Using Microsoft Excel 2013

Microsoft Excel 2013 is a very powerful spreadsheet program. It is a tool for organizing data – whether numbers (numerical data) or words (alphanumeric). A “spreadsheet” is a table of values arranged in rows and columns. Each value can have a predefined relationship to the other values. While spreadsheets are typically used in business settings, there are many more applications where a spreadsheet can be useful.

1. Create a new spreadsheet.

Let’s suppose that you are the owner of a small business, with several sales people. You want to track the monthly sales figures for each salesperson.

To begin creating a spreadsheet in Microsoft Excel 2013, click on the FILE button, then click on “NEW”. Then click on the “BLANK WORKBOOK”
A Table will appear:

Across the top of the table will be letters, each designating a “column”; along the left side of the table will be numbers, each designating a “row.” The boxes that appear on the spreadsheet are “cells.” Data is placed into the cells. Cells are referred to by the corresponding column letter and row number. For example, on the blank worksheet above find the cell that is the fourth from the left and the ninth from the top (do not count the heading boxes, where the letters and numbers appear). The cell that you located is designated as cell “D9.” Cell “D9” is shown by the arrow in the next screen shot:
Now you need to set up the sheet for your data. You will want a row (left to right) for each salesperson and a column (top to bottom) for each month of the year.

On the blank worksheet, begin at the top [cell A1] and type in “SALESPERSON.” This is the heading for the column. Below that, enter the names of four salespeople [Bob, Mary, John and Alice], one in each cell. At the top of the worksheet, starting with cell B1 and working to the right, enter the months of the year. [Cell B1 is January, C1 is February, D1 is March, and so one, through cell M1 for December. If you need to, you can adjust the width of the cell – move the cursor to the edge of the top box (the one with the letter in it), click and hold and move the mouse to drag to change the width of the cell. You can also double click the edge of the cell and that will automatically adjust the cell box.

Your spreadsheet should look like this:
2. Enter the data.

Let’s enter sales figures for six months for each salesperson. Starting with Bob, begin inserting sales figures for January through June. Then do the same for each of the other salespeople. Your spreadsheet should look something like this (your numbers will be different):
3. Format the cells. To set the cells to record the figures as dollars, we need to FORMAT the cells. Starting in cell B2, left click and hold, then move the mouse to the right to cell M2 and down to cell M5, and release the left mouse button. Now with the cursor inside the highlighted area right click, select “Format Cell.” Click on the “numbers’ tab located on the far left. Under category, click “Currency.” Then, click “OK.”
<table>
<thead>
<tr>
<th>Salesperson</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob</td>
<td>100</td>
<td>85</td>
<td>105</td>
<td>102</td>
<td>94</td>
<td>99</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mary</td>
<td>135</td>
<td>128</td>
<td>111</td>
<td>146</td>
<td>168</td>
<td>175</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John</td>
<td>112</td>
<td>115</td>
<td>118</td>
<td>105</td>
<td>145</td>
<td>100</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alice</td>
<td>140</td>
<td>125</td>
<td>185</td>
<td>169</td>
<td>170</td>
<td>160</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Format Cells:

- **Number Category**: General Number
- **Decimal Places**: 2
- **Currency Format**: $1,204.10

Currency formats are used for general monetary values. Use Accounting formats to align decimal points in a column.
Or, if you are on the “HOME” Tab, click “Numbers” and you will get to the same “FORMAT” prompt.
The numbers in the cells will now appear as dollars, with dollar signs and two decimal places. You can adjust the number of decimal places in the Format Cells window. If you add sales figures for July, you will see that they appear as dollars. Your spreadsheet should not look something like this:

4. Insert a formula.

Now that the sales figures are in, you want to see which of the salespeople had the highest volume. In cell N1 type “YTD” [this is “Year to Date”]. Move the cursor into cell N2. Click on the “HOME” tab. Now, click on the Σ symbol [this is the Greek letter “Sigma” a mathematical symbol for “SUM”].
Click “Enter” and the sum of the sales figures for Bob will appear in the cell. Repeat this step for each of the other salespeople. Column N now shows that the annual sales total for each of the salespeople.

Sorting the Data

To sort the data according to the most sales, put the cursor in cell B6, click $\sum$ and enter. This will give sale totals for the month of January. Repeat this step for the remaining months, including the YTD column. Your spreadsheet should look like this:

To sort data alphabetically by Salesperson:

Highlight the data by dragging your mouse over the entire table. Select and click “Sort.” You will have the option to sort alphabetically from A-Z or Z-A.
The spreadsheet will look like this, with the salespeople’s names alphabetically listed from A-Z.

To sort the data by year, highlight your table, click on the sort data tab. Click “Custom Sort.” A prompt will appear. Click “YTD” next to “sort by then” and click “ok.”
To sort the data by a month, highlight your table by dragging the mouse over the entire table. Click on “sort and filter.” Click on the “sort by” tab, and scroll down to the month you would like to sort by.

To add a graph to your excel sheet.

Excel includes powerful graphing and charting tools. To create a simplified graph, Select the cells you want to chart, including the column titles and row labels. These cells will be the source data for the chart. ... From the Insert tab, click the desired Chart command. Choose the desired chart type from the drop-down menu. The selected chart will be inserted in the worksheet. Your excel sheet will then look like this:
<table>
<thead>
<tr>
<th>Salesperson</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob</td>
<td>$100.00</td>
<td>$85.00</td>
<td>$105.00</td>
<td>$102.00</td>
<td>$94.00</td>
<td>$93.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John</td>
<td>$122.00</td>
<td>$115.00</td>
<td>$118.00</td>
<td>$105.00</td>
<td>$105.00</td>
<td>$105.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mary</td>
<td>$135.00</td>
<td>$128.00</td>
<td>$111.00</td>
<td>$148.00</td>
<td>$168.00</td>
<td>$175.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alice</td>
<td>$145.00</td>
<td>$125.00</td>
<td>$185.00</td>
<td>$165.00</td>
<td>$170.00</td>
<td>$160.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$492.00</td>
<td>$453.00</td>
<td>$219.00</td>
<td>$520.00</td>
<td>$577.00</td>
<td>$528.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>