

Easy Way



Teach yourself...

Microsoft Excel 2007

(Level 1)

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Written in plain English

A Cheryl Price Publication

Easy Way - Microsoft Excel 2007 (Level 1)

This book is designed to teach beginner topics for learning Microsoft Excel 2007. It contains simple step-by-step exercises to guide you through the learning process.

There are dozens of exercises including consolidation exercises, both theory and practical at the end of each section.

The process of consolidation and accumulation of learning is unique to the Cheryl Price books.

Retrievable exercise files are used with this book. These are available for free download from our web site at www.cherylprice.co.nz. Instructions for downloading are included on the next page.

Free Resource: A free resource "What is a Spreadsheet" (with manual exercises) is available on our Download page at www.cherylprice.co.nz. This is an excellent resource for total beginners to spreadsheets or for those students who have difficulty understanding spreadsheet concepts.

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ISBN 978-1-877562-73-0

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Published in New Zealand

Downloading Exercise Files

Exercise files can be downloaded from the Cheryl Price web site as follows:


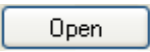




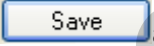
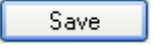
1	In your web browser, type: www.cherylprice.co.nz
2	Press Enter on the keyboard to display the Cheryl Price website.
3	Click on the Resources tab as shown at the right. 
4	Click on <u>Easy Way – Microsoft Excel 2007</u>
5	Click on the <u>Free download</u> hyperlink, ie Excel 2007, Level 1 Free download The File Download dialog box will display.
6	If you have Winzip use the following instructions otherwise move to step 7.
	a Click on  .
	b Click on the  of the  button.
	c If My Documents folder is not displayed click on Set default unzip folder at the bottom of the list. Ensure My Documents is selected then click on Select Folder .
	d Click on the  of the  button and click on the My Documents folder. The files will be unzipped.
7	Click on  and ensure My Documents folder is displayed. Click on 
8	Click on Open Folder which will display My Documents folder. Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files. You will need to double click on this folder to use the exercise files in this book.

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Files used in this book

(Instructions are at the front of this book for downloading retrievable files from our web site.)

Opened	Created
Atrium	Balance Sheet – <i>Current Date</i>
Balance Sheet	Balance Sheet – Excel 2003
Brighton Winery	Bankings - Alteration
Chatswood	Bankings - June and July
Costello's Product Sales	Barbara's Bag Bazaar Sales Figures
Creative Caps	Best Books Ltd - Branch Sales
Delphine's Cooking School	Biscuits Invoice
Eats and Treats	Car Hire Costs
Enrolments – 2009	Foreign Explorer
Fashion House	Household Budget
Fashion Xpress	Invest
Fiji Landing Apartments	Sherard College Grades
Housekeeping Services	
Lifestyle Books	
Peter Hamilton Transport	
Premier Books	
Quotation	
Retirement Scheme	
Sales Commission	
Spreadsheet Plan	
Sunshine Flowers	
Tracey's Budget	
Wilson Markers	

Sample Document

Spreadsheet Theory

The Excel Screen

Opening and Exploring a Workbook

Creating a New Workbook

Learning Outcomes

At the end of this section you should be able to -

- ☐ Understand what a spreadsheet is
- ☐ Start and exit Excel 2007
- ☐ Understand the Excel 2007 screen
- ☐ Open and explore an existing workbook
- ☐ Create and save a new workbook
- ☐ Enter text, numbers and formulas into a worksheet
- ☐ Apply basic formatting to a worksheet
- ☐ Print a worksheet

Sample Document

Spreadsheets

A spreadsheet is essentially a large working area composed of rows and columns. The intersection of a row and column is called a cell. Text and numbers are entered into these cells and formulas are used to manipulate the data to provide information required.

Microsoft Office Excel 2007 (or any spreadsheet program) makes calculations easy - it replaces your pencil, paper and calculator. If you change data in a worksheet, every formula associated with that data will be automatically recalculated accordingly.

Data can therefore be altered to re-calculate budgets and to forecast results using different sales projections. Worksheets can be saved on disk, retrieved and printed as required.

Note In this book Microsoft Office Excel 2007 will be referred to as Excel 2007.

Spreadsheets are widely used -

- 1 **In industry and commerce for**
 - financial accounts
 - forecasting and projection results
 - recording and comparing data
 - personnel details
- 2 **At home for**
 - budgeting
 - calculations, eg painting, wallpapering
 - savings and travelling expenses
- 3 **At schools for**
 - test and examination results
 - timetables
 - school rolls
- 4 **At clubs for**
 - membership fees
 - sports results
 - sponsorship details

Examples of other spreadsheet programs include Lotus 1-2-3, Corel Quattro Pro and OpenOffice Calc (the last of which can be freely downloaded from the Internet).

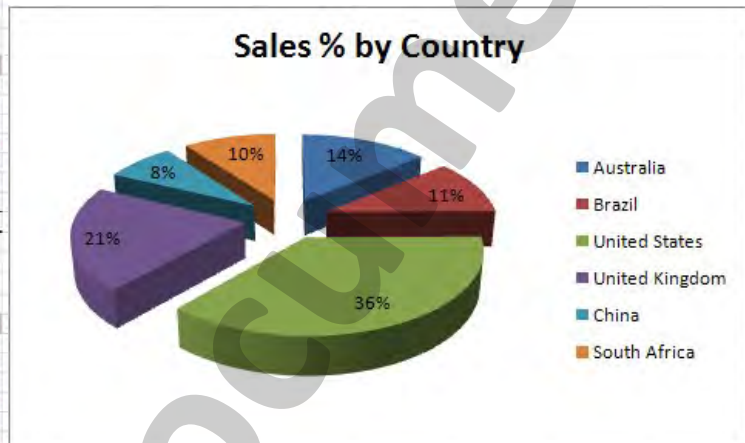
Spreadsheet/Worksheet

The word *spreadsheet* is a general term for any document created by a spreadsheet program; a spreadsheet is referred to in Excel 2007 as a *worksheet*. Both of these terms are used throughout this book but they refer to the same thing.

Samples of Spreadsheets

	A	B	C	D	E	F	G	H
1	Day Trippers							
2								
3								
4	Tours	January	February	March	April	May	June	Total
5	Hinterland Tour	256	353	178	125	374	322	1608
6	The Coast Tour	312	262	285	310	345	370	1884
7	Bryon Bay and Tweed Heads	408	478	324	314	423	384	2331
8	Fraser Island	993	810	826	786	874	882	5171
9	Brisbane in a Day	554	487	512	456	492	414	2915
10	Brisbane at Night	452	435	478	398	416	488	2667
11	Total	2975	2825	2603	2389	2924	2860	16576

	A	B	C	D	E	F
1	VitaHealth Products - Worldwide Sales					
2	2009					
3						
4		Q1	Q2	Q3	Q4	Total
5	Australia	105,000	95,600	87,500	160,200	448,300
6	Brazil	85,000	92,300	75,000	96,000	348,300
7	United States	199,000	357,000	224,785	391,255	1,172,040
8	United Kingdom	153,000	169,000	158,700	180,250	660,950
9	China	62,500	52,500	49,000	82,000	246,000
10	South Africa	75,000	84,000	70,400	96,100	325,500
11						
12	Total	679,500	850,400	665,385	1,005,805	3,201,090
13						
14						
15	2008					
16						
17		Q1	Q2	Q3	Q4	Total
18	Australia	55,000	88,000	76,000	155,350	374,350
19	Brazil	75,000	85,300	72,400	95,000	327,700
20	United States	155,000	225,000	123,950	250,780	754,730
21	United Kingdom	125,000	255,690	155,890	175,500	712,080
22	China	65,000	45,650	45,000	75,000	230,650
23	South Africa	78,000	89,000	65,890	95,200	328,090
24						
25	Total	553,000	788,640	539,130	846,830	2,727,600
26						
27						
28	2007					
29						
30		Q1				
31	Australia	125,000				
32	Brazil	75,000				
33	United States	185,500				
34	United Kingdom	145,500				
35	China	65,000				
36	South Africa	72,500				
37						
38	Total	668,500				



	A	B	C	D	E	F	G
1	Te Kea Trading Company						
2	Pricing Structure for December Sale						
3							
4							
5	Product	Cost Price	Retail Price	% Margin	Quantity in Stock	Value of Stock	Sale Price
6							
7	Calendars	\$ 11.00	\$ 18.95	41.95%	50	\$ 550.00	\$ 17.06
8	Saucepans	75.00	95.00	21.05%	25	1,875.00	85.50
9	Electric Jug	42.00	75.50	44.37%	32	1,344.00	67.95
10	Men's Sweatshirt	24.00	42.95	44.12%	55	1,320.00	38.66
11	Weedeater	185.00	269.90	31.46%	24	4,440.00	242.91
12	T-Shirts	15.00	24.85	39.64%	75	1,125.00	22.37
13	Garden Shed	295.00	375.50	21.44%	11	3,245.00	337.95
14	Crockpot	120.00	159.90	24.95%	30	3,600.00	143.91

Advantages of Spreadsheets

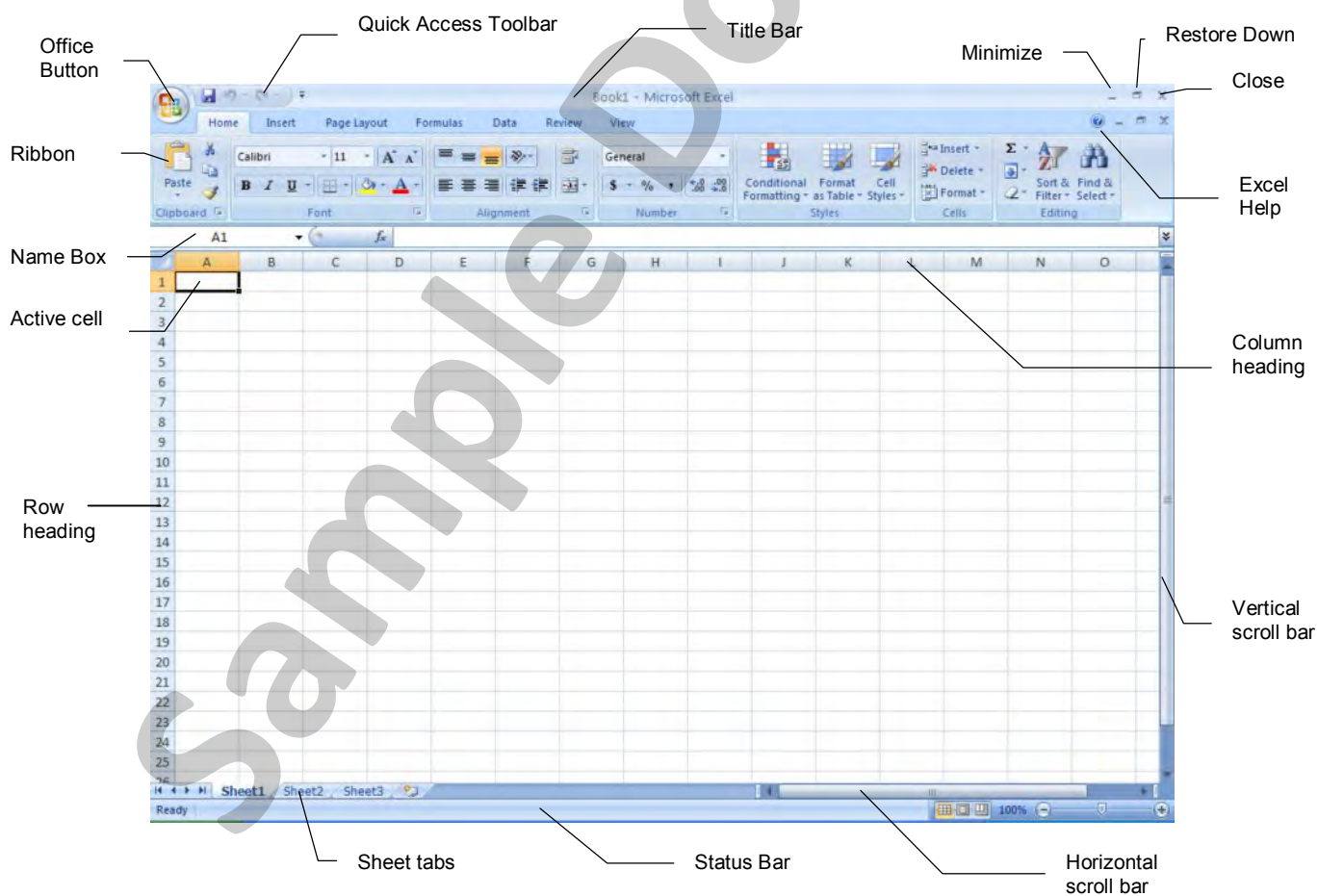
- Calculations can be performed quickly and easily.
- If data is altered, the calculations automatically adjust.
- Worksheets within a workbook can be used for different groups of data. Data from a group of worksheets can be calculated onto one summary worksheet.
- Charts can be used to visually display data, eg bar, column, pie, line.
- Data can be manipulated, grouped and sorted into a specific order for lists, databases, etc. Data within a spreadsheet can then be quickly located.

Starting Excel 2007

Exercise 1

- 1 Click on  at the bottom left-hand corner of the screen.
- 2 Select  from the Start Menu.
- 3 Select  from the Programs menu.
 -  Microsoft Office Access 2007
 -  Microsoft Office Excel 2007
 -  Microsoft Office Outlook 2007
 -  Microsoft Office PowerPoint 2007
 -  Microsoft Office Publisher 2007
 -  Microsoft Office Word 2007
- 4 Select  from the list to start Excel 2007.

The Excel Screen



Office Button

The Office Button is positioned at the top left corner of the Excel screen. Click on the button to display the Office Button menu. This menu contains tools required to perform basic tasks such as opening, saving and printing a spreadsheet.



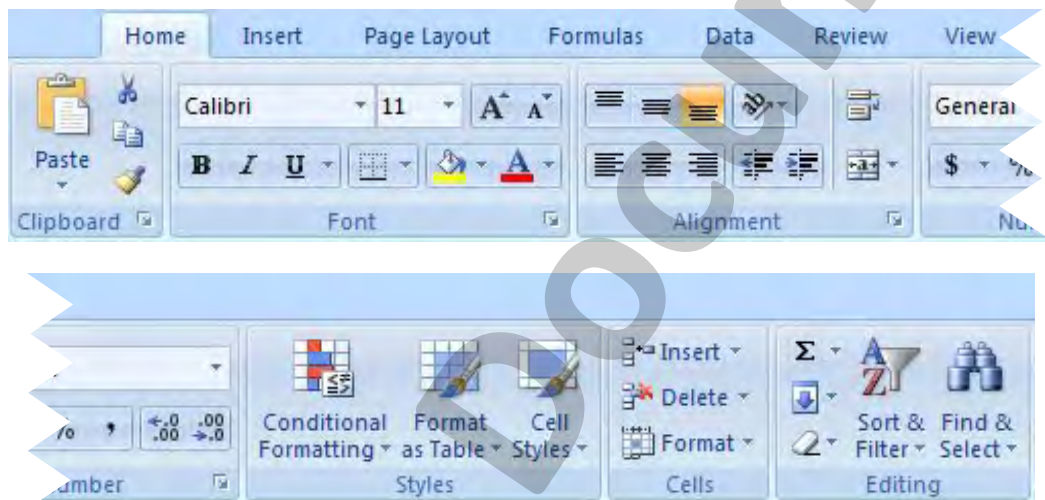
Quick Access Toolbar

The Quick Access Toolbar contains commands to Save, Undo and Redo. Frequently used commands can be added to this menu.



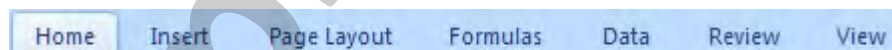
The Ribbon

The toolbars and menus from the previous versions of Excel have been replaced by the Ribbon. The Ribbon provides access to all the tools required for working with a spreadsheet.

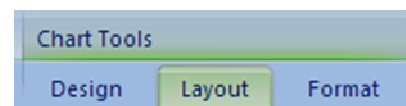


Ribbon Tabs

The Ribbon has a series of tabs along the top; click on the tab to display the Ribbon required. There are seven default tabs:

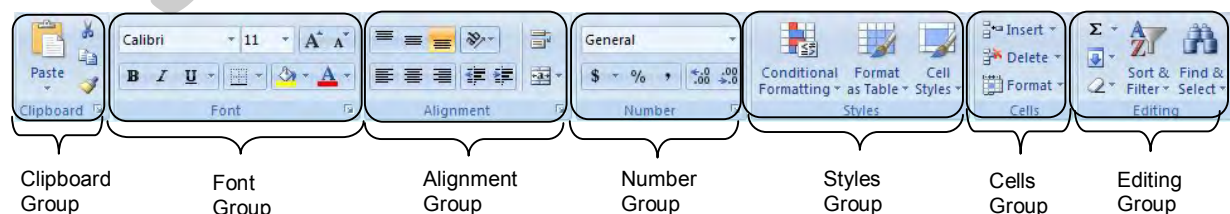


There are also hidden tabs that also appear when appropriate, such as the Chart Tools. These appear when you are working on a chart and disappear again when you have finished.



Groups

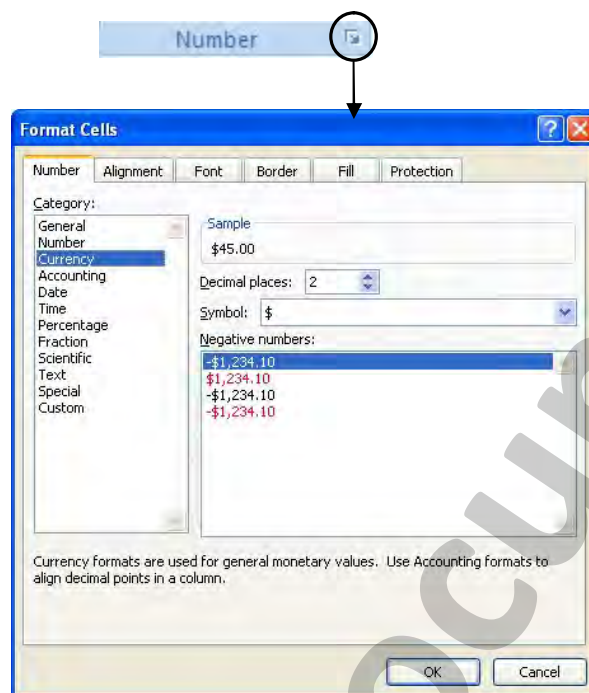
Ribbons are split into groups, (eg the Font Group). Each group contains command buttons appropriate to a particular action; the font formatting tools are located in the Font Group.



Dialog Box Launcher

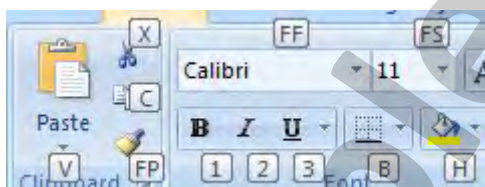
The Dialog Box Launcher button is the small diagonal arrow in the bottom right corner of some groups. When you click on this button, it displays an associated dialog box.

Dialog boxes usually contain more settings or advanced features. For example, the Number dialog box allows you to make formatting changes to the contents of the current cell.



Key Tip Badges

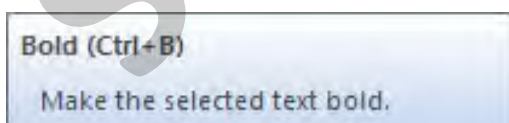
The keyboard can be used to select tabs and buttons on the Ribbons. If you press Alt, Key Tip Badges become active.



These small badges are labelled with various letters and numbers, that when pressed on the keyboard, will trigger the associated command or function. For example, to format text to bold, press Alt, then H (opens the Home Ribbon) then 1 (activates bold).



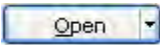
ScreenTips

When you rest the mouse pointer over a button or command, a screen tip appears. This is a small window describing the function of that command.



Opening a Workbook

Exercise 2

- 1 Click on the Office Button  at the top left of the window.
- 2 Click on  **Open** to display the Open dialog box.
- 3 Select **Fashion House**
- 4 Click on .

Cell Contents

Microsoft Excel allows you to enter data into any cell in a worksheet. Data may consist of text, numbers or a formula based on selected cells.

Various parts of a worksheet are shown below.

	A	B	C	D
1	The Fashion House - Conference Budget			
2				
3		Australia	America	Britain
4	Air Fares	897.00	1,586.95	2,425.28
5	Accommodation	1,200.00	1,800.50	2,000.00
6	Meals	950.00	1,060.96	1,250.25
7	Car Rental	660.50	501.23	680.25
8	Travel Insurance	80.00	100.00	95.00
9	Total	\$3,787.50	\$5,049.64	\$6,450.78

Labels

Values

Formula

=SUM(C4:C8)

(ie adds the values in cells C4 to C8)

Labels

Text/numbers that are not used in a mathematical formula or equation are called labels. They help the reader understand different parts of a worksheet, ie column headings, row headings, title of a worksheet, etc.

Values

Data that is used to calculate results or the end result of a calculation.

Formulas

A mathematical equation using cell references/constraints to produce a result. The result of a formula is seen in the worksheet; clicking on a cell will display the formula itself in the Formula Bar. When values change, the result of the formula will be updated automatically in the worksheet.

Exercise 3

- 1 Click in the Name Box at the top left of the worksheet.



- 2 Type: **C9**.
- 3 Press Enter. The cursor will move to cell C9 within the current worksheet.
The Formula Bar displays the formula that has been used to calculate the total for the America column.
- 4 Double click on the selected cell (C9) to display the Range Finder. The Range Finder shows the cells that are included in the formula (data range).

The Range Finder shows the formula `=SUM(C4:C8)` and the data range C4:C8. The data range includes the following values:

	Australia	America	Britain
Air Fares	897.00	1,586.95	2,425.28
Accommodation	1,200.00	1,800.50	2,000.00
Meals	950.00	1,060.96	1,250.25
Car Rental	660.50	501.23	680.25
Travel Insurance	80.00	100.00	95.00
Total	\$3,787.50	=SUM(C4:C8)	

- 5 Press Esc to turn off the Range Finder.

- Ctrl W
- 6 Click on the Office Button and click on . If asked to save changes click on No.

The formula used to add the total for the America column can be broken down as follows.

Equal to $=$ SUM (Function) (C4:C8) (Range)

Equal to

To determine that this is a *formula* (equation) $=$ is placed at the beginning of a formula.

Function

A built-in formula designed for ease of use. Functions can perform tasks such as addition, calculating the average of a group of values, inserting the date, calculating angles, calculating the value of an investment over a period, etc. (SUM will add together the contents of selected cells.)



Range

Reference to cells containing values, C4:C8 (ie C4 to C8). The range is used instead of typing `=C4+C5+C6+C7+C8` when using the SUM function.

Moving around a Worksheet

Exercise 4



In this exercise you will learn how to move the cursor around a worksheet, select cells, total columns/rows and create basic formulas.

- 1 Click on the Office Button  then click on  **Open**. Select the file called **Wilson Markers**. Click on Open.
- 2 Practise cursor movements as described below.

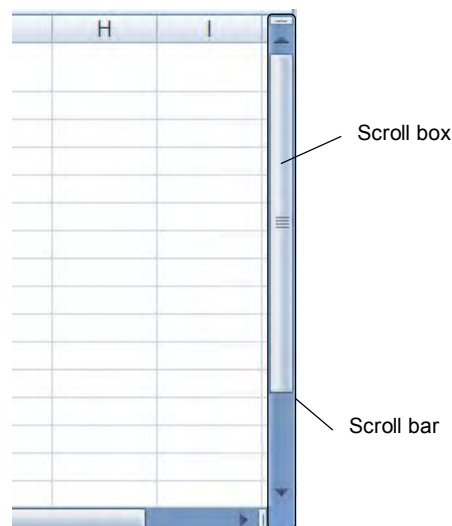
Cursor Movements

	Keyboard	Mouse
A column at a time	→ or ←	Move mouse and click
A row at a time	↑ or ↓	Move mouse and click
Beginning of a row	Home	Move mouse and click
End of a row of data	End →	Move mouse and click
Beginning of a row of data	End ←	Move mouse and click
Down one window	Page Down	Point and click below vertical scroll box
Up one window	Page Up	Point and click above vertical scroll box
Cell A1	Ctrl Home	Point and drag vertical scroll box up
Bottom right corner cell of data	Ctrl End	Point and drag vertical scroll box down
Next worksheet	Ctrl Page Down	Move mouse and click
Previous worksheet	Ctrl Page Up	Move mouse and click
Beginning and end of a row of data or to the end of the worksheet	Ctrl → or ←	Move mouse and click
Beginning and end of a column of data or to the end of the worksheet	Ctrl ↑ or ↓	Move mouse and click
Across one window to the right	Alt Page Down	Point and drag the horizontal scroll box right
Across one window to the left	Alt Page Up	Point and drag the horizontal scroll box left

Scroll Bars

The vertical and horizontal scroll bars at the right and bottom of the screen will move you around the worksheet area, beyond what you can initially see on your screen. Click on the  at the bottom right of your screen, on the vertical scroll bar, to move down the worksheet. Click on the  to move up the worksheet. Click in the required cell to make that cell “active”.

Dragging the scroll box on the vertical scroll bar will move quickly up or down the worksheet. Use the horizontal scroll box at the bottom of the screen to move to the left or right of a worksheet.

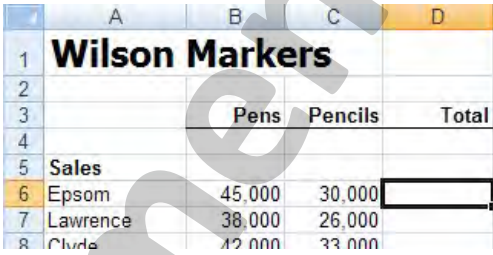
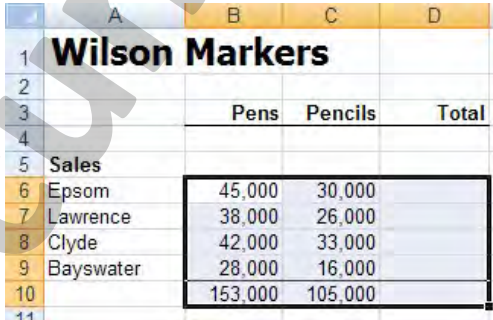
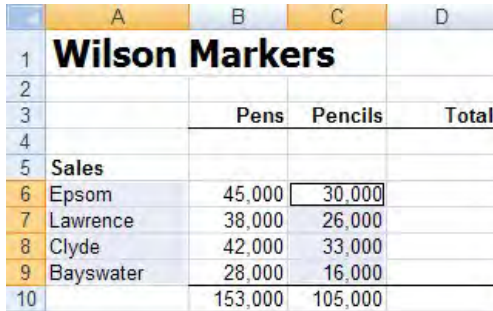
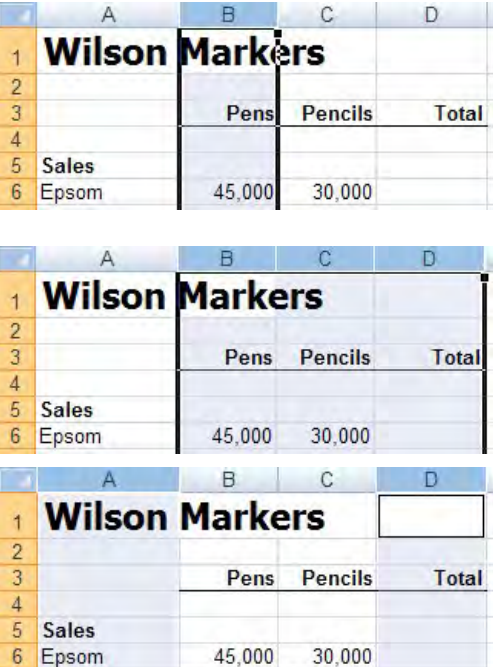


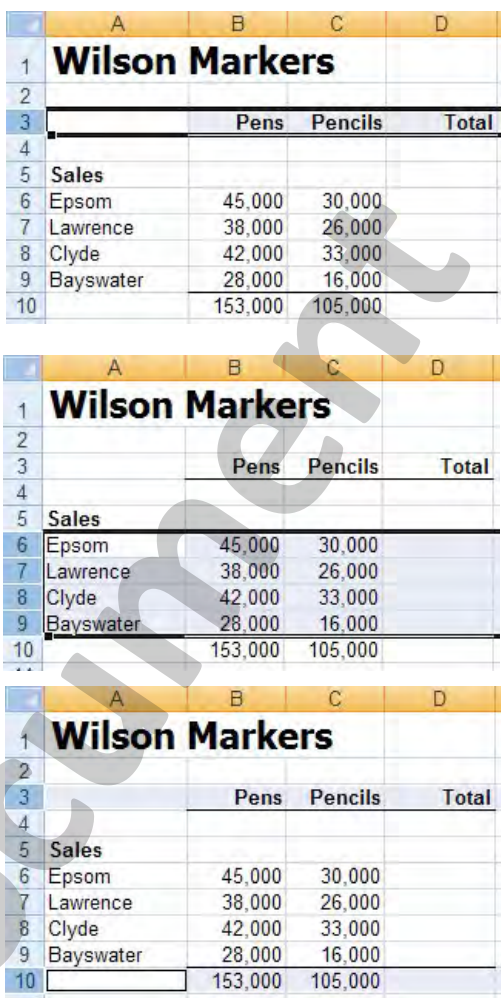
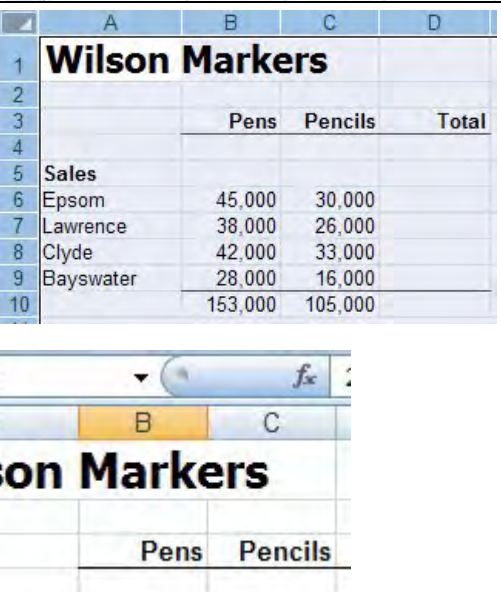
Selecting Cells

Exercise 5

Cells within a worksheet are selected to enter, edit or format data.

➤ Practise *selecting* using the various methods shown below.


Selecting	Mouse
Single cell	<p>Click in the centre of the cell.</p> 
Range of cells	<p>Click in the first cell in the range and drag to the last cell in the range.</p> <p>Alternatively, click in the first cell, hold down the Shift key and click on the last cell.</p> 
Non-adjacent cells	<p>Select the first range of cells then hold down the Ctrl key on the keyboard and select the second range of cells and so on.</p> 
An entire column(s)	<p>Click on the column header B OR with the cursor in the column press Ctrl Spacebar.</p> <p><i>Adjacent columns</i> Click and drag on the column headers.</p> <p><i>Non-adjacent columns</i> Hold down the Ctrl key and click on each column header.</p> 

<p>An entire row(s)</p>	<p>Click on the row header 3 OR with the cursor in the row press Shift Spacebar.</p> <p><i>Adjacent rows</i> Click and drag on the row headers.</p> <p><i>Non-adjacent rows</i> Hold down the Ctrl key and click on each row header.</p>	
<p>Entire worksheet</p>	<p>Click on the Select All button above the first row header and to the left of the first column header OR press Ctrl A.</p>	
<p>Deselecting selected cells</p>	<p>Click in a blank cell outside the selected cells.</p>	



Tip You can hold down the Shift key and use the arrow keys on the keyboard to select cells. Pressing an arrow key (with the Shift key released) will deselect cells.

The AutoSum Button

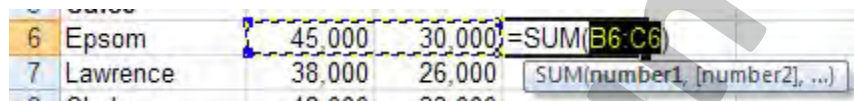
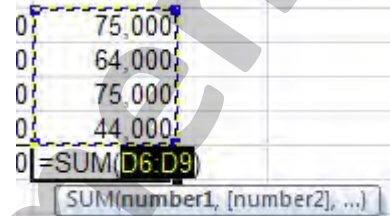
The AutoSum button  is used for the addition of multiple cells in a worksheet. It is located in the Editing Group on the Home Ribbon. The drop-down arrow next to the AutoSum button is used to select other functions, eg average, maximum, etc.



Before clicking on this button, ensure the active cell is where the result is to appear.

The AutoSum function will look *upwards* from the cursor position (within a column) to find cells to add.

However, if cells above a total cell do not contain values then the AutoSum function will look to the *left* of the cursor position and select cells to add (across a row).



Exercise 6

1 Click on cell D6.


Alt = 2 Click on the AutoSum button  located in the Editing Group on the Home Ribbon.

SUM					
X ✓ f_x =SUM(B6:C6)					
	A	B	C	D	E
1	Wilson Markers				
2					
3		Pens	Pencils	Total	Increases
4					
5	Sales				
6	Epsom	45,000	30,000	=SUM(B6:C6)	
7	Lawrence	38,000	26,000	SUM(number1, [number2], ...)	
8	Clyde	42,000	33,000		
9	Bayswater	28,000	16,000		
10		153,000	105,000		

Notice that the formula displays = (Equal to) indicating the start of a formula. The SUM function adds the data in the cells indicated in the range. Brackets are used to display the range to be totalled (from cell B6 to cell C6).

3 Click on the Enter button  on the Formula Bar.


4 Click on cell D7. Use the AutoSum button again to calculate the total for row 7.

5 Click on cell D8. Click on the AutoSum button . You will notice that Excel has selected the cells *above* the result cell (ie column D). In this exercise we need the cells in row 8 to be calculated. Click and drag from cell B8 to C8, as shown at the right.

6 Click on the Enter button  on the Formula Bar.

SUM					
X ✓ f_x =SUM(B8:C8)					
	A	B	C	D	E
1	Wilson Markers				
2					
3		Pens	Pencils	Total	Increases
4					
5	Sales				
6	Epsom	45,000	30,000	75,000	
7	Lawrence	38,000	26,000	64,000	
8	Clyde	42,000	33,000	=SUM(B8:C8)	
9	Bayswater	28,000	16,000	SUM(number1, [number2], ...)	
10		153,000	105,000		


- 7 Calculate the total for row 9.
- 8 Click on cell D10. Press Alt = which is the same as clicking on the AutoSum button. The cells for column D will be selected. Notice that the heading has not been selected. Excel will not select cells with text or data that has been separated by blank rows.

- 9 Click on the Enter button .
A quick method of totalling many rows and columns is to select all the data, including a blank row and column for the results.

- 10 Select cells B13 to D17.

- 11 Click on the AutoSum button .

Each column and row is automatically totalled. If you had selected another row or column outward (column E and row 18) the totals would have appeared in last column/row of the selection.

- Ctrl S 12 Click on the Save button  on the Quick Access Toolbar to save the workbook with the same file name.

	A	B	C	D	E	F
1	Wilson Markers					
2						
3		Pens	Pencils	Total		Increase by 10%
4						
5	Sales					
6	Epsom	45,000	30,000	75,000		
7	Lawrence	38,000	26,000	64,000		
8	Clyde	42,000	33,000	75,000		
9	Bayswater	28,000	16,000	44,000		
10		153,000	105,000	258,000		
11						
12	Cost of Sales					
13	Epsom	25,000	15,000			
14	Lawrence	18,000	11,000			
15	Clyde	20,000	16,000			
16	Bayswater	12,000	13,000			
17						
18						
19	Net					

Using Operator Symbols

The same operator symbols for calculating figures manually are used by Excel to calculate the data within cells.

Operator Symbols

+ Addition
- Subtraction

/ Division
* Multiplication





Exercise 7

In this exercise you will enter a calculation in cell B19 which will subtract the Cost of Sales total for Pens (B17) from the Sales total (B10).

- 1 Click on cell B19. Type: =
- 2 Click on cell B10. Type: -
- 3 Click on cell B17. The formula will read:
=B10-B17

Notice that the cell references and cells are colour coded. The cell reference for B10, and cell B10 are in blue, and the cell reference for B17 and cell B17 are in green. This is so you can easily identify where the cells are in the formula and worksheet.

- 4 Click on the Enter button .

SUM						=B10-B17
	A	B	C	D		
1	Wilson Markers					
2						
3		Pens	Pencils	Total		
4						
5	Sales					
6	Epsom	45,000	30,000	75,000		
7	Lawrence	38,000	26,000	64,000		
8	Clyde	42,000	33,000	75,000		
9	Bayswater	28,000	16,000	44,000		
10		153,000	105,000	258,000		
11						
12	Cost of Sales					
13	Epsom	25,000	15,000	40,000		
14	Lawrence	18,000	11,000	29,000		
15	Clyde	20,000	16,000	36,000		
16	Bayswater	12,000	13,000	25,000		
17		75,000	55,000	130,000		
18						
19	Net	=B10-B17				