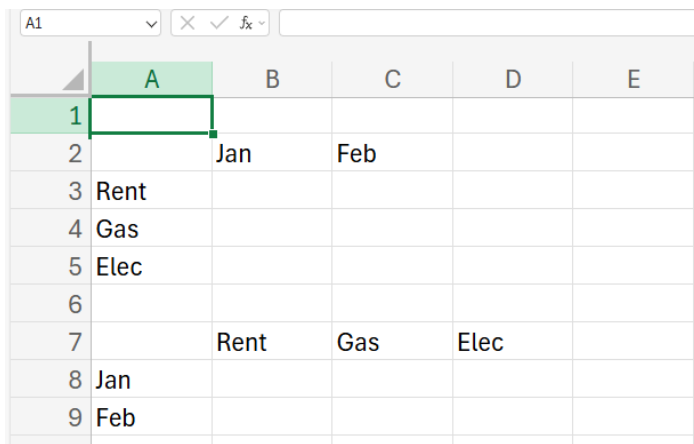


ELECTRONIC RECORD KEEPING FOR CLUBS AND PERSONAL USE

Presented by Helene Orenstein
for the Sun City Summerlin Computer Club
November 21, 2025

What is a Spreadsheet?

- A spreadsheet contains data in rows and columns. Some types of spreadsheets have a standard layout such as an Income Statement. However, you can design yours as you like.
- The general layout usually puts the items as the rows and the particulars of the item in the columns.



	A	B	C	D	E
1					
2		Jan	Feb		
3	Rent				
4	Gas				
5	Elec				
6					
7		Rent	Gas	Elec	
8	Jan				
9	Feb				

Creating Your Spreadsheet

- It is suggested that you map out your spreadsheet layout on paper first. However, Excel has the flexibility to add and subtract rows, columns and sheets so easily, you can create the layout as you insert the data. You can even use the Transpose function to flip the rows and columns if you decide later that your spreadsheet works better that way.
- It is not necessary to enter your data in a specific order. You can use the Sort function later organize it.

Online Tutorials and References for Excel

- [Basics of Excel - Complete Tutorial](#)
- [Basic Tasks in Excel - Microsoft Support](#)
- [How to Use Microsoft Excel: Complete Beginner's Guide 40+ Tips](#)

Search for Excel Link

The screenshot shows a Bing search results page for the query "excel". The browser's address bar shows the URL: https://www.bing.com/search?q=excel&cvid=8048d11e433040cfabaff2ce7fd54303&gs_lcrp=EgRIZ.... The search bar contains the text "excel". Below the search bar, there are navigation tabs for "ALL", "SEARCH", "VIDEOS", "IMAGES", "MAPS", "NEWS", "COPILOT", and "MORE". The main content area features a large card for "Microsoft Excel" with a sub-card for "Microsoft excel" and a search result for "cloud.microsoft". A yellow arrow points to the "cloud.microsoft" result. On the right side, there is a featured image of a smartphone displaying the Excel app, with the text "Microsoft Excel Spreadsheet editor" and "All images". At the bottom right, there is a "Wikipedia" link and a "microsoft.com" link. The browser's status bar at the bottom shows the time as 1:36 PM.

excel - Search

https://www.bing.com/search?q=excel&cvid=8048d11e433040cfabaff2ce7fd54303&gs_lcrp=EgRIZ...

Bing

excel

1647 Sign in

ALL SEARCH VIDEOS IMAGES MAPS NEWS COPILOT MORE

Microsoft Excel
Spreadsheet editor

Overview Features History Versions Uses

Available On

microsoft.com
Google Play

Microsoft excel
<https://www.microsoft.com/en-us/microsoft-365/excel?ocid=ORSEA...>
Productivity · Productivité

Microsoft Excel is a powerful spreadsheet software program that offers data visualization and analysis tools. With this app, you can create, view, edit and share your files with ea...

Download

cloud.microsoft
<https://excel.cloud.microsoft> · en-us

Edit spreadsheets online for free | Microsoft Excel ...
Create and edit spreadsheets online with Microsoft Excel for the web. Easy formatting, analysis, and real-time collaboration from any device.

Microsoft Excel
Spreadsheet editor
All images

Microsoft Excel is a popular spreadsheet editor developed by Microsoft for Windows, macOS, Android, iOS and iPadOS. It features calculation or computation capabilities, graphing tools, pivot tabl... +

Wikipedia

microsoft.com

1:36 PM

Sign In to Your Excel (Outlook Email) Account or Create a New One

excel - Search | Edit spreadsheets online for | What's new in Microsoft Ed | +

https://excel.cloud.microsoft/en-us/?wdOrigin=OFFICEWEBAPPHOME.SHELL

Excel | Features | See plans & pricing | Sign in

Welcome to Excel for free on the web

Sign in or sign up for free to start using Excel for the web right away, no installation or purchase required.

Create blank workbook | Upload a file

Create with templates

Recommended | Budgets | Lists | Calendars | Schedules | Invoices | Household | Search templates

Monthly College Budget

Current Budget: \$1,225 | Target Budget: \$1,056

Category	Amount
Room & Board	\$1,000
Books & Supplies	\$150
Transportation	\$50
Personal Expenses	\$75

Elegant Embrace INVOICE

Item #	Description	Qty	Unit Price	Amount	Price
1001	Flowers	50	\$1.50	\$75.00	\$75.00
1002	Table	25	\$3.00	\$75.00	\$75.00
1003	Seating	50	\$1.50	\$75.00	\$75.00

ANNUAL BUDGET

Category	Target	Actual
Income	\$10,000	\$10,000
Expenses	\$8,000	\$8,000
Surplus	\$2,000	\$2,000

CONFERENCE / TRAINING SESSION

Date	Topic	Speaker
11/15/23	AI in Marketing	John Doe
11/22/23	Customer Retention	Jane Smith
11/29/23	Product Development	Mike Johnson

2023 JANUARY

Day	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30							
31							

Weekly Lesson Planner

Day	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Math							
Science							
History							
Language							
Art							
Music							
Physical Education							

Meal Planner

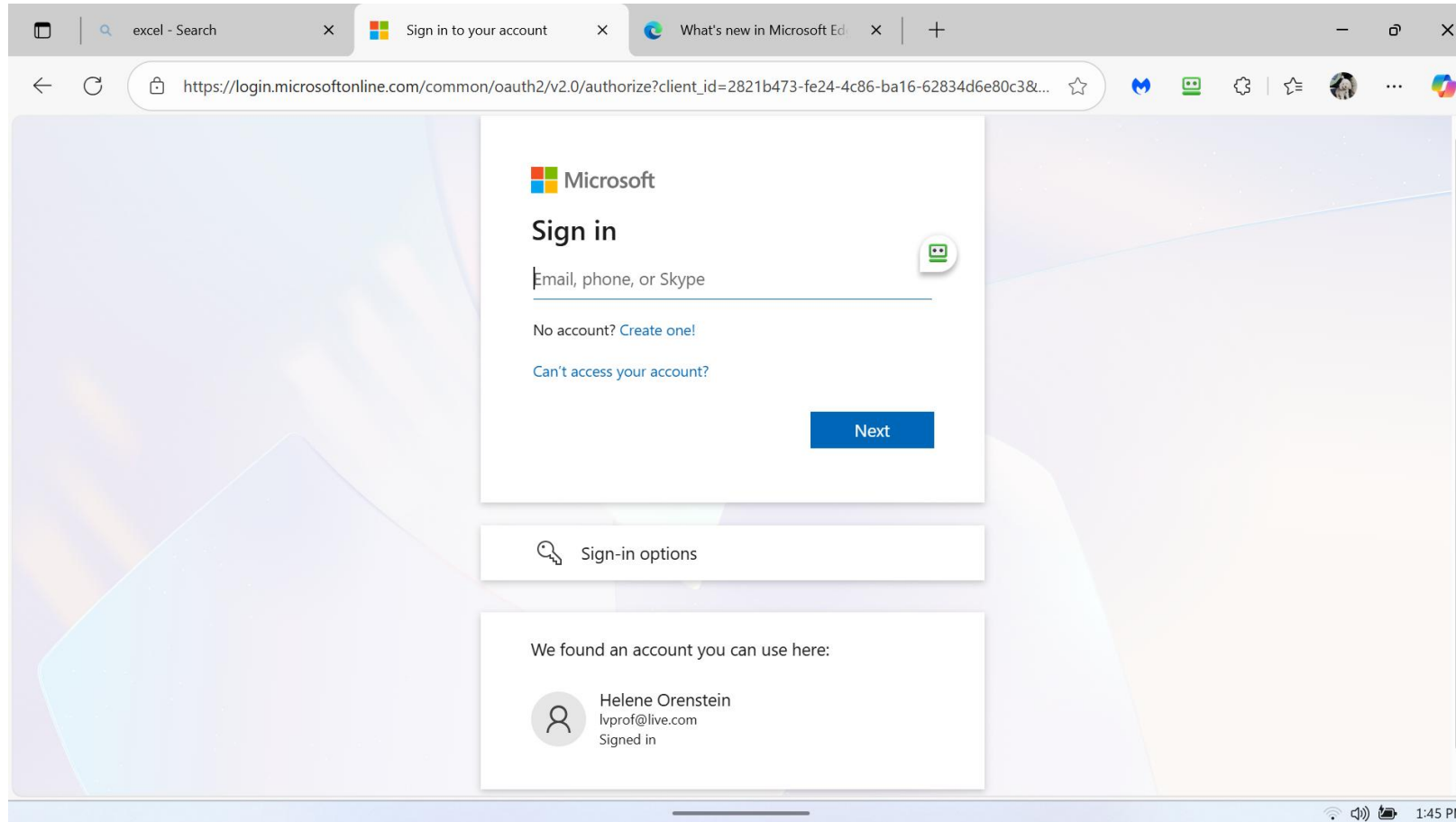
Day of the Week	Breakfast	Lunch	Dinner
Monday	Scrambled Eggs	Grilled Chicken	Roasted Potatoes
Tuesday	Yogurt & Fruit	Salmon Salad	Vegetable Stir-Fry
Wednesday	Smoothie	Turkey Sandwich	Spaghetti & Meat Sauce
Thursday	Oatmeal	Chicken Soup	Grilled Fish
Friday	French Toast	Beef Stir-Fry	Roasted Chicken
Saturday	Pancakes	Breakfast Burrito	BBQ Ribs
Sunday	Waffles	Brunch	Family Dinner

OPEN or CLOSED DATE TRACKER

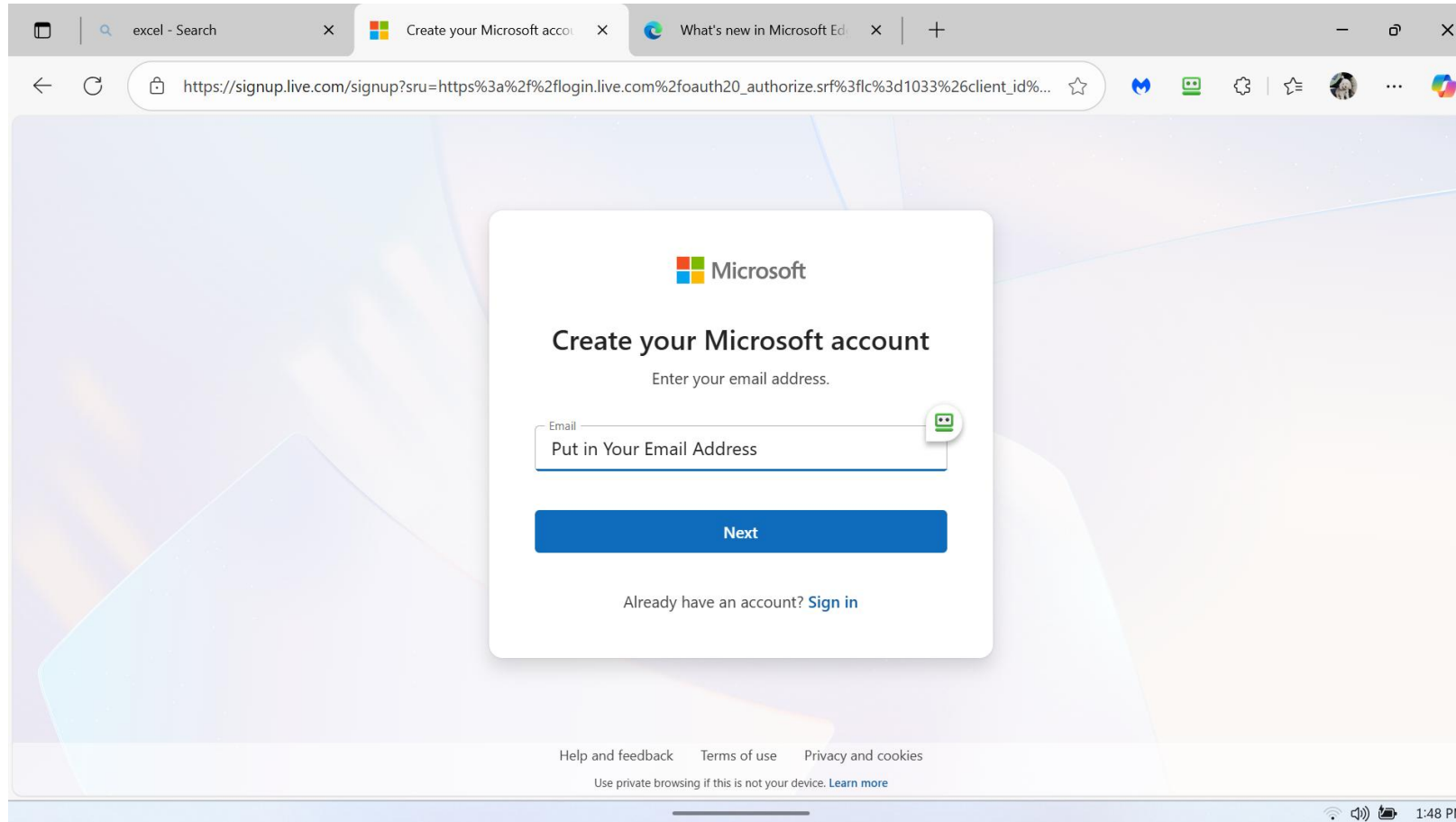
Date	Status
1/1/23	Open
1/2/23	Open
1/3/23	Open
1/4/23	Open
1/5/23	Open
1/6/23	Open
1/7/23	Open
1/8/23	Open
1/9/23	Open
1/10/23	Open
1/11/23	Open
1/12/23	Open
1/13/23	Open
1/14/23	Open
1/15/23	Open
1/16/23	Open
1/17/23	Open
1/18/23	Open
1/19/23	Open
1/20/23	Open
1/21/23	Open
1/22/23	Open
1/23/23	Open
1/24/23	Open
1/25/23	Open
1/26/23	Open
1/27/23	Open
1/28/23	Open
1/29/23	Open
1/30/23	Open
1/31/23	Open

1:40 PM

Create a New Excel (Outlook Email) Account



Enter Your Email Address



The screenshot shows a web browser window with three tabs: "excel - Search", "Create your Microsoft account", and "What's new in Microsoft Ed...". The address bar contains the URL: https://signup.live.com/signup?sru=https%3a%2f%2flogin.live.com%2foauth20_authorize.srf%3flc%3d1033%26client_id%26.... The main content is a white modal box with the Microsoft logo at the top. Below the logo, the text reads "Create your Microsoft account" and "Enter your email address." There is an input field with the placeholder text "Put in Your Email Address" and a small green icon with a speech bubble to its right. Below the input field is a blue button labeled "Next". At the bottom of the modal, it says "Already have an account? [Sign in](#)". At the bottom of the browser window, there are links for "Help and feedback", "Terms of use", and "Privacy and cookies", along with a note: "Use private browsing if this is not your device. [Learn more](#)". The system tray at the bottom right shows the time as 1:48 PM.

Microsoft

Create your Microsoft account

Enter your email address.

Email

Next

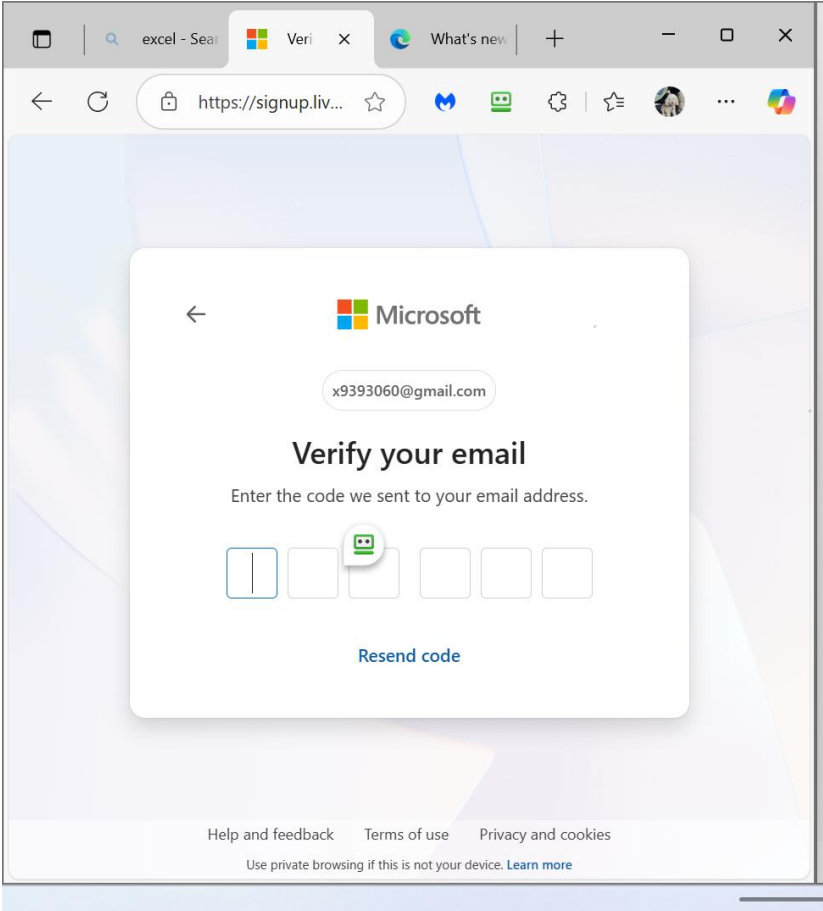
Already have an account? [Sign in](#)

[Help and feedback](#) [Terms of use](#) [Privacy and cookies](#)

Use private browsing if this is not your device. [Learn more](#)

1:48 PM

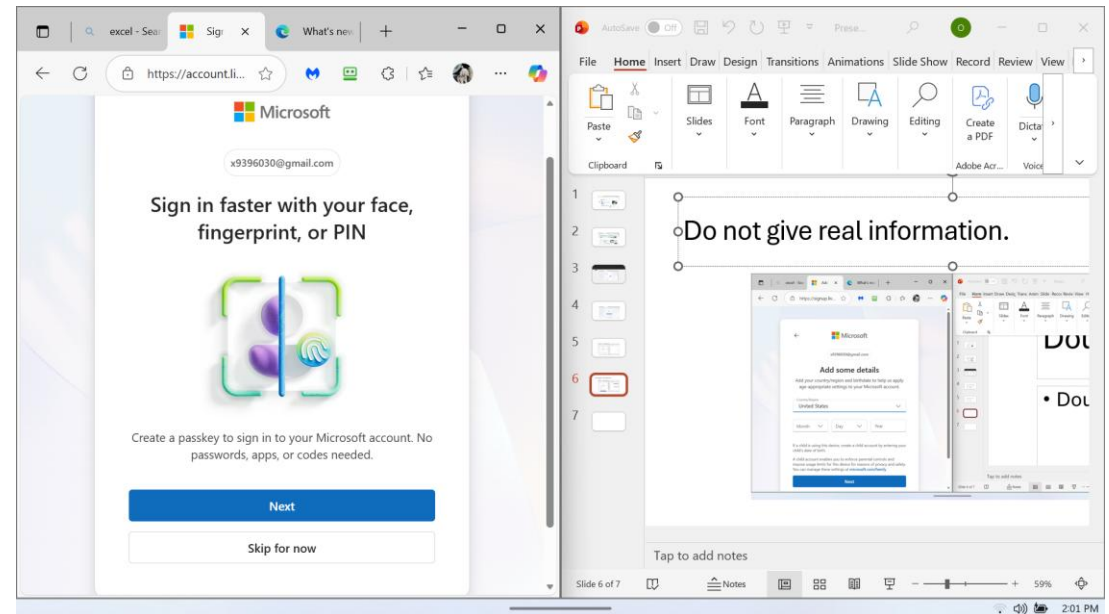
Verify



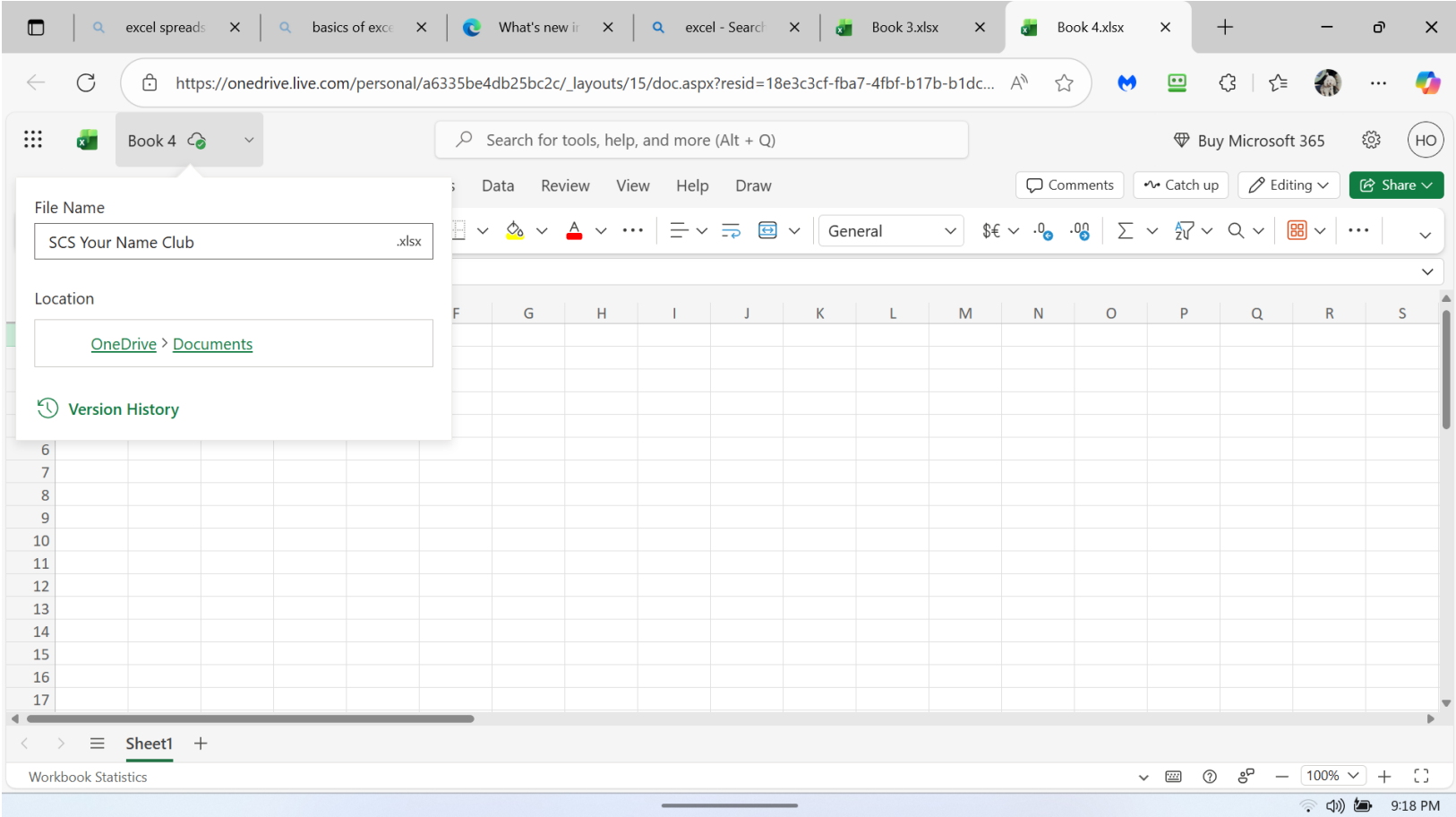
Enter Your *Alias* Information

Do not give your real information.

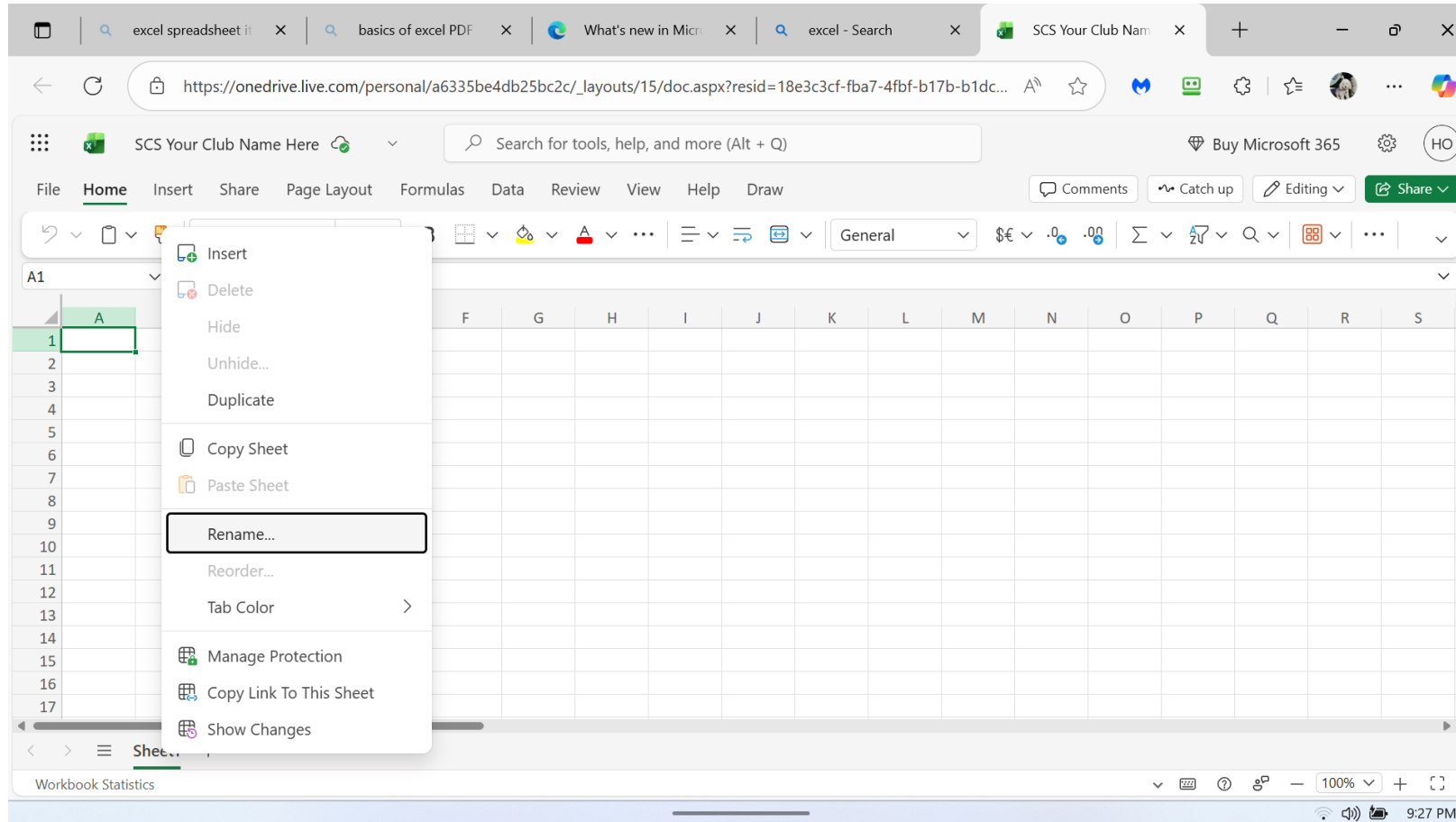
- Create an *Alias* name and birthday
- Use it for all new accounts except those that do require correct information such as Banks or Airlines
- Use it consistently
- However, use a different password for every account



Save Your Document to OneDrive

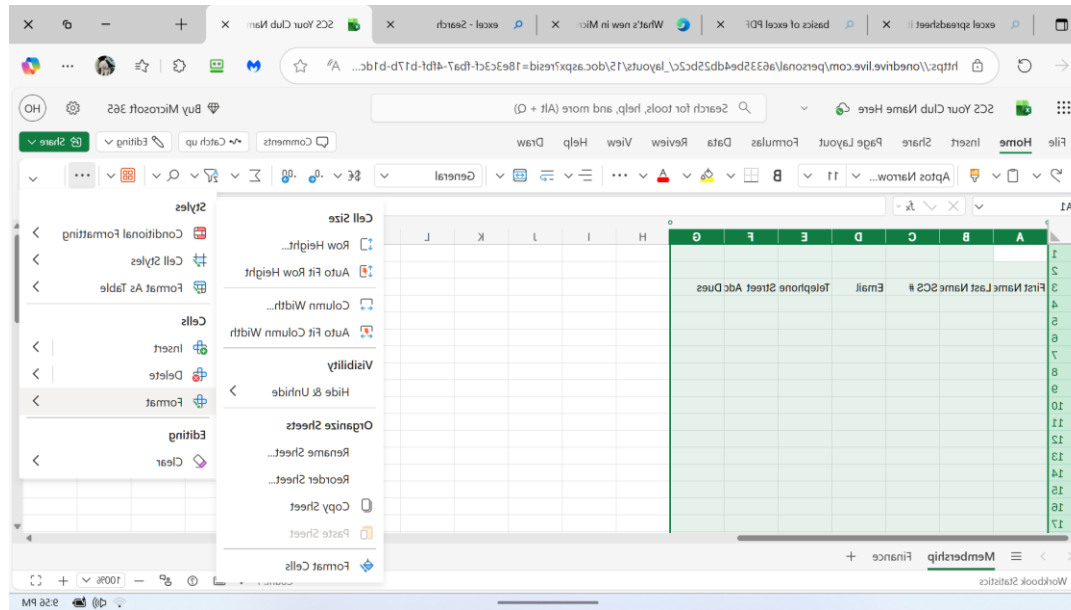
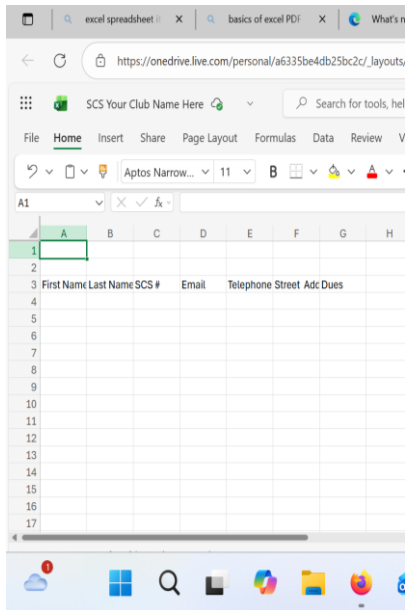


Rename Tabs – Right Click on Tab

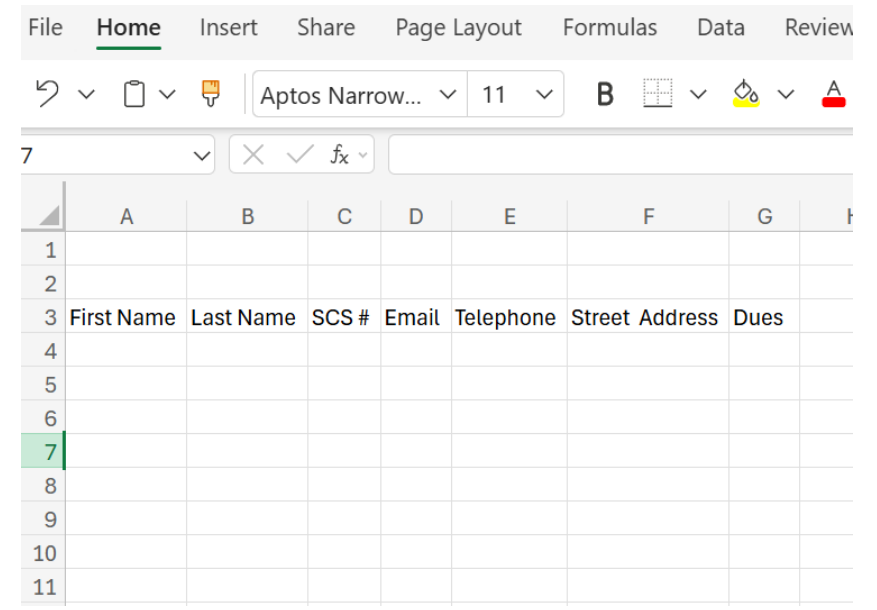


Enter Your Column Titles

Without Autofit on



With Autofit on



Enter Your Data

Member Information Sheet

First Name John

Last Name Smith

SCS Id # 00320

Email js@gmail.com

Street Address 1234 Happy St

First Name Jane

Last Name Smith

SCS Id # 00301

Email JaneSmith@Yahoo.com

Street Address 1234 Happy St

First Name Sam

Last Name Young

SCS Id # 00200

Email samyg@outlook.com

Street Address 4567 Rainbow Ct

First Name Nancy

Last Name Egan

SCS Id # 10050

Email Dancer1@cox.net

Street Address 3456 Fiass St

SCS Your Club Name Here

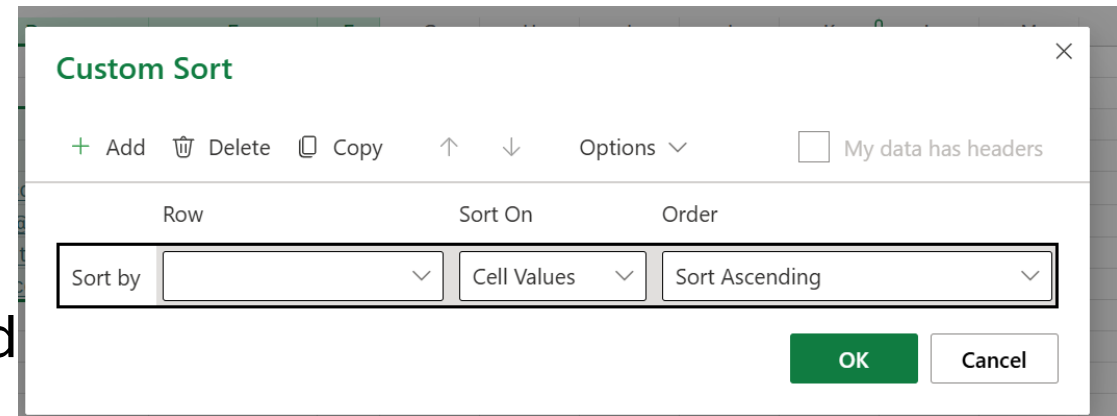
File Home Insert Share Page Layout Formulas Data Review View

Page Setup Print Area Breaks Sheet Right-to-Left

	A	B	C	D	E	F	G
1							
2							
3	First Name	Last Name	SCS #	Email	Street Address	Dues	
4							
5	John	Smith	320	js@gmail.com	1234 Happy St		
6	Jane	Smith	301	Janesmith@Yahoo.com	1235 Happy St		
7	Sam	Young	200	samyg@outlook.com	4567 Rainbow Ct		
8	Nancy	Egan	50	dancer1@cox.net	456 Fiass St		
9							
10							

Edit Your Spreadsheet and Data Layout

- Insert or Delete Rows or Column
 - Right click on row(s) or column(s)
 - Click on your choice
- Custom Sort Data by Columns/Rows
 - Select the column or the row or all data if you want the adjacent items to be included in the sort (Ctrl A.)
 - Click on the Sort button on the Ribbon
 - Select Custom Sort
 - Select the correct column letter
 - Check My Data has Headers if required



Insert Formulas

Numbers: =Count()

Items: =CountA()

The screenshot shows an Excel spreadsheet with a table of names and addresses. The formula bar at the top displays `=COUNTA(B5:B8)`. The spreadsheet data is as follows:

	A	B	C	D	E	F	G
1							
2							
3		First Name	Last Name	SCS #	Email	Street Address	Dues
4							
5		John	Smith	320	js@gmail.com	1234 Happy St	
6		Jane	Smith	301	Janesmith@yahoo.com	1235 Happy St	
7		Sam	Young	200	samyg@outlook.com	4567 Rainbow Ct	
8		Nancy	Egan	50	dancer1@cox.net	456 Flass St	
9							
10							
11	Total	=COUNTA(B5:B8)Function for Counting Items in a list					
12							
13							

+, -, *, / =Sum()

The screenshot shows an Excel spreadsheet with a table of names and dues. The formula bar at the top displays `=SUM(G5:G8)`. The spreadsheet data is as follows:

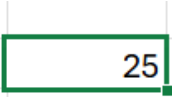
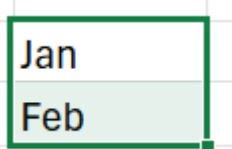
	A	B	C	D	E	F	G	H	I
1									
2									
3		First Name	Last Name	SCS #	Email	Street Address	Dues		
4									
5		John	Smith	320	js@gmail.com	1234 Happy St	25		
6		Jane	Smith	301	Janesmith@yahoo.com	1235 Happy St	25		
7		Sam	Young	200	samyg@outlook.com	4567 Rainbow Ct	25		
8		Nancy	Egan	50	dancer1@cox.net	456 Flass St	25		
9									
10									
11	Total		4				100		
12									
13									

AutoSum

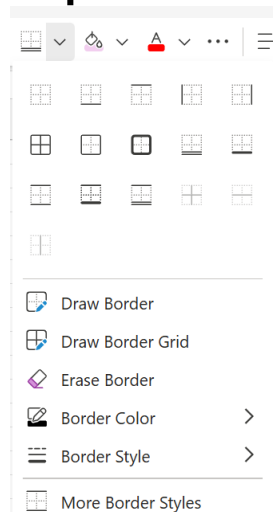
The screenshot shows the AutoSum dropdown menu in Excel. The menu is open, showing various options for auto-summing data. The options are:

- Sum (Alt+=)
- Average
- Count Numbers
- Max
- Min
- Add
- Minus
- Multiply
- Divide
- More Functions...

Finance

- Add Tabs for Each Revenue or Expense
- Create an Income Statement
- Link Tab Totals to Calculate
- Copy – Pull down using THIN CROSS 
- Autofill – Fill enough cells to indicate pattern, Select and pull down using THIN CROSS 

- Borders -



Tab Example – Meeting Expenses

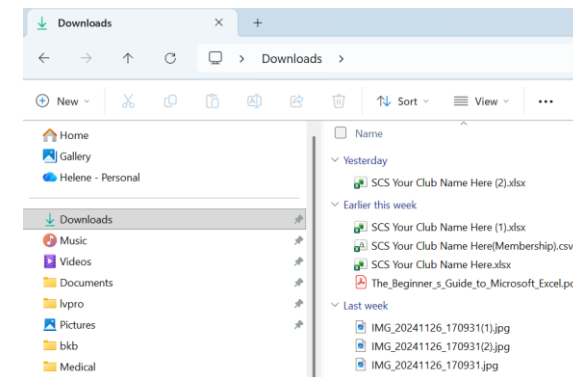
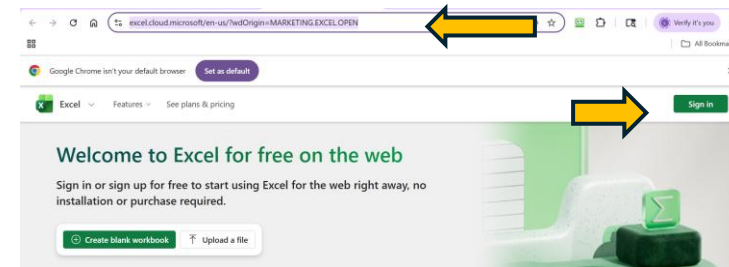
The screenshot shows an Excel spreadsheet titled "Meeting Expenses" with the following data:

Date	Food	Supplies	Decorations	Entertainment	Total	
Jan	Pizza				50	
	Soda				25	
	Coffee				15	
Feb						
Mar						
Apr						
May		Supplies			DT	13
Jun						
Jul			Decorations		DT	9.75
Aug					Smiths	10
Sep						
Oct						
Nov						
Dec						
Total	=SUM(C6:C14)					

Formulas shown in the spreadsheet include: `=SUM(C6:M6)` for the total of January expenses, `=SUM(M3:M6)` for the total of January sub-categories, and `=SUM(C6:C14)` for the overall total of all months.

Access Your Document Online and on Your Device

- Online:
 - <https://excel.cloud.microsoft/en-us/?wdOrigin=MARKETING.EXCEL.OPEN>
- Your Device:
 - File Explorer, Downloads



Accessing Your OneDrive

Onedrive.live.com

The screenshot shows the OneDrive web interface in a browser window. The address bar displays the URL: https://onedrive.live.com/?login_hint=x9396030%40gmail%2Ecom&view=1. The interface includes a search bar, a navigation pane on the left with options like 'Home', 'My files', 'Shared', and 'Recycle bin', and a main content area. A blue banner at the top offers a 'Get 100 GB free for a month' trial. Below this, there are filters for 'Recent' files, categorized by application: Word, Excel, PowerPoint, and OneNote. A table lists the recent files:

Name	Opened	Owner
SCS Your Club Name Here My Files	34m ago	Hel Oren
Book 3 My Files	Wed at 4:48 PM	Hel Oren
Book 2 My Files	Tue at 9:16 PM	Hel Oren
SCS Your Name Club My Files	Tue at 9:15 PM	Hel Oren