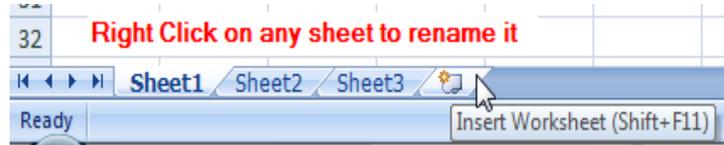


Learning Excel by Creating a Budget

In this lesson you will learn how to use and work with Microsoft Excel by creating a simple budget.

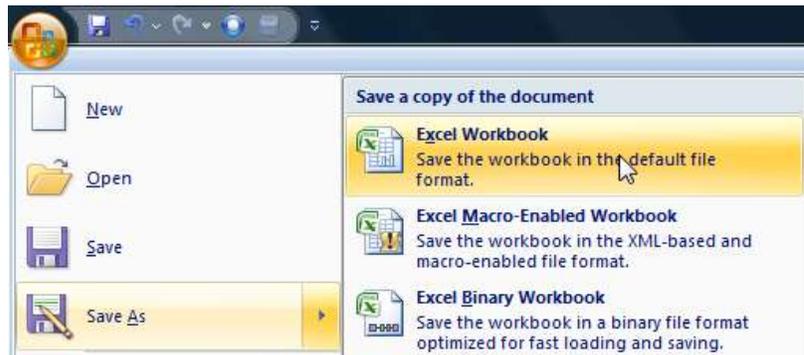
- Click the Excel icon to start Excel 

- At the bottom of your screen you will see 3 Sheet Tabs
- Altogether these sheets are called a **Workbook**
- You can add new sheets or rename sheets



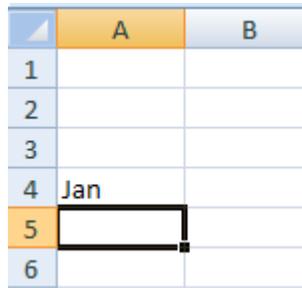
Saving your Spreadsheet

- Click on the Office Icon and select Save As
- Give your Workbook a name (Budget) and remember where you saved it.
- In the future you only need to click the disk icon to save again



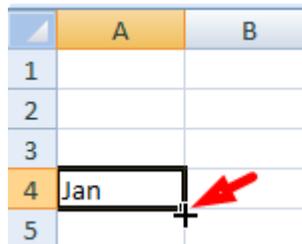
Entering the months

- Click in cell A4
- Type Jan
- Press Enter



Filling the months down

- Click in cell A4 again
- Move your pointer over the button in the cell until it turns into a small cross



- Hold down the left mouse button and drag down to fill in the months
- The months should extend from A4 to A15

3	
4	Jan
5	Feb
6	Mar
7	Apr
8	May
9	Jun
10	Jul
11	Aug
12	Sep
13	Oct
14	Nov
15	Dec
16	

Entering the categories

- Type House Payment in cell B3
- Type Auto in cell C3
- Type Utilities in cell D3
- Type Credit Card in cell E3
- Type Clothing in cell F3
- Type Entertainment in cell G3

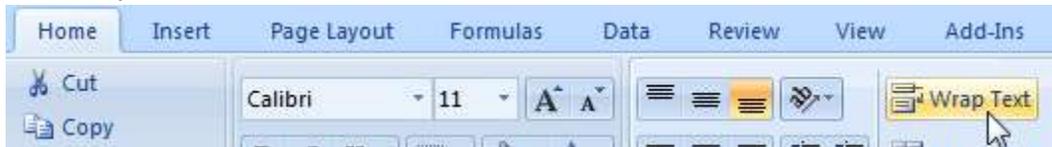
B	C	D	E	F	G
House Payment	Auto	Utilities	Credit Card	Clothing	Entertainment

Wrapping the text

- Click Row 3

2						
3	House Payment	Auto	Utilities	Credit Card	Clothing	Entertainment
4	Jan					

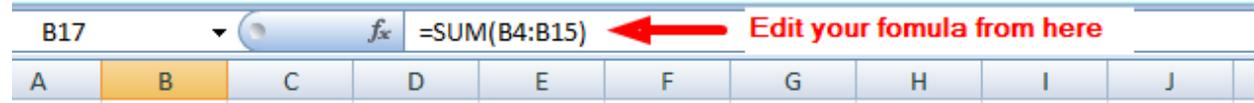
- Make sure the Home Tab is selected
- Click the Wrap Text icon



- The text is now wrapped in the cells

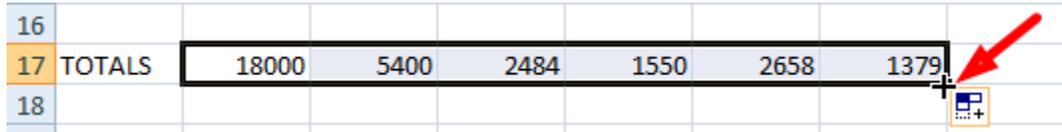
House Payment	Auto	Utilities	Credit Card	Clothing	Entertainment
---------------	------	-----------	-------------	----------	---------------

- Notice that your formula will show in the formula bar at the top of your worksheet
- If you have to edit your formula, you will edit it from the Formula Bar

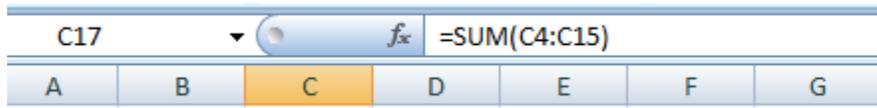


Filling the formula to the right

- Click in cell B17
- Move your mouse to the small button till your cursor turns into a small cross
- Hold down the left mouse button and drag right
- (Just as you dragged the months of the year previously)

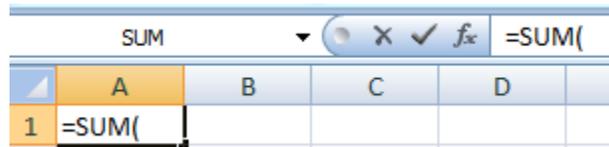


- Click in cell C17 and notice that the formula changed by itself as you filled right
- Check the other cells to see how the formulas have adjusted

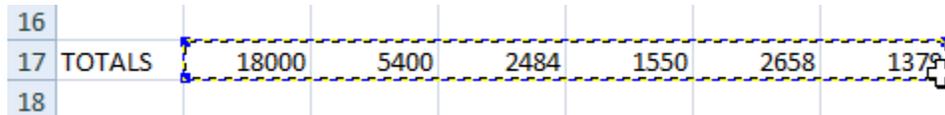


Totaling the Totals

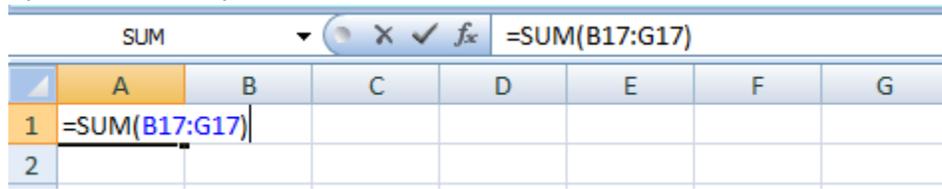
- Click in Cell A1
- Type **=SUM(**



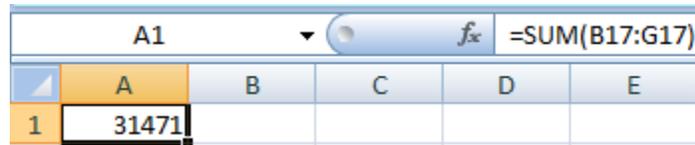
- Click in Cell B17
- Highlight to the right to cell G17



- Close the parenthesis and press Enter



- Cell A1 should now contain the total of the category totals



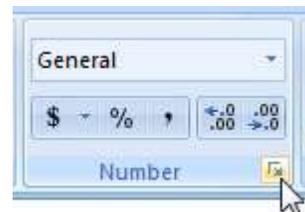
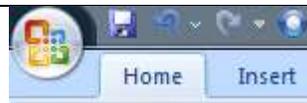
Formatting the cells for currency

- Click in cell A1
- Highlight to cell G17

The screenshot shows the budget spreadsheet with a red arrow indicating the selection of cells A1 to G17. The spreadsheet data is as follows:

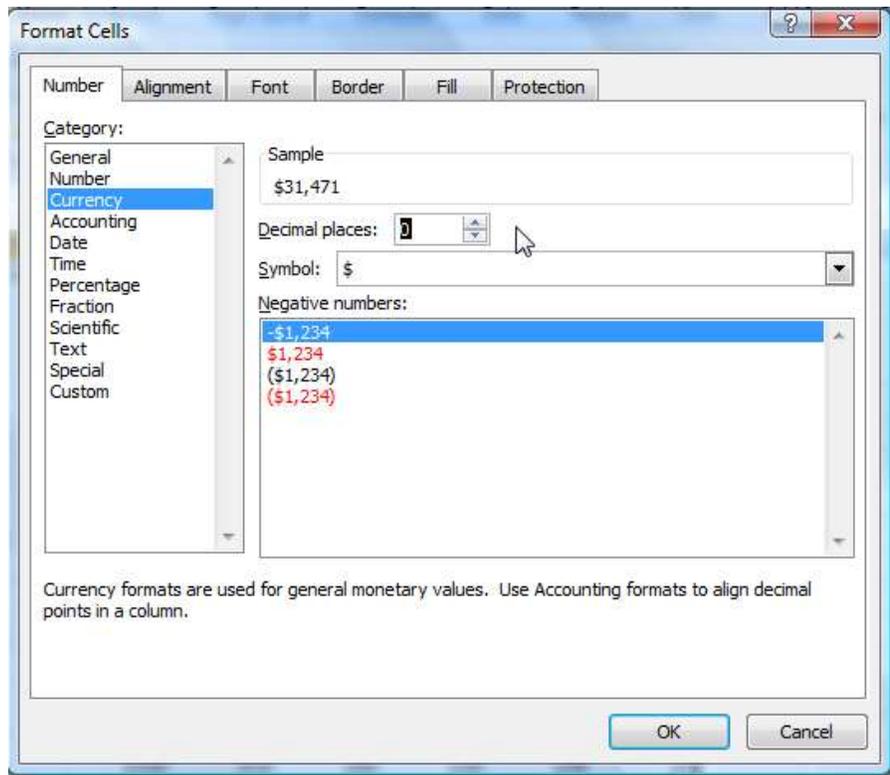
	A	B	C	D	E	F	G
1	31471						
2		House			Credit		Entertain
3		Payment	Auto	Utilities	Card	Clothing	ment
4	Jan	1500	450	250	100	300	200
5	Feb	1500	450	150	100	250	100
6	Mar	1500	450			266	125
7	Apr	1500	450	175	100	0	75
8	May	1500	450	221	100	148	82
9	Jun	1500	450	235	150	399	54
10	Jul	1500	450	178	150	211	252
11	Aug	1500	450	199	150	111	99
12	Sep	1500	450	144	150	102	45
13	Oct	1500	450	261	150	75	85
14	Nov	1500	450	231	150	198	250
15	Dec	1500	450	240	150	298	12
16							
17	TOTALS	18000	5400	2484	1550	2658	1379

- Click the Home Tab
- Click the Number group as shown on the right



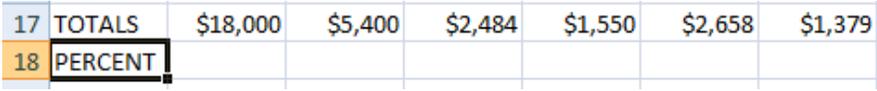
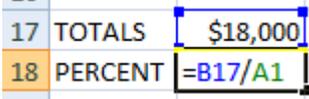
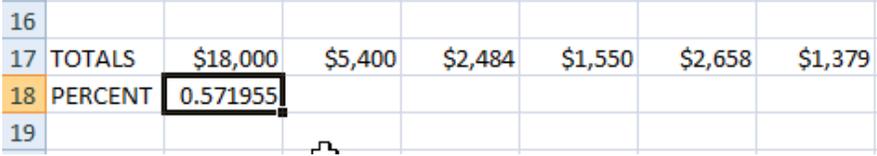
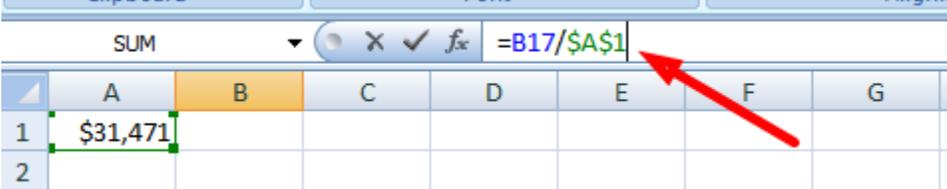
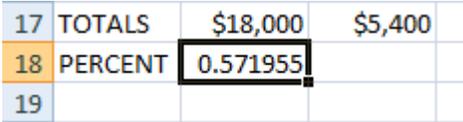
- Click the Number Tab
- Select Currency
- Set the Decimal Places to 0 (no decimals)
- Click OK

See right >>>>>



Notice now that the cells are formatted as currency with no decimal places

	A1	=SUM(B17:G17)					
	A	B	C	D	E	F	G
1	\$31,471						
2		House			Credit		Entertain
3		Payment	Auto	Utilities	Card	Clothing	ment
4	Jan	\$1,500	\$450	\$250	\$100	\$300	\$200
5	Feb	\$1,500	\$450	\$150	\$100	\$250	\$100
6	Mar	\$1,500	\$450	\$200	\$100	\$266	\$125
7	Apr	\$1,500	\$450	\$175	\$100	\$0	\$75
8	May	\$1,500	\$450	\$221	\$100	\$148	\$82
9	Jun	\$1,500	\$450	\$235	\$150	\$399	\$54
10	Jul	\$1,500	\$450	\$178	\$150	\$211	\$252
11	Aug	\$1,500	\$450	\$199	\$150	\$111	\$99
12	Sep	\$1,500	\$450	\$144	\$150	\$102	\$45
13	Oct	\$1,500	\$450	\$261	\$150	\$75	\$85
14	Nov	\$1,500	\$450	\$231	\$150	\$498	\$250
15	Dec	\$1,500	\$450	\$240	\$150	\$298	\$12
16							
17	TOTALS	\$18,000	\$5,400	\$2,484	\$1,550	\$2,658	\$1,379

<p>Entering Percentages</p> <ul style="list-style-type: none"> Click in cell A18 Type Percent 	
<ul style="list-style-type: none"> Click in Cell B18 Type a division sign / Click in cell A1 (we are dividing cell B18 by cell A1) Press Enter 	
<ul style="list-style-type: none"> The percentage should show in cell B18 	
<p>Fixing the A1 Total so it will not adjust when you fill right</p>	
<ul style="list-style-type: none"> Look at the formula in the Formula Bar  <ul style="list-style-type: none"> If we fill this formula to the right (B18 to G18) the B17 will adjust to C17, then E17, etc. Also the A1 will become B1, then C1, then D1, etc We do not want the A1 part of the formula to adjust because it is the total amount (A1) that we are dividing by 	
<ul style="list-style-type: none"> To fix the problem put a dollar sign in front of the A and a dollar sign in front of the 1 This will keep the A1 part of the formula from changing when we fill right 	
<ul style="list-style-type: none"> The formula in cell B18 should be: <p>=B17/\$A\$1</p>	

- Now fill the Percent formula to the right the way you filled the Totals

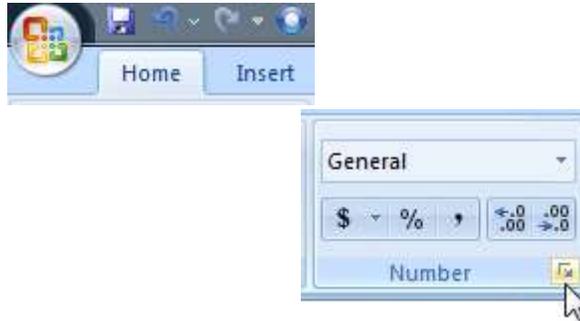
16							
17	TOTALS	\$18,000	\$5,400	\$2,484	\$1,550	\$2,658	\$1,379
18	PERCENT	0.571955	0.171587	0.07893	0.049252	0.084459	0.043818
19							

Format the decimals as percents

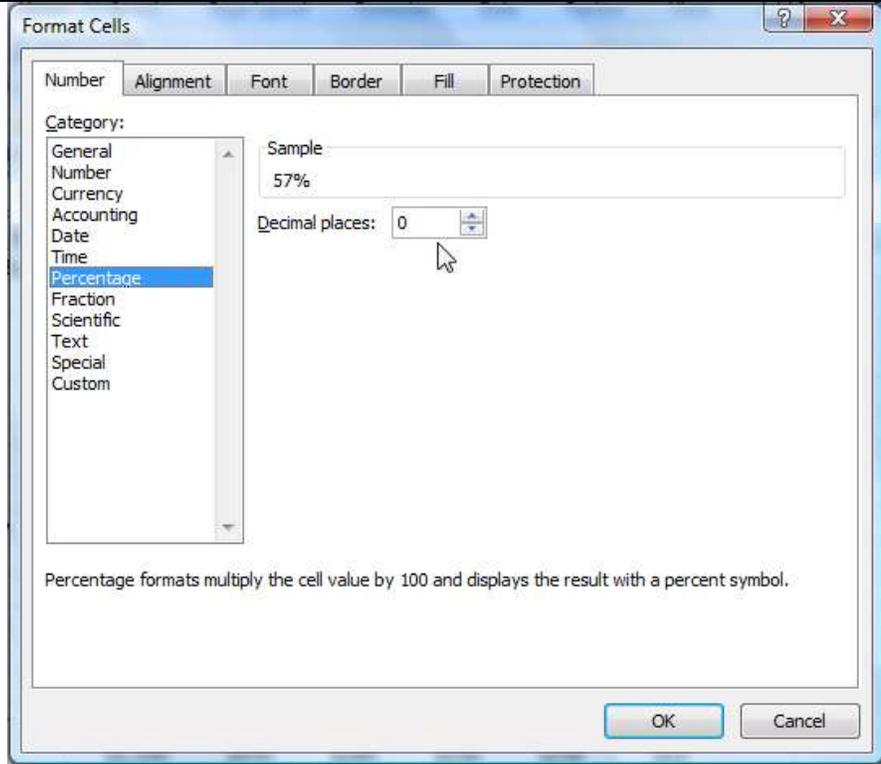
- Highlight the cells from B18 to G18

16							
17	TOTALS	\$18,000	\$5,400	\$2,484	\$1,550	\$2,658	\$1,379
18	PERCENT	0.571955	0.171587	0.07893	0.049252	0.084459	0.043818
19							

- Make sure the Home Tab is selected
- Click the Number icon as shown



- Click Percentages
- Select 0 decimals



- Your result should look like the one on the right

16							
17	TOTALS	\$18,000	\$5,400	\$2,484	\$1,550	\$2,658	\$1,379
18	PERCENT	57%	17%	8%	5%	8%	4%
19							

Renaming the Sheet 1 Tab

- Right click on the Sheet 1 Tab
- Select Rename and name the tab, BUDGET

- Your Budget should look like the one below.
- You can dress it up with color if you like

	A	B	C	D	E	F	G	
1	\$31,471	My Budget - Frank Schneemann						
2								
3		House Payment	Auto	Utilities	Credit Card	Clothing	Entertainment	
4	Jan	\$1,500	\$450	\$250	\$100	\$300	\$200	
5	Feb	\$1,500	\$450	\$150	\$100	\$250	\$100	
6	Mar	\$1,500	\$450	\$200	\$100	\$266	\$125	
7	Apr	\$1,500	\$450	\$175	\$100	\$0	\$75	
8	May	\$1,500	\$450	\$221	\$100	\$148	\$82	
9	Jun	\$1,500	\$450	\$235	\$150	\$399	\$54	
10	Jul	\$1,500	\$450	\$178	\$150	\$211	\$252	
11	Aug	\$1,500	\$450	\$199	\$150	\$111	\$99	
12	Sep	\$1,500	\$450	\$144	\$150	\$102	\$45	
13	Oct	\$1,500	\$450	\$261	\$150	\$75	\$85	
14	Nov	\$1,500	\$450	\$231	\$150	\$498	\$250	
15	Dec	\$1,500	\$450	\$240	\$150	\$298	\$12	
16								
17	TOTALS	\$18,000	\$5,400	\$2,484	\$1,550	\$2,658	\$1,379	
18	PERCENT	57%	17%	8%	5%	8%	4%	
19								

GOOD JOB!