Skills for Success Curriculum Resource Cover Page

Organization

CESBA

Curriculum Resource

Creating Worksheets in Excel Introduction to Excel Tabs, Tools, and Formulas with practice activities. Learners will be asked to recreate a simple monthly budget using formulas and AutoFill. Final task involves using IF Functions to create a spreadsheet for ordering supplies for a small online business.

OALCF Alignment

Competency	Task Group	Level
Competency A -Find and Use Information	**A1. Read continuous text**	**2**
Competency A -Find and Use Information	**A2. Interpret documents**	**2**
Competency B - Communicate Ideas and Information	**B3. Complete and create documents**	**2**
Competency C - Understand and Use Numbers	**C1. Manage money**	**2**
Competency C - Understand and Use Numbers	**C4. Manage data**	**2**
Competency D - Use Digital Technology	**N/A**	**3**

Competency E - Manage Learning	**N/A**	**1**

Goal Paths (check all that apply)

☒ Employment
☒ Apprenticeship
☒ Secondary School Credit
☐ Postsecondary
☒ Independence

Embedded Skills for Success (check all that apply)

☒ Adaptability
☐ Collaboration
☒ Communication
☐ Creativity and innovation
☒ Digital
☒ Numeracy
☒ Problem Solving
☒ Reading
☒ Writing

Notes:

Suggested Milestone – Using Excel to complete Milestone 30 or Milestone 56

Learners will need a USB (memory stick) to complete these exercises.

If your Board does not use USBs (memory sticks), please talk to your learners about where you would like them to save their Excel work instead.

Learners will need access to a computer or laptop and MS Excel.

Digital Threat Awareness

Pathway Pillar - Enhancing and Expanding Digital Delivery

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Thank you to the many CESBA members that supported the project by reviewing curriculum resources.

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Introduction to Spreadsheets

A spreadsheet is a piece of paper or a computer program, used for accounting and organizing data using rows and columns into which information can be entered. Each cell records data. Microsoft Excel is an example of a spreadsheet program. There are other programs that create spreadsheets, but Excel is the one that is used most often.

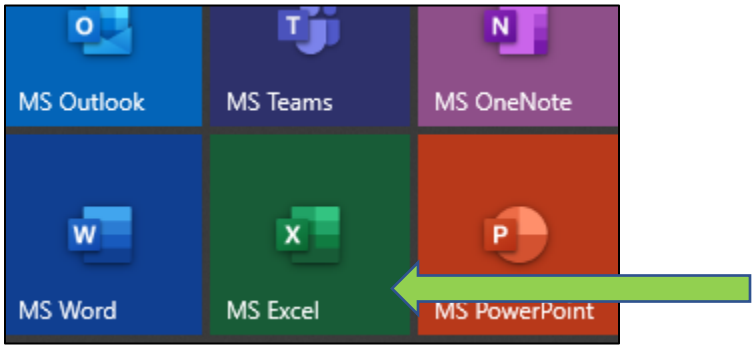
Excel can be used for many different tasks, such as recording information, tracking data, making budgets and schedules, recording attendance, and updating inventory.

This course will examine basic features and formulas. You will be using those basics at the end of the course to design a budget and an order sheet. **Please try out the examples in the lessons as you work through this course as you will be doing review activities for each section.**

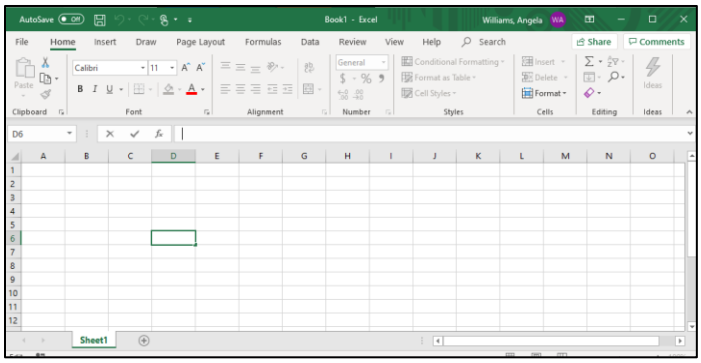
Lesson 1: Introduction to Excel Basics

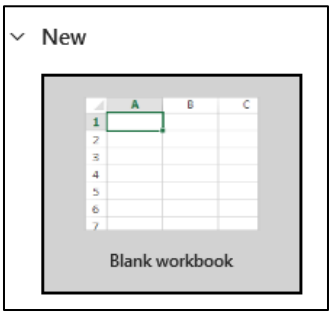
To start using Excel, click the Windows icon located on the bottom left of the screen.

Find MS Excel and click on it.



Look for the MS Excel icon on your start screen.





Once you click on this Icon, select the **Blank Workbook**. Excel will open to this screen.

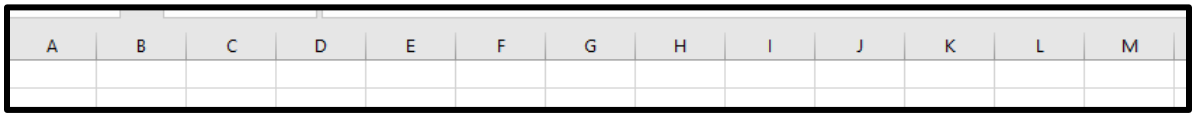
This is a spreadsheet or Excel worksheet.

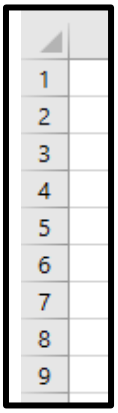
An Excel spreadsheet is made up of **rows** and **columns of cells**.

Rows go across (horizontally) and columns are up and down (vertically).

The rows in Excel are numbered.

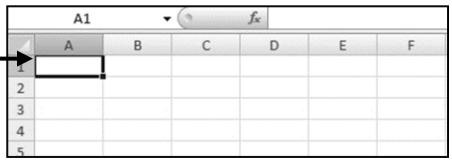
The columns in Excel are classified by letters of the alphabet.





A **Cell** is a box where you can enter text or other information.

Cell

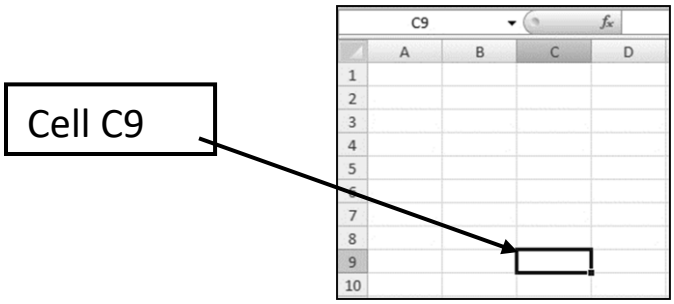


Cell **A1** is selected here.

In Excel, each **row has a number, and each column has a letter**. Cells are identified by the column letter and a row number for that Cell.

When you click on the row number it will highlight that entire row. When you click on the column letter it will highlight that entire column.

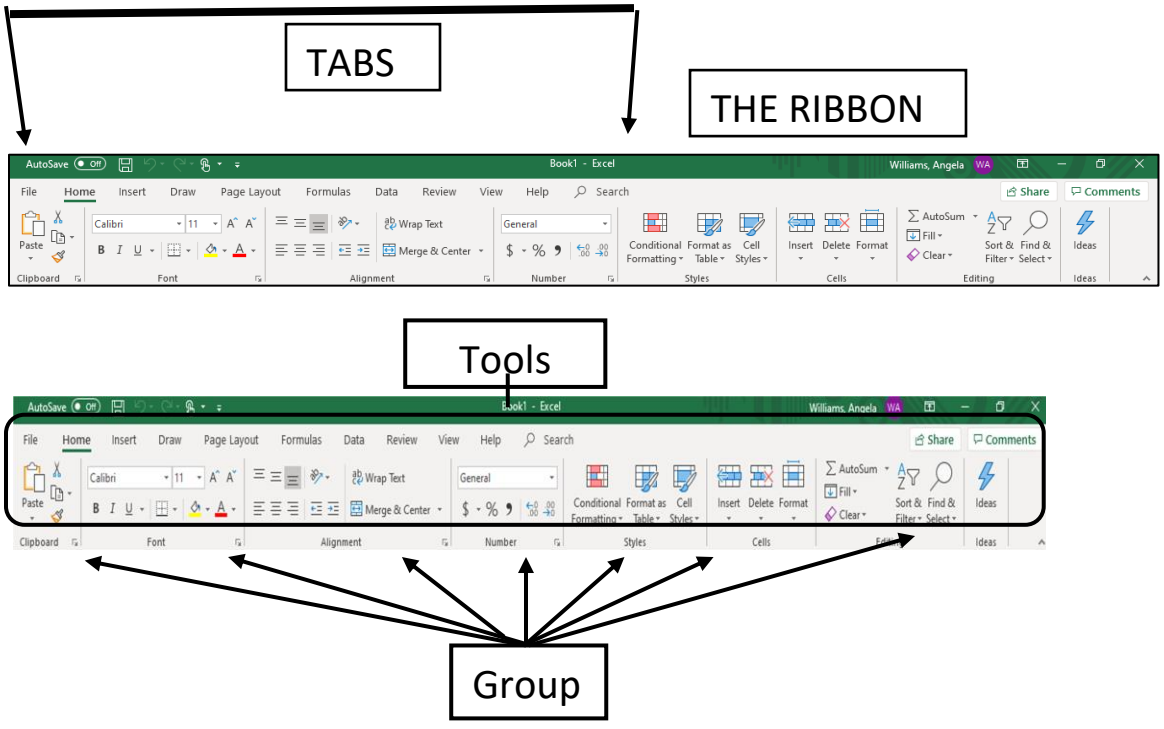
For example, C9 is the Cell in column C and row 9.



The Excel Ribbon

Options in Excel are sorted by categories. This is called the Ribbon.

The Ribbon is divided into Tabs that each have different **Groups of Tools**. The titles of the Tabs in Excel are Home, Insert, Page Layout, Formulas, Data, Review, and View.

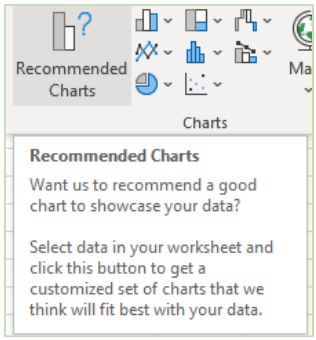


Each tab has different tools.

Activity 1: Exploring the Ribbon

You can **hover** over icons (pictures) on the tool bar to see what each one does.

Do not click. Just move the mouse over the tool to get a description.



Information shown when hovering (stopping the mouse cursor) on this tool.

Take some time to **explore** this program by clicking on the Tabs on the Excel Ribbon. Start by looking at the tools under the Home Tab and then move right and explore the Tabs below in order.

In this activity, look for the tool in the second column within the Tab provided. Hover over it with the mouse.

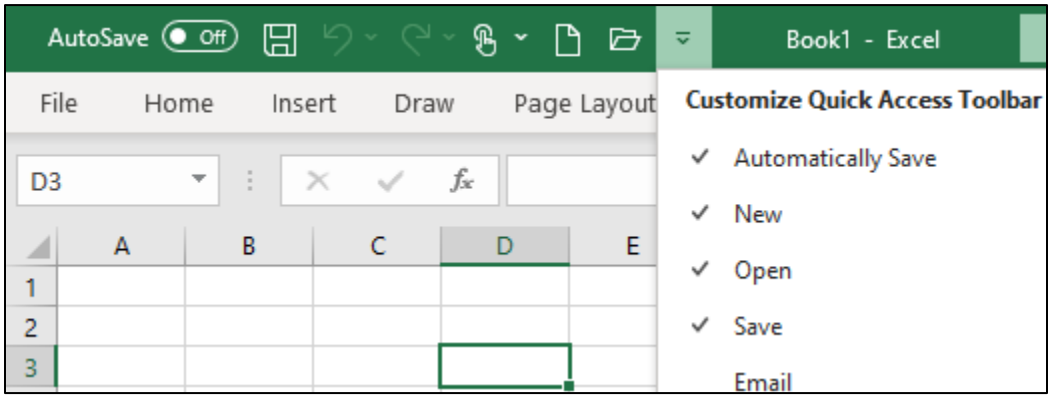
You may checkmark each one once as you finish it.

☐ Home Tab	Font and font style tools
☐ Insert	Chart tools
☐ Draw	Drawing Tools
☐ Page Layout	Themes tools
☐ Formulas	Calculation tools
☐ Data	Forecast tools
☐ Review	Proofing tools
☐ View	Zoom tools

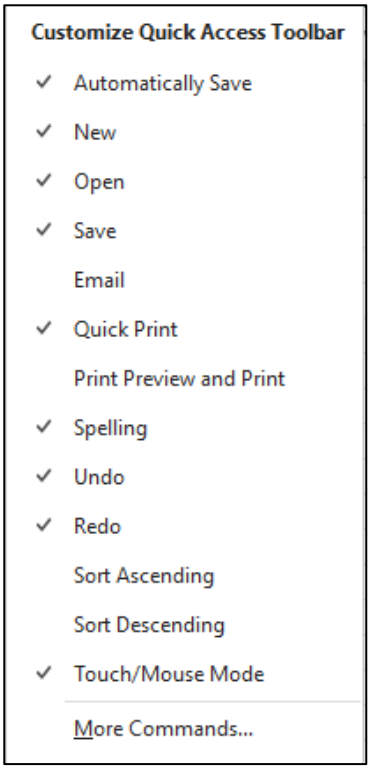
Setting the Quick Access Toolbar in Excel

Microsoft Office programs like Excel have a toolbar at the top of the screen that you can set to get quick access to tools and options.

To place icons on your Quick Access Toolbar, open Excel and open a blank Excel workbook. Click on the small down arrow to see the menu.



The options with checkmarks will show up on your Quick Access Toolbar. You can click an option to checkmark it.



Activity 2: Customize your Quick Access Toolbar

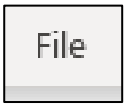
1. Open Excel and a new workbook.

2. Click on the down arrow on your Excel Quick Access Toolbar.

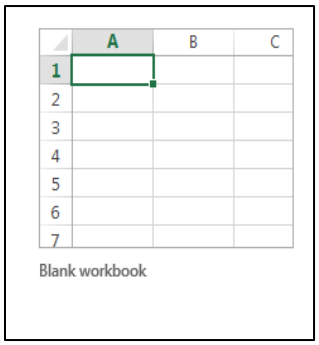
3. Check all the options shown here. You will have to click the down arrow each time to choose an option.

Opening a New Workbook

To open a new, blank workbook, click on the New icon on your Quick Access Toolbar.

Or click on the File tab. 

Click on the New option then select Blank Workbook and a new workbook will open.

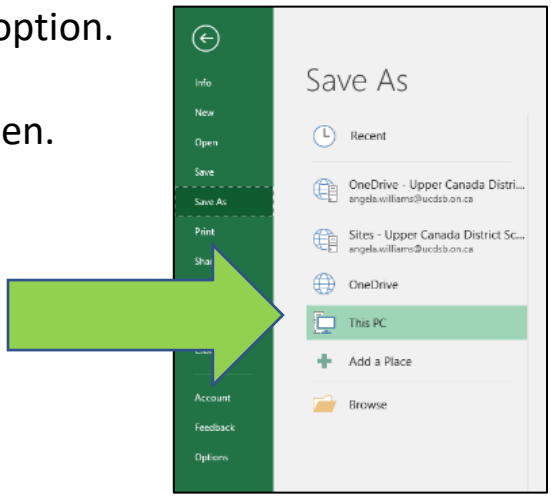


Saving to USB (Memory Stick/Removable Disk)

With a new, blank workbook open, put your memory stick into the USB port of your computer.

Click on on the Quick Access Toolbar. Or click on the File tab and choose the **Save As** option.

You will see this screen.



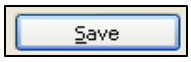
Click on the Browse button.

Choose the USB option (Removable Disk) to save to your USB.

Note: The USB drive name may change. If using a USB from a certain company, the USB might show that company's name instead of the term 'Removable Disk'.

The USB drive will always have this image beside it to help locate it.

These are the steps for saving to a USB.

1. Scroll down.
2. Double click on the USB drive.
3. Click in the 'file name' box.
4. Delete everything in the 'file name' box.
5. Type the name of your spreadsheet.
6. Click 

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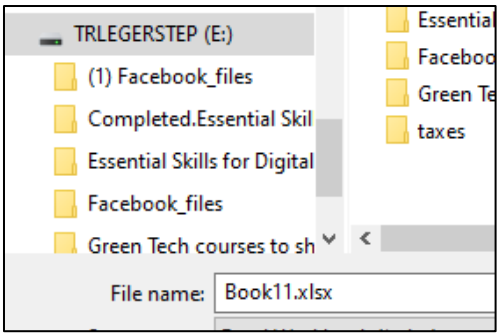
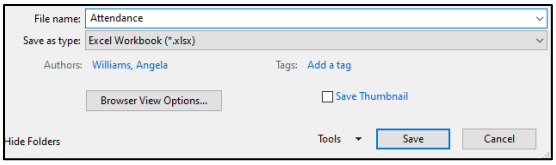


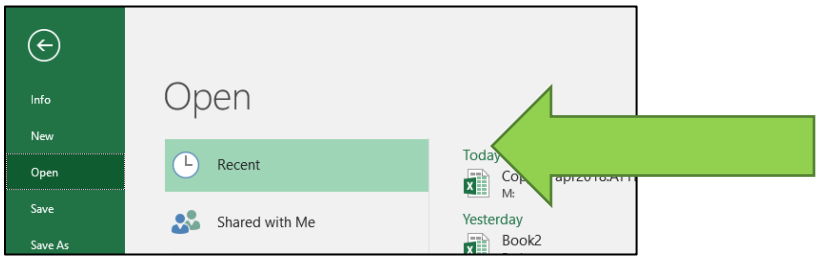


Opening a Saved Workbook

With a Workbook open, put your memory stick into the USB port.

Click on the File Tab on your Quick Access Toolbar.

Double click (click twice) on Recent.



Choose the file you would like from the list of the workbooks on which you have recently worked on.

Note: If the file you need is not listed in your recent workbooks, then click on the Browse icon.

Click on Browse

Scroll down and choose the USB option (Removable Disk) to see your files.

Double click on the file you wish to open.

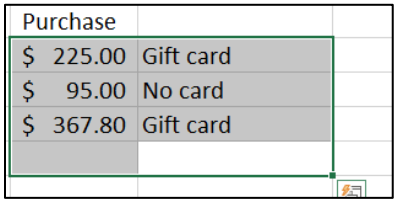
Selecting and Deselecting

To select a Cell, simply click your cursor in the Cell and begin to type information.

To select any number of cells. Make sure that your cursor is at the beginning of your selection and hold the mouse button down until you get to the end of the selection.

To select (highlight) simply click and hold the left button on the mouse.

Move the mouse across the area.

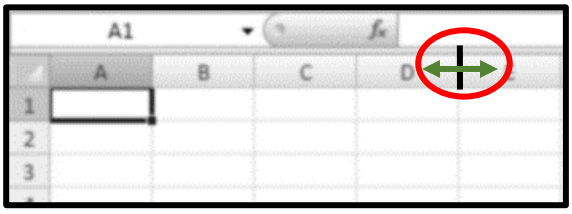


The cell you started at will remain white but has still been highlighted.

To deselect, click your mouse on any blank in an unused area on the worksheet. The highlighted area will disappear.

Making a Row/Column Wider or Narrower

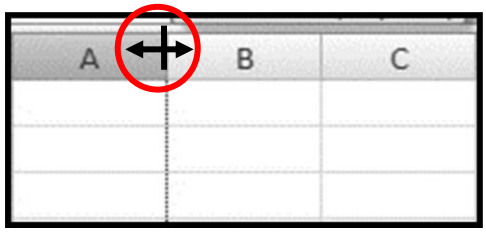
Click on the Column header you want to make wider.



Once this black arrow appears, you can click, hold, and drag the **column** either direction, to make it wider or narrower.

If the text shows as **#####**, there are a few possibilities. One possibility is that the Cell is not wide enough for the text.

If this happens, simply make the Cell wider by dragging the arrow as shown below.



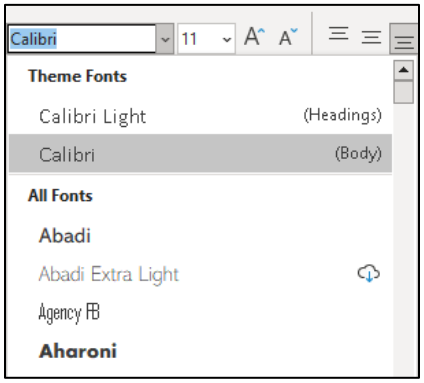
Use the same arrow to make the rows taller or shorter. Move the cursor between the number of the Row you wish to resize until you see the double-edged arrow. Now click the arrow and drag the row to size.

Fonts

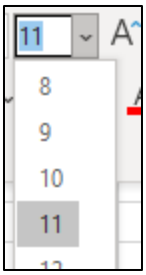
To change the Font style in Excel, simply click on the Cell you want to change.

Go to the Home Tab.

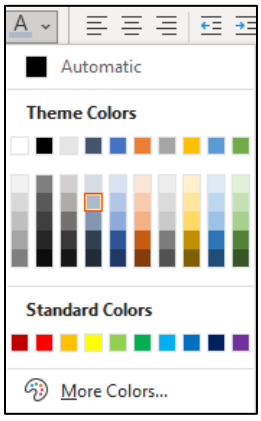
Go to the Fonts menu.



Select the down arrow. Then, select a Font from the drop-down menu and click on it. This will replace the text with the new font.

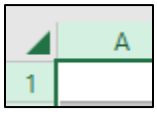


You can click the down arrow beside the font size number as well to make the font larger or smaller.



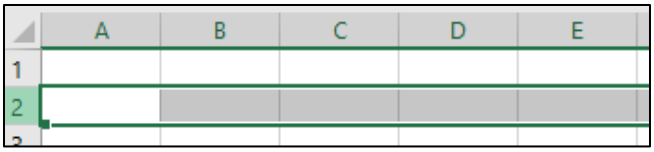
To change font colour, click into the cell of the font you want to change, then click on the down arrow beside the letter A icon with the colour band shown below it.

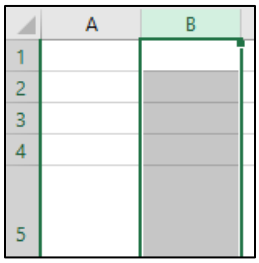
Select the colour you would like by clicking on the colour box in the drop down menu.



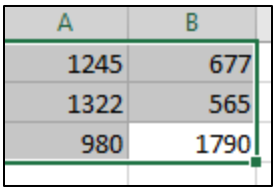
If you would like to change the font type, size or colour of an entire worksheet, you can click the arrow in the left corner to highlight the whole spreadsheet and then make changes.

If you would like to make changes to a row, you can click on the row number to highlight that row.





If you would like to make changes to one column you can click on the column letter to highlight that column and then make changes.

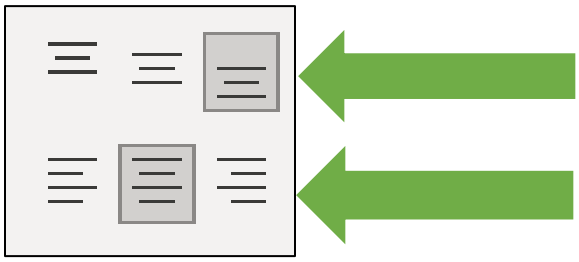


You can also hold down the left button of your mouse to highlight certain cells that you would like to change. Move your mouse across these cells and then make the changes.

Cell Alignment

You can also move or align the text in your cells, rows and columns to the right, centre or left. You can change this the same way you change fonts.

The alignment tools are located in the Home Tab.



Click these to move the text up and down in the cell.

Click these tools to move the text left, center or right in a cell.

Workbooks and Worksheets

Worksheets are the pages that you are working with. A Worksheet is also considered a Spreadsheet.

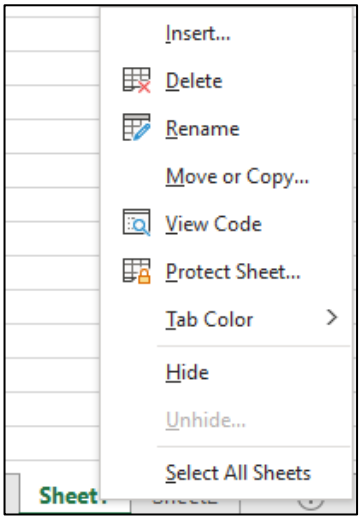
A **Workbook** is the file that holds all the Worksheets.

You may add more Worksheets to your Workbook if you wish.

You can see a sheet at the bottom of the page called Sheet 1.

To work with a specific sheet, simply click on the tab of the worksheet that you want to work on.

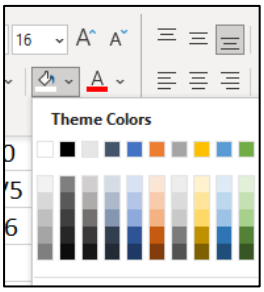
To add another sheet, you must click on the plus sign . Located to the right of the tabs. Click the plus sign to add as many sheets as you need. Each click will add a new sheet to your workbook.



To name a worksheet in the workbook, right click on the tab and click Rename.

To arrange the sheets in a different order in the workbook, click on the sheet tab and drag it (hold down left mouse button) to move it somewhere else.

Adding Fill Colour to Cells, Rows or Columns



You can change the colour of cells, rows, and columns in Excel.

You can do this by selecting cells, rows, and columns in the same way that you select them to change fonts.

You can click on the down arrow beside the little paint can and select a colour.

Activity 3: Practicing New Skills

The following activity reviews the basic Excel functions learned in Lesson 1 so far. You may go back over parts of Lesson 1 at any time if needed, to help with this activity.

1. Open Excel.
2. Open a Blank Workbook.
3. Rename Sheet1 in the Workbook. Call the sheet **Practice**.
4. Click on Cell **A1**.
5. Type Monday.
6. Click on Cell **B1**. *You can also move to the next Cell using the arrow keys.* Then type Tuesday in the cell next to Monday.
7. Move to Cell **C1** and type Wednesday.
8. From Cell **D1-G1** type the rest of the weekdays.

9. Click on the number 1 for row 1. Change the font of the row to Arial size 14.

10. Change the fill colour (paint bucket icon) of the row to yellow.

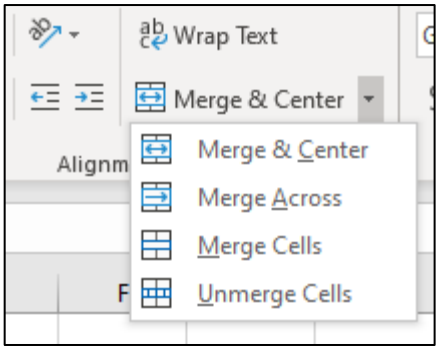
11. Make the font colour blue.

12. Centre the text in the cells.

13. Adjust your cells so you can see all the words on the row.

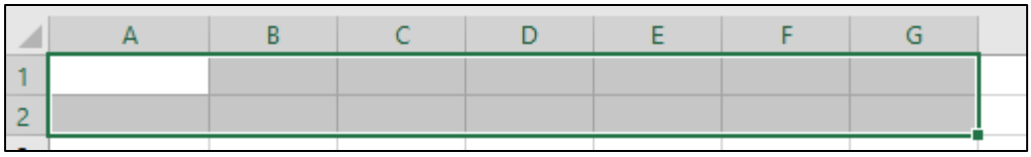
14. Save the file on your memory stick as **Weekdays** and close.

Merge and Centre



In Excel, you can Merge cells together to make titles and subheadings.

First, highlight the area that you wish to Merge and Centre.

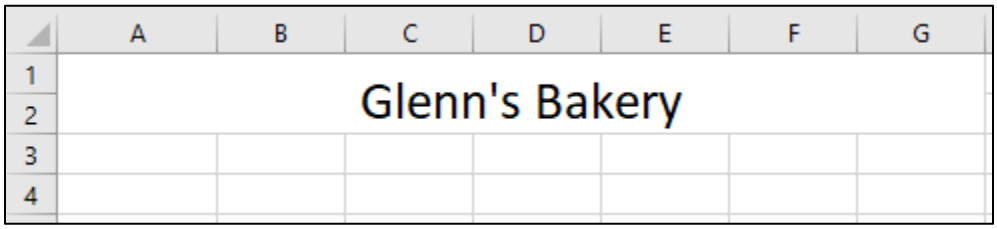


Click on the Home Tab, then on Merge & Center

The menu will open.

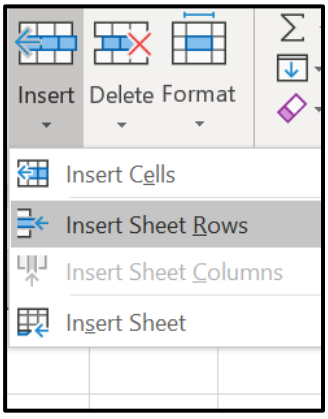
From this menu you can select the way that you would like the Cells to merge.

To unmerge the cells, highlight the area and select Unmerge Cells from the dropdown menu.



Inserting Rows and Columns

You can go to the Home Tab to insert new rows and columns to your spreadsheet.



On the Home Tab, there is a tool called Insert. To add a column, click on the column letter to highlight your column.

Click on Insert and then choose Insert Sheet Columns from the dropdown menu.

A column will insert **to the left** of the column that you have highlighted.

To add a row, click on the number of the row to highlight it.

The new row will appear **above** the row you have highlighted.

Activity 4: Merge and Centre

1. Open your Weekdays spreadsheet.

2. Click on the number 1 (for row 1) to highlight the whole row.

3. Insert a row.

Your top row should now be blank.

4. Hold down the left mouse button and highlight Cells A1 to C1.

5. Merge and Centre these Cells.

6. Type the title: Weekdays in the highlighted cells.

7. Change the font size in Row 1 to size 14 and the font colour to red.

	A	B	C	D	E	F	G
1		Weekdays					
2	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

9. Click on the Save icon in your Quick Access Toolbar to resave the spreadsheet with these changes.

Lesson 2: Formulas in Excel

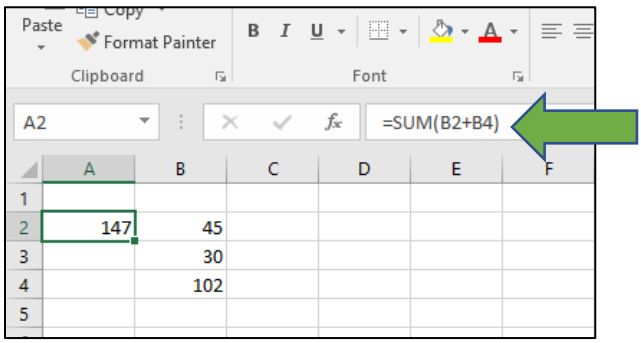
Adding Cells

When you want to add more than two Cells together, you must use the SUM function.

You click on the cell where you wish to use the calculation.

The Formula Bar is located at the top of the Excel page. This is the easiest place to write your formulas.

Typing the formula directly into the Cell will do the same thing. Formulas that you type in the formula bar will appear in the cell in which you have clicked.



You can use a SUM formula to add two or more cells together.

For example, if you wanted to add numbers in a column (cells A1 to A5), and put the total in the cell beneath them, then you would type this formula into cell A6.

=SUM(A1:A5)

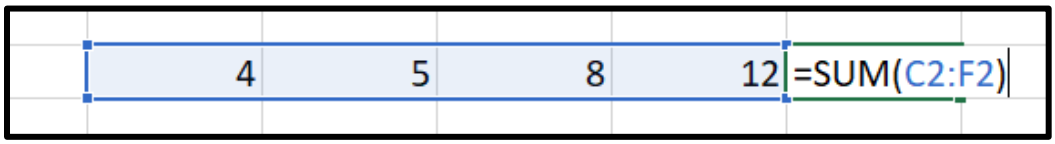
Then tap the ENTER key on your keyboard.

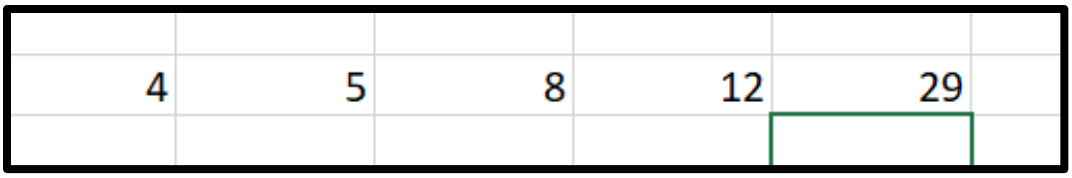
You can do this with rows as well.

Use the SUM formula to total the cells in a row.

In this example, cells C2, D2, E2 and F2 have been added together.

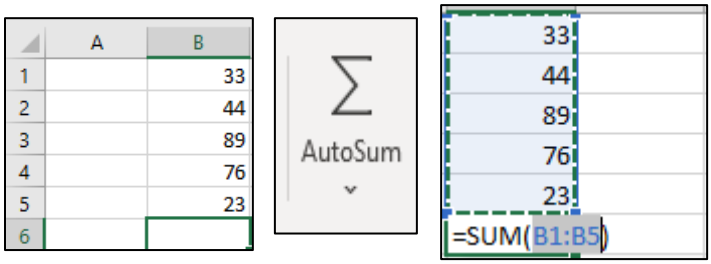
=SUM(C2:F2)





AutoSum

AutoSum will automatically add your cells for you. Click into the Cell under or beside the numbers you want to AutoSum, then click AutoSum. It is in 2 places on the Home Tab and the Formula Tab.



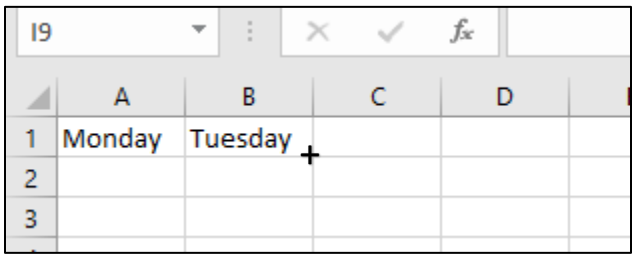
Click in the cell where you want the total to appear (in this image it is B6).

Click AutoSum, then your ENTER key.

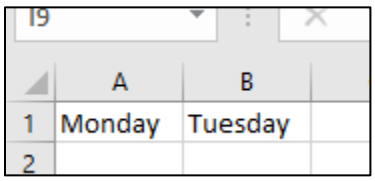
AutoFill

AutoFill is a useful tool, especially for files that contain information like days of the week or months. This is because you can type a little bit of information and AutoFill will fill in the rest.

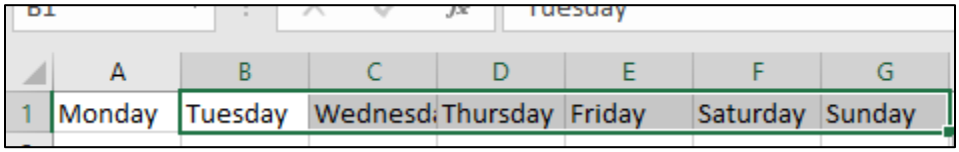
Try this example: Type Monday into Cell “A1” and Tuesday into Cell “B1” as shown in the picture below.



Click into Cell B1 (Tuesday) go to the bottom right corner of that cell (small black box) and look for a skinny black plus sign to appear. + This is called the fill handle.



When you see it hold down your left mouse button and drag the mouse across to cell G1. Autofill will fill in the rest of the days. It sees the pattern and finishes it for you.



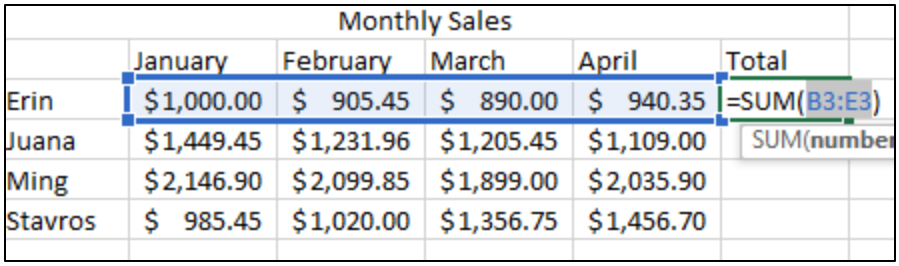
When you do this in your own spreadsheets, click on the fill handle (the black cross) when it appears and drag your cursor until you reach the Cell where you would like the information to end.

You may have to widen some columns to fit all the information.

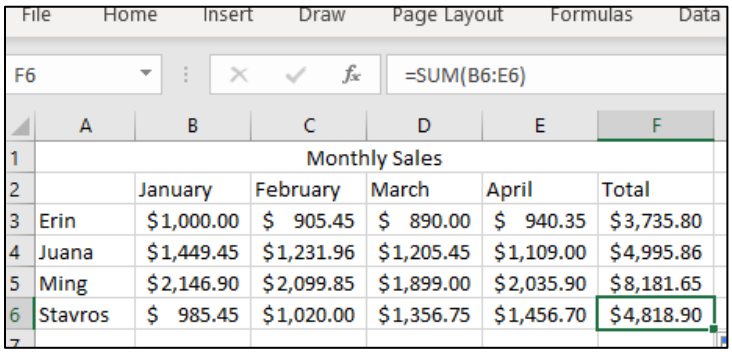
Place the mouse between the two columns. Drag your cursor outward to make the Column wider or inward to make the Column narrower.

The same Autofill is also useful for filling in **months**, **numbers,** and **any common sequence (pattern).**

When AutoFill is used with formulas it will change the formula to the next cell. Click and hold on the fill handle and drag to the right (or down) to fill in the other cells. Excel adjusts the formula for the row or column it is on. In the example underneath Juana's total formula would read =SUM(C4:E4) and Ming's would be =SUM(C5:E5).



Monthly Sales					
	January	February	March	April	Total
Erin	$1,000.00	$ 905.45	$ 890.00	$ 940.35	=SUM(B3:E3)
Juana	$1,449.45	$1,231.96	$1,205.45	$1,109.00	
Ming	$2,146.90	$2,099.85	$1,899.00	$2,035.90	
Stavros	$ 985.45	$1,020.00	$1,356.75	$1,456.70	



	A	B	C	D	E	F
1	Monthly Sales					
2		January	February	March	April	Total
3	Erin	$1,000.00	$ 905.45	$ 890.00	$ 940.35	$3,735.80
4	Juana	$1,449.45	$1,231.96	$1,205.45	$1,109.00	$4,995.86
5	Ming	$2,146.90	$2,099.85	$1,899.00	$2,035.90	$8,181.65
6	Stavros	$ 985.45	$1,020.00	$1,356.75	$1,456.70	$4,818.90

When using the fill handle, AutoFill adjusts the formula.

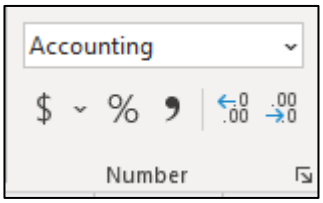
If you would like to learn more about AutoSum and AutoFill, including some tips and tricks, you can visit the following site to learn more:

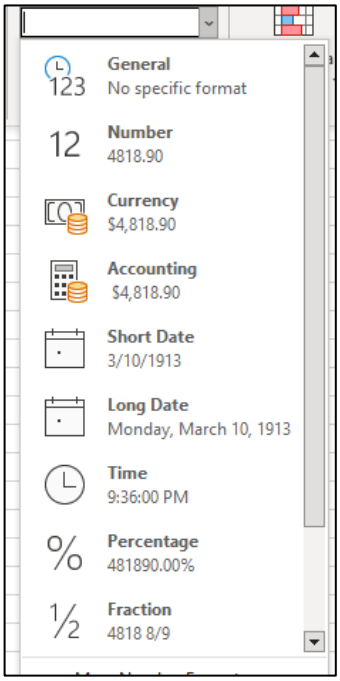
https://chrismenardtraining.com/post/how-to-use-the-sum-function-and-autosum-in-microsoft-excel

You can type the above address into the address bar on your Internet browser and watch the video.

Excel Tip: You can also use the Tab key and the arrows on your keyboard to move around your worksheets.

Number Formatting Options





In the Home Tab, you have options to format how the numbers will look in your cells.

You can click on the down arrow to choose an option or use the icons below the drop-down menu to quickly change a cell. The quick icons will add dollar signs, show percentages, change to comma style, or add or take away decimal places depending on which one you click on.

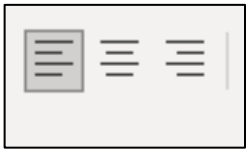
Your options in the drop-down menu are shown to the left.

There are examples on how to write long and short dates and times under those categories.

Activity 1: Formulas and AutoFill

1. Open a new Excel workbook.

2. Type the information shown on the next page into the new workbook. Before you start make sure your workbook is set to be right justified.



3. Type the following information into a new spreadsheet:

	A	B	C	D	E	F	G	H	I
1									
2	Bakery Sales Feb 4-Feb11								
3		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
4	Cheese croissants	12	14	12	26	46	18	22	
5	Crusty bread	10	10	12	10	25	10	4	
6	Doughnuts - Jelly	24	36	15	48	48	16	18	
7	Doughnuts - Chocolate	48	24	24	24	50	22	26	
8	Garlic Loaves	4	28	33	16	11	31	19	
9	Poppyseed bagels	36	44	45	44	56	56	22	
10	Total								

4. Click in Cell B10.

5. Click on AutoSum and press the ENTER key on your keyboard.

6. AutoFill the formula from Cells B10 to H10.

7. Click in Cell I4 and use AutoSum to calculate the cell.

8. Use AutoFill to fill in the formulas from I4 to I10.

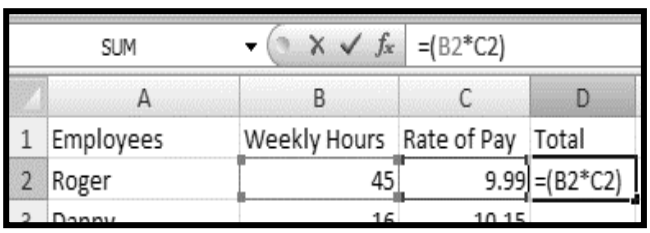
9. Save your spreadsheet to your USB as Bakery Sales.

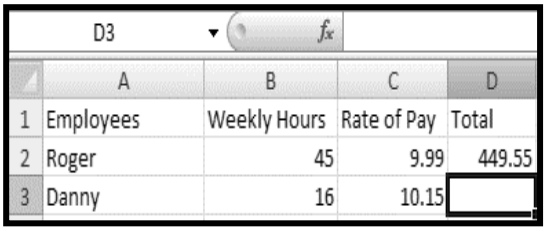
Using a Basic Multiplication Formula

In Excel, you will use the star symbol above the 8 key on your keyboard to do multiplication. Hold down the shift key and then press the 8 key on the keyboard or the keypad. *

=SUM(A1*B1).

The example below shows a multiplication formula being used to calculate rate of Pay for the weekly hours worked.





You will need to know how to do multiplication formula to calculate orders in the final task of this course. The symbols can be found above the numbers on your keyboard.

List of Basic Excel Formulas

* Multiply	→	To multiply two Cells, the formula would look like this. = (A2*A4)
/ Divide	→	To divide two Cells, the formula would look like this. = (A2/A4)
= Equal	→	Formulas always begin with =
– Subtract	→	To subtract two Cells, the formula would look like this. = (A2-A4)
+ Add	→	To add two Cells, the formula would look like this. =(A2+A4)

Activity 2: Practice Basic Formulas

Part 1

1. Open a Blank Workbook. Rename Sheet1. Call the worksheet Division.

2. Type the number 18 in Cell A1 and the number 2 in Cell A2. In Cell A3 type a division formula to divide Cell A1 by Cell A2 and press the ENTER key. Type the number 24 in Cell B1 and the number 4 in Cell B2. AutoFill the division formula from Cell A3 to Cell B3.

3. Leave the workbook open.

Part 2

1. Go to Sheet2. If there is not a Sheet2 in the Workbook add one by clicking the plus sign.

2. Rename Sheet2 Budget.

You will be creating a worksheet to track monthly expenses in this activity. Excel is a great program to use for budgeting or tracking monthly costs.

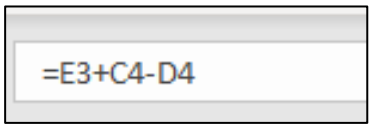
3. Type the information from the next page into the Budget workbook. Hint: Click on Column A to highlight that column and choose Short Date from the Number formatting options in the Home Tab. This will help when typing in the dates shown on the example.

Afterwards, double check your work to make sure that everything is in the right cells and has been entered correctly.

	A	B	C	D	E	F
1		Budget April 2020				
2					Balance from March	
3			Credit	Debit	$1,260.00	
4	1/4/2020	Rent		$ 950.00		
5	2/4/2020	Banking Fees		$ 12.00		
6	2/4/2020	Paycheck	$ 842.99			
7	3/4/2020	Gas		$ 75.60		
8	4/4/2020	Birthday money	$ 75.00			
9	5/4/2020	GST	$ 112.00			
10	6/4/2020	Dinner out		$ 50.00		
11	7/4/2020	Groceries		$ 243.15		
12	9/4/2020	Latte		$ 4.00		
13	10/4/2020	Gas		$ 75.00		
14	13/4/2020	Hydro		$ 189.00		
15	14/4/2020	Groceries		$ 64.20		
16	15/4/2020	Latte		$ 4.00		
17	17/4/2020	Gas		$ 70.25		
18	18/4/2020	Paycheck	$ 854.00			
19	20/4/2020	Concert		$ 112.00		
20	23/4/2020	Gas		$ 67.00		
21	25/4/2020	Groceries		$ 44.30		
22	27/4/2020	Latte		$ 4.00		
23	28/4/2020	Lunch out		$ 24.00		
24	29/04/2020	Cellphone		$ 78.00		
25						

4. For this budget, you will be trying a formula with both adding and subtracting in it to track debits and credits for the month.

5. In Cell E4 you will be entering the formula =E3+C4-D4 and pressing the ENTER key. This formula calculates the balance plus credits minus expenses (debits).



Balance from
$1,260.00
$310.00
$298.00
$1,140.99
$1,065.39
$1,140.39
$1,252.39
$1,202.39
$959.24
$955.24
$880.24
$691.24
$627.04
$623.04
$552.79
$1,406.79
$1,294.79
$1,227.79
$1,183.49
$1,179.49
$1,155.49
$1,077.49

6. AutoFill the formula from E4 to E25.

7. You can check your answers with the image here.

8. Save this workbook to your USB under the file name: April Budget

Lesson 3: IF Functions

The IF function can be used to determine if something is one way, or another based on data.

This can be used if the statement is either “True” or “False”.

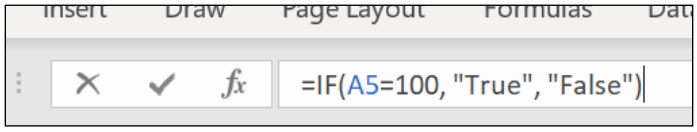
It can be used to track if an order is “Sold” or “In stock”.

Remember that IF functions are the same as any Excel formula and they must always begin with an = (equal sign).

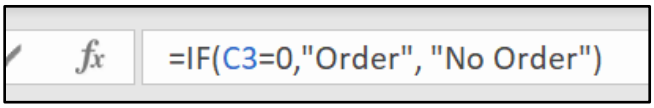
You can design your IF Function to show whatever data you would like to be true or false.

Here are 3 examples of ways to use the IF Function:

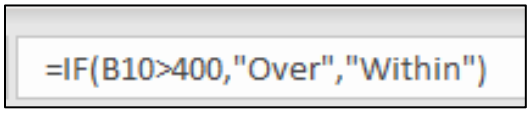
1) The data in this example must equal 100 to be true. Any cell value that is not 100 is labelled false. True is written first because it is the answer that goes with the formula.



2) This store needs to order stock when quantities have run out. Therefore, this IF function is used to remind staff to order the needed items. Order is written first because if the Cell equals zero than it needs to be ordered.



3) This individual needs to stay within budget. This formula tells if the individual stayed within the 400-dollar spending budget. The greater than sign shows that if the Cell is above 400 then it is Over.



Activity 1: Practice IF Functions

1. Open your April Budget workbook. Move the Budget sheet to the first sheet space by dragging it to the left.

This person needs to have $950.00 for their share of the rent and $12.00 for banking charges for May 1st.

Place an IF Function in Cell F24 to make sure that they have this money for the next month.

2. Type =IF(E24>962,”within”,”over”) in Cell F24 to see if the end balance is greater than $962.00. If it is, then it is within budget. Press the ENTER KEY to see the result.

3. Save your April Budget worksheet.

Activity 2: Designing an IF Function

A store is having a promotion and giving away $10 gift cards to any customers who spend over $200.00 at the store.

They are using an Excel workbook to track the giveaways.

Design a spreadsheet using the information listed below.

1. Use the subtitles: Name, Postal Code and Purchase in Row 1, in Cells A1, A2 and A3.

2. Use the information below to fill in Rows 2 – 4.

Amanda Jones, K0A 1A0, purchase: $225.00

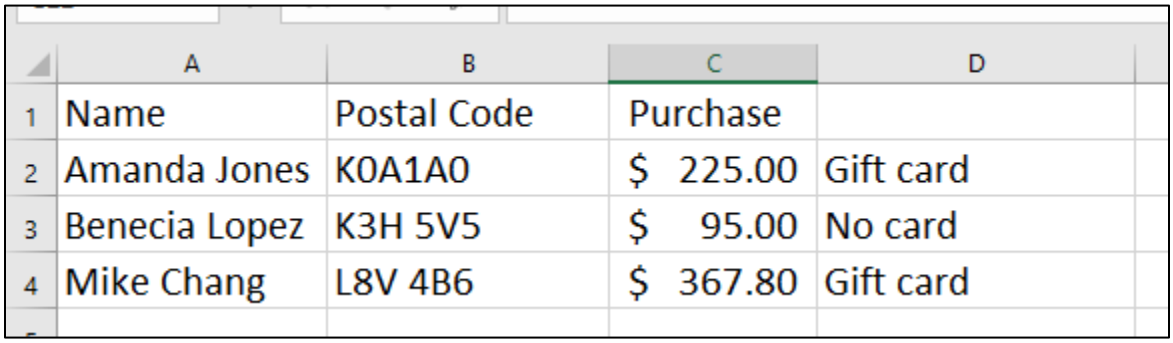
Benicia Lopez, K3H 5V5, purchase $95.00

Mike Chang, L8V 4B6, purchase $367.80

In Cell D2 type this IF Function

=IF(C2>200,”Gift card”,”No card”).

3. Check your work with the image below.



	A	B	C	D
1	Name	Postal Code	Purchase	
2	Amanda Jones	K0A1A0	$ 225.00	Gift card
3	Benecia Lopez	K3H 5V5	$ 95.00	No card
4	Mike Chang	L8V 4B6	$ 367.80	Gift card

Final Task: Creating an Order Sheet

You will be asked to review skills from this course in this task. You may review any part of this course during this final task if needed.

This activity involves creating a supply order sheet for a small online business. The sheet will help the owners know when items need to be remade. Since the owners make all their items, they have decided to use the term “Make more” instead of Order when creating their IF function.

1. Open a New Workbook.

2. Rename Sheet1. Name this worksheet Winter Stock.

3. Use the image on the next page to create your sheet.

Here, the owners’ assistant keeps track of online orders. The assistant has been told to let the owners know when they need to start making more items.

The owners will make start making more of an item when the number of that item remaining is lower than 4.

	A	B	C	D
1				
2	The Knitting Queen - Winter 2022			
3		Price	Sold	In Stock
4	Black Beanie	$ 25.00	4	6
5	Black fingerless gloves	$ 22.00	10	0
6	Black knit socks	$ 30.00	8	2
7	Black Mittens	$ 20.00	2	12
8	Black/white scarf	$ 32.00	12	2
9	Blue cable knit sweater	$ 75.00	4	5
10	Children's black beanie	$ 12.00	14	2
11	Cream Mittens	$ 20.00	0	3
12	Green Beanie	$ 25.00	1	2
13	Green Mittens	$ 20.00	1	7
14	Grey cable knit sweater	$ 75.00	1	10
15	Grey knit socks	$ 30.00	10	0
16	Rainbow Mittens	$ 20.00	2	10
17	Rainbow scarf	$ 32.00	6	1
18	Red beanie	$ 25.00	10	7
19	Red cable knit sweater	$ 75.00	4	4
20	Red fingerless gloves	$ 22.00	6	1
21	Red Mittens	$ 20.00	2	8
22	White knit socks	$ 30.00	2	2
23				

5. Create an order sheet in Excel just like the one shown above.

6. In Cell E4 type the following:

=IF(C4<4,"Make more","No order")

7. AutoFill the IF Function from Cells E4 to E22.

8. In Cell F3 type Total Sold.

9. In Cell F4 type a formula to multiply * the cost of the item and number of items sold in that row.

10. AutoFill (drag) the formula down from Cell F4 to Cell F22 to show the selling total for each item.

11. Highlight the spreadsheet and change the font size to 14. If needed, make the width of the columns larger.

12. Highlight the title and shade it yellow.

13. Save as: Final Excel Task.

Congratulations! You have finished this course.