

DEVELOPING A SPEADSHEET FROM SCRATCH

A Seminar Presented By Jim Wilkinson
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Before starting it is always advisable to sketch a layout of what you want on the spreadsheet. You can alter it after finishing, but it is best to know in advance what you want it to contain. Always leave some room between the data and the formula cell to add items.

After sketching out the outline, bring up the Works Spreadsheet program and give it a **title** in cell A-1.....(just click the mouse in cell A-1) ...such as **HOUSEHOLD EXPENSES**. Don't worry that the typing exceeds the cell width.

In cell C-2 type Jan. and hit "Enter". Note that it is Jan with a period after it. (it will be explained later why we skipped a column...from A to C).

In cell A-4 start listing the items you want to keep track of. From here you would go to cell A-5, A-6, A-7, etc.....all listed in column A. Don't worry that the typing exceeds the cell limit. When finished listing all the items you want in column A, double-click the column letter A and it will expand the cell width to accommodate the text.

Click cell C-2 where Jan. has been inserted. The cell will be outlined in heavy black lines. Now move the pointer down to the lower right corner of the cell until you see "Fill", hold down the left mouse button and drag to the right until you have all the months of the year across the line 2. Now, while they are all highlighted, click the icon in the toolbar that will center them in the cells. All will be abbreviated and you can adjust them as you see fit. To alter them simply click the ones you want to correct and go to the cell reference field and type it the way you want it to look. Let's say you don't like Apr. and you want April....highlight Apr. , go to the cell reference field and type April and then hit 'Enter' on the keyboard. Same for Jun, Jul, Sep

With all the months in place, we can now center the title across the months so it looks neat.

Place the mouse pointer in cell A-1, where the title is located, hold down the left mouse button and drag across only row 1 till you are **two columns** beyond where Dec. is located and release the mouse button.

Now go to “**Format**” on the menu bar, click on “**Alignment**” and then select “**Center across selection**” and then “OK”.

So, we have a title, the months of the year, and the items we wish to keep track of as regards expenses. Take one more look at the items you have in column 1 to be sure you have everything listed. Now we will put in the formulas to automatically add the columns and rows as we put in the data. This part is easy because we will use the calculator button on the toolbar.

Go to page 2 for this next part.

We will have to make an assumption here for demonstration purposes. Let’s assume your last item that you want to track is in line 23. We will allow for some additions in rows 24 , 25, and 26 and drop down to line 27, column C...**cell C27** ...and click this cell to outline it.

Now click the Calculator icon on the toolbar and you will see the Easy Calc dialog box....click “**Add**” and then click “**Next**”.

The cursor is flashing in the field that says “Range”. Move the box out of the way using the title bar and then put the cursor in cell C4, hold down the left mouse button and drag straight down column C and stop at row 26. The “Range window should now read **C4:C26**. The alternative way is to type C4:26 in the field. Do that if you are having a problem highlighting only the cells you want added. Click “**Next**”.

This window says “Results At:” and should read C27. If it does not say C27 then type it in because that is where you want the formula to be. Click “Finish” and a 0 will appear in that cell...C27. This indicates that no data is in cells C4 through cell C26. The formula you just created is displayed in the Cell Reference Field at the top.

We need the same formula for all the months of the year and we will use the ‘Fill’ function to do it. The computer is smart enough to know what to do here.

Put the cursor in the lower right corner of cell C27 and when you see 'Fill' hold down the left mouse button and drag straight across row 27 until you are at column N which is where Dec should be. Release the mouse button and 0's will show up in all the columns across row 27.

That takes care of the formatting of the columns. Now we will do the rows so you have an annual total of all the items you are keeping track of.

Another assumption: Column N is where Dec is located.

Click cell P4 and then click the Calculator icon in the toolbar.

Put the mouse pointer in cell C4, hold down the left mouse button and drag straight across row 4 and stop at column N. The calculator window should now read "Range" C4:N4. Click "Next"

The results field should now show P4 which is where you want the results, so click finish and a 0 will appear in cell P4.

To get the same formula in all the rows, click cell P4, then put the mouse in the corner till you see "Fill" and drag straight down column P and stop at row 26.

0's will now appear in all the intervening cells.

Now highlight all the cells where the data will be recorded, and include the cells where the formulas are ...and then click the \$ sign in the toolbar. This will cause all data you put in to automatically change to dollar amounts. For instance you put in 59.85 and it will become \$59.85 when you click out of that cell. The cells with formulas in them will become \$0.

If you want to round off your figures so you only display \$45 then highlight the cells where all the data will appear and then go to "Format" on the menu bar, click "Number" then highlight "Currency" and set the decimal figure at 0, then click "OK".

NOW...the reason we left column B blank and row 3 blank. Click cell B3 to outline it, go to 'Format' on the menu bar and click "**Freeze Titles**". This will keep the months and items frozen so they will always be in view when you put in the data.

Now let's talk about printing the spreadsheet. Before trying to print it according to the below instructions, take off the "Freeze Titles" format. (This would be at the end of the year)

The first thing you need to do is to go to cell A1 and hold down the mouse button and then highlight all the data you have entered....and ONLY the data you have entered.

Now go to "File", then "Print Area" and "Set Print Area" and then "OK" when it says that it will only print the area you have highlighted.

Now you have to go to "File" , "Page setup" and make sure it is in Landscape format.

Go to "File" , "Print Preview" and see if all the months and totals show up in the landscape form. If not, then you have to squeeze in the months columns or reduce the font size. By reducing the font size you can squeeze in the months columns even more. Keep going to print preview until it shows all the data you want printed. Once it does, then print it.

You did it!!

As you input figures in the cells the program will automatically total them for the months and give you yearly totals so you know where all your money is going.