



Lesson: Create A Mileage Form

Description: You have constructed a mileage reimbursement template form for your staff. The form requires your employees to enter their total daily commute miles. The form should provide the end user with some limited instructions. The form should also display the “From” and “To” dates traveled, total miles traveled, and the total check amount for the employee’s reimbursement.

KnowledgeWave Inc
Employee Mileage Reimbursement Form

Employee Name:

Month:

Calculated Miles:

Dates Traveled:

[Click Column Headers For Instructions](#)

Odometer Readings

Date	Beginning Miles	Ending Miles	Miles Traveled	City/Town/State	Notes
7/11/2018	20000	20150			
7/12/2018	20150	20250			

Days Traveled

Total Reimbursable Miles

Check Amount



Lesson Steps:

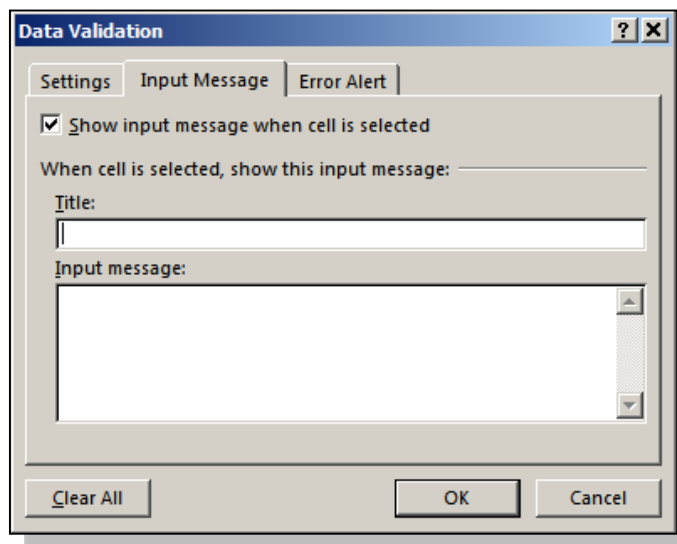
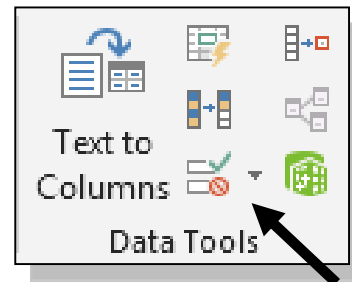
CREATING NAMED CELL RANGES:

1. Select Cells B15 – B20 and in the name field enter “DaysTraveled”
2. Select Cells E15 – E20 and in the name field enter “MilesTraveled”

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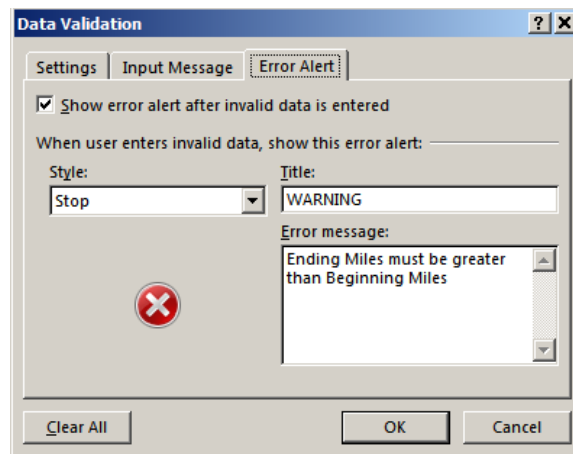
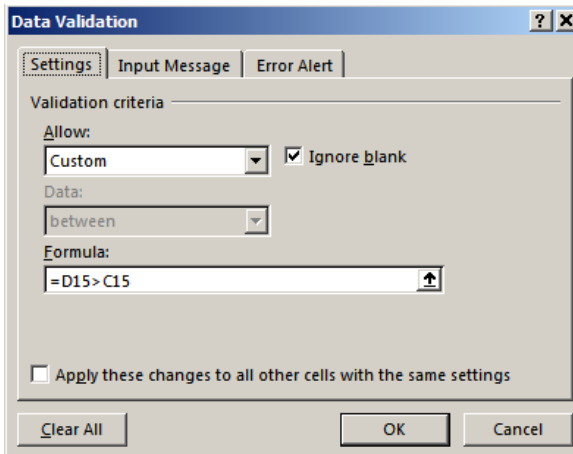
3. Click on the DATA tab, select cell B14, select the Data Validation icon
4. Select the **Input Message** tab within the Data Validation dialog Box
5. In the Title field, type "**Enter**"
6. In the Input Message field type: "**Dates Traveled (mm/dd/yyyy)**"
7. Click **OK**

8. Enter a similar user message for cell C14.
9. Title: "**Enter**"
10. Input Message: "**Starting Odometer Reading**"
11. Enter a user message for D14.
12. Title: "**Enter**"
13. input Message: "**Ending Odometer Reading**"



CREATING WARNING MESSAGES

14. Select Cells D15 – D20
15. Again, select Data Validation - but this time select the **SETTINGS** tab in the Data Validation dialog box
16. In the **ALLOW** field drop-down, select "**Custom**"
17. In the "Formula" field enter "**=D15 > C15**"
18. Select the **ERROR ALERT** tab
19. In the "Style" field drop-down select "**Stop**"
20. In the "Title" field enter "**WARNING**"
21. In the "Error Message" field enter "**Ending miles must be greater than beginning miles**"



CREATING CALCULATED FIELDS:

22. Select Cell E15 and enter: **"=D15-C15"**
23. Populate the remaining cells D16-D20 with this formula
24. Select cell E23 and enter: **"=COUNT(DaysTraveled)"**
25. Select cell E25 and enter: **"=SUM(MilesTraveled)"**
26. Select cell E28 and enter: **"=E25*0.5"**

TESTING ENTERED DATA VALUES AND VALIDATION

27. Enter valid data values into the "Date Traveled", "Beginning Miles", and "Ending Miles" data cells and verify all formula cells are displaying accurate results.
28. Attempt to enter an Ending Odometer reading less than the Beginning Odometer reading and verify you receive a warning message.
29. Review the formula in cell C11. Ask your instructor for help if you don't understand what it is doing.
30. To prepare this as a template for your staff, remove the test values you've entered within the Dates and Odometer Cells. When your staff person opens the file to use it, these cells should be empty.

NOTE: Employees who will be using your form, will follow the steps:

- **Opening the form as a template**
- **Fill in the appropriate travel and mileage data**
- **Re-save the form as a standard excel file**

SAVING YOUR NEW TEMPLATE FOR FUTURE USE

31. Click the **FILE** Tab **Save As**

32. From the Save as type list, select **Excel Template (xltx)**. Notice that Excel chooses the location in which to place the template in a folder in which Excel will look when your employees use the template. By default, templates are stored in:

Windows 7	C:\Users\[UserName]\AppData\Roaming\Microsoft\Templates
Windows 8.1	C:\Users\[UserName]\AppData\Documents\Custom Office Templates

33. Save the Template, giving it the filename **Mileage Form**.

34. Click the **FILE** Tab and **Close** so that excel remains open but the Mileage Template Form is closed.

VALIDATING THE MILEAGE TEMPLATE FORM OPENS CORRECTLY FOR YOUR END USERS

- **You are now going to perform the steps one of your staff persons would take, in the event they were to use to your Mileage form the way you intended. You are going to play-act being an end user of the form.**

35. From Excel's FrontStage, click the **FILE** tab, and then Click **New**. Excel should display a number of Microsoft Template files from which to choose from. Above the display of available Microsoft Template files, you should see the **Personal** Templates hyperlink. Click on this hyperlink, to access the folder where Excel has saved your Mileage Template Form.

36. Double-click on your Mileage Template Form and at the top of Excel, verify the file name it displays. Excel should not display it as a template file.

37. Click on the cells that have data-validation instructions to see what your staff person would see when they do this. Verify the instruction messages are displayed properly.

38. Enter Mileage data into the form as if you were a staff person filling it out and verify all of the calculation fields are displaying accurate numbers.

39. Once you are done filling data into the form, click the **FILE** tab and then click **SAVE (but do not actually save the file)**.

40. Verify that Excel will save the file, not as a template file, but as a standard Excel file, having the **.xlsx** extension.

41. You have completed your development and validation of your template file. It should now be available for your staff's ongoing use.