



Improving Business Worksheet #3

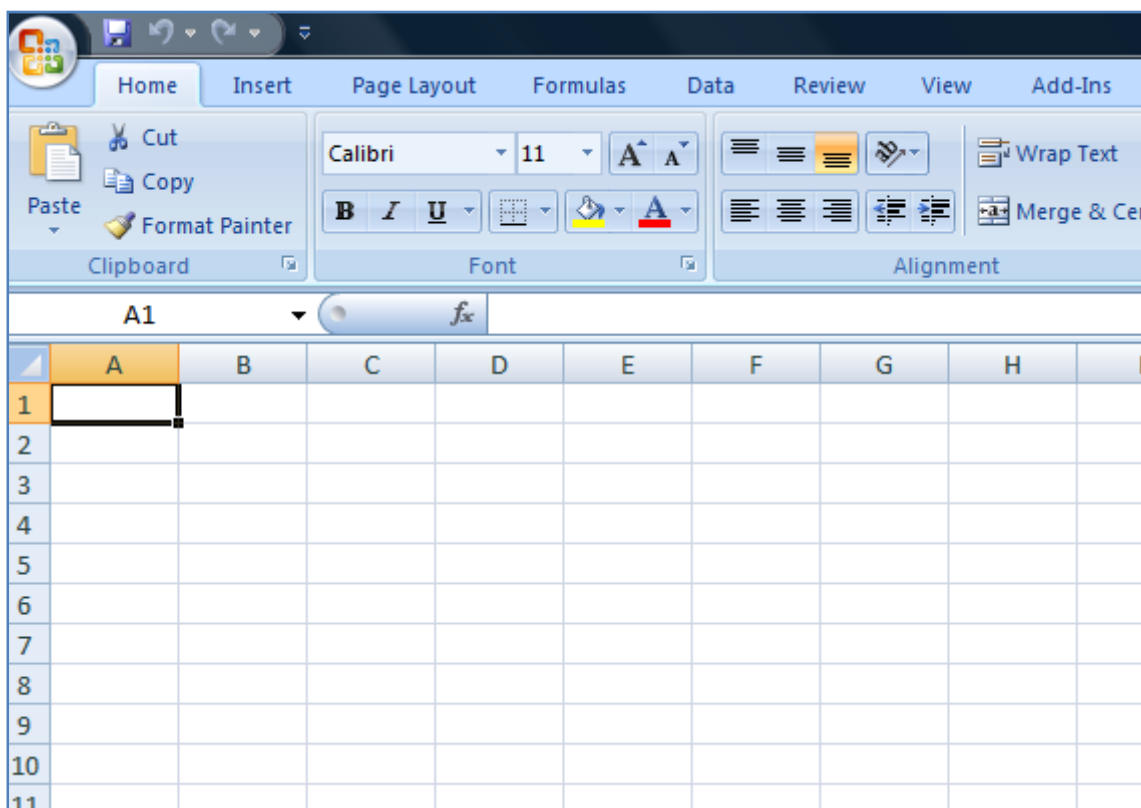
Start to use Microsoft Excel

Every business needs to have the most important facts and figures to hand. Microsoft Excel, or one of a variety of other spreadsheets, is a useful tool for doing just that. A spreadsheet is a computer programme which provides a working space made up of a grid of rows and columns. In Microsoft Excel 2007 there can be more than sixteen thousand columns, and over a million rows of data. More than enough for almost any conceivable small and medium sized business.

This worksheet will describe how to create a simple spreadsheet, and will take as an example the purchases of a small business during a month. Of course there are a great variety of applications of the spreadsheet as a business tool. If you are able to create a comparable example based on your own business then you should be able to easily think of many other ways in which such a way of presenting your business information could be of vital importance.

We will assume that you have already installed Microsoft Excel 2007, although the example in this worksheet is relevant to almost any other spreadsheet programme.

Let's start by running the programme. It opens up and shows a blank spreadsheet with the top left hand corner appearing something like this.



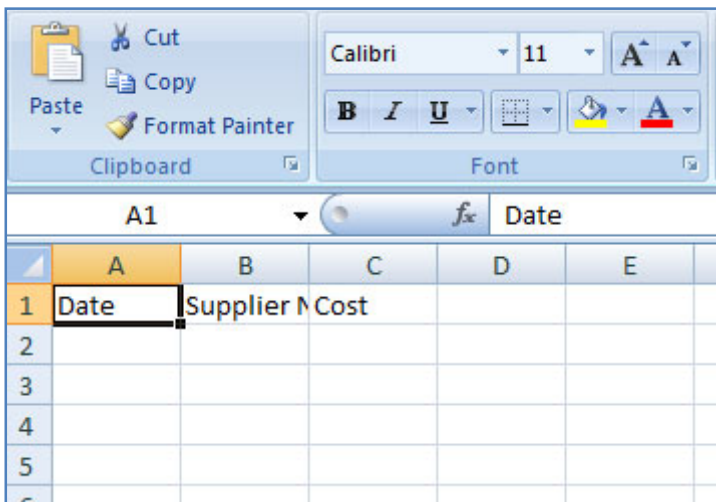
Each of the boxes is called a Cell, and they are referred to by the Column letter and the Row number. So the cell highlighted in the figure above is A1. You can move around the spreadsheet by using the up, down, left and right arrows, or by clicking on a cell with the mouse.

We need some headings for our purchasing data. Let's add some titles. If you find that they do not fit into the width of each column then you can increase the column width by clicking between the letters which are at the top of each column.

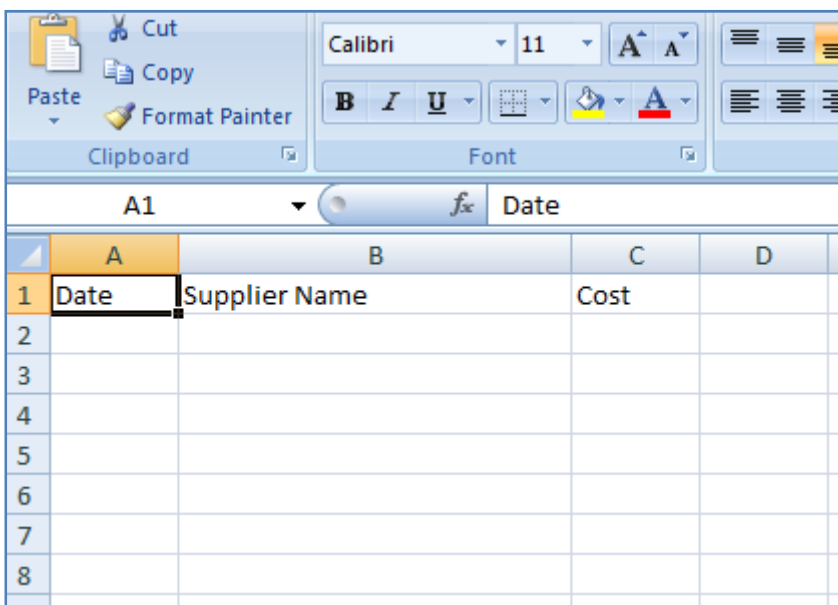
Add these titles...

Date, Supplier Name, Cost

Your spreadsheet should look something like this.



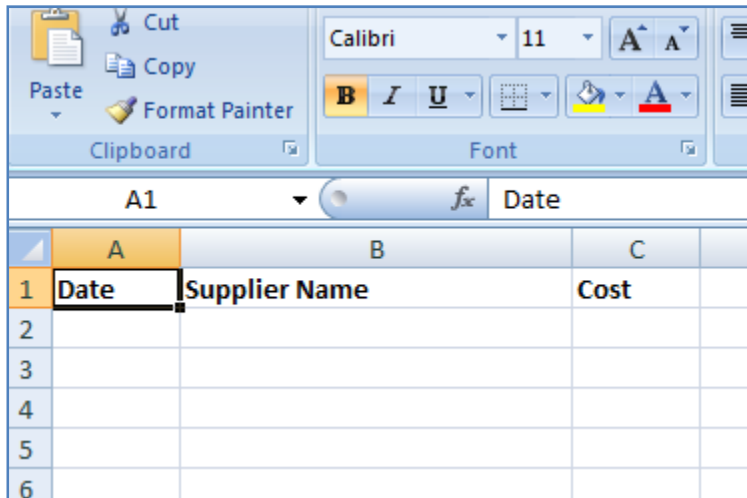
You can see that the full title 'Supplier Name' is hidden. So click between the letters B and C and the cursor will change to show that you can hold down the left mouse button and slide the column width to make it as wide as you need. Try to increase the width of column B so that all of the title can be seen, and make sure you provide enough space for the names of your suppliers. It should look like this.



It would be good if our titles were in bold so that they stood out a little. Highlight each of the titles and then click on the B for bold in the formatting section of the menu at the top of the spreadsheet. There are a

variety of ways to do almost anything in Excel, but for now click on each title in turn and then make it bold by clicking on the small B in the formatting menu.

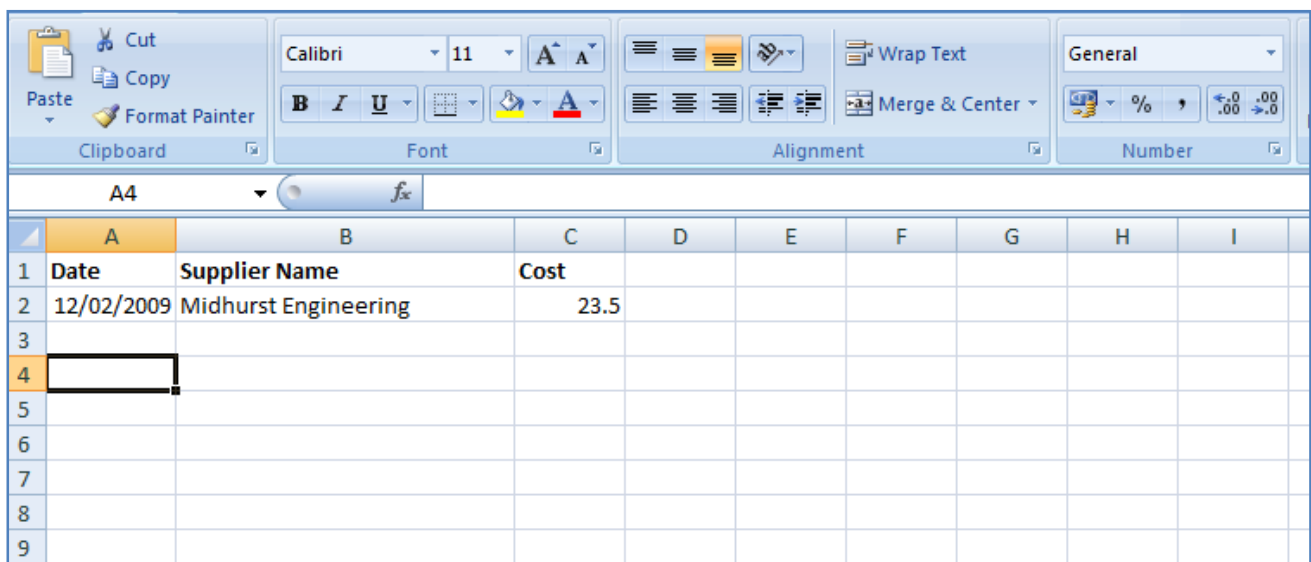
Here is what our example spreadsheet should now look like.



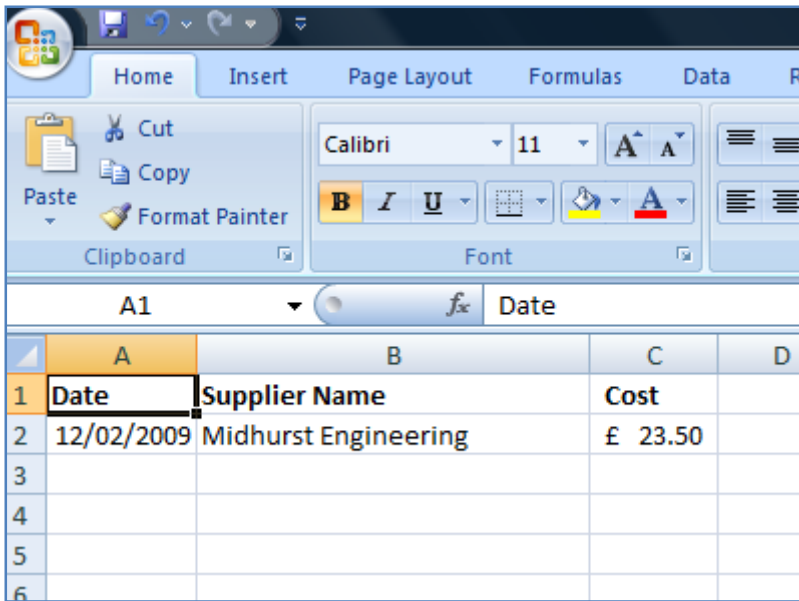
Now we want to start adding some data.

Click on cell A2, the one just under the Date title. We are going to add some example purchasing data, so it is not important what dates we choose, though you could use real data from your own business. Let's put in a date, in the format dd/mm/yyyy, so something like 12/02/2009 for February 12th, 2009. Then we will add a Supplier Name in the second column, and in the third column the cost of our purchases from that Supplier on this date.

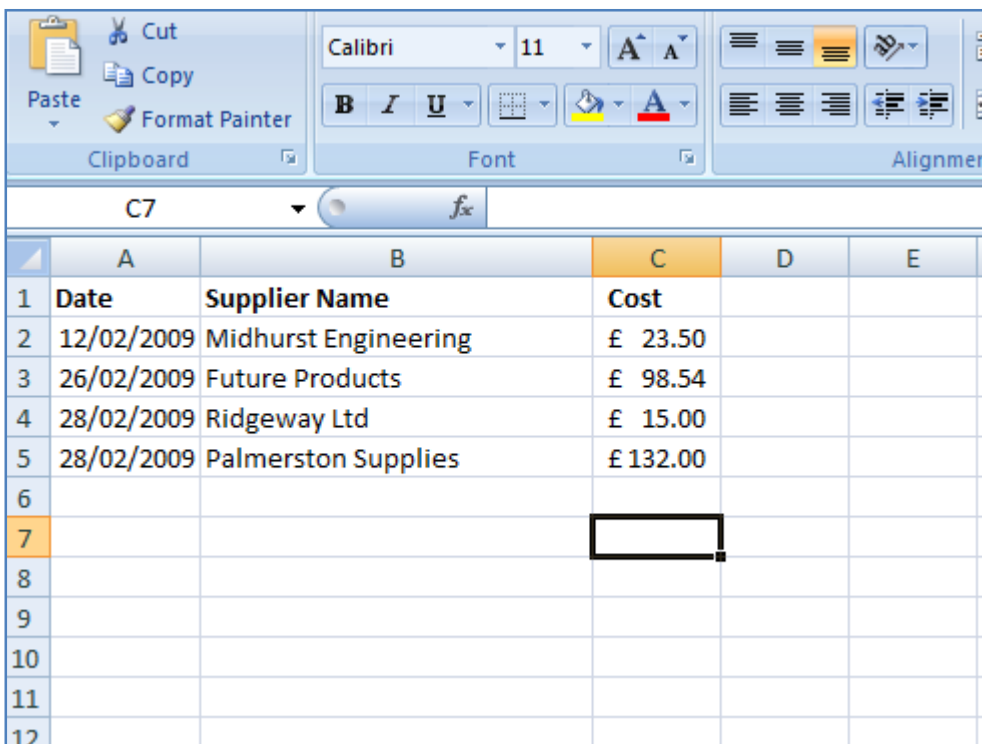
Your spreadsheet example should look something like this.



This doesn't look too bad, but the cost column is only showing one decimal place, and the numbers do not line up with the title. We can fix this by clicking on the C in the heading of the costs column, and then clicking on the little pile of coins icon in the menu section over to the right of the figure above. Try that and your example should now look as in the following figure.

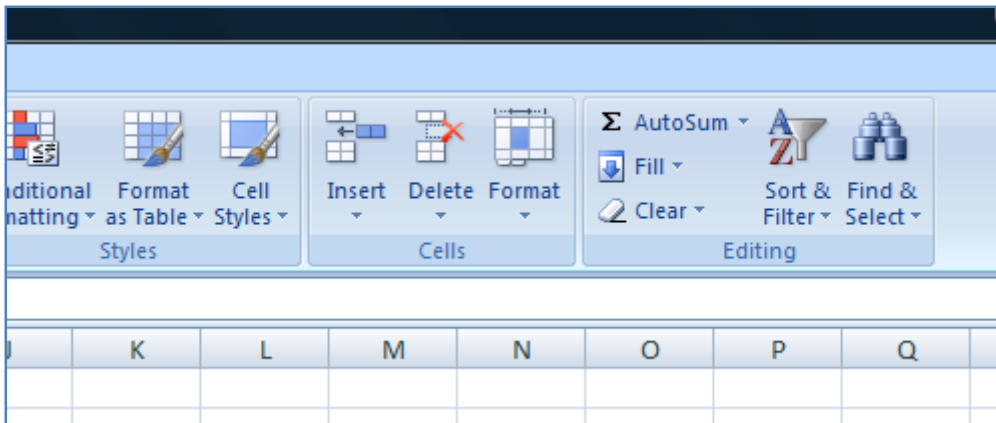


This looks much better. Now we can add some more records. We will add three more to show the principle. If you are using your own business data then you could add all of the purchases you actually made in the month. Your spreadsheet will look something like this.

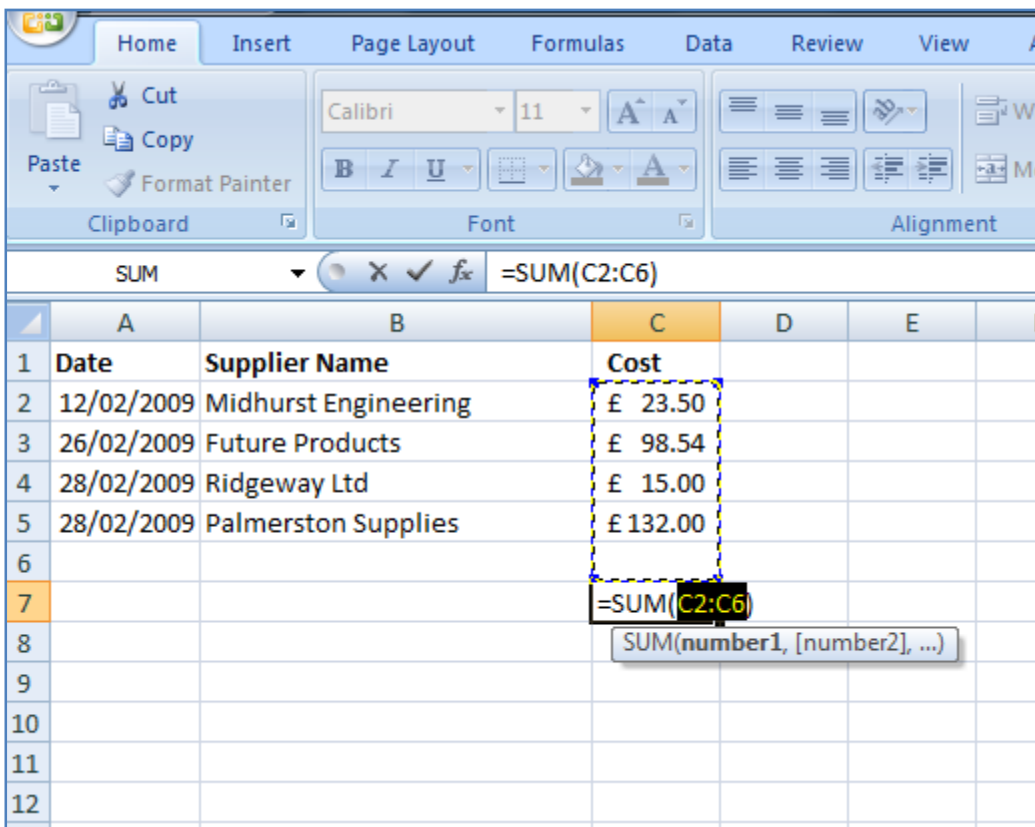


You will probably have many more records than we have added. But your first spreadsheet is now almost complete. All we need to do now is add up all of the purchases in our costs column so that we can see how much we spent in the month. Click on the cell which is one below the last entry in the costs column, as we have done in the figure above.

Then look along the menu until you find the sigma icon, the Greek letter used to indicate a sum. The figure below shows the section of the menu where it can be found.



It is labelled AutoSum. Click on it and if you have highlighted the cell below your last cost record then the spreadsheet should show something like the following.



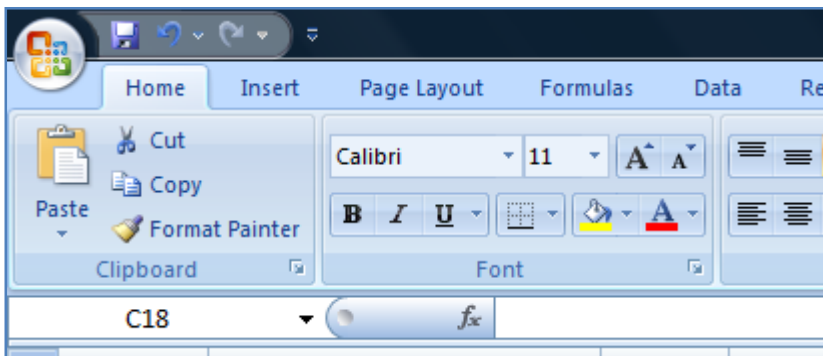
It has guessed which figures you want it to add up. All that we need to do is hit the Enter key and it will add the figures together and put them in the cell we first selected.

To make the total figure stand out a little, highlight it and click on the bold icon, the small B in the formatting menu, just as you did for the column titles.

Now we have created a simple spreadsheet which contains a number of records, as many as we could practically create, with three columns to record dates, names and costs. We have formatted the cost field so that it shows the currency neatly, and we have used the bold format to highlight the headings of our columns, and the total of our purchases. If you have followed this example then your own spreadsheet should look something like this.

	A	B	C	D
1	Date	Supplier Name	Cost	
2	12/02/2009	Midhurst Engineering	£ 23.50	
3	26/02/2009	Future Products	£ 98.54	
4	28/02/2009	Ridgeway Ltd	£ 15.00	
5	28/02/2009	Palmerston Supplies	£ 132.00	
6				
7			£ 269.04	
8				
9				

We just need to save this spreadsheet so that we can use it again. We can either use the keyboard by holding down Ctrl-S, or we can click on the logo in the top left corner of the spreadsheet and then choose Save from the menu.



You can see the logo in the corner of this figure.

If you have reached this far, and followed the instructions, then you have created a useful spreadsheet which you could easily modify for a number of other applications. You could record sales information in the same way, and add another column if you wanted to store Sales or Purchase Order number information.

Why not try and create another spreadsheet based on your own information. Good luck!

© Farrington Business Solutions, 2009

This worksheet is provided as a free service by Farrington Business Solutions and should not be considered as constituting any specific business advice to any particular business. This worksheet should not be considered as creating any business relationship between Farrington Business Solutions and any business or reader of this information. No liability will be accepted for any outcome associated with the use of the materials contained in this worksheet or on the Farrington Business Solutions website or in any other communication.