

Supplies:

- You will need the workbook you created in Session 1. (A completed Session 1 My Budget workbook is available for download at <http://www.mc-npl.org/ComputerLab/ClassResources.html>.)
- You will need the handout pertaining to Session 2.

Instructions: Follow the directions below to enhance your **My Budget** spreadsheet.

- 1) Worksheet Referencing using multiple worksheets:** You will be creating a Summary sheet which will find the **AVERAGE** of your yearly expenses.
- a) Open *My Budget.xlsx*. Use the handout to enter the amounts for the actual expenses in the February and March Worksheets.
 - b) Rename Sheet2 **SUMMARY**
 - c) In the SUMMARY sheet, enter January in cell **B1**
 - d) Using the fill handle, drag across to M1. Note the **auto fill** feature. Check columns to see if they need to be resized.
 - e) In cell **A1**, type the label **ACTUAL EXPENSES**. Resize column A.
 - f) Click on the tab for the January worksheet. Select cells **A3** through **A12**. Click the copy button which is on the home tab in the clipboard group.
 - g) Click on the tab for the Summary worksheet. Click into cell A2. Click the paste button which is on the home tab in the clipboard group.
 - h) Click in cell **B2** and type an = and then **click on the tab for the January worksheet and into the C3 cell**, actual cost of Rent, and click the check mark on the formula bar. Note the formula bar in the summary sheet which displays characters indicating a referenced worksheet and cell.
 - i) Use the fill handle to copy the reference from cell **B2** to cell **B11**.
 - j) Using the same method, reference the actual cost of rent for Feb –
 - i. click in cell **C2**,
 - ii. type an =,
 - iii. click on the tab for the February worksheet,
 - iv. click into cell **C3**, and
 - v. click on the check mark.
 - vi. Use the fill handle to copy the reference from cell **C2** to cell **C11**
 - k) Repeat the steps to reference actual figures for March.
 - l) Type the word **AVERAGE** into cell **N1**.
 - m) Click in cell **N2** to enter the formula
 - i. Type “=”
 - ii. Go to **Formulas** tab > **Insert Function**, select **Average**, click OK and note how it assumes the range that we want. Click OK again.
 - iii. Use the fill handle to drag the formula to cell N11.

2) Create a visual element

- a) Click on the tab for the January worksheet and be sure you are clicked in an empty cell in column G.
- b) Click on the **Insert** tab, the **Charts** group, the **Pie** button
- c) Mouse over the pie chart styles until you find the **Exploded pie in 3D** and click on it. Notice the three **Chart Tools** contextual tabs that open up when you do this.
- d) On the **Chart Tools Design** tab, in the **Data** group, click **Select Data**
- e) When prompted for data range, on the worksheet, select cells A15, A16, A17, B15, B16, B17. Click OK.
- f) In **Chart Layouts** group, find **Layout 2** and click on it.
- g) Replace the text in the **chart title** text box, with **Expenses-vs-Savings**.
- h) Click on the **Chart Tools Layout** tab. In the **Labels** group, click the **Data Labels** button.
- i) Click on **More Data Label Options**.
- j) Under **Label Options**, check **Value** and **Percentage** and uncheck **Show Leader Lines**; Under **Label Position**, check **Outside End**; In **Separator Box**, select **(New Line)**. Click **Close**.
- k) Click on the **Design** tab. In the **Chart Styles** group, click on the **More** button at the right end to open the selection of chart styles and select **Style 42**.
- l) Right click on the plot area of the chart and select **Format Plot Area**. Select the **Gradient fill** button and change the preset color to **Rainbow II**. Click close.
- m) Using the move tool, move the chart around. (Note: move tool engages when you click inside the chart, then drag to move.) Drag and resize the chart to straddle columns H to L.

3) Insert Comments using copy and paste to eliminate column E

- a) Using the January sheet, click in cell E3. In the Formula Bar, select the text that is displayed there and copy it. *Do not click in the cell and copy; that is a different task and you will not get the result you want.*
- b) Click in cell B3, the budgeted amount for rent. Then click on the **Review** tab and in the **Comments** group, click on **New Comment**.
- c) Backspace to get rid of "**Your Name:**" Then, right click to **paste in the comment**.
- d) Click outside the comment box and note the red smart tag
- e) Click to select the cell with the smart tag, then right click and note options to show or hide the comment. Hide is the default (the comment disappears when you move the mouse). Click on **Show/Hide Comments**, then use the move tool and resize tool to move and resize the text box.


- f) Follow the same steps to copy and paste the comment regarding Utilities.
- g) Finally, **select column E**. Right click in the column, and select delete.

4) Viewing the Worksheet in Print Preview

- a) Click on the **Office Button**. Move down to **Print** and over to click on **Print Preview**.
- b) Notice that the colors are greyed. That is because the lab computers are not connected to a color printer.
- c) Note in the preview image how the comments are not displayed even though they are displayed when viewing the worksheet.
- d) Note how the Monthly Budget title may not be centered correctly.
- e) Note how the chart may drag onto more than one page.
- f) Close Print Preview.

5) Using the Page Setup To Modify the Worksheet

a) To Print the Worksheet

- i. On the **Page Layout** tab of the ribbon, in the **Page Setup** group, click the dialog box launcher  button. In the **Page Setup** dialogue click on the **Page** tab. On that tab, under the section marked **Scaling**, select the radio button next to *Fit to 1 pages wide by 1 pages tall*. This will automatically adjust your percentages so that everything will print on one page.

b) Adding a Header

- ii. While still in page set-up, select the **Header/Footer** tab
- iii. Click on Custom Header and type **January 2009 Budget** in the center section. Click OK .

6) Printing Comments

- a) While still in page set-up, click on the **Sheet** tab.
- b) Drop the arrow down next to Comments to select **As Displayed on Sheet**.
- c) Select **OK**.

7) Using Print Preview

- a) Click on the **Office Button**. Move down to print and over to click on **Print Preview**. Note how everything fits to one page and how your comments are displaying. Close Print Preview.
- b) Close and save My Budget.xlsx.

8) Opening Another Workbook

- a) Due to time constraints, a new workbook, named **Monthly Income.xlsx**, has been created for you. You must download it from the library website, saving it to your flash drive. Once you have done that, open the Monthly Income workbook.

9) Linking Workbooks

- a) Open the My Budget workbook

- b) In the My Budget workbook, on the January worksheet, click in cell **B15**, and type an equal sign.
- c) Reference the Monthly Income workbook by clicking on its button on the task bar.
- d) Click in cell D9 of the January worksheet, and click the check mark on the formula bar.
- e) Click in cell B15 and notice the Formula Bar with its references to the workbook, worksheet, and cell listed there.

10) Updating Linked Workbooks

- a) Save and close My Budget.
- b) In the Income Workbook, change the Secretary salary (Amount Paid) to \$700. Note the change to the total income figure to \$2950.00.
- c) Save and close Monthly Income
- d)** Open My Budget. Notice the income amount. Did it update to \$2950.00? Ans: No.
- e) Note the Security Warning above the formula bar. Click on **Options** and select **Enable this content**. Click OK.
- f) NOTE: These workbooks will remain linked as long as the filename or storage location does not change.

11) Ending Class

- a) Save and close out of any open workbooks.