Lesson 1: Creating a Worksheet and a Chart
Microsoft Excel 2016

IN THIS CHAPTER, YOU WILL LEARN HOW TO

- Describe the Excel worksheet
- Enter text and numbers
- Use the Sum button to sum a range of cells
- Enter a simple function
- Copy the contents of a cell to a range of cells using the fill handle
- Apply cell styles
- Format cells in a worksheet
- Create a 3-D pie chart
- Change a worksheet name and worksheet tab color
- Change document proprieties
- Preview and print a worksheet
- Use the AutoCalculate area to display statistics
- Correct errors on a worksheet

SET UP You don’t need any practice files to complete this exercise; just follow the steps.

1. Open a blank Excel Workbook. Maximize the word window
2. In the Styles gallery, click the Normal style.

To Enter the Worksheet Titles
3. Click cell A1 to make cell A1 the active cell
4. Type: Personal Budget Worksheet in cell A1 and the point the Enter box in the formula bar to prepare to enter text in the active cell.
5. Click the Enter box (green ✓) to complete the entry.
6. Click cell A2.
7. Type: Monthly Estimates as the cell entry.

To Enter Column Titles
8. Click cell A3 to make it the active cell.
9. Type: Income to begin entry of a column title. Press the TAB key.
10. Click cell B3
11. Type January in B3, February in C3, March in D3, April in E3, May in F3, June in G3, July in H3, August in I3, September in J3, October in K3, November in L3, and December in M3.
12. Click cell A8 to make it the active cell.
13. Type: Expenses to begin entry of a column title. Press the TAB key.
14. Click cell B8
15. Type: January in B8, February in C8, March in D8, April in E8, May in F8, June in G8, July in H8, August in I8, September in J8, October in K8, November in L8, and December in M8.

To Enter Row Titles
1. Click cell A4 to make it the active cell.
2. Type: Wages to begin entry of a column title. Press the ENTER key.
3. Type **Dividends** in A5 and **Total** in A6.
4. Click cell A9.
5. Type **Rent** in A9, **Food** in A10, **Tuition** in A11, **Books** in A12, **Entertainment** in A13, **Car Payment** in A14, **Gas** in A15, **Miscellaneous** in A16, and **Total** in A17.

**To Enter Numbers**
6. Click B4.
7. Type **1000.29** in B4, then using the AutoFill handle click-and-drag to cell M4.
8. Enter the remaining Personal budget numbers from the table below in to your spreadsheet:

<table>
<thead>
<tr>
<th>Incomes</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wages</td>
<td>1000.29</td>
<td>1000.29</td>
<td>1000.29</td>
<td>1000.29</td>
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<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
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<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rent</td>
<td>400.89</td>
<td>400.89</td>
<td>400.89</td>
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<tr>
<td>Food</td>
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</tr>
<tr>
<td>Books</td>
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<td>0</td>
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<td>0</td>
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<td>100</td>
<td>100</td>
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<td>100</td>
</tr>
<tr>
<td>Car Payment</td>
<td>154.79</td>
<td>154.79</td>
<td>154.79</td>
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<td>154.79</td>
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<tr>
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<td>150</td>
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<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

**To Sum a Column of Numbers**
9. Click cell B6 to make it the active cell.
10. Click the SUM button on the HOME tab, to display a formula in the formula bar.

> **Hint:** the formula should read **=SUM(B4:B5)**
11. Press the **ENTER** key to accept the formula.
12. Repeat steps 9 – 11 to enter the SUM function n cell B17.

> **Hint:** the formula should read **=SUM(B9:B16)**

**To Copy a cell to Adjacent Cells in a Row**
13. Click cell B6 to make it the active cell, then click on the Fill handle in the bottom right corner of the active cell.
14. Click and drag the fill handle to select the range to cell M6.
15. Release the mouse button to copy the SUM function.

**To Determine Multiple Totals at the Same Time**
17. Click cell N4.
18. Drag the lower-right fill handle down to cell N6.
19. On the HOME tab, in the Editing group, click the SUM button.
20. Repeat steps 17 – 19 for cell B17.
To Enter a Formula Using the Keyboard
21. Click cell B19.
22. Type: =B6-B17, then press ENTER.

To Copy a Cell to Adjacent Cells in a Row
23. Click cell B19.
24. Drag the Fill handle to select the destination area from C19:N19 to copy the formula.

To Workbook with a New File Name
25. Click on the Save button on the Quick Access Toolbar.
26. Save the document as Bob Gleamin Budget in your class folder.

To Change a Cell Style
27. Click cell A1 to make it the active cell.
28. Click the Cells Style button to display the Cell Styles gallery.
29. Click the Title cell style in the Titles and Headings area of the Cell Styles gallery.

To Change the Font
30. Click cell A2 to make it the active cell.
31. Click the Font arrow in the Font group to display the list of fonts.
32. Scroll in the list and click on the Cambria font.

To Bold a Cell
33. Click cell A1.
34. Click the Bold button in the Font group to change the text to be bold.
35. Repeat step 34 to bold cell A2.

To Increase the Font Size of a Cell Entry
36. Click cell A2.
37. Click the Font Size arrow in the Font group and click on the number 14.

To Change the Font Color of a Cell Entry
38. Click cell A1 then click the Font Color arrow to display the gallery.
39. Point to the ‘Blue, Accent 1’ color and click it to change the color.
40. Repeat steps 38 and 39 for cell A2.

To Center Cell Entries across Columns by Merging Cells
41. Click cell A1 and drag the selection handle to cell N1.
42. On the HOME tab, in the Alignment group, click the Merge & Center button.
43. Repeat steps 41 and 42 to merge and center cells A2 through N2.

To Format Rows Using Cell Styles
44. Click cell A3 and then drag to cell N3 to select the range.
45. Click the Cell Styles button in the Cell Styles gallery.
46. Click on the Heading 1 cell style in the Title and Headings group.
47. In the Alignment group, click the **Center** button.
48. Click on cell A8 and drag to cell N8.
49. Repeat steps 45 and 46 to format the range A8:N8 with the **Heading 1** cell style format.
50. Select cell range A6:N6 and format the range with the **Total** cell style format.
51. Select cell range A17:N17 and format the range with the **Total** cell style format.
52. Select cell range A19:N19 and format the range with the **Accent 1** cell style format.
53. Select cell range A4:N4 and format the range with the **20%-Accent 1** cell style format.
54. Select cell range A9:N9 and format the range with the **20%-Accent 1** cell style format.
55. Select cell range A11:N11 and format the range with the **20%-Accent 1** cell style format.
56. Select cell range A13:N13 and format the range with the **20%-Accent 1** cell style format.
57. Select cell range A15:N15 and format the range with the **20%-Accent 1** cell style format.
58. Select cell range A5:N5 and format the range with the **40%-Accent 1** cell style format.
59. Select cell range A10:N10 and format the range with the **40%-Accent 1** cell style format.
60. Select cell range A12:N12 and format the range with the **40%-Accent 1** cell style format.
61. Select cell range A14:N14 and format the range with the **40%-Accent 1** cell style format.
62. Select cell range A16:N16 and format the range with the **40%-Accent 1** cell style format.

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**To Format Numbers in the Worksheet**

63. Select the range B4:N4.
64. Click the ‘**Accounting Number Format**’ in the Number group on the HOME tab.
65. Select the range B5:N5.
66. Click the ‘**Comma Style Format**’ in the Number group on the HOME tab.
67. Select the range B6:N6.
68. Click the ‘**Accounting Number Format**’ in the Number group on the HOME tab.
69. Select cell A7.
70. Repeat steps 64 to format the ranges B9:N9, B17:N17, and B19:N19 with the **accounting number** format.
71. Repeat steps 66 to format the ranges B10:N16 with the **comma style** format.

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**To Adjust Column Width**

72. Point to the line in between the column A and column B header.
73. Click and drag the line to show the longest cell in the column.
74. Repeat the same steps for columns B through N.
To Use the Name Box to Select a Cell
75. Click the Name box in the formula bar and then type a3 as the cell you want to select.
76. Press the enter key to change the active cell in the Name box and make cell A3 the active cell.

To Add a 3-D Pie Chart
77. Select the range A9:A16.
78. Hold down the ctrl key, select the range N9:N16.
79. Click the INSERT tab, click the ‘Insert Pie or Doughnut Chart’ button.
80. Click the 3-D Pie in the Insert Pie or Doughnut Chart gallery.
81. Click the chart title and type: Monthly Expenses.
82. Deselect the chart title.

To Apply a Style to a Chart
83. Click the CHART TOOLS DESIGN tab, click the Chart styles button to display the Chart Style gallery.
84. Click Style 3 in the Chart Style.

To Move a Chart to a New Sheet
85. Click the Move Chart button to display the Move Chart dialog box.
86. Click New Sheet to select it and then type: Monthly Expenses in the New Sheet text box.
87. Click OK.

To Change the Worksheet Tab Name
88. Double-click the sheet tab labeled Sheet1 in the lower-left corner of the window.
89. Type: Monthly Budget Planner as the worksheet tab name and press enter.
90. Right-click the sheet tab, point to Tab Color on the menu, click the color of your shirt in the Theme colors area.

To Preview and Print a Worksheet in Landscape Orientation
91. Click the FILE tab on the ribbon.
92. Click the Print tab in the Backstage view.
93. Click the Portrait Orientation button in the Setting area and then select Landscape Orientation to change the orientation of the page to landscape.
94. Click the No Scaling button and then select ‘Fit Sheet on One Page’ to print the entire worksheet on one page.
95. Click the Print button.

To Save an Existing Spreadsheet with the Same File Name
96. Click the Save button on your Quick Access Toolbar.

Submit your completed Bob Gleamin Budget to the Class Work Submission Drop Box on the class Web Page. Your Budget should look like Figure 1-1 on the next page.
### Personal Budget Worksheet

#### Monthly Estimates

<table>
<thead>
<tr>
<th>Income</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wages</td>
<td>$1,000.29</td>
<td>$1,000.29</td>
<td>$1,000.29</td>
<td>$1,000.29</td>
<td>$1,000.29</td>
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<td>$1,000.29</td>
<td>$1,000.29</td>
<td>$12,003.48</td>
</tr>
<tr>
<td>Dividends</td>
<td>4,000.75</td>
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<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<td>4,000.75</td>
<td>-</td>
<td>-</td>
<td>-</td>
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</tr>
<tr>
<td>Total</td>
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<td>$1,000.29</td>
<td>$1,000.29</td>
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</table>

<table>
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<tr>
<th>Expenses</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
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<th>October</th>
<th>November</th>
<th>December</th>
<th>Totals</th>
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<tbody>
<tr>
<td>Rent</td>
<td>$400.89</td>
<td>$400.89</td>
<td>$400.89</td>
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<td>-</td>
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<td>-</td>
<td>-</td>
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<tr>
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<td>100.00</td>
<td>100.00</td>
<td>100.00</td>
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</tr>
<tr>
<td>Car Payment</td>
<td>154.79</td>
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<td>154.79</td>
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<td>154.79</td>
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