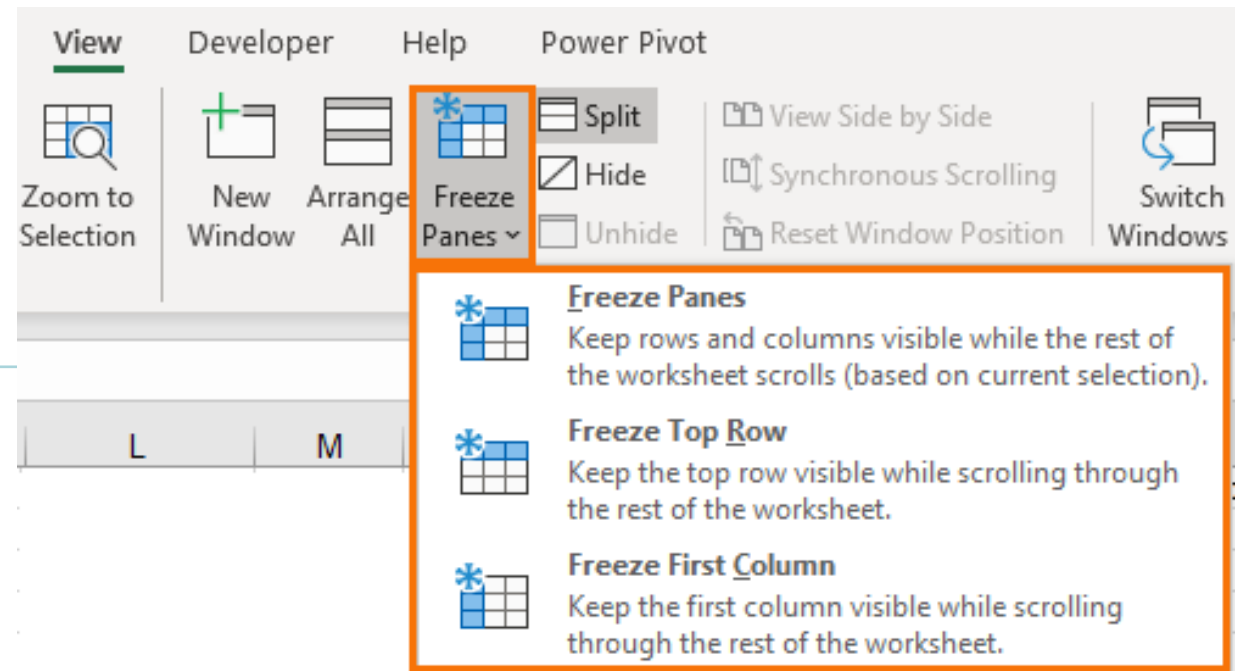
Freeze Panes

Benefits

- Keeps headers visible while scrolling
- Makes large worksheets easier to navigate
- Helps users review data without losing context
- Especially useful for wide or long reports

Reminders

- Freeze the correct row or column
- Remember it only affects screen view, not printing
- Can be turned off easily if the view gets confusing



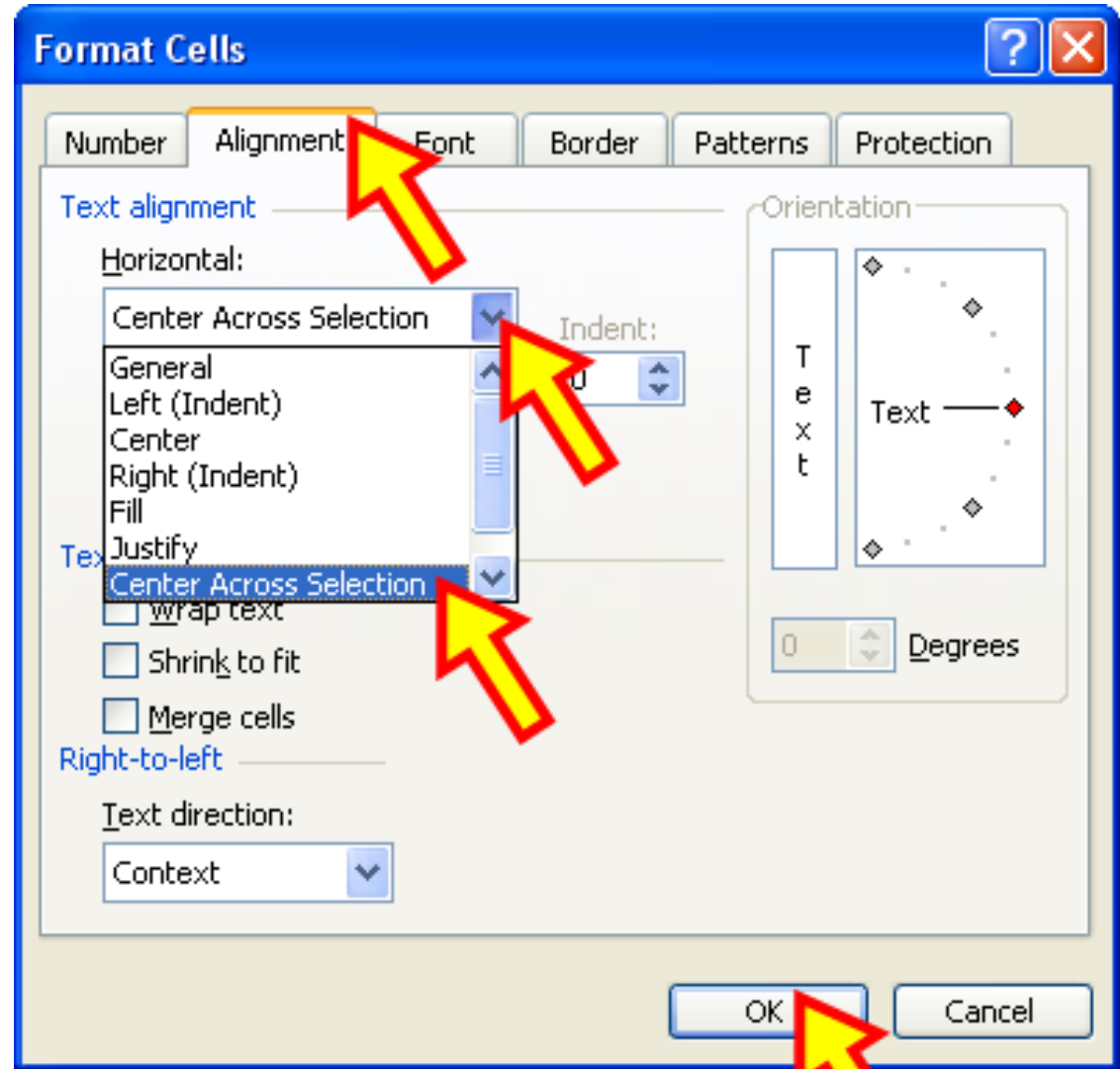
Center Across Selection

Benefits

- Looks like merged cells without merging
- Keeps sorting and filtering working properly
- Avoids issues with copying, pasting, and selecting cells
- Better option for report headers

Reminders

- Only works horizontally, not vertically
- Can be harder to find than Merge & Center
- Other users may not realize the cells are not merged



Me: Didn't save for 47 minutes

Excel: Stops responding

Me:



Time Saving Shortcuts

Keyboard Shortcuts You Should Know

Ctrl + A

- Select all

Alt + =

- AutoSum

Ctrl + F

- Find

Ctrl + T

- Create Table

F4

- Cycle through absolute/relative references (\$A\$1) in formula

F2

- Edit the active cell

Ctrl + S

- Save

Ctrl + C

- Copy selection

Ctrl + X

- Cut selection

Ctrl + V

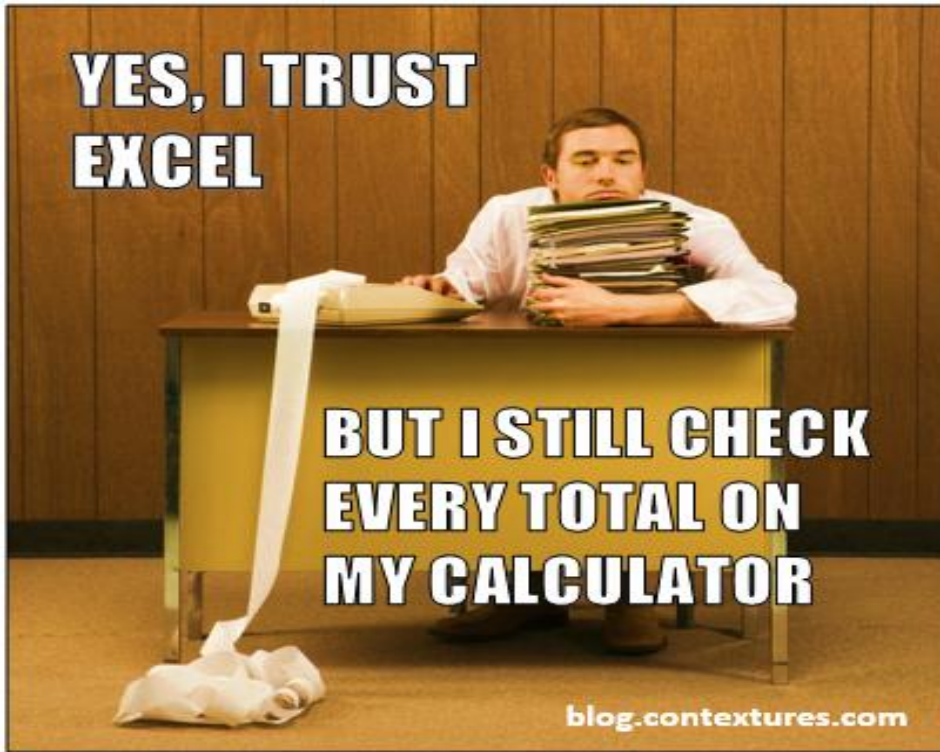
- Paste selection

Ctrl + Y

- Redo recent action

Ctrl + Z

- Undo recent action



Excel Formulas

Beginner Excel Formulas

Formula	What It Does	Example Formula	What's it for?
SUM	Adds numbers together	=SUM(number1, [number2], ...)	Total expenditures or revenues
AVERAGE	Calculates an average	=AVERAGE(number1, [number2], ...)	Average monthly spending
MIN	Returns the lowest value	=MIN(number1, [number2], ...)	Lowest transaction amount
MAX	Returns the highest value	=MAX(number1, [number2], ...)	Highest transaction amount
IF	Applies basic logic	=IF(logical_test, value_if_true, value_if_false)	Flag budget overruns
ROUND	Controls decimal places	=ROUND(number, num_digits)	Control decimal precision in reports
COUNT	Counts numeric cells	=COUNT(value1, [value2], ...)	Count numeric transactions
COUNTA	Counts non blank cells	=COUNTA(value1, [value2], ...)	Count filled records
TODAY	Returns current date	=TODAY()	Timestamp reports
TRIM	Removes extra spaces	=TRIM(text)	Clean imported text data

Intermediate Excel Formulas

Formula	What It Does	Example Formula	What You Would Use It For
XLOOKUP	Finds matching values	=XLOOKUP(lookup_value, lookup_array, return_array, [if_not_found], [match_mode], [search_mode])	Convert fund codes to fund names
SUMIFS	Sums using multiple criteria	=SUMIFS(sum_range, criteria_range1, criteria1, [criteria_range2], [criteria2], ...)	Total spending by fund and year
COUNTIFS	Counts using multiple criteria	=COUNTIFS(criteria_range1, criteria1, [criteria_range2], [criteria2], ...)	Count transactions by criteria
IFERROR	Handles expected errors	=IFERROR(value, value_if_error)	Prevent divide by zero errors
TEXT	Formats values as text	=TEXT(value, format_text)	Format values for reports
LEFT	Extracts text from left	=LEFT(text, [num_chars])	Extract fund code from account string
RIGHT	Extracts text from right	=RIGHT(text, [num_chars])	Extract year or suffix
MID	Extracts text from middle	=MID(text, start_num, num_chars)	Extract department code
CONCAT	Joins text values	=CONCAT(text1, [text2], ...)	Build full account numbers
YEAR	Extracts year from date	=YEAR(serial_number)	Determine fiscal year
PROPER	Capitalizes the first letter of each word	=PROPER(text)	Clean up inconsistently entered text


Advanced Excel Formulas

Formula	What It Does	Formula Syntax	What You Would Use It For
FILTER	Returns dynamic filtered data	=FILTER(array, include, [if_empty])	Show only current fiscal year data
UNIQUE	Returns distinct values	=UNIQUE(array, [by_col], [exactly_once])	List unique funds or departments
SORT	Sorts data dynamically	=SORT(array, [sort_index], [sort_order], [by_col])	Rank expenditures highest to lowest
SORTBY	Sorts based on another column	=SORTBY(array, by_array1, [sort_order1], ...)	Sort by spending amount
LET	Simplifies complex formulas	=LET(name1, value1, calculation)	Simplify complex calculations
LAMBDA	Creates custom functions	=LAMBDA([parameter1, parameter2, ...], calculation)	Create reusable rate formulas
TEXTBEFORE	Extracts text before delimiter	=TEXTBEFORE(text, delimiter, [instance_num])	Extract fund code
TEXTAFTER	Extracts text after delimiter	=TEXTAFTER(text, delimiter, [instance_num])	Extract department or object
SEQUENCE	Generates number series	=SEQUENCE(rows, [columns], [start], [step])	Generate fiscal years
CHOOSECOLS	Selects specific columns	=CHOOSECOLS(array, col_num1, [col_num2], ...)	Create dynamic report views

Common Excel Errors

Error Type	When It Happens	Common Finance Fix
#####	Column is too narrow or a date/time calculation returns a negative value	Auto-fit column, or fix date logic (common in payroll and CIP timelines)
#DIV/0!	A formula divides by zero or a blank cell	Use IF or IFERROR to control results
#N/A	A lookup value cannot be found	Verify lookup tables, then wrap with IFERROR
#NAME?	Excel does not recognize text in a formula (misspelled function or named range)	Correct function spelling or quotation marks
#NULL!	A space was used instead of a comma between ranges	Replace the space with a comma
#NUM!	Invalid numeric calculation (IRR, RATE, etc.)	Review assumptions and input values
#REF!	Formula references a deleted or invalid cell	Undo deletion or rebuild formula using continuous ranges
#VALUE!	Incorrect data type used in a calculation	Convert text to numbers or use proper functions

#N/A
THE "OUR PRINCESS IS IN ANOTHER CASTLE" ERROR
 Happens when a function can't find the data it's looking for.




#####
THE "I NEED MORE SPACE" ERROR
 This simply means that the cell is not large enough to display the value.



#VALUE!
THE "YOU MUST BE JOKING" ERROR
 You've given a function an incorrect argument.



#NAME?
THE "SAY WHAAAT? ERROR
 You provided an incorrect function name or a named range that doesn't exist.



#REF!
THE "I SWEAR IT WAS JUST HERE" ERROR
 A formula used to refer to a cell that doesn't exist any longer.



XLOOKUP

What It Does:

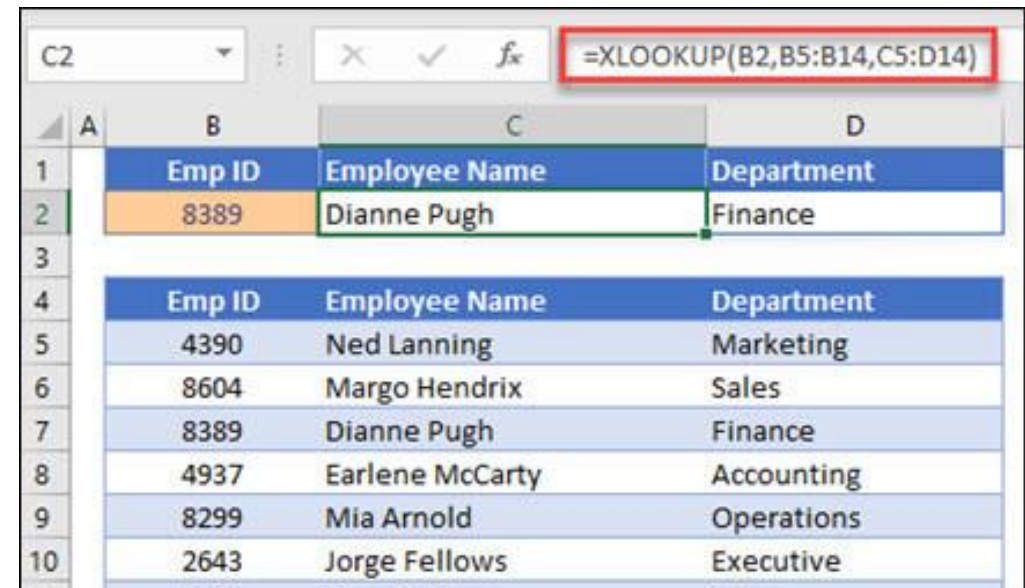
- Finds a value in one column and returns a related value from another column

Basic Syntax

- XLOOKUP(lookup_value, lookup_array, return_array, [if_not_found], [match_mode], [search_mode])

Why Use XLOOKUP?

- Looks left or right
- Exact match by default
- No need to count column numbers
- Cleaner error handling



The image shows an Excel spreadsheet with a table of employee data. The formula bar at the top shows the formula `=XLOOKUP(B2,B5:B14,C5:D14)` in cell C2. The table has columns for Emp ID, Employee Name, and Department. The data is as follows:

Emp ID	Employee Name	Department
8389	Dianne Pugh	Finance
4390	Ned Lanning	Marketing
8604	Margo Hendrix	Sales
8389	Dianne Pugh	Finance
4937	Earlene McCarty	Accounting
8299	Mia Arnold	Operations
2643	Jorge Fellows	Executive

Function Arguments

XLOOKUP

Lookup_value	<input type="text"/>	= any
Lookup_array	<input type="text"/>	= reference
Return_array	<input type="text"/>	= reference
If_not_found	<input type="text"/>	= any
Match_mode	<input type="text"/>	= number

Searches a range or an array for a match and returns the corresponding item from a second range or array. By default, an exact match is used.

Lookup_value is the value to search for.

Formula result =

[Help on this function](#)

OK

Cancel

SUMIFS

Note: *SUMIF/SUMIFS will error if the formula references a cell in a closed workbook. It only works within the same spreadsheet.*

	A	B	C	D	E	F	G
1	Fund	Fiscal Year	Amount				
2	1384	2025	1,200				
3	1384	2024	900				
4	3600	2025	750				
5	1384	2025	500				
6							
7							
8			\$ 1,700	=SUMIFS(C2:C5,A2:A5,"1384",B2:B5,2025)			
9							
10							

What It Does:

- Adds values that meet one or more conditions

Basic Syntax

- SUMIFS(sum_range, criteria_range1, criteria1, [criteria_range2], [criteria2], ...)

Why Use SUMIFS?

- Summarizes data quickly
- Handles multiple conditions at once
- Reduces manual filtering and sorting
- Helps answer specific questions from large datasets

Function Arguments

SUMIFS

Sum_range = reference

Criteria_range1 = reference

Criteria1 = any

Criteria_range2 = reference

Adds the cells specified by a given set of conditions or criteria.

Criteria1: is the condition or criteria in the form of a number, expression, or text that defines which cells will be added.

Formula result =

[Help on this function](#)

IF

	A	B	C	D	E
1	Fund Code	Adopted	Actual	Status (IF Result)	
2	1384	50,000	52,300	Over Budget	=IF(C2>B2,"Over Budget","On Track")
3	3600	75,000	72,400	On Track	
4	1384	40,000	38,900	On Track	
5	3600	60,000	61,200	Over Budget	
6					
7					

What It Does:

- Tests whether something is true or false and returns a result based on the answer

Basic Syntax:

- IF(logical_test, value_if_true, value_if_false)

Why Use IF?

- Adds decision-making to a spreadsheet
- Helps flag items that need attention
- Shows different results based on conditions
- Useful for yes/no, pass/fail, over/under, or status checks

Function Arguments

IF

Logical_test = logical

Value_if_true = any

Value_if_false = any

=

Checks whether a condition is met, and returns one value if TRUE, and another value if FALSE.

Logical_test is any value or expression that can be evaluated to TRUE or FALSE.

Formula result =

[Help on this function](#)

SEQUENCE

What it does

- Creates a list of sequential numbers automatically

Syntax

- `SEQUENCE(rows, [columns], [start], [step])`

Example

- `=SEQUENCE(12)`
Creates a list of numbers from 1 to 12

Why Use SEQUENCE?

- Creates number lists quickly
- Updates automatically if the formula changes
- Useful for numbering rows, periods, months, or years
- Reduces manual typing and dragging formulas

TEXTJOIN | X | ✓ | fx | =SEQUENCE(1,5,2026,1)

	A	B	C	D	E	F
1	Real-World Example					
2						
3	Create a list of fiscal years automatically:	2026,1)	2027	2028	2029	2030
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						

Function Arguments

SEQUENCE

Rows: 1 = 1

Col...: 5 = 5

Start: 2026 = 2026

Step: 1 = 1

= {2026,2027,2028,2029,2030}

Returns a sequence of numbers.

Rows: the number of rows to return.

Formula result = 2026

[Help on this function](#) OK Cancel

CONCAT

What It Does:

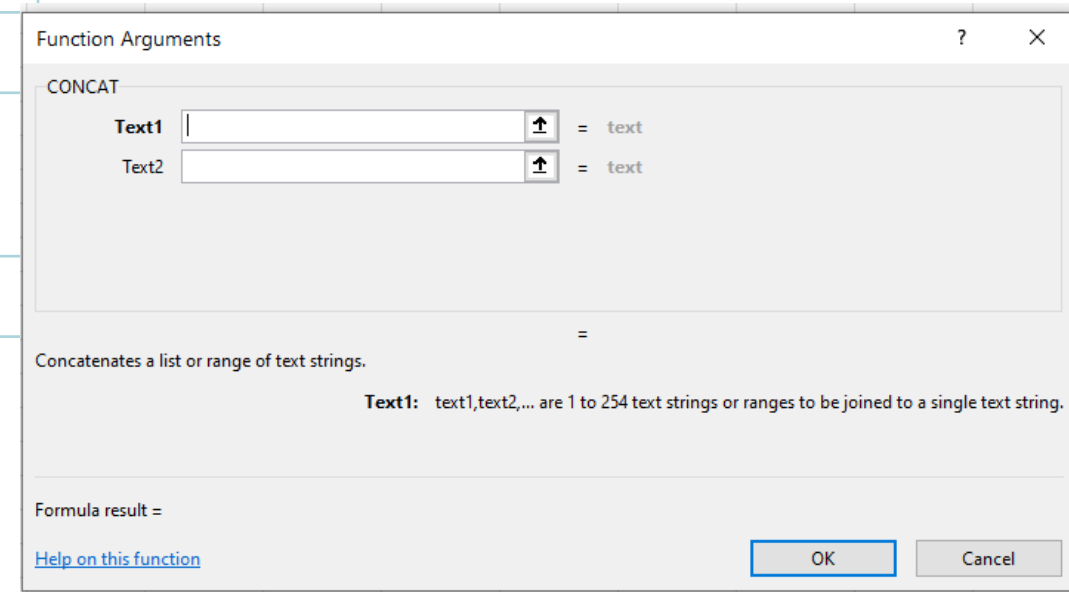
- Combines text, numbers, or cell values into one cell

Basic Syntax:

- `CONCAT(text1, [text2], ...)`

Why Use CONCAT?

- Joins values quickly
- Works with text, numbers, and cell ranges
- Replaces the older CONCATENATE function
- Useful for creating labels, IDs, or combined descriptions



TEXTJOIN

What It Does:

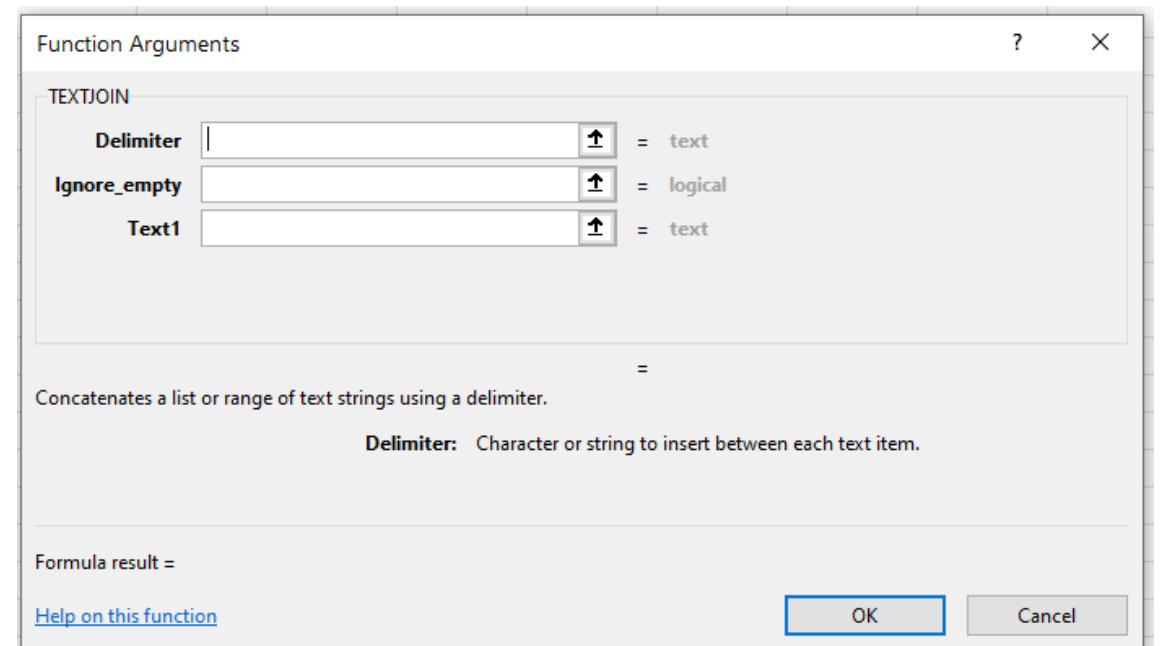
Combines text, numbers, or cell values into one cell with a separator between each value

Basic Syntax:

TEXTJOIN(delimiter, ignore_empty, text1, [text2], ...)

Why Use TEXTJOIN?

- Adds separators automatically, such as spaces, commas, or dashes
- Can ignore blank cells
- Works well with ranges or lists
- Creates cleaner combined text than CONCAT



CONCAT VS TEXTJOIN

Use CONCAT when:

- You are joining a few values together
- You do not need automatic separators
- Blank cells are not a major issue

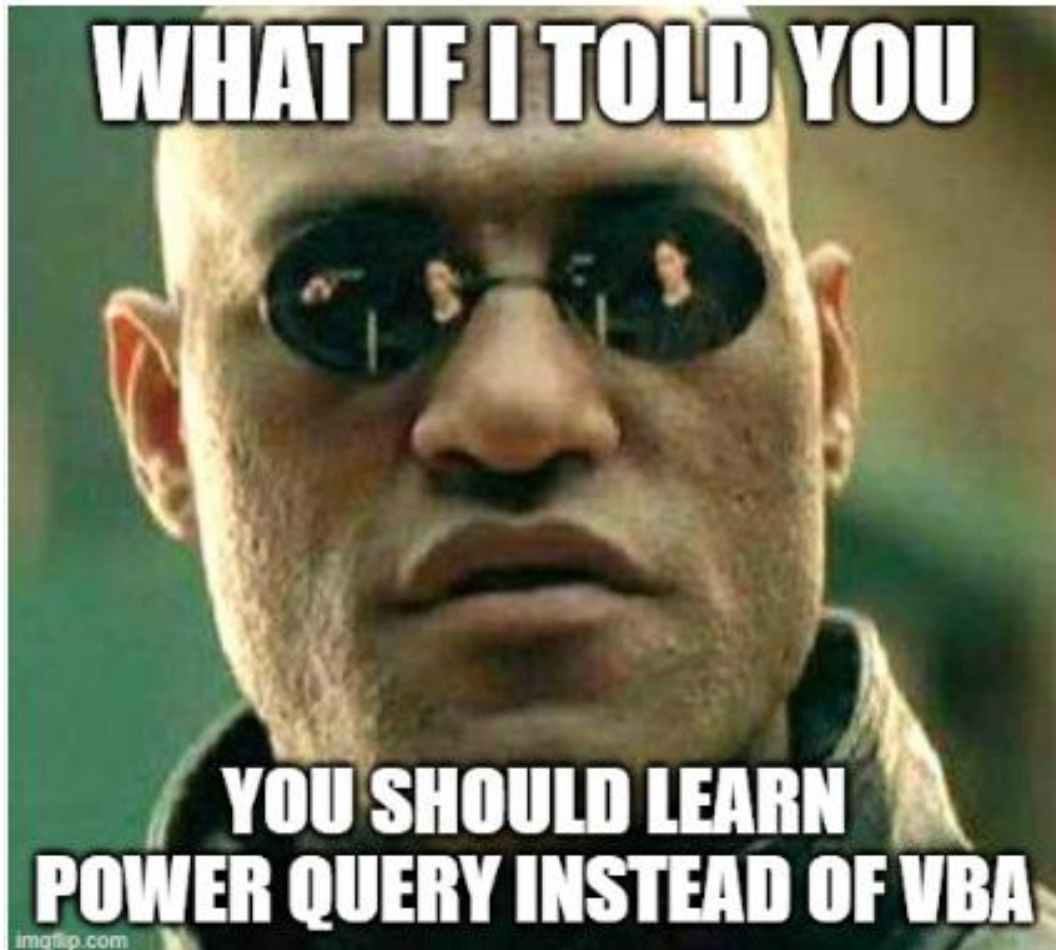
Use TEXTJOIN when:

- You want spaces, commas, or dashes between values
- You are combining a range or list
- You want to ignore blank cells automatically

The screenshot shows the Excel interface. The formula bar at the top contains the formula `=TEXTJOIN(" ",TRUE,B4:H4)`. Below the formula bar, a grid of cells is shown with columns labeled A through J. The grid is divided into two sections: "CONCAT & TEXTJOIN".

In the "CONCAT & TEXTJOIN" section, the first row shows the text "The cat in the hat" in cells B4 through H4. To the right, a cell contains the result "The cat in the hat" with the formula `=TEXTJOIN(" ",TRUE,B4:H4)` below it.

The second row shows the numbers 8, 6, 7, 5, 3, 0, 9 in cells B7 through H7. To the right, a cell contains the result "8675309" with the formula `=CONCAT(B7:H7)` below it.



Data Analysis Tools

Data Analysis Tools

PivotTables

- Summarize large data quickly
- Drag-and-drop analysis

Conditional Formatting

- Highlight trends
- Spot issues instantly

Data Validation

- Create dropdown lists
- Prevent data entry errors

Analyze Data Feature

- Select a cell in a data range, then on the **Data** tab, select the **Analyze Data** button.
- Analyze Data in Excel will analyze your data and return interesting visuals about it in a task pane.



The screenshot shows the Microsoft Excel interface. The ribbon is set to the 'Data' tab, which is highlighted with a red box. The 'Analyze Data' button in the ribbon is also highlighted with a red box. Below the ribbon is a blank spreadsheet grid with columns labeled F through U. On the right side, the 'Analyze Data' task pane is open, displaying a message: 'We need data to give you answers. Open a worksheet with data or select 'Try an Example' to explore Analyze Data with inserted sample data.' and a 'Try an Example' button. There is also a 'Learn more' link at the bottom of the task pane.

What is Power Query?



<https://youtu.be/x7mzOYEn0XA?si=eckoz5k0y1Dfv1Qm>

Thank you

Rebecc Schnirman

(561) 966-6650

rschnirman@pbc.gov

