

Case study

Renee, an Adventure Works executive based in the USA, has shared two files with you. The first is an Excel workbook called [Sample.xlsx](#). The second is a PDF file called [Exchange Rates.pdf](#). Your task is to add some data to the workbook file from the PDF and ensure it is correctly structured and formatted for readability.

Excel User Interface

In this course, we use the Microsoft 365 Desktop version of Excel. Microsoft 365 releases updates monthly, incorporating new features. You might experience changes in the Excel Desktop User Interface (UI) that have taken place after the development of this training content. As a result, the screenshots in the videos, readings, or exercises might not align precisely with how you experience the UI. However, please note that these changes do not impact the functionalities of the UI. Therefore, you will still be capable of performing all the steps demonstrated in the videos, readings, and exercises.

Instructions

Step 1: Download and open the required files

- Locate and download the file **Sample.xlsx** from the provided link.
- Open the file in Microsoft Excel.
- This file contains a sheet named **Sheet1**, which holds financial data. Another sheet named **Contacts** is included but will be used later.

City	State Abbrev.	State	Office Type	Revenue	Operating Ex	Operating	Depreciation
Warner	NH	New Hampshire	Corporate	1E+05	65792	4667	
East Natchitoches	RI	Rhode Island	Franchise	4E+05	101465	5068	
Lyon	MA	Massachusetts	Partner	1E+05	67388	5700	
Willow Run	NH	New Hampshire	Corporate	2E+05	83600	5089	
Farmington Lake	RI	Rhode Island	Franchise	4E+05	82675	6100	
Martins Corner	NH	New Hampshire	Franchise	3E+05	85288	5795	
Pickeral Narrows	ME	Maine	Partner	2E+05	100834	5153	
Center	MA	Massachusetts	Corporate	2E+05	73705	5599	
Spring City	MA	Massachusetts	Partner	4E+05	79297	4872	
East Waterford	ME	Maine	Franchise	2E+05	83178	4734	
Coltman	RI	Rhode Island	Corporate	5E+05	86688	6066	
Hebron	NH	New Hampshire	Partner	4E+05	88286	4604	
Longview	MA	Massachusetts	Partner	4E+05	92698	5195	
Conyersville	RI	Rhode Island	Franchise	1E+05	67175	4956	
Emerson	NJ	New Jersey	Franchise	1E+05	87513	5168	
Scottsville	NJ	New Jersey	Partner	4E+05	81912	4842	
Willaha	NY	New York	Partner	1E+05	104528	~5673	
Mittenlane	NY	New York	Partner	2E+05	103757	5144	
Mount Baker	NY	New York	Corporate	2E+05	89974	5062	
Wilmington	DE	Delaware	Partner	1E+05	15789	4522	
Tokyo	Tokyo		Partner	4E+05	111416	6705	
Yokohama	Kanto		Partner	3E+05	102870	8416	
Osaka	Kansai		Corporate	4E+05	109975	8581	
Berlin	Berlin		Partner	5E+05	97692	7023	
Hamburg	Hamburg		Corporate	4E+05	109405	4698	
Munich	Bavaria		Franchise	4E+05	107434	4505	

Download the Exchange Rates PDF

- Locate and download the file **Exchange Rates.pdf** from the provided link.
- Save this file in a location where you can easily access it later.
- You will need this file in **Step 4** to add exchange rate data to the Excel workbook.

Step 2: Verify and correct the existing information in the sheet

To begin, open **Sheet1** in the *Sample* Excel file, then carry out the following tasks:

- The **State Abbreviation** column is unnecessary and can be deleted because the sheet contains international data. Select column **B**, then right-click and select **Delete Columns** from the shortcut menu.
- The entries in column **D** appear different than the other columns. This is because the column is too narrow. Position the mouse pointer on the vertical line between the **D** and **E** column identifiers, then double-click to resize the column automatically.
- The figures in the spreadsheet will be a key focus of the meeting, so you need to confirm that there are no other issues in the number range. The number in cell **G18** is sitting over to the left of the cell, which indicates that Excel is treating the entry as text. The ~ character at the beginning of the entry is causing the problem, causing the entry to be auto-detected as text. **Note: When a number is aligned to the left, it often means Excel is**

treating it as text. Removing any unnecessary symbols (e.g., ~) ensures Excel correctly recognizes it as a number. Double-click on cell **G18** to enter **Edit mode**. Then move the cursor to the right of the character and press **backspace**. Press **Enter** to confirm the amendment and correctly realign the entry.

4. Add a column to hold country data to display the worksheet's international financial data. Add this new column to the right of the **State** column and fill in the country entries. Select the letter **C** that identifies the column to select it. Then right-click and choose **Insert Columns** from the shortcut menu. A new blank column appears to the left of the column titled **Office Type**.
5. Type the heading **Country** in **C1** and then **USA** in **C2**. Move the cursor back to **C2**, then hover the mouse pointer over the bottom right-hand corner until it becomes the narrow black cross. Hold down the mouse button and drag it down as far as row **21** to copy the entry quickly into the appropriate cells. Add **Japan** to **C22** and use a similar **Autofill** technique to complete the country entries in rows **23** and **24**. Add **Germany** to **C25** and use a similar **Autofill** technique to complete the country entries in rows **26** and **27**.
6. Renee would like the information relating to Japan and Germany to be easily identifiable. So, she has asked you to add these country names as headings above both sets of information to create a clearer distinction between the data for these countries and the USA. First, select row **22** on the left-hand side. Then right-click and choose **Insert Rows** from the shortcut menu. Select row **26** and repeat the insert rows operation. Then type **Japan** in cell **A22** and **Germany** in **A26**.

Step 3: Format the data

The worksheet now contains all the required information. Your next step is to improve its readability before presenting it to management.

1. First, you need to emphasize the titles in row 1. Select the range of cells **A1 to H1**, and on the **Home** tab, select the **Font** group. Then choose **font size 14** and a different background color. Without canceling the selection, center the headings. On the **Home** tab, select the **Alignment** group, then select the **Center** choice.
2. The heading **Revenue** in **E1** and the **Depreciation** heading in **H** are only partially visible, as the columns are not wide enough to accommodate the text. Double-click on the vertical separator between **E** and **F** to automatically resize column **E**. Then perform a similar adjustment on column **H**.

3. The titles in **F1** and **G1** are also exhibiting visibility issues. However, widening the columns would create too much visible white space. Instead, select **F1** and **G1**. On the **Home** tab, select the **Alignment group**, then choose **Wrap Text**.
4. Column **G** still needs to be a little wider. So, hover the mouse pointer over the dividing line between the column letters **G** and **H**, hold down the mouse button, and drag it slightly to the right.
5. The headings in the first row now stand out and are easier to read. You now need to emphasize the country headings in **A22** and **A26**. Move the cursor to **A1**. On the **Home** tab, in the **Clipboard** group, select the **Format Painter** button and then select **A22**. Repeat the process for **A26**. Next, select cells **B22** to **H22** and apply the same background color. Repeat this process for cells **B26** to **H26**.
6. Next, you need to add currency formats to distinguish between the three currencies in the sheet. Select cells **E2** to **H21**. On the **Home tab** in the **Number** group, select the **currency drop-down** and then choose the **dollar** symbol. However, this action generates extra characters and decimal places. So, column **F** needs to be resized a little.
7. Select cells **E25** to **H27** and choose the **Euro** currency format from the **Currency** drop-down.
8. Finally, select cells **E23** to **H25** and select the **Currency** drop-down again. There is no Japanese Yen choice offered in the immediate list. Since Japanese Yen does not appear in the immediate currency list, select 'More Accounting Formats,' then choose 'Currency' from the category list. In the Symbol drop-down, select '¥ Japanese (Japanese Yen)'.

Step 4: Add new information to the workbook

Now that you've improved the formatting and readability of the data in **Sheet 1**, you need to add the information from the *Exchange Rates.pdf* file to the Microsoft Excel workbook.

1. The information on exchange rates needs to be in the Excel file but held separately from the data you have just been working on. Create a new worksheet by selecting the **+** symbol in the worksheet **tab** area.
2. In cell **A1** of the new sheet, type the heading **USD Amount**. In cell **B1**, type the heading **Currency**. In cell **C1** type the heading **Rate**. In **A2**, type the number **1**, and in **B2** type **Yen**. In **A3**, type the number **1**, and in **B3** type **Euro**. Then, in **C2** and **C3**, add the appropriate exchange rate figures from the PDF.

3. To provide visual consistency between both sheets, format these headings to match the headings in **Sheet1**.

Step 5: Manage the worksheets

The workbook is now almost complete. In the last few steps, you must name and organize the worksheets you need for the presentation.

1. The original worksheet that you edited is still called **Sheet1**. The sheet you added to hold the exchange rate information will also have a generic title of **Sheet** followed by a number. Both titles could be more descriptive. So, rename the first sheet **Sample Figures**, and the other sheet **Exchange Rates**. Right-click the relevant **sheet tab**, type the new names, and select **OK**.
2. To prepare for your presentation, it is best to position the **Exchange Rates** sheet to the right of the **Sample Figures** sheet. Point your cursor at the **Exchange Rates** tab, hold down the mouse button, and drag it to its new position.
3. You don't yet have all the required data for the **Contacts** sheet. In addition, this sheet is not directly relevant to your presentation. However, the information will be needed in the future. Rather than deleting it, you can hide it for the duration of the presentation. Select the **sheet**. On the **Home** tab in the **Cells** group, choose **Format** and then select **Hide & Unhide** to hide the sheet. To hide the **Contacts** sheet, go to **Home > Cells group > Format > Hide & Unhide**.