

CREATING FORMS USING EXCEL

Quick Tips

1. **Page Setup:** Page Tab--Landscape, Margins tab-- All Margins -- .5, Sheet--remove check on Gridlines.
2. **Row Height:** Click Select All button, go to Format, Row, Row Height--15 or drag row up to make all rows height of 15; Change font to Times New Roman, 12pt.
3. **Merge cells:** Highlight desired cells, click the merge cell button on toolbar. Text is automatically centered--use buttons to make left justified if desired. Type in text and format text as desired. Click out of the merged cells, then click back in. Go to Format, Cells. You now have formatting options available that will apply to all the merged cells--borders, font, text wrapping, protection, etc.
4. **Creating lines:** Highlight text and click Underline button. Use this option ONLY if typed information on the line will not change.
5. **Creating lines to be typed on:** Use Drawing toolbar to draw a line. Hold down <Shift> key as you draw to make a straight line, or create border on bottom of cell/cells to underline.
6. **Creating check boxes:** Use the textbox tool on the drawing toolbar and draw a textbox in desired location. With textbox highlighted, change the font size to 10 or so one can type a character ("x" or "*", "y" or "n") in the textbox. Always test box after creating to make sure character will fit in box.
7. **Resize columns & rows:** Move cursor over column/row label border (in gray area) until cursor changes to double headed arrow. Left click and drag column/row to resize.
8. **Drag and copy data:** Highlight cell/cells. Black square will appear in right bottom corner. Left click and drag down (or across). Data or formula in

highlighted cells will be copied to all selected cells. If pattern is indicated, then pattern will be repeated (Mon., Tues., or 1, 2, 3, etc).

9. **Borders:** Add AFTER TEXT is entered. Select cells; go to Format, Cells, Border. Choose desired border, style and color and where to apply borders.
10. **Formulas in adjacent cells:** Enter formulas in first cell. Highlight and drag down or across to copy into other cells.
11. **Formulas in non-adjacent cells:** Begin formula with equal (=) sign, then type in cell name (column, row: A3). Insert function desired (+, *, /, -) then next cell name. Continue until all cells in calculation have been added. (Example: =A3+C10+F7. This formula will add the numbers in cells A3, C10 and F7 to get a total).
12. **Copying a sheet:** Open desired worksheet. Go to Edit, Move or Copy Sheet. Choose where copy is going and put a check on Create a copy box. Leaving this box unchecked will move the worksheet from its current location to the new one you select.
13. **Renaming a sheet:** Right click on the worksheet name at bottom of window. Choose Rename and type in new name for worksheet.
14. **Automatically update information from one worksheet/workbook into another:** Open both worksheets/workbooks. Highlight and copy desired cell. Navigate to desired cell in worksheet where data is to be pasted. Choose Edit, Paste Special. At bottom of window, click Paste Link button. Whatever data is typed in original cell will automatically be inserted into second cell. Original worksheet does not have to be opened. Whenever the second worksheet is opened a message will appear informing you that the worksheet will be updated and asking if you want to continue. Say Yes. Excel will automatically find the updated information and insert it into the worksheet.
15. **Protecting Worksheet:** Open worksheet. Highlight all cells that you do not want formulas or information changed. Go to Format, Cells and choose Protection tab. Place a check mark on "Locked". Now go to Tools,

Protection, Protect Sheet. A window opens asking what you want to protect. Leave a check on all options. If you desire, you can add a password to protect the sheet. Information can now be added to all cells that you did not lock. Cells that are locked (those with formulas) cannot be changed.

16. **Unprotect Worksheet:** Go to Tools, Protection and choose Unprotect sheet. If you have added a password in the above step, you will have to supply it to remove protection and allow changes.
17. **If then formula:** This formula is used when the desired data in one cell is dependent upon the information in another cell. For example, shipping charges are free if an item is over \$100 but \$5.95 if under \$100, this formula can be used to place the word "free" or the amount in the desired cell.

	A	B	C	D
1	Quantity	Item Description	Price	Total
2	1	Printer	159.95	\$ 159.95
3				
4		Shipping		Free
5				

← Function

The IF worksheet function checks a condition that must be either true or false. If the condition is true, the function returns one value; if the condition is false, the function returns another value. The function has three arguments: the condition you want to check, the value to return if the condition is true, and the value to return if the condition is false.

=IF(logical_test,value_if_true,value_if_false)

For the above example, the function (in cell D4) says if the number in cell D2 is greater than \$100, then put the word "Free" in cell D4. If the number in cell D2 is less than \$100, then put \$5.95 in cell D4.

If you are entering a label in the formula that you want displayed, you must enclose it in quotes. For example, you may want to create an Excel file with questions and use a formula to display whether the user supplied the correct or incorrect answer. In the following example, a worksheet was produced

and the formula displayed either "Right" or "Wrong" in Column D after the user typed in their response. Cell D 10 contains a "Count formula" that counted "Wrong" responses.

D3 =IF(C3="Baton Rouge","Right","Wrong")

	A	B	C	D
2				
3		What is the capital of Louisiana?	Baton Rouge	Right
4		What is the state flower?	rose	Wrong
5		What is the river in New Orleans?	Mississippi	Wrong
6		What is the nickname for the southern part of the state?	Acadiana	Right
7		What state borders Louisiana on the west?	Texas	Right
8		What state borders Louisiana on the north?	Arkansas	Right
9				
10			TOTAL WRONG	4
11				
12	Hide column "D", then protect the sheet to use as a test. Unprotect to grade.			

18. Count: This formula counts the number of cells in the specified range that includes values (if counting attendance you must put a number in the cell for it to be counted. Labels are ignored). If the cell is empty it is not included in the total count. This formula is useful when having to count days present.

In the example below, students were given a "1" if present and the cell left blank if they were absent (these are the shaded cells). The function in cells Q2 says if there is a number in any cell from B2 to P2 then count that cell and skip any cells with no numbers (if there was an "A" it would be skipped because "A" is a label--the Count Function only counts values).

Q2 =COUNT(B2:P2)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Name	2-Dec	3-Dec	4-Dec	5-Dec	6-Dec	9-Dec	10-Dec	11-Dec	12-Dec	13-Dec	16-Dec	17-Dec	18-Dec	19-Dec	20-Dec	Total
2	Sue	1	1	1	1	1	1	1		1		1	1	1			11
3	Bob	1	1	1		1	1	1	1	1	1	1		1	1	1	13
4	Jim	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	15
5	lam		1	1	1		1	1	1	1		1	1			1	10

19. Count If: This formula specifies what data needs to be in a cell in order to be counted. In the example below, we want to count only the number of students who have paid the full amount to go on a field trip. The formula says if the values in cells C2 through C6 are equal to 5 (the full amount), then count them.

	A	B	C	D	E
1	Name	Workbooks	Field Trip	Lunch	Raffle Tickets
2	Sue	\$ 10.00	\$ 5.00	\$ 2.50	\$ 25.00
3	Jim	\$ 10.00	\$ 5.00		\$ 10.00
4	Bob		\$ 5.00	\$ 2.50	\$ 30.00
5	Mary	\$ 10.00	\$ 2.00		\$ 5.00
6	Tim		\$ 3.00		\$ 15.00
7					
8		Total FT	3		
9		Total Lunch		2	

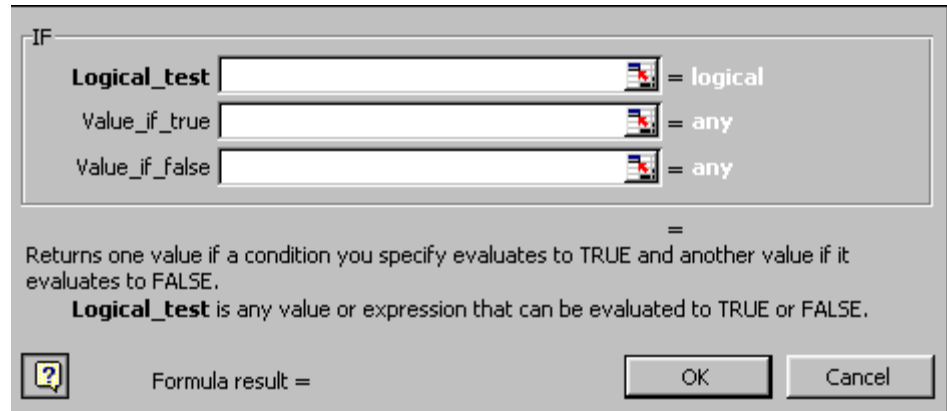
The formula in cell D9 (=Count(D2:D6)) will indicate how many lunches need to be purchased.

20. Using the Wizard to create Formulas: When creating more than "one step" formulas, Excel provides a formula Wizard to help reduce errors in the formula.

- a. Place your cursor in the cell where you want the desired formula, then click the equal sign "=" in the formula bar.
- b. A function box will open showing the last function you used. Click the drop down arrow to view a list of recent functions. Click "More Functions" to see additional ones.

b. Click the drop down arrow to see functions.

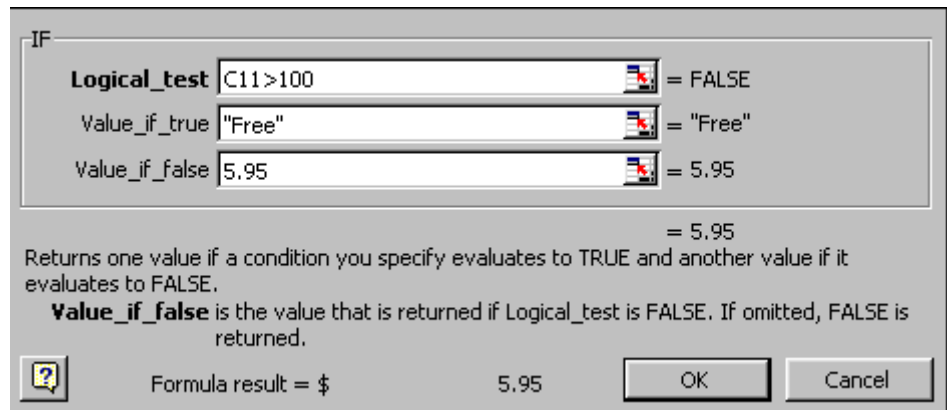
- c. Choose the "If" function by clicking on it. The formula wizard box for this function will open.
 - i. You can either type in the cells desired directly in the box or click the red arrow at the end of the line. The worksheet will appear and you can highlight the desired cells.



- ii. Notice that the selected cells are typed into the formula bar and the wizard box.



- iii. To return to the formula wizard, click the red, down arrow at the end of the formula box. Finish typing in rest of formula. The wizard automatically can detect if data is a label or a value and will put the quotes in automatically for labels.



- iv. Click OK once formula is complete.