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145 – BASIC EXCEL FUNCTIONS

You Gotta Crawl Before You Can Walk

1. [Click to Begin List]

Let's learn a little about Microsoft Excel

HINT: ctrl-scrollwheel up or down zooms in or out of the excel file

It may be necessary to add categories, or additional line items to categories as the year and the expenditures diversify. When adding to the spreadsheet, it is important to be sure that Excel calculates the new information, and the entire spreadsheet (whole year, each month) is calculating correctly. Excel is usually smart enough to re-add subcategories when more rows are added, as long as you do it carefully following these instructions:

- place cursor set to select entire row right below subtotal row
- right click and insert
- name the new column
- populate zeros (or values) into months across new row
- verify vertical sum, horizontal sum and YTD subtotal is accurate

Make sure the Page Setup for this document is optimized to show a maximum amount of data with minimal page usage. It might be necessary to “shrink to page” or adjust margins to make the report fit well. The most important thing is to have the report be only one page wide. This may require a switch to landscape mode later in the year.

Excel page is called a worksheet