

# UNIT

# 2

## Excel 2007: Business and Personal Finances

### Unit Objectives:

After completing this Unit, you will be able to:

#### LESSON 1

Excel Basics

#### LESSON 2

Create Data and Content

#### LESSON 3

Format Data and Content

#### LESSON 4

Analyze Data

#### LESSON 5

Manage Workbooks



### Why It Matters

Microsoft Excel is a powerful business tool. Using Excel, you can organize lists of data, calculate expenses for a project, create charts, and much more. A skilled Excel user is a good candidate for a variety of jobs. *What is one way that Excel might help you with your schoolwork?*



Go Online

REAL WORLD CONNECTION

[glencoe.com](http://glencoe.com)

Go to the **Online Learning Center** and select your book. Choose **Unit 2** to learn how businesses use spreadsheet applications in the real world.



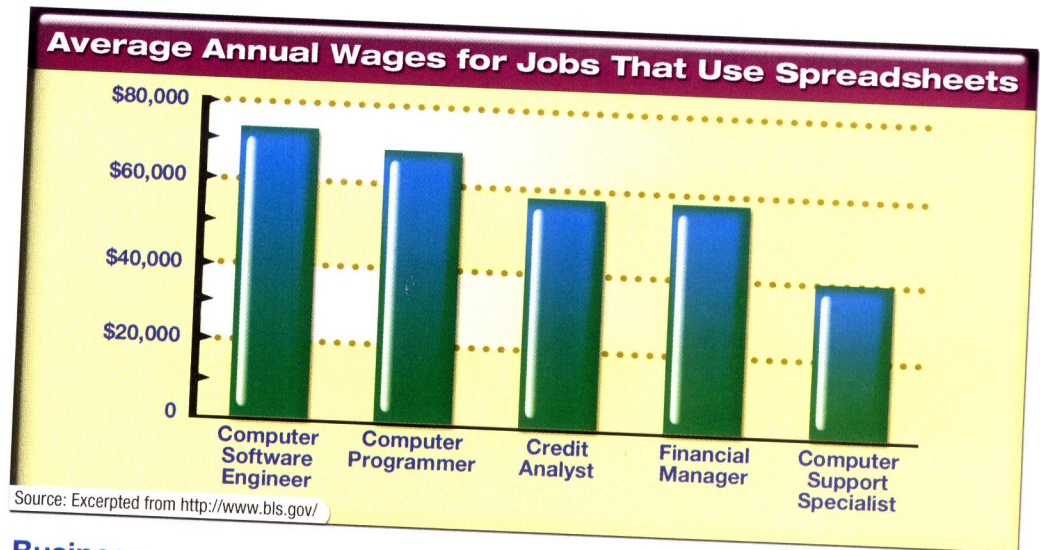
### Career Checklist

To use spreadsheets effectively in the workplace, remember to:

- ✓ Use standard formats and fonts.
- ✓ Group related worksheets into a single file.
- ✓ Hide distracting rows, columns, or worksheets to focus on essential information.
- ✓ Use color to group and classify information.
- ✓ Format your spreadsheet for easy printing.

## How Can Spreadsheet Skills Advance Your Career?

Spreadsheets are complex tools that are used to measure performance, plan a budget, and make other calculations. If you have spreadsheet skills you can also learn to manage and manipulate information in the workplace. Spreadsheets are used to maintain schedules, track expenses, and manage large-scale projects in a variety of careers.



### Business

Spreadsheet software is valuable in the world of business. Credit analysts and financial managers use a wide range of spreadsheet functions to input and assess credit histories, financial portfolios, and budgets.

### Computer Occupations

There are a wide variety of high-salary jobs in the computer industry that use spreadsheets for their non-mathematical capabilities. Computer software engineers and computer programmers use spreadsheets to classify and manipulate the huge amount of complex information needed to analyze programming problems, write programs, and create software. A computer support specialist might use spreadsheets to log and track data from their support calls.



### READING CHECK

- 1 **Evaluate** How could spreadsheet skills improve your chances of obtaining a higher salary?
- 2 **Math** Which of the careers listed in the chart has the highest annual wage potential?



# LESSON

# 1

# Excel Basics

## Key Concepts

- Identify parts of the Excel screen
- Open and close workbooks
- Name and save a workbook
- Insert and edit cell contents
- Calculate a sum
- Print a worksheet

## Standards

The following standards are covered in this lesson. Refer to pages xxv and 715 for a description of the standards listed here.

### ISTE Standards Correlation

#### NETS•S

2b, 3b, 3d, 4c, 6a, 6b,

#### Microsoft Certified Applications Specialist

Excel

1.4, 3.2



In this lesson, you will learn basic Excel skills such as opening and closing a workbook, inserting and editing cell contents, and naming and saving a workbook. These basic skills will give you the foundation you need to learn more complex Excel skills.

## 21st CENTURY SKILLS

**Be Productive** Productivity is a measure of how well you use resources, such as time or money. If you think the results you are getting are worth the time and effort you put into a project, then you are probably being productive. Two people may spend the same amount of time on a project, but one person may be more productive if he or she has better tools or is more organized. Excel is a tool that can help you organize your work more productively. *What tools do you use to organize your work?*







## Before You Read

**Prior Knowledge** Look over the Key Concepts at the beginning of the lesson. Write down what you already know about each concept and what you want to find out by reading the lesson. As you read, find examples for both categories.

### Read to Learn

- Explore the Excel application and how it works.
- Understand how to enter values and formulas into worksheet cells.
- Consider how Excel can help you organize important data, such as an inventory.

### Main Idea

Excel is an important tool that allows you to create and edit spreadsheets.

### Vocabulary

#### Key Terms

button	Quick Access Toolbar (QAT)
cell	Ribbon
cell reference	ScreenTip
command	spreadsheet
dialog box	sheet tab
folder	tab
formula	title bar
formula bar	workbook
group	worksheet

### Academic Vocabulary

These words appear in your reading and on your tests. Make sure you know their meanings.

illustrate  
learn

### Quick Write Activity



**Create a List** Chances are that everyday you do simple calculations such as adding or subtracting numbers. Think about the tools you use on a daily basis to work with numbers (e.g., calculator, pencil and paper, etc.). On a separate piece of paper, make a list of these tools. In your list, describe how these tools help you make sense of numbers. How could these tools be improved to help you work better?

### Study Skill

**Avoid Distractions** Is it sometimes hard for you to finish your homework? Talk to your family about establishing a set time every day for homework. Make sure both family and friends know that you are not available during this time.

### Academic Standards

#### English Language Arts

**NCTE 3** Apply strategies to interpret texts.

**NCTE 4** Use written language to communicate effectively.

#### Math

**NCTM (Number and Operations)** Understand numbers, ways of representing numbers, relationships among numbers, and number systems.

**NCTM (Number and Operations)** Compute fluently and make reasonable estimates.



# MATH MATTERS

## Introduction to Excel

**E**xcel is a type of spreadsheet software. Spreadsheet software allows users to organize and manipulate numbers and other data.

### How Can I Use Excel?

Although Excel can be used to organize text, it is more commonly used to organize and process numbers in rows and columns. Businesses use Excel for many kinds of data, including budgets, sales figures, expense statements, and time cards.

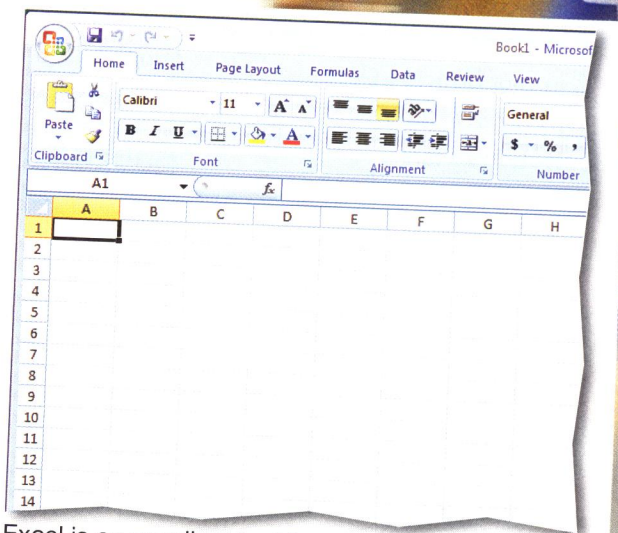
You could use Excel to organize and process information about a variety of things, including:

- Your class schedule
- Your grades
- Your friends' addresses and phone numbers
- Your personal budget

### When Should I Use Excel?

It is best to use Excel whenever you need to store and process data, especially numbers. There are many advantages to entering data in an Excel spreadsheet instead of a table in Word, including:

- A spreadsheet has ready-made columns and rows.
- Excel has built-in formulas that can automatically calculate sums, averages, maximum values, and minimum values.
- The formulas in Excel can be copied to other columns and rows to make quick and accurate calculations.



Excel is an excellent tool for tracking financial information.

### SKILLBUILDER

- 1. Identify** What are some additional ways that businesses might use Excel?
- 2. Evaluate** Why do you think many people prefer using Excel's built-in formulas instead of calculators to process data?
- 3. Analyze** Explain how Excel is different from Word.
- 4. Describe** Use the Internet to find out more about Excel. Describe one new use for Excel that you learned.

