Intro to Excel

Excel is a Microsoft spreadsheet program, which can be used for budgets, calculations, and charts.

Frequently Used Terms and Definitions:

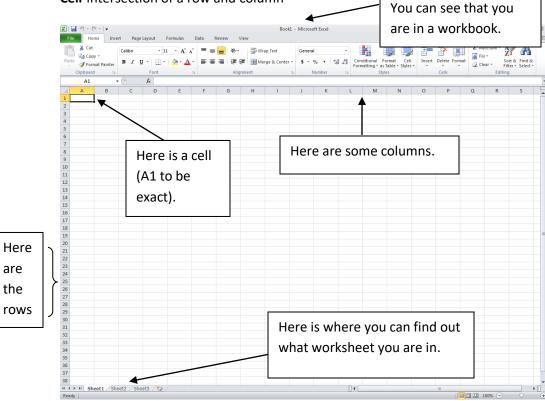
Worksheet-an individual spreadsheet

Workbook-group of worksheets

are the **Column**-vertical group of data; indicated by letters running along the top of the spreadsheet

Row-horizontal group of data; indicated by numbers running along the left side of the spreadsheet

Cell-intersection of a row and column



Here is the start of a budget in Excel:

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As you can see in the above budget, some of the words seem to go into the next column. However, if you were to type numbers in Column D, the words would be chopped off in Column C. In order for you to be able to read all of the words and numbers in both column C and D, you will need to resize the columns.

Steps to do this-

- 1. Put your cursor in between Column C and D.
- 2. When your cursor changes from a fat white plus sign to a horizontal line with arrows coming out of it, double click.
- 3. Now your columns should be resized.

Formulas:

In order to make a budget work correctly, you will need to have some basic knowledge of how formulas work. There are two that we will be working with today.

The first one is using the Auto Sum. By using this, you can automatically add a row or column without typing a formula. You will have highlighted the row or column that you want to add and then click the auto sum button:

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If you were to click into cell D6, you would see a formula written there:

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For a regular formula, there are a few things that you need to remember:

- 1. You always have to put an = sign once you are in the cell where you want the formula.
- 2. You should always use the cell marker (ex. D6) instead of the value in the cell.
- 3. Try to think about what the result will be and compare to what you get. If it doesn't make sense than something might have been written in wrong.

In our budget, the Savings is the Income Total (cell D6) minus the Expenses Total (cell D13). Here is what the formula and the screen should look like:

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If we wanted to make this budget for the whole year, we could do that. We would make Column D the "ideal" and then starting with Column E we would use the months of the year. Instead of having to label every column, there is the fill handle. For instance:

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You can also use the fill handle for formulas, for both columns and rows, etc. A very neat tool!

You always have the option to add a column or row as well as delete a column or row. For instance, we have decided that we do not want a blank row in between the Income section and the Expenses section. You would put your cursor in one of the cells in that blank row. Then you go to the Home tab, Cells group and click on Delete:

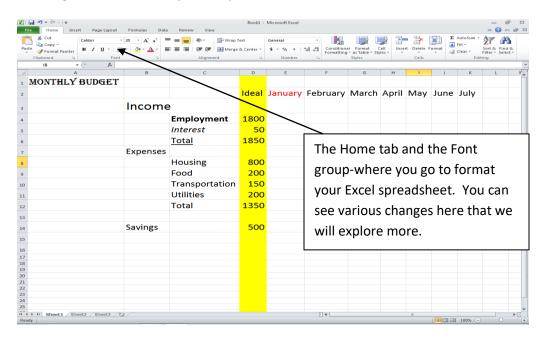
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In order to add columns or rows, you go to the same group and "Insert Cells." Again you need to be very careful of the screen and read everything!

Formatting your spreadsheet:

A word of caution-most of the formatting that you might do in Word, is unnecessary in Excel. However, you should know how to highlight a row or change the font in Excel just like you would in Word. All of these commands can be found in the Home Tab and the Font group.



Printing Your Worksheet:

More so than in Word, you may need to change the Page Layout to Landscape to print more efficiently in Excel.

If you go to the File tab, and then to the Print option, with the Print Settings you have the option to change your page to Landscape. This is illustrated below:

