

Re: Re-post as I still can't seem to get this to work 100%

Source:

<http://www.tech-archive.net/Archive/Excel/microsoft.public.excel.worksheet.functions/2009-02/msg03587.html>

- *From:* joeu2004 <joeu2004@xxxxxxxxxxxx>
 - *Date:* Tue, 17 Feb 2009 21:13:26 -0800 (PST)
-

On Feb 17, 6:56 pm, Danny Boy <Danny...@xxxxxxxxxxxxxxxxxxxxxxxxxxxx> wrote:

I apologize for any lack of clarity on my part.

I think the mistakes were my misreadings of the requirements. Looking back, everything you say below was stated in the previous posting.

I must say that at this point, I would hope that I've shown enough of the "tools" that you would be able to make corrective modifications. But I'll give it another go.

```
=IF(AND(O4="Yes",OR(I4=1,P4<>"")),  
"Program "&I4&" Completed",  
IF(OR(O4="No",AND(I4=2,TODAY(>EDATE(M4,3))),  
"Program "&I4&" Not Completed", ""))
```

I believe that implements the rules exactly at you specified, namely for Level 2, the status is "completed" only if both O4="Yes" and P4 has a date. If O4="Yes", P4 is blank and today > M4 plus 3 months, the status is "not completed".

If the formula does not work, feel free to let me know what condition I overlooked.

----- original posting -----

On Feb 17, 6:56 pm, Danny Boy <Danny...@xxxxxxxxxxxxxxxxxxxxxxxxxxxx> wrote:

Hi Joe:

Your assumption is correct (if the final interview beyond the 3-month limit, you would simply leave P4 blank, and Q4 would continue to read "not complete").

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We give clients three months from the date of their final class (identified in Column M) to complete their final interview (Column P). If a client does not return for their final Interview, than Column Q would flag "Level 2 Program Not Completed". Until the three month date triggers however, Column Q would remain blank (as non completion would only be triggered if they did not return for their final interview within three months).

I did test your formula on a Level 2 client who is currently in a class scheduled to end this weekend (February 21st). Column Q triggered the "Level 2 Program Not Completed", and at this juncture that flag should not appear (given that the client hasn't yet finished class, and has up to three months to have his final interview).

I also tested the formula on a Level 1 client (who is also slated to complete class this weekend), and the "Level 1 Program Not Completed" flag triggered for him as well.

Again, if the Completion Status of the client (Column O) is blank, than the flag in Column Q would not appear.

I apologize for any lack of clarity on my part.

Dan

"joeu2004" wrote:

Start with the following:

```
=IF(O4<>"Yes", "Program "&I4&" Not Completed",  
IF(I4=1, "Program 1 Completed",  
IF(AND(P4<>"",TODAY()>=P4), "Program 2 Completed",  
"Program 2 Not Completed")))
```

And that could be rewritten as:

```
=IF(O4<>"Yes", "Program "&I4&" Not Completed",  
IF(OR(I4=1, AND(P4<>"",TODAY()>=P4)),  
"Program "&I4&" Completed",  
"Program 2 Not Completed"))
```

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But that might be harder to understand and/or maintain (change in the future).

Note that I made some simplifying assumptions, which may or may not meet your needs.

The key assumption is that whether or not P4 is within 3 months of the program end date (M4) is a policy issue that does not need to encumber the Q4 logic. That is, I assume that if the interview beyond the 3-month limit, you would simply leave P4 blank, and Q4 would continue to read "not complete".

If that is not sufficient, perhaps the following logic would meet your needs:

```
=IF(O4<>"Yes", "Program "&I4&" Not Completed",  
IF(I4=1, "Program 1 Completed",  
IF(AND(P4<>"",P4<=EDATE(M4,3),TODAY()>=P4),  
"Program 2 Completed", "Program 2 Not Completed")))
```

Or similar to the previous "optimization":

```
=IF(O4<>"Yes", "Program "&I4&" Not Completed",  
IF(OR(I4=1, AND(P4<>"",P4<=EDATE(M4,3),TODAY()>=P4)),  
"Program "&I4&" Completed",  
"Program 2 Not Completed"))
```

(And you could exclude the condition TODAY()>=P4 if P4 is filled in only after the interview is completed.)

If neither formula does not meet your need, let me know what combination of conditions fails.

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HTH.

----- original posting -----

On Feb 17, 5:45 pm, Danny Boy
<Danny...@xxxxxxxxxxxxxxxxxxxxxxxxxxxx>
wrote:

Hi Joe:

Your right, after further testing I did find a few instances where the flags in Column Q (where the original formula was posted) did not work at 100%. Perhaps I should start from scratch in explaining what I'm looking for and identify what the various columns are designed to do:

Column I= Program Assignment (Level 1 or 2)
Column M=Date that class is scheduled to end
Column O= Program Completion Status (Yes versus No)
Column P=Final Program Interview Date (only applicable for Level 2 clients)

The various flags which should trigger in Column Q are based upon the above conditions. These flags include:

Level 1 Program Completed
Level 1 Program Not Completed
Level 2 Program Completed
Level 2 Program Not Completed

For a Level 1 client to be deemed as "completed", Column I must say "1", and Column O must say "Yes".

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If Column O says "No", then the Level 1 Non Completion Flag should trigger.

If Column O does not identify the class status (Yes/No), then Column Q should stay blank. In other words, if a client is currently in a class, and the class yet ended, then no completion status in Column Q would be yet identified. Once the class is over, I toggle Column O to identify Yes or No..

For a Level 2 client to be deemed as "complete", Column I must say "2", Column O must say "Yes", and Column P must include a final program interview date.

If a Level 2 client has not had their final program interview within three months of their last class date (identified in Column M), or if Column O says "No", then the flag "Level 2 Program Not Completed" would trigger.

As is true for Level 1 client (if Column O does not identify the class status-Yes/No), then Column Q should stay blank. In other words, if a client is currently in a class, and the class yet ended, then no completion status in Column Q would be yet identified. Once the class is over, I toggle Column O to identify Yes or No.

I hope this narrative better explains what I am trying to accomplish with my formula.

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Thanks so much for your time!

Dan

"joeu2004" wrote:

On Feb 17, 4:19 pm, Danny Boy
<Danny...@xxxxxxxxxxxxxxxxxxxxxxxxxxxx>
wrote:

Your first formula suggest
worked perfectly, and
covered all of the bullet
proofing I needed. Thank
you very much for your
time!

Glad it worked for you. But I hope you test it
carefully, especially
the last condition, namely I4=2 and
O4="Yes" and P4="" and TODAY()

EDATE(M4,3).

Based on your second posting (response to
my first response), I am not
convinced I understood the intent of your
logic correctly in the first
place.

If my "simplified" formula might has it
wrong, the fix might be as
simply as changing "Not Completed" to
"Completed".

But I'm concerned that there might
yet-another condition that I did

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not cover.

If you cannot figure out how to correct any mistake I might have in the simplified formula, post back and fill in the logic error that I explain in my response to your second response, the explanation of the FALSE return value.

----- original posting -----

On Feb 17, 4:19 pm, Danny Boy
<Danny...@xxxxxxxxxxxxxxxxxxxxxxxxxxxx>
wrote:

Your first assumption was correct Joe (that I4 can only contain 1 or 2 and O4 can only contain Yes or No). 1 vs. 2 is a program level assignment, and Yes versus No references whether or not the class was completed.

You are also correct that I did not copy and paste directly from the worksheet as I should have, and thus the errors you noted.

Your first formula suggest worked perfectly, and covered all of the bullet proofing I needed. Thank you very much for your time!

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Best,

Dan

"joeu2004" wrote:

PS....

On Feb 17,
3:06 pm,
Danny Boy
<Danny...@xxxxxxxxxxxxxxxxxxxxxxxxxxxx>
wrote:

```
=IF(AND(I4=1,O5="Yes"),"Level  
1  
Program  
[...]
```

I suspect O5
is a typo (in
the
worksheet
or just the
posting?). I
suspect it
should be
04.

Again, if
you did not
cut-and-paste
from your
worksheet
to your
posting, it
would be a
good
practice in
the future,
especially if

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the
issue is a
likely typo
in a
formula, as
you suspect.

PS: It also
seems like
there is one
less closing
parenthesis
in your
posting,
further
evidence
that you
probably
did not
cut-and-paste
from
the
worksheet,
as you
should.

As for any
simplification,
that
depends on
what
assumptions
can be
made about
the contents
of I4 and
O4, and
how
bullet-proof
you want to
make the
formula.

For
example, I4

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can only
have 1 or 2,
and O4 can
only have
"Yes" or
"No", and
you are not
trying to
detect
unexpected
values, you
could
write:

```
=if(I4=1,if(O4="Yes","Level  
1 Program  
Completed",  
"Level 1  
Program  
Not  
Completed"),  
if(O4="No","Level  
2 Program  
Not  
Completed",  
if(P4<>"", "Level  
2 Program  
Completed",  
if(today(>edate(M4,3),"Level  
2 Program  
Not  
Completed", ""))))
```

If that is not
sufficient
bullet-proofing,
perhaps the
following
modification
would
suffice:

```
if(or(and(I4<>1,I4<>2),and(O4<>"Yes",O4<>"No")), ""  
if(I4=1,[...as  
above...]))))
```

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HTH

original
posting

On Feb 17,
3:06 pm,
Danny Boy
<Danny...@xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx>
wrote:

I'm
having
trouble
getting
the
formula
below
to
work
after
adding
the
additional
condition
of:

Additional
Condition:

IF(TODAY(>EDATE(M4,3)

Full
Formula:

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```
=IF(AND(I4=1,O5="Yes"),"Level  
1  
Program  
Completed",IF(AND(I4=1,O4="No"),"Level  
1  
Program  
Not  
Completed",IF(AND(I4=2,O4="Yes",P4<>""),"Level  
2  
Program  
Completed",IF(TODAY()>EDATE(M4,3),AND(I4=2,O4="Y  
2  
Program  
Not  
Completed",IF(AND(I4=2,O4="No"),"Level  
2  
Program  
Not  
Completed","")))
```

Any
suggestions
to
rectify
this
problem?

Thanks
for
any
suggestions!