

TECHNOCEO

For Microsoft Office 2010 Student Workbook



TECHNOeBooks

Project-based Computer Curriculum eBooks



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SESSION 3

Organize Financial Information

Investors want to know about the financial status of the company. They will be interested in the operating expenses and sales revenue. You are going to use Microsoft Excel to organize the financial information of your company using worksheets. The data will be formatted to make it easy to read and look professional. This information will be added later to the presentation.

Assignment 7: Introduction to Microsoft Excel

Assignment 8: About Operating Expenses

Assignment 9: About Sales Revenue

Session 3 Review: About Microsoft Excel

Session 3 Skill Review: Track Your Own Earnings

Session 3 Extension Activity: Format Table Style

Assignment 7: Introduction to Microsoft Excel

What is a Spreadsheet?

A spreadsheet is a *worksheet* that organizes information in columns and rows. A spreadsheet helps to manage, analyze, and present information. In Microsoft Excel, a *workbook* is the file in which data is organized and stored. Since each workbook can contain many worksheets, various kinds of related information in a single file can be organized.

Open Microsoft Excel

Click the START menu, point to *All Programs – Microsoft Office – Microsoft Excel*.



Label the Parts of the Microsoft Excel Window

The screenshot shows the Microsoft Excel interface with the following parts labeled:

- 1: Title Bar (Book1 - Microsoft Excel)
- 2: Quick Access Toolbar (Save, Undo, Redo)
- 3: Ribbon (Home, Insert, Layout, Formulas, Data, Review, View, Add-Ins)
- 4: Ribbon Tab (Home)
- 5: Ribbon Group (Clipboard)
- 6: Ribbon Command (Paste)
- 7: Formula Bar (A1, fx)
- 8: Name Box (A1)
- 9: Row Header (1)
- 10: Column Header (A)
- 11: Worksheet Grid
- 12: Row Selection
- 13: Sheet Tab (Sheet1, Sheet2, Sheet3)
- 14: Status Bar (Ready)
- 15: Scroll Bars

Terms:

- Cell
- Ribbon
- Group
- Name Box
- Sheet Tab
- File Tab
- Row
- Quick Access Toolbar
- Scroll Bars
- Formula Bar
- Title Bar
- Tab
- Command
- Status Bar
- Column

- | | | |
|----------|-----------|-----------|
| 1. _____ | 6. _____ | 11. _____ |
| 2. _____ | 7. _____ | 12. _____ |
| 3. _____ | 8. _____ | 13. _____ |
| 4. _____ | 9. _____ | 14. _____ |
| 5. _____ | 10. _____ | 15. _____ |

NAME _____ DATE _____

Window Part	Description
TITLE BAR	A bar at the top of the window that shows the workbook name, program name, and the control buttons.
QUICK ACCESS TOOLBAR	A set of commands that are used often, such as Save and Undo. You can add commands to the Quick Access Toolbar to customize it for your own use.
FILE TAB	A tab to the left side of the window which opens Backstage view, a menu of basic commands used in many Microsoft Office programs, such as New, Open, Save and Print. To return to the document, press ESCAPE, click the thumbnail of the document, or click any tab on the ribbon.
RIBBON	A band that contains a set of tabs including Home, Insert, Page Layout, Formulas, Data, Review, and View.
NAME BOX	A box that shows the name of the active cell.
TAB	A part of the ribbon used to organize commands that do similar types of activities. For example, the Insert tab has commands that add objects to the worksheet.
GROUP	A collection of commands on a tab that do similar actions. For example, the Alignment group contains commands that change the placement of text in a cell, such as Left, Center, or Right.
SCROLL BARS	Bars used to change the part of the worksheet shown in the window. The worksheet can be moved up or down using the vertical scroll bar, or to the left and right using the horizontal scroll bar.
SHEET TAB	A tab at the bottom corner of the window that changes the active worksheet.
FORMULA BAR	A bar that lets you insert or edit the contents of a cell.
COMMAND	A button, menu, or box that tells the program to do a task. A command often has a picture that shows the action. For example, the Cell Styles command looks like a cell with a paint brush.
CELL	Found on a worksheet, a cell is a rectangular box that is identified by a unique letter and number combination. Type a number or text into this box.
STATUS BAR	A strip along the bottom of the screen where applications display information. This can include calculations, view shortcuts, and zoom slider.
ROW	A horizontal group of cells in a worksheet. Each row is identified using numeric row headings.
COLUMN	A vertical group of cells in a worksheet. Each column is identified using alphabetic column headings.

Look Around the Window

15. Find the *Microsoft Office Excel Help* command . Where is it located?

16. Find the *Zoom slider* . Where is it located?

17. Find the *Quick Access Toolbar*.  Where is it located?

Close Microsoft Excel

 Click the File tab and choose *Exit*. Do not save changes.

Assignment 8: About Operating Expenses

Investors need to know about company expenses. Expenses are the costs of operating a business. There are many different types of expenses:

<i>Salaries</i>	cost of paying employees
<i>Rent</i>	cost of renting a place for the business
<i>Inventory</i>	cost of purchasing each item sold from the manufacturer
<i>Utilities</i>	cost to have electricity, heat, and water in the building
<i>Office Supplies</i>	cost of paper, printer ink, envelopes, pens, and any other materials needed to operate the company

Follow the instructions to organize company financial information in Microsoft Excel using the Financial Template.

Open Financial Template in Microsoft Excel

- ☞ Open the *CEO* folder.
- ☞ Double click the *Financial Template* document.
- ☞ Click the *Operating Expenses* worksheet tab.

You are now working in Microsoft Excel.

This workbook has 3 worksheets, each identified by its sheet tab.

	A	B	C	D	E	F	G
1	Operating Expenditures						
2	The company operating expenses are listed monthly.						
3		Salaries	Rent	Inventory	Utilities	Office Supplies	
4	January	\$ 7,000.00	\$ 1,300.00	\$ 7,225.00	\$ 1,200.00	\$ 275.00	
5	February	\$ 7,000.00	\$ 1,300.00	\$ 8,100.00	\$ 1,000.00	\$ 320.00	
6	March	\$ 7,000.00	\$ 1,300.00	\$ 8,475.00	\$ 1,200.00	\$ 265.00	
7	April	\$ 7,000.00	\$ 1,300.00	\$ 3,625.00	\$ 1,750.00	\$ 55.00	
8	May	\$ 7,000.00	\$ 1,300.00	\$ 8,950.00	\$ 1,000.00	\$ 120.00	
9	June	\$ 7,000.00	\$ 1,300.00	\$ 2,375.00	\$ 1,400.00	\$ 325.00	
10	July	\$ 7,000.00	\$ 1,300.00	\$ 1,175.00	\$ 1,300.00	\$ 495.00	
11	August	\$ 7,000.00	\$ 1,300.00	\$ 5,750.00	\$ 1,100.00	\$ 360.00	
12	September	\$ 7,000.00	\$ 1,300.00	\$ 2,800.00	\$ 900.00	\$ 180.00	
13	October	\$ 7,000.00	\$ 1,300.00	\$ 7,450.00	\$ 1,100.00	\$ 445.00	
14	November	\$ 7,000.00	\$ 1,300.00	\$ 9,825.00	\$ 900.00	\$ 230.00	
15	December	\$ 7,000.00	\$ 1,300.00	\$ 4,750.00	\$ 1,300.00	\$ 395.00	
16							
17							
18							

Operating Expenditures Sales Revenue Sheet 3

sheet tabs

The **Operating Expenditures** worksheet contains information about company expenses for one year.

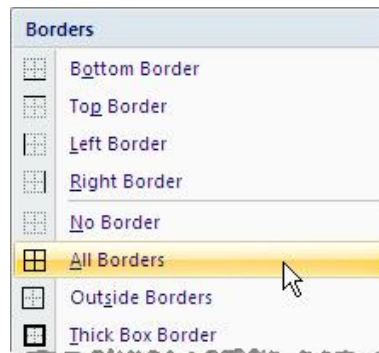
Format the Borders

The information on the worksheet is difficult to read because there are no borderlines to separate the data. Add a border to cells to make the operating expense easy to read.

- ☞ Select cell **A4**.
- ☞ Hold the SHIFT key and then select cell **F15** to highlight all the months and financial data.

	A	B	C	D	E	F	G
1	Operating Expenditures						
2	The company operating expenses are listed monthly.						
3		Salaries	Rent	Inventory	Utilities	Office Supplies	
4	January	\$ 7,000.00	\$1,300.00	\$ 7,225.00	\$1,200.00	\$ 275.00	
5	February	\$ 7,000.00	\$1,300.00	\$ 6,100.00	\$1,000.00	\$ 320.00	
6	March	\$ 7,000.00	\$1,300.00	\$ 8,475.00	\$1,200.00	\$ 265.00	
7	April	\$ 7,000.00	\$1,300.00	\$ 3,625.00	\$1,750.00	\$ 55.00	
8	May	\$ 7,000.00	\$1,300.00	\$ 8,950.00	\$1,000.00	\$ 120.00	
9	June	\$ 7,000.00	\$1,300.00	\$ 2,375.00	\$1,400.00	\$ 325.00	
10	July	\$ 7,000.00	\$1,300.00	\$ 1,175.00	\$1,300.00	\$ 495.00	
11	August	\$ 7,000.00	\$1,300.00	\$ 5,750.00	\$1,100.00	\$ 360.00	
12	September	\$ 7,000.00	\$1,300.00	\$ 2,800.00	\$ 900.00	\$ 180.00	
13	October	\$ 7,000.00	\$1,300.00	\$ 7,450.00	\$1,100.00	\$ 445.00	
14	November	\$ 7,000.00	\$1,300.00	\$ 8,825.00	\$ 800.00	\$ 230.00	
15	December	\$ 7,000.00	\$1,300.00	\$ 4,750.00	\$1,300.00	\$ 395.00	
16							
17							

- ☞ On the Home tab, locate the Font group and click the arrow beside *Borders*.
- ☞ From the list, select *All Borders*.



- ☞ With the cells still selected, click the arrow beside *Borders* again.
- ☞ From the list, select *Thick Box Border*.

Thick outside border

Thin inner borders

	A	B	C	D	E	F	G
1	Operating Expenditures						
2	The company operating expenses are listed monthly.						
3		Salaries	Rent	Inventory	Utilities	Office Supplies	
4	January	\$ 7,000.00	\$1,300.00	\$ 7,225.00	\$1,200.00	\$ 275.00	
5	February	\$ 7,000.00	\$1,300.00	\$ 6,100.00	\$1,000.00	\$ 320.00	
6	March	\$ 7,000.00	\$1,300.00	\$ 8,475.00	\$1,200.00	\$ 265.00	
7	April	\$ 7,000.00	\$1,300.00	\$ 3,625.00	\$1,750.00	\$ 55.00	
8	May	\$ 7,000.00	\$1,300.00	\$ 8,950.00	\$1,000.00	\$ 120.00	
9	June	\$ 7,000.00	\$1,300.00	\$ 2,375.00	\$1,400.00	\$ 325.00	
10	July	\$ 7,000.00	\$1,300.00	\$ 1,175.00	\$1,300.00	\$ 495.00	
11	August	\$ 7,000.00	\$1,300.00	\$ 5,750.00	\$1,100.00	\$ 360.00	
12	September	\$ 7,000.00	\$1,300.00	\$ 2,800.00	\$ 900.00	\$ 180.00	
13	October	\$ 7,000.00	\$1,300.00	\$ 7,450.00	\$1,100.00	\$ 445.00	
14	November	\$ 7,000.00	\$1,300.00	\$ 8,825.00	\$ 800.00	\$ 230.00	
15	December	\$ 7,000.00	\$1,300.00	\$ 4,750.00	\$1,300.00	\$ 395.00	
16							
17							

Format the Expense and Month Headings

Change the expense headings by formatting the font, adding borders, and changing the alignment.

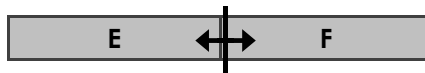
Format the Font

- Select cell **B3**, hold the SHIFT key and then select cell **F3** to select the five headings.
- On the Home tab, locate the Font group and use the following commands to format the expense headings:



TECHNOTIP:

If the headings do not fit, you need to resize the columns or rows. Place the mouse pointer between the letter column headings. The cursor changes to a double sided arrow. Double click to resize the cell to fit the contents or drag the column or row manually to resize it.



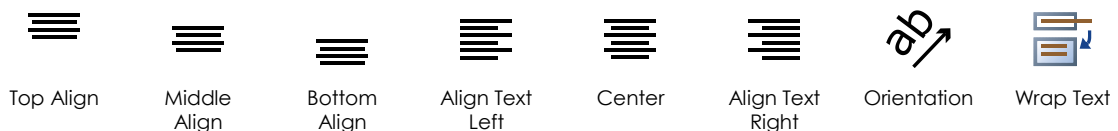
Format the Borders

- Select the expense headings.
- Click the arrow beside *Borders* and select *All Borders*.
- With the cells still selected, click the arrow beside *Borders* again.
- From the list, select *Thick Box Border*.



Format the Alignment

- Select the expense headings.
- On the Home tab, locate the Alignment group and use the following commands to format the expense headings:



- APPLY WHAT YOU KNOW TO FORMAT THE MONTH HEADINGS.**

Format the Title Operating Expenditures

Format the worksheet heading **Operating Expenditures** to make it look good. You will use Merge and Center to combine many cells together to make one large cell. This will let you center the title over the table.

- ☞ Select cell **A1**. Press the SHIFT key and select the last cell that the data covers. In this case it is cell **G1**.

	A	B	C	D	E	F
1	Operating Expenditures					

- ☞ On the Home tab, locate the Alignment group and click *Merge and Center*.



- ☞ Format the worksheet title to look clear and bold.

Format the Worksheet

Apply your knowledge to format the worksheet. Below are some tips:

- The worksheet should look professional.
- The fonts should be easy to read.
- The borders should help to separate information.
- The fill color should make important information stand out.
- The headings should be formatted differently than the information in the table.

Save the Worksheet into the Workbook Folder

- ☞ Click Save on the Quick Access Toolbar.



- ☞ Go to the *Workbook* folder.

- ☞ Add your company name to the file name so that it reads **Company Name Financial**, for example: *TechnoSkater Financial*.

- ☞ Click Save.

Close Microsoft Excel

- ☞ Click the File tab and choose *Exit*.

Assignment 9: About Sales Revenue

Investors need to know about company revenue. Revenue is the amount of money the company earns. There are many different types of information investors will want to know about sales:

<i>Items Sold</i>	quantity of product sold
<i>Cost</i>	amount of money it costs to make the product
<i>Total Cost</i>	total amount of money it costs to make a specific quantity of product (items sold x cost)
<i>Retail Value</i>	price the customer pays for the product
<i>Gross Sales</i>	total amount of money earned from selling a specific quantity of product (items sold x gross sales)
<i>Net Monthly Sales</i>	amount of money earned each month after the total cost for that item has been subtracted (gross sales – total cost)
<i>Product Line Total</i>	total amount of money earned for each product line during a 12 month period
<i>Grand Total</i>	total amount of money earned for all product lines during a 12 month period

Follow the instructions to organize company sales revenue information in Microsoft Excel using the Financial Template.

Open the Workbook in Microsoft Excel

- ☞ Open the *Company Name Financial* workbook in Microsoft Excel.
- ☞ Click the *Sales Revenue* worksheet tab.



	A	B	C	D	E	F	G	H
1	Sales Revenue							
2	The company sales are listed monthly according to product line.							
3								
4	Product Type							
5								
6	Product Line #1							
7								
8		Items Sold	Cost	Total Costs	Retail Value	Gross Sales	Net Monthly Sales	
9	January	30	\$ 50.00					
10	February	20	\$ 50.00					
11	March	30	\$ 50.00					
12	April	50	\$ 50.00					
13	May	82	\$ 50.00					
14	June	88	\$ 50.00					
15	July	100	\$ 50.00					
16	August	54	\$ 50.00					
17	September	78	\$ 50.00					
18	October	90	\$ 50.00					
19	November	175	\$ 50.00					
20	December	250	\$ 50.00					
21								
22								Product Line 1 Total
23								

TECHNOTIP:

Make sure you have the product line and price information from Assignment 1. You will need to transfer this information to the Sales Revenue worksheet.

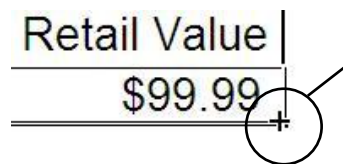
Enter in Product Information

The **Sales Revenue** worksheet contains information about the money the company has earned from product sales.

It is missing information. You need to fill in the **product type, product lines, and retail value**. You will find this information in Assignment 1.

You will use the *Autofill* to fill the cells for each month with a retail value and cost information.

- ☞ Select cell **B4** and type **Product Type**.
- ☞ Select cell **B6** and type the **Name of Product Line #1**.
- ☞ Select cell **E9**. Type the **Retail Value**.
- ☞ To quickly fill the Retail Value column with the amount, hold the mouse pointer over the lower right corner of cell **E9**. Click and drag to cell **E20**.



The mouse pointer changes to a crosshair (+). This is called the fill handle of the AutoFill feature.

- ☞ **REPEAT STEPS TO FILL IN THE INFORMATION FOR PRODUCT LINE #2 AND PRODUCT LINE #3.**

Format Cells

- ☞ Use your knowledge to format the following:

- | | |
|--|--|
| <input type="checkbox"/> A1 - Sales Revenue | <input type="checkbox"/> Borderlines |
| <input type="checkbox"/> B4 - Product Type | <input type="checkbox"/> Table headings |
| <input type="checkbox"/> B6, B24, B42 – Product Name | <input type="checkbox"/> Table information |

Save Changes to the Workbook and Close Microsoft Excel

- ☞ Click Save on the Quick Access Toolbar.



- ☞ Click the File tab and choose *Exit*.