

## Part 1: Personal Budget – Data Entry

1. Open a Blank Excel Workbook and save it as “**BudgetXX**” (XX = your initials)
2. Select cell **A1** and type Personal Budget Worksheet.
3. Select cell **A2** and type Monthly Estimates.
4. Select cell **A3** and type Income.
5. Select cell **B3** and type January. Continue with the following:

**C3** – February

**D3** – March

**E3** – April

**F3** – May

**G3** – June

**H3** – July

**I3** – August

**J3** – September

**K3** – October

**L3** – November

**M3** – December

**N3** – Total

6. Select cell **A8** and type Expenses.
7. **Repeat** step 5 for range **B8:N8**.
8. Enter the following data in the following cells:

**A4** – Wages

**A5** – Dividends

**A6** – Total

**A9** – Rent

**A10** – Food

**A11** – Tuition

**A12** – Books

**A13** – Entertainment

**A14** – Car Payment

**A15** – Gas

**A16** – Miscellaneous

**A17** – Total

**A19** – Net

9. Enter numbers into appropriate fields as show in the diagram below:

Income	January	February	March	April	May	June	July	August	September	October	November	December	Total
Wages	1000.29	1000.29	1000.29	1000.29	1000.29	1000.29	1000.29	1000.29	1000.29	1000.29	1000.29	1000.29	12003.48
Dividends	4000.75	0	0	0	0	0	0	0	4000.75	0	0	0	8001.5
Total													
Expenses	January	February	March	April	May	June	July	August	September	October	November	December	Total
Rent	400.89	400.89	400.89	400.89	400.89	400.89	400.89	400.89	400.89	400.89	400.89	400.89	4810.68
Food	300	300	300	300	300	300	300	300	300	300	300	300	3600
Tuition	1500	0	0	0	0	0	0	0	1500	0	0	0	3000
Books	500	0	0	0	0	0	0	0	500	0	0	0	1000
Entertainment	100	100	100	100	100	100	100	100	100	100	100	100	1200
Car Payment	154.79	154.79	154.79	154.79	154.79	154.79	154.79	154.79	154.79	154.79	154.79	154.79	1857.48
Gas	100	100	100	100	150	150	150	100	100	100	100	100	1350
Miscellaneous	100	100	100	100	100	100	100	100	100	100	100	100	1200
Total													
Net													

10. Save all changes to your workbook.

## Part 2: Personal Budget – Formulas and Functions

1. Open your “**BudgetXX**” Workbook.
2. Select cell **B6** and use the **SUM** Function to calculate the sum of cell range **B4:B5**.
3. Select cell **B6** again and use the fill handle to copy the sum formula to cell range **C6:M6**.
4. **Repeat** steps 2 and 3 with **B17** now as your active cell.
5. Select cells **N4** to **N5** and use the **SUM** function to calculate the sums of the corresponding rows in cell **N6**.
6. **Repeat** step 5 for cells **N9** to **N17**.
7. Select cell **B19** and enter the following formula: **=b6-b17** then press enter.
8. Use the fill handle to copy the formula used in cell **B19** to cell range **C19:N19**.
9. Save the changes to your workbook.

### Part 3: Formatting Your Budget Workbook

1. Open your saved Budget Workbook.
2. Select cell **A1** and from the Home ribbon tab, select the Cell Styles button (HOME tab | Styles Group) and select **Title** cell style.
3. With cell **A1** still selected, change the font style to **bold** (HOME tab | Font Group). Then change the text color to '**Blue, Accent 1**' (Column 5, Row 1).
4. Change the font of cell **A2** to Cambria and its font size to 14. Repeat step 3 for cell **A2**.
5. Highlight cell range **A1:N1** and select '**Merge & Center**' (HOME tab | Alignment group) from the Home ribbon button.
6. **Repeat** step 5 for cell range **A2:N2**.
7. Highlight cell range **A3:N3**. Change formatting to the **Heading 1** cell style from the Cell styles button.
8. **Repeat** step 7 for cell range **A8:N8**.
9. Use step 7 as a reference to apply formatting to the following cell ranges:

Total cell style -	<b>A6:N6, A17:N17</b>
Accent 1 cell style -	<b>A19:N19</b>
20% - Accent 1 cell style -	<b>A4:N4, A9:N9, A11:N11, A13:N13, A15:N15</b>
40% - Accent 1 cell style -	<b>A5:N5, A10:N10, A12:N12, A14:N14, A16:N16</b>

10. Highlight cell range **B4:N4**. Select the '**Account Number Format**' (HOME tab | Number Group) to apply the format to the selected range.
11. Select cell range **B5:N5**. Select the '**Comma Style Format**' to apply the format to the selected range.
12. Apply the accounting number format to the following cell ranges:

**B6:N6, B9:N9, B17:N17, B19:N19**

13. Apply the comma style format to the following cell ranges:

**B10:N16**

14. Select column A. Double click the column boundary to adjust the width of the column to the width of the largest item in the column.
15. **Repeat** step 14 to adjust the width of columns **B** through **N**.
16. Once complete, save the changes you made to the existing workbook file.

## Part 4: Creating a Chart

1. Open your saved Budget Workbook.
2. Select cell range **A9:A16**.
3. While holding down CTRL, select cell range **N9:N16**.
4. Click on the '**Insert Pie or Doughnut Chart**' button (INSERT tab | Charts group) and select 3-D Pie Chart.
5. Click on the chart title and name it Monthly Expenses.
6. Click on the '**Chart Styles**' button to display the gallery and choose style 3. Click the Chart Styles button again to deselect.
7. Click the '**Move Chart**' button (CHART TOOLS DESIGN tab | Location group).
8. Select '**New sheet**' and name the new sheet Monthly Expenses. Select Okay.
9. Right click on the Sheet1 and rename it to Monthly Budget Planner.
10. Change the color of the Monthly Budget Planner to '**Orange Accent 2**'.
11. Save all changes to your Personal Budget Workbook and UPLOAD it to OneDrive for grading.

## Personal Budget Rubric

Criteria	Points
<b>Part 1: Data Entry</b>	
Headings	5
Income Entries	5
Expense Entries	5
Month Entries	5
Number Entries	5
<b>Subtotal</b>	<b>25</b>
<b>Part 2: Formulas and Functions</b>	
Sum Functions	5
Fill Handles	5
Income Totals	5
Expense Totals	5
Net Totals	5
<b>subtotal</b>	<b>25</b>
<b>Part 3: Formatting</b>	
Formatting (-1 each infraction)	25
<b>Subtotal</b>	<b>25</b>
<b>Part 4: Chart Creation</b>	
Chart Creation	5
Title Renaming	5
New Sheet Move	5
Rename/color Sheet	5
File Name	5
<b>subtotal</b>	<b>25</b>
<b>TOTAL</b>	<b>100</b>