

Microsoft Excel -  
Lesson 4:

Building an Excel Worksheet

Lesson Notes

<p>I. <u>Planning &amp; Execution Steps:</u></p> <ol style="list-style-type: none"> <li>a. Purpose of the worksheet, what will it include, how will it be organized?</li> <li>b. Enter titles, data &amp; formulas</li> <li>c. Test the worksheet</li> <li>d. Edit the worksheet</li> <li>e. Document the worksheet</li> <li>f. Polish the worksheet</li> <li>g. Print or present the worksheet</li> </ol>	<p>B-2-3 Book</p>
<p>II. <u>In planning and designing a worksheet it is important to :</u></p> <ol style="list-style-type: none"> <li>a. Read page B-2</li> </ol>	<p>B-2</p>
<p>III. <u>Building Your Worksheet:</u></p> <ol style="list-style-type: none"> <li>a. Enter all Data Labels and Text First</li> <li>b. Enter all of your data after you manage your Titles</li> <li>c. Be creative and customize your worksheets to your liking, but remember to follow some logical order and organization.</li> </ol>	<p>Book</p>
<p>IV. <u>Your Assignment:</u></p> <ol style="list-style-type: none"> <li>a. Develop a personal monthly finance workbook for one year.</li> <li>b. Include the following:             <ol style="list-style-type: none"> <li>i. Income:                 <ol style="list-style-type: none"> <li>1. Differentiate Sources</li> </ol> </li> <li>ii. Expenses:                 <ol style="list-style-type: none"> <li>1. Utilities, Grocery, Rent, Entertainment, Education, Vehicle Payment, Others?</li> </ol> </li> <li>iii. Balances for expenses, income, assets, inventory, etc.                 <ol style="list-style-type: none"> <li>1. Sums, Percentages, Changes from month to month</li> </ol> </li> <li>iv. Other Information?</li> <li>v. Multiple sheets may be used.</li> <li>vi. Be creative and use what you have learned thus far. If you take this exercise seriously, you will have a powerful financial tool that can be used for years to come.</li> <li>vii. Insert data in a minimum of two months. The remaining ten months can be without data but must have the appropriate functions, formulas, and labels. Certain months may have special expense or income items (i.e. – December, Christmas expenses or Christmas bonus)</li> <li>viii. The completed product is due _____.                 <ol style="list-style-type: none"> <li>1. You will be graded upon your quality of work and application of skills that you have learned thus far.</li> </ol> </li> </ol> </li> </ol>	<p>Assignment &amp; Internet Example</p>