

Setting Up a Workbook:

You can set up the workbooks a certain way before you print out by using the **Page Layout** tab or by using the **Page Layout View** at the bottom right corner. The commands on the tab will let you change page orientation, paper size and margin size. You may also insert page breaks and



repeat certain header row(s) to make your workbook easier to read. You can also launch the **Page Setup** dialog box and find more commands for the tab.

Note: Make a cell in the first column as your active cell or select an entire row if you wish to place a page break below that row by using the *Breaks* command on the ribbon.

It is easier to use the Page Layout View at the bottom right corner to insert the Headers and the Footers



Setting Page Orientation:

Excel offers two page orientation options: **landscape** and **portrait**. Landscape orients the page horizontally, while Portrait orients the page vertically. Portrait is especially helpful for worksheets with a lot of rows, while Landscape is best for worksheets with a lot of columns.

Exercise: Select *January* worksheet from the same *ExcelPart3.xlsx* to practice.

- Change the view to see the worksheet in the **Page Layout View** at the bottom right corner.
- Use the Orientation on the **Page Layout** tab to view in **Landscape.** Change it back to the **Portrait** view and see which looks better for this example.
- Since we have more rows than columns in the worksheet, **Portrait** view is better for our example.



| Webinar Training Log January | 1 | |
|---|-------------|-----------|
| tmail Address | First Name | Last Name |
| Jared&Ledbetter @vestain surance.net | Lared | Ledbetter |
| SeverigiKelly @vest a insurance.net | deventy | Kely |
| dem ad etteRK orth @vestain surance.net | Dernadette | Koth |
| Gary Smith@vestainsurance.net | Gary | smith |
| sanelleCTerrell@vestainsurance.net | Janelle | Terrel |
| Bob byB Price @vestainsurance.net | Bobby | Price |
| MarioPMc Cauley @vestainsurance.net | Mario | McCauley |
| WilleCMartinez@vestainsurance.net | willie | Martinez |
| MichaeluBrewen@vestainsurance.net | Michael | Srever. |
| deOliye@vestainsurance.net | ida | Nye |
| trnativiandoza@vestainsurance.net | Erna | Mendoza |
| vergielsdarrison @vestainsurance.net | vergie | Garrison |
| SandrauMoore@vestainsurance.net | Sandra | Moore |
| une Dio hnson @vest alnsurance.net | June | Johnson |
| MelvinN Sadler Øvestain surance, net | Melvin | Sedier |
| KennethvPisher@vestainsurance.net | Kenneth | risher |
| evanikTurman @vestainsurance.net | evan | Turman |
| Andrea)Chol@vestainsurance.net | Andres | Ictol |
| GarySMiller Øvestalnsurance.net | Gary | Miler |
| Davidtstokes grvestainsurance.net | David | Stokes |
| foseWOpperman@vestainsurance.net | 80.M | Opperman |
| Pau TWebb-@vestain surance.net | Paul | webb |
| ChristopherEGagnon@vestainsurance.net | Christopher | Gagnon |
| Eesnort Gowins@vestainsurance.net | Eleanor | Gowins |
| Philiptxenned y@vestainsurance.net | philip | sannedy |
| Tanyairdmith@vestainsurance.net | Tanya | Smith |

| Webinar Training Log: January | | | |
|-------------------------------------|------------|-----------|--------------------|
| Em all Address | First Name | Last Name | Webinar Completed: |
| JaredBLedbetter@vestainsurance.net | Jared | Ledbetter | x |
| BeverlyJKelly@vestainsurance.net | Beverly | Kelly | x |
| BernadetteRKorth@vestainsurance.net | Bernadette | Korth | x |
| GaryVSmith@vestainsurance.net | Gary | Smith | x |
| Janelle CTerrell@vestainsurance.net | Jane lle | Terrell | x |
| BobbyBPrice@vestainsurance.net | Bobby | Price | x |
| MarioPMcCauley@vestainsurance.net | Mario | McCauley | x |
| Willie CMartinez@vestainsurance.net | Willie | Martinez | x |
| MichaelLBrewer@vestainsurance.net | Michael | Brewer | x |
| idaCNye@vestainsurance.net | Ida | Nye | x |
| ErnaBMendoza@vestainsurance.net | Erna | Mendoza | x |
| VergieBGarrison@vestainsurance.net | Vergie | Garrison | × |
| SandralMoore@vestainsurance.net | Sandra | Moore | x |
| JuneDJohnson@vestainsurance.net | June | Johnson | x |
| MelvinNSadler@vestainsurance.net | Melvin | Sadler | x |
| KennethVFisher@vestainsurance.net | Kenneth | Fisher | x |
| EvanRTurman@vestainsurance.net | Evan | Turman | x |
| AndrealChoi@vestainsurance.net | Andrea | Choi | x |
| GarySMiller@vestainsurance.net | Gary | Miller | x |

Portrait View

Landscape View

Setting Page Margins:

A margin is the distances from the edge of the page to the content on your page. By default, every workbook's margins are set to Normal, which is a one-inch space between the content and each edge of the page. Sometimes you may need to adjust the margins to make your data fit more comfortably on the page. Excel includes a variety of predefined margin sizes.

Exercise: Use the same *January* worksheet to practice.



- Click on the **Page Layout** view button on the bottom right corner of the screen. Then click on the **Page Layout** tab on the Ribbon and select the **Margins** command.
- Select the desired margin size from the drop-down menu. Select the **Wide** margin for our example to see how it looks to have a wider margin for the workbook.

- You may also select the **Custom Margins** command. **Page Setup** dialog box will be activated. Change the numbers of the **Left, Right, Top,** and **Bottom** to customize your margin width.
- You may also change the numbers under **Header** and **Footer** boxes to specify how much space do you want to keep between the edge of the paper and either a header or a footer.
- You can also specify how much you want to see your data centered on your worksheet printout. This is especially useful if you do not have much data.

Setting Print Area:



Use the same workbook to practice this function. This command is especially useful if you want to print the subset of your huge data.

- Keep the worksheet in the **Layout** view.
 - Select Cells A1:D8 to set as the Print Area.

Click on the arrow on **Print Area** command and select **Set Print Area**.

No matter how large your data is, you are just setting to print that selection only.

• Click on **Print Area** one more time and select **Clear Print Area** to clear the chosen print area.

Inserting or Removing Page Breaks



You can add a break where you want the next page to begin in the printed copy. *Your page break will be inserted above and to the left of your selection.*

• Keep the worksheet in the **normal** view. We want to start a new page beginning row 16.

• Click on Cell A16 or select the entire row 16. (It is important you select the entire row or click the cell in the first column of the row to

- Click on Insert Page Break. Click it away from row 16 and you should see the page break line above row 16.
- **Remove Page Break** you need to select a cell right below the page break line to use this. In this example, entire row 16 or any cells on row 16.
- **Reset All Page Breaks** your cell selection can be anywhere on your worksheet. By clicking this will reset all page breaks you put on your worksheet regardless of your selection.

• You can also view your worksheet in the Page Break

Preview by clicking on the last button at the bottom right corner. You shall see the page with *solid* dark blue lines as the page breaks. In this view, you can also move the breaks by pointing onto the lines and drag the mouse to the new location – up/down or left/right. Default page breaks lines are represented by the *dotted* dark blue lines and the manually created one has *solid* dark blue lines just like the boundary lines.

| 4 | A | в | с | D |
|----|-------------------------------------|------------|-----------|--------------------|
| 1 | Webinar Training Log: January | | | |
| 2 | Email Address | First Name | Last Name | Webinar Completed: |
| 3 | JaredBLedbetter@vestainsurance.net | Jared | Ledbetter | x |
| 4 | BeverlyJKelly@vestainsurance.net | Beverly | Kelly | x |
| 5 | BernadetteRKorth@vestainsurance.net | Bernadette | Korth | x |
| 6 | GaryVSmith@vestainsurance.net | Gary | Smith | x |
| 7 | JanelleCTerrell@vestainsurance.net | Janelle | Terrell | x |
| 8 | BobbyBPrice@vestainsurance.net 200 | Bobby | Price | x |
| 9 | MarioPMcCauley@vestainsurance.net | Mario | McCauley | x |
| 10 | WillieCMartinez@vestainsurance.net | Willie | Martinez | x |
| 11 | MichaelLBrewer@vestainsurance.net | Michael | Brewer | x |
| 12 | IdaCNye@vestainsurance.net | Ida | Nye | x |
| 13 | ErnaBMendoza@vestainsurance.net | Erna | Mendoza | x |
| 14 | VergieBGarrison@vestainsurance.net | Vergie | Garrison | x |
| 15 | SandraJMoore@vestainsurance.net | Sandra | Moore | x |
| 16 | JuneDJohnson@vestainsurance.net | June | Johnson | x |
| 17 | MelvinNSadler@vestainsurance.net | Melvin | Sadler | x |
| 18 | KennethVFisher@vestainsurance.net | Kenneth | Fisher | x |
| 19 | EvanRTurman@vestainsurance.net | Evan | Turman | x |

Page Break Preview

Printing Titles or Repeating Rows at the Top:

If your worksheet uses title headings, it's important to include these headings on each page of your printed worksheet. It would be difficult to read a printed workbook if the title headings appeared only on the first page. The **Print Titles** command allows you to select specific rows and columns to appear on each page.



Exercise: Use the same worksheet – January and go back to normal view from the bottom right.

- Click on **Print Titles** command from the **Page Setup** tab. Page Setup dialog box will come up.
- Click on the red arrow for the box says *Rows to repeat at the top* as shown below. (**Note:** you can also use the function *Columns to repeat at left* if you need the print out with repeated column(s) on every page.)

| Page Setup | | |
|---------------------------------------|-------------------------------------|--|
| Page | Margins Header/Footer Sheet | |
| Print <u>a</u> rea: Print titles – | | |
| Rows to r | epeat at top: to repeat at left: | |

• The **Page Setup** dialog box will be resized to a smaller size as shown in the picture below.

| | А | В | с | D |
|----|--|------------|-----------|--------------------|
| 1 | Webinar Training Log: January | | | |
| z, | Email Address | First Name | Last Name | Webinar Completed: |
| 3 | JaredBLedbetter@vestainsurance.net | Jared | Ledbetter | x |
| 4 | BeverlyJKell Page Setup - Rows to repeat at top: | | ? × | x |
| 5 | Bernadettektortnevestansurance.net | Demauelle | KUT III |) _x |
| 6 | GaryVSmith@vestainsurance.net | Gary | Smith | x |

- To repeat the first row in our example where column headings are, click on Row Number 1 and 2 as if you are selecting the entire Rows 1 and 2. The row selection will show as dotted moving lines. And the selection of the Row 1 will appear in the box as \$1:\$2 to indicate that we are selecting to repeat Rows 1 and 2 on the top of every printed page.
- Click on the red arrow and the Page Setup box should open again.
- Click on **Print Preview** button to see that the header row is repeated on every page of the print out.
- **Gridlines:** Cell gridlines you see on screen will not print out unless you check out the **Gridlines** box in **Page Setup** box. This can be used alternative to setting **Borders** in cell.
- **Row and column headings**: If you desire to include the column names such as A, B, C and the row numbers 1, 2, 3 in your printout, check this box.

| P | age Setup | - | | | | |
|---|--|--------------------------|-------|----------|--|--|
| | Page | Margins | Heade | r/Footer | | |
| | Print <u>a</u> rea: Print titles – <u>R</u> ows to r | epeat at top: | | | | |
| | <u>C</u> olumns to repeat at left: | | | | | |
| | Print | | | | | |
| | 🔽 <u>G</u> ridlin | nes | | | | |
| | Black | and white | | | | |
| | Draft | quality | | | | |
| | Row and column headings | | | | | |
| | Page order | | | | | |
| | | , then over then down | | | | |

Inserting Headers and Footers:

The **header** is a section of the workbook that appears in the **top margin**, while the **footer** appears in the **bottom margin**. Headers and footers generally contain information such as page number, date, and workbook name that you want to repeat on every page. It is easier to insert headers and

footers while in the Page Layout view

Exercise: Use the same worksheet *January* above.

- Click on the **Page Layout** view on bottom right corner.
- Click in one of the three sections (left, middle, or right) appear in the header section of our worksheet. You should see **Header & Footer Tools** tab will appear on the **Ribbon**. Click on the **Design** tab.

| ₽ | ب ب | <u>ج</u> ، | - | D | ÷ | v | VorksheetP | ractice - Exce | I | He | ader & F | ooter To | | | | | | | | |
|----------|----------|--------------------|----------------------|-------------------|----------------------|----------------|-----------------------|------------------|---------------|-----------------|-----------------|------------|------------------------------|----------------|--|-------------------------------|----|---------------|----------|-----|
| File | Ho | me l | nsert | Page Layo | out f | Formulas | Data | Review | View | | Desi | gn | ♀ Tell n | ne what yo | ou want to do | | | | | |
| Header | Footer | # Page Numbe | Number r of Pages | Current (Date | L Current Time | File Path N | File Shew Name Nan | et Picture Forme | ormat dicture | Go to leader | Go to Footer | Differ | ent First Pag ent Odd & E | e ven Pages | ✓ Scale wi ✓ Align wi | th Document th Page Margin | ns | | | |
| Header 8 | k Footer | | | Hea | ader & Fo | ooter Elen | nents | | | Navig | ation | | | Opti | ons | | | | | |
| A1 | | - | × v | fx | Web | inar Trai | ining Log: | January | | | | | | | | | | | | |
| | | 1 | | · · · · 1 | | | 2 | 3 | | 4 | | 5 | | 6 | 7 | | 8 | - · · · · · | , | 1 |
| | | | | | | A | к | | | | В | | с | | D | | Е | F | : | |
| | | | Header | | oft Soci | tion | | | | | Mide | lla Sactio | | | | | | Pia | ht Costi | ion |
| - | | | albate | -j L | en seu | uon | | | | | What | lie Sectio | | | | | | nigi | it setti | |
| | 1 | | Webi | nar Tra | aining | Log: Ja | anuary | | |] | | | | | | | | | | |

• From here, you can access commands that will automatically include page numbers, dates, and workbook names in any of the three sections.

- Click on the Current Date command in the left section.
- Click in the middle section and type in your name.
- Click in the right section and then click on the Page Number command on the ribbon.
- You can click in the bottom part of the page to switch to the **Footer Section** and insert these commands or enter anything.

Printing

- To access the print pane, click on **File** menu on top. Click on **print** command.
- Print Preview will be shown as below.

| ¢ | | WorksheetPractice - Excel | | | ? – | 🗗 🗙 Sign i |
|-------------|-----------------------------------|--------------------------------------|----------------------|--------------------|---------------|---------------|
| Info | Print | | | | | |
| New Open | Copies: 1 1 | 2/13/2020 Left Section | Middle Section | | Right Section | |
| Save | Print | Webinar Training Log: January | | | | |
| Jave | | Em ail Address | First Name Last Name | Webinar Completed: | | |
| Save As | Printer | JaredBLedbetter@vestainsurance.net | Jared Ledbetter | x | | |
| | Microsoft Print to PDE | Be ve rlyJKe lly@vestainsurance.net | Beverly Kelly | x | | |
| Print | Ready I | Be madetteRKorth@ve stainsurance.net | Bernadette Korth | x | | |
| | Printer Properties | GaryVSmith@vestainsurance.net | Gary Smith | x | | |
| Share | | Janelle CTerrell@vestainsurance.net | Jane le Terrell | x | | |
| Evnort | Settings | BobbyBPrice@vestainsurance.net | Bobby Price | x | | |
| export | Print Active Sheets | MarioPMcCauley@vestainsurance.net | Mario McCauley | x | | |
| Publish | Only print the active sheets | Willie CMartinez@vestainsurance.net | Willie Martinez | x | | |
| | Pages: | MichaelLBrewer@vestainsurance.net | Michael Brewer | x | | |
| Close | | IdaCNye@vestainsurance.net | lda Nye | x | | |
| | 123 123 123 • 4 | ErnaBMendoza@vestainsurance.net | Erna Mendoza | x | | |
| | | VergieBGarrison@vestainsurance.net | Vergie Garrison | x | | |
| Account | Landscape Orientation - 5 | SandraJMoore@vestainsurance.net | Sandra Moore | x | | |
| o | | JuneDJohnson@vestainsurance.net | June Johnson | x | | |
| Options | Letter - 6 | MelvinNSadler@vestainsurance.net | Melvin Sadler | x | | |
| | | KennethVFisher@vestainsurance.net | Kenneth Fisher | x | | |
| | Normal Margins 7 | EvanRTurman@vestainsurance.net | Evan Turman | x | | |
| | Leic 0.7 Kight 0.7 | Andre aJChoi@vest ainsurance.net | Andrea Choi | x | | |
| | No Scaling - 8 | GarySMiller@vestainsurance.net | Gary Miller | x | | |
| | Print sneets at their actual size | | | | | |
| | Page Setup | | | | | |
| | | L | | | | J |
| | 4 1 of 2 | 2 🕨 9 | | | | 10 🖽 🛃 |

- 1. **Printer:** If your computer is connected to multiple printers, click on the drop-down and select the printer.
- Print Active Sheets: If your workbook has more than one worksheets and you want to print multiple worksheets, activate the worksheets first <u>before</u> you get to this Print Preview pane and select Print Active Sheets. Or select Print Entire Workbook OR choose Print Selection if you just highlighted a block of data to print.
- 3. **Pages:** You can specify particular pages to print by selecting page numbers in these two boxes.
- 4. **Collated:** If you are printing multiple copies, you can choose whether you want the copies **collated** or **uncollated**.
- 5. Portrait Orientation: Choose Portrait or Landscape.



- 6. Letter: If your printer uses different paper sizes, you can select your **paper size** here.
- 7. Custom Margins: Here you can adjust the page margins to fit the data better.
- 8. No Scaling: Scaling helps you to make small adjustments from the Print pane to fit your workbook content neatly onto a printed page. Note: Worksheets will become more difficult to read as they are scaled down, so you may not want to use this option when printing a worksheet with a lot of information.
- 9. Flipping through pages: Use right and left arrows to print preview your workbook with multiple pages to print.

Settings



| Γ | × | 🖌 🛛 🛪 | T | T |
|---------------------------------|-------------------------------------|------------------|---------------------------|-------------|
| 10. Show Margins: Use this to | 2/13/2020 Left Section | / Middle Section | | Right Secti |
| view and adjust margins | Webinar Training Log: January | | | |
| | Em ail Address | First Name Las | t Name Webinar Completed: | |
| visually in print preview pane. | JaredBLedbetter@vestainsurance.net | Jared Leo | lbetter x | |
| The page margins will appear | BeverlyJKelly@vestainsurance.net | Beverly Kel | ly x | |
| in the Proview paper (Sec | BernadetteRKorth@vestainsurance.net | Bernadette Kor | th x | |
| | GaryvSmitn@vestainsurance.net | lanelle Ter | nun X mell v | |
| picture on right) Hover the | BobbyBPrice @vestainsurance.net | Bobby Price | ce x | |
| mouse over one of the | MarioPMcCauley@vestainsurance.net | Mario Mc | Cauley x | |
| | Willie CMartinez@vestainsurance.net | Willie Ma | irtinez x | |
| margin markers until the | MichaelLBrewer@vestainsurance.net | Michæl Bre | wer x | |
| cursor becomes a double | IdaCNye@vestainsurance.net | lda Nye | e x | |
| | ErnaBMendoza@vestainsurance.net | Erna Me | ndoza x | |
| arrow . In our example, we'll | VergieBGarrison@vestainsurance.net | Vergie Gar | rrison x | |
| outoned the left means in to | SandraJMoore@vestainsurance.net | Sandra Mo | ore x | |
| extend the left margin to | JuneDJohnson@vestainsurance.net | June Joh | inson x | |
| place the spreadsheet more | MelvinNSadler@vestainsurance.net | Me vin Sad | ller x | |
| place the spicadsheet more | KennethVFisher@vestainsurance.net | Kenneth Fis | her x | |
| towards the center of the | EvanRTurman@vestainsurance.net | Evan Tur | man x | |
| P 2 C 2 | Andre aJChoi@vest ainsurance.net | Andrea Cho | pi x | |
| hage. | GarySMiller@vestainsurance.net | Gary Mil | ler x | |
| 1. Copies: Verify the number of | | | | |
| copies you wish to print here. | • | | | |

12. Print: If you're satisfied with all the adjustments you have made, click on Print to print your worksheet(s) or workbook.

Introduction to Formulas:

Just like a calculator, Excel has the ability to calculate numerical information using formulas. Excel can add, subtract, multiply, and divide. In this lesson, we'll show you how to use cell references to create simple formulas.

Note: All formulas start with the '=' equal sign. This is because the cell contains, or is equal to, the formula and the value it calculates.

| Addition | + | =10+5 |
|----------------|---|-------|
| Substraction | - | =10-5 |
| Multiplication | * | =10*5 |
| Division | / | =10/5 |

Understanding Cell Reference:

As shown in the table above, you can simply create formulas manually by typing in fixed numbers to get calculation. However, most of the time, you will use cell addresses to create a formula. This is known as making a **cell reference**. **Cell reference** identifies individual cells, rows, and/or columns in a worksheet. They tell Excel where to look for values to use in a formula. Using cell references will ensure that your formulas are always accurate because you can change the value of **referenced cells** without having to rewrite the formula.

To practice, **open up add a new worksheet by clicking on the + sign in sheet tab area** in same workbook **ExcelPart3.xlsx**. Enter 10 in Cell A1 and 5 in Cell A2. Instead of typing in =10+5 to get the result in Cell A3, you can use Cell addresses to get the same result. See the formula entered into Cell A3 (Figure 1) displays the answer to the equation =A1+A2 in Figure 2. If any value in those referenced cells (A1 or A2) changes – such as changing the value in Cell A1 to 20, the result cell A3 will automatically recalculates for you as shown in Figure 3.



Figure 1



Figure 3

By combining a mathematical operator with cell references, you can create a variety of simple formulas in Excel. Formulas can also include a combination of cell references and numbers, as in the examples below:

| Cell Ref | Meaning | Practice |
|----------|---------------------------|---------------------------|
| =F2-1 | Subtract 1 from Cell F2 | In cell C1, enter =A3-1 |
| =G2/F2 | Divide Cell G2 by Cell F2 | In cell C2, enter =A3/A2 |
| =F2*1.5 | Multiply Cell F2 by 1.5 | In cell C3, enter =A3*1.5 |

| Basic Mathematical Functions | | | | | | |
|------------------------------|---|-------------------|--|--|--|--|
| AVERAGE | Finds the average within a range of cells. | =AVERAGE(A10:A20) | | | | |
| ΜΑΧΙΜUΜ | Finds the largest number within a range of cells. | =MAX(D3:D15) | | | | |
| MINIMUM | Finds the smallest number within a range of cells. | =MIN(D3:D15) | | | | |
| SUM | Finds the total or sum within a range of cells. | =SUM(A10:A20) | | | | |

To Create a Formula Using the Point-and-Click Method:

Rather than typing cell addresses manually, you can **point and click** on the cells you wish to include in your formula. This method can save a lot of time and effort when creating formulas.

Exercise: Use *Monthly Budget* worksheet to practice some formulas in same workbook.

- 1. Enter a formula to add all income lines. Three ways to add income lines:
 - \circ Select Cell B13.
 - Type in the equal sign "=".
 - Point and click individual cells to be included in the formula as shown. Type in "+" sign after each cell is selected except in the last cell.

OR

- \circ Select Cell B13.
- Click on AutoSum function in Editing group.
- Fix the formula to include all cells to be included in the formula by either typing or using your mouse function.



| 3 | Monthly Budget Template | | | | |
|----|---------------------------|------------------|-----|--|--|
| 4 | | | | | |
| 5 | Monthly income for the mo | onth of: | | | |
| 6 | | | | | |
| 7 | ltem | Amount | | | |
| 8 | Salary | 25001 | | | |
| 9 | Spouse's salary | 24001 | | | |
| 10 | Dividends | 1 | | | |
| 11 | Interest | I I | | | |
| 12 | Other | 200 | | | |
| 13 | Total | =B8+B9+B10+B11+E | 312 | | |

| 4 | | | | |
|----|----------------------------------|---|-------------|--|
| 5 | Monthly income for the month of: | | | |
| 6 | | | | |
| 7 | ltem | A | mount | |
| 8 | Salary | | 2500 | |
| 9 | Spouse's salary | | 2400 | |
| 10 | Dividends | | | |
| 11 | Interest | | | |
| 12 | Other | | 200 | |
| 13 | Total | = | SUM(B8:B12) | |
| 14 | | | SUM(number | |

| Item | Amount | |
|-----------------|-------------|--------------|
| Salary | 2500 | |
| Spouse's salary | 2400 | |
| Dividends | | |
| Interest | | |
| Other | 200 | |
| Total | =sum(B8,B9, | B10,B11,B12) |
| | | |

OR

- Select Cell B13.
- Type in the equal sign "=".
- Type in "SUM(" and point and click to select all cells to be included in the formula as shown. Type in "," after each cell reference and ")" at the end of the formula.

As you can see, there are more than one way to address cell references in the formula. The followings are examples on cell references.

Other Examples on Cell References:

| Cell references | Refer to values in |
|-----------------|---|
| A10 | the cell in column A and row 10 |
| A10,A20 | cell A10 and cell A20 <i>as in =SUM(B8,B9,B10,B11,B12)</i> |
| A10:A20 | the range of cells in column A and rows 10 through 20 <i>as in =SUM(B8:B12)</i> |
| B15:E15 | the range of cells in row 15 and columns B through E |
| A10:E20 | the range of cells in columns A through E and rows 10 through 20 |

Select cell B37. Use the AutoSum function Column (Cell B19 through B36).

to total all expenses in that

Fo meforence colle on link data in come on company worksh

To reference cells or link data in same or across worksheets

Excel allows you to refer to any cell on any worksheet, which can be especially helpful if you want to reference a specific value from one cell to another in the same worksheet or in another workbook. If a value changes in the source cell, the change in reflect in the result cell automatically.

- Select cell B43. In this cell, we want to have our total income figure from cell B13 appear. So we will link cell B43 to cell B13. In other words, we will reference this cell B43 to cell B13 in the same worksheet.
 - Linking is like entering a formula. It begins with an equal sign. And the formula begins where you want to see the result. In this case, we want to see the total income figure in cell B43.
 - Select cell B43.
 - Type in equal "=" sign.
 - \circ Then click the reference cell B13.
 - Press Enter on your keyboard. The value of the referenced cell will appear in cell B43.

| 59 | | |
|----|---------------------|--------|
| 10 | Income vs. Expenses | |
| 11 | | |
| 12 | ltem | Amount |
| 13 | Monthly income | = |
| 14 | Monthly expenses | |
| 15 | Difference | |

| Item | Amount |
|------------------|--------|
| Monthly income | 5100 |
| Monthly expenses | |
| Difference | |
| | |

| 5 | Monthly income for the month of: | | | |
|---|----------------------------------|--------|--|--|
| 5 | | | | |
| 7 | ltem | Amount | | |
| В | Salary | 2500 | | |
| 9 | Spouse's salary | 2400 | | |
| 0 | Dividends | | | |
| 1 | Interest | | | |
| 2 | Other | 200 | | |
| 3 | Total | 5100 | | |
| 1 | | | | |

| 42 | Item | Amount |
|----|------------------|----------|
| 43 | Monthly income | 5200 |
| 44 | Monthly expenses | 4145. |
| 45 | Difference | =B43-B44 |
| 46 | | |

- Apply the same method and link Cell B44 to cell B37.
- Test to change the Salary figure in cell B8 to 2600. You will see the immediate change in related cells B13 and referenced cell B43.
- Enter the subtraction formula in cell B45 to find out Difference (Income-Expenses).

Trace Precedents and Dependents:

Sometimes, checking **formulas** for accuracy or finding the source of an error can be difficult when the formula uses precedent or dependent cells. For practice, let's use the same workbook.

 Trace Precedents shows arrows that indicate which cells affect the value of the currently selected cell. In our example, if you want to check which are the values that affect the value in cell "B45", this is where "Trace Precedents" help. Select B45. Go to the

| P Trace Precedents | 随 Show Formulas | | | | |
|--------------------|--------------------|--|--|--|--|
| 📲 Trace Dependents | Error Checking 🔹 | | | | |
| 🔀 Remove Arrows 🔹 | 🕭 Evaluate Formula | | | | |
| Formula Auditing | | | | | |

| 40 | Income vs. Expenses | | |
|----|---------------------|----|-------|
| 41 | | | |
| 42 | Item | An | nount |
| 43 | Monthly income | • | 5200 |
| 44 | Monthly expenses | | 4145 |
| 45 | Difference | | 1055 |
| | | _ | |

Formula tab and select **Trace Precedents.** You will see the blue line pointing out the cells (Cell B43 and B44) that can affect the value in cell **B45.** Click **Trace Precedents** again since it runs the precedents in recursion, and blue line extends to cell **B37 (Total Expense)** and **B13 (Total Income).** Clicking on **Trace Precedents** one more time will extend to include all those rows in the expense column and all rows in income column which creates values in **Cell B13** and **B37.** *So if any of the value in income and expense cells changes, cells B13, B37 and ultimately B45 will be affected.*

To remove the arrows, use the "Remove Arrows" button from "Formulas" toolbar.

Trace Dependents does exactly the opposite. This option shows which are the cells affected by values from this cell. In our example let's take a look at cell "B8". Click on Trace Dependents. You will see cell B13 (Total income) depends on it. Click Trace Dependents again since it runs the dependency in recursion, and another arrow pointing to cell B43 indicates the value in cell B43 is also depending on the value in cell B13. Clicking on Trace Dependents one more time will show that value in cell B45 is depending on cell B43. So if value in cell B8 changes, values in cells B43 and B45 will be affected.

To remove the arrows, use the "Remove Arrows" button from "Formulas" toolbar.

Relative and Absolute Cell References:

There are two types of cell references: **relative** and **absolute**. Relative and absolute references behave differently when copied and filled to other cells. Relative references **change** when a formula is copied to another cell. Absolute references, on the other hand, remain **constant**, no matter where they are copied.

Relative Cell References: *By default*, all cell references are **relative references**. When copied across multiple cells, they change based on the *relative position of rows and columns*. For example, if you copy the formula **=A1+B1** from row 1 to row 2, the formula will become **=A2+B2**. Relative references are especially convenient whenever you need to repeat the same calculation across multiple rows or columns. Let's verify this by opening the *Grocery* worksheet in same workbook.

- Select cell F2.
- Enter the formula to find the total cost of row 2 for oranges. (Total cost = Qty * Price)
- The formula should be =C2*E2 as shown.
- When we copied this formula from cell F2 to the lower cell F3 by using the Fill Handle, the cell reference changed based on the *relative position of the row* in this case, Row 3. So, the copied formula becomes =C3*E3
- Select cell F3 again; use the Fill Handle, and copy the formula to all lower cells by dragging the mouse or doubleclicking the mouse. Remaining rows now will have copied formulas with the cell references changed to the relative position of their row numbers.

| | А | В | С | D | E | F | |
|---|----------|---------|----------|------|-------|---------------|----|
| 1 | Category | Item | Quantity | Unit | Price | Total Cost | E |
| 2 | Produce | Oranges | 1 | Bag | 3.99 | =C2*E2 | ŀ |
| ~ | - · | | - | | 1 00 | 0.00 | Ε. |

| | А | В | С | D | E | F | |
|---|----------|---------|----------|------|-------|---------------|-----|
| 1 | Category | Item | Quantity | Unit | Price | Total Cost | Bra |
| 2 | Produce | Oranges | 1 | Bag | 3.99 | 3.99 | Ha |
| 3 | Produce | Apples | 2 | Lb | 1.99 | =C3*E3 | |
| 4 | Produce | Bananas | 3 | Lb | 0.49 | | |

| | А | В | С | D | E | F |
|---|----------|----------|----------|-------|-------|---------------|
| 1 | Category | Item | Quantity | Unit | Price | Total Cost |
| 2 | Produce | Oranges | 1 | Bag | 3.99 | 3.99 |
| 3 | Produce | Apples | 2 | Lb | 1.99 | 3.98 |
| 4 | Produce | Bananas | 3 | Lb | 0.49 | 1.47 |
| 5 | Produce | Lettuce | 1 | Bunch | 1.29 | 1.29 |
| 6 | Produce | Tomatoes | 2 | Lb | 0.99 | 1.98 |

• Format column E (price column) and column F (total cost column) in accounting number format with \$ sign.

To Edit a Formula:

When you need to edit an existing formula, you can do so in a number of ways. Let's assume we are going to edit our formula in Cell F2 in *Grocery* worksheet to include the markup of 10%. That would require to multiply the original formula =C2*E2 with 1.1 as =C2*E2*1.1. To do this, follow these steps.

 Double-click on Cell F2 where we entered our original formula. The cursor should be blinking at the end of the existing formula. (If not, move your cursor to the end of the existing formula.)

OR

| СО | COUNTIF ▼ : × ✓ <i>f</i> _x =C2*E2 | | | | | | | | | |
|----|--|---------|----------|------|-------|---------------|--|--|--|--|
| | А | В | С | D | E | F | | | | |
| 1 | Category | Item | Quantity | Unit | Price | Total Cost | | | | |
| 2 | Produce | Oranges | 1 | Bag | 3.99 | =C2*E2 | | | | |
| S | Droduce | Apples | 2 | ГЬ | 1 00 | | | | | |

• Then type in the multiplication symbol "*" and "1.1" as shown.

| С | C D | | F | |
|----------|---------------|------|------------|---|
| Quantity | Quantity Unit | | Total Cost | E |
| 1 | Bag | 3.99 | =C2*E2*1.1 | ŀ |
| 2 | Lb | 1.99 | | |

• You can also click directly in the formula bar area to fix the formula. When finished, hit

| Enter command | \checkmark | in the formula bar. |
|---------------|--------------|---------------------|
| Enter command | | in the formula par. |

Enter key on your keyboard or select the

| Clipboard | F ₂₄ | ाज Font | | | | |
|------------|-----------------|----------------|------|--------|--|--|
| COUNTIF | · : 🗙 | f _x | =C2* | E2*1.1 | | |
| A | В | Enter | D | E | | |
| a . | | C | | | | |

- In either case the calculated value will show in Cell F2.
- Undo your change by clicking on the undo command on quick access toolbar or Control+Z.

| С | D | E | F |
|----------|------|-------|------------|
| Quantity | Unit | Price | Total Cost |
| 1 | Bar | 3.99 | 4.389 |

Absolute Cell Reference:

There may be times when you do not want a cell reference to change when filling cells. Unlike **relative references**, **absolute references** do not change when copied or filled. When you want to keep a row and/or column *constant*, use an **absolute reference**.

An absolute reference is designated in a formula by the addition of a dollar sign (\$). It can precede the column reference, the row reference, or both. See the examples, below.

| \$A\$2 | The column and the row do not change when copied | - | Used generally more than |
|--------|--|---|--------------------------|
| \$A2 | The column does not change when copied | | the other two formats. |
| A\$2 | The row does not change when copied | | |

When writing a formula, select the cell you want to change and press the **F4** key on your keyboard to switch between relative and absolute cell references. This is an easy way to quickly insert an absolute reference. Let's do the exercise below.

- Select cell H1.
- Click on the % sign in the *Number* group to indicate that you are formatting cell H1 content as percentage.
- Enter number 8 in cell H1.
- You will see 8% in cell H1. Consider this number as a discount you are going to apply to all rows in *Total Cost* column.
- Select cell H2.
- Enter the formula =F2*H1 (by pointing and clicking on those cells). Then hit function key
 F4 before you hit the Enter button. Your formula would change from =F2*H1 to =F2*\$H\$1

| H1 | H1 ▼ : × ✓ f _x =F2*\$H\$1 | | | | | | | | | | |
|----|--------------------------------------|---------|----------|------|-------|---------------|----------------|------------|--|--|--|
| | А | В | С | D | E | F | G | Н | | | |
| 1 | Category | Item | Quantity | Unit | Price | Total Cost | Brand/Comments | 8% | | | |
| 2 | Produce | Oranges | 1 | Bag | 3.99 | 3.99 | Halo | =F2*\$H\$1 | | | |
| 3 | Produce | Apples | 2 | Lb | 1.99 | 3.98 | | | | | |
| 4 | Produce | Bananas | 3 | Lb | 0.49 | 1.47 | | | | | |

Select cell H2 again. Use the Fill Handle and copy the formula to the rows below.
 Examine each cell from H3 onward. The first cell reference changes to the relative cell from F2 to F3, F4 and so on relatively. However, the second sell reference \$H\$1 stays the same no matter what row you are looking at.

Subtotal Data

When you have a list of data in a column, just like you have in *Grocery* worksheet, you can automatically calculate subtotals and grand totals by using the **Subtotal** command in the **Outline** group on the **Data** tab. You may want to find out the subtotal for Produce, Meat, Dairy, etc. *Keep the data you want to subtotal in the furthest left column – in this example "Category" as we want to find out the subtotals on each category*. You can find **Sum** or **Average** or more in the SUBTOTAL. Let's practice by using the *Grocery* worksheet.



- Click anywhere on the data first.
- Click on Data>Subtotal command in the Outline group.

- **Subtotal** window will pop up. In here you can select Sum, Average, etc. under the Use Function. We will select Sum as we want to find out total on each category.
- Select "Total Cost" and "8%" columns to subtotal figures in those two columns. (Note: you want to select only those boxes where adding, counting, finding averages provide meaningful data. In here checking the "Brand/Comments" column will not provide any meaningful data. In other words, select the data that is calculable.)
- Click on OK button.
- Once you created the Subtotals, you will see the outline symbols at the upper left corner of the worksheet.

| 1 | 2 | 3 | | А | В | С | D | E | F | G | Н |
|---|---|-----|---|----------|----------|----------|-------|-------|---------------|----------------|--------|
| | | | 1 | Category | Item | Quantity | Unit | Price | Total Cost | Brand/Comments | 8% |
| Г | Γ | · . | 2 | Produce | Oranges | 1 | Bag | 3.99 | 3.99 | Halo | 0.3192 |
| | | · . | 3 | Produce | Apples | 2 | Lb | 1.99 | 3.98 | | 0.3184 |
| | | | 4 | Produce | Bananas | 3 | Lb | 0.49 | 1.47 | | 0.1176 |
| | | | 5 | Produce | Lettuce | 1 | Bunch | 1.29 | 1.29 | | 0.1032 |
| | | | 6 | Produce | Tomatoes | 2 | Lb | 0.99 | 1.98 | | 0.1584 |
| | - | | 7 | Produce | | | | | 12.71 | | 1.0168 |

| Subtotal | ? | × |
|---------------------------|----|--------|
| <u>At each change in:</u> | | |
| Category | | \sim |
| Use function: | | |
| Sum | | \sim |
| A <u>d</u> d subtotal to: | | |
| Quantity Unit Drice | | ^ |
| ✓ Total Cost | | |
| Brand/Comments | | ~ |
| Replace current subtotals | | |
| Page break between groups | | |
| ✓ Summary below data | | |
| Remove All OK | Ca | ancel |

- The highest number Level 3 gives you the most detailed with Subtotals for each category with the **Sum** figures for selected boxes Total Cost and 8% columns.
- Clicking on the Level 2 will only provide Subtotals for each category hiding the details on each row.
- Clicking on the Level 1 will only provide the Grand Totals for the entire sheet.

(To remove subtotals, click the Subtotals command again and click the "Remove All" button in the Subtotals box.)

| 122 | | ٨ | R | C | D | F | F | G | Ц |
|-----|----|-------------|------|----------|------|-------|---------|----------------|---------|
| 123 | _ | A | D | C | U | E | Tatal | 0 | п |
| | | Category | Item | Quantity | Unit | Price | Total | Brand/Comments | 8% |
| | 1 | | | | | | Cost | | |
| | 7 | Produce | | | | | 12.71 | | 1.0168 |
| + | 12 | Dairy Total | | | | | 18.045 | | 1.4436 |
| + | 16 | Meat Total | | | | | 38.91 | | 3.1128 |
| + | 21 | Drinks | | | | | 30.92 | | 2.4736 |
| + | 24 | Pasta Total | | | | | 19.91 | | 1.5928 |
| + | 27 | Soup Total | | | | | 17.33 | | 1.3864 |
| + | 29 | Bakery | | | | | 5.97 | | 0.4776 |
| + | 34 | Snacks | | | | | 29.3 | | 2.344 |
| + | 37 | Supplies | | | | | 7.57 | | 0.6056 |
| · · | 38 | | | | | | | | |
| · · | 39 | | | | | | | | |
| · · | 40 | | | | | | | | |
| . · | 41 | | | | | | | | |
| . · | 42 | | | | | | | | |
| · · | 43 | | | | | | | | |
| · · | 44 | | | | | | | | |
| . · | 45 | | | | | | | | |
| · · | 46 | | | | | | | | |
| | 47 | | | | | | | | |
| | 48 | Grand | | | | | 180.665 | | 14,4532 |
| | 40 | | | | | | | | |