



Excel 2003: Formatting Learning Guide

Excel design concepts

The Goal

Your goal is always to design a clean and readable spreadsheet by:

- **Enhancing and emphasizing your data** where appropriate
- **Creating contrast** between the various sections of your spreadsheet:
 - *document title*
 - *column headers*
 - *row headers*
 - *data of different kinds*

The Tools

Use these tools to create contrast and emphasis in your documents.

- **colors**
- **borders**
- **fonts**
- **text styles**

Use no more than two fonts in your document. To create contrast within data using a single font, use text styles like **bolding** and *italicizing*. Most documents will use these two kinds of fonts in combination:

- A **serif font** (like *Times*, shown below, left) for **text** in your spreadsheet.
- A **sans serif font** (like *Tahoma*, shown below, right) for your **titles and headers**.

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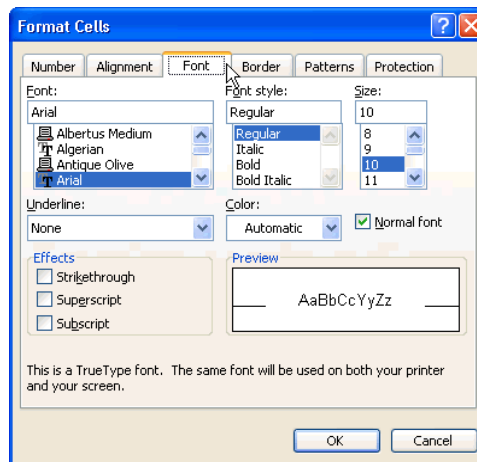
The Rules

- **Don't** use too many fonts in your spreadsheet.
- **Only use color only** if you'll print or display your spreadsheet on a color device; otherwise, use black and white shading instead.
- **Use color, borders, and styles conservatively**, unless your audience demands radical design.
- **Let your design enhance the presentation of your data**, not overwhelm it.
- **Only create a design element that has a purpose.** Don't simply create one because it looks cool.
- **Know when to break the rules.**

Formatting Cells

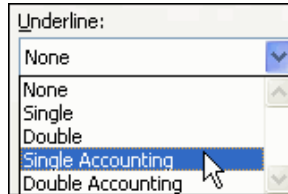
Applying text formats

- **Select the cells** to receive the new text formatting.
- From the **Format menu**, choose **Cells**.
- Click on the **Font tab**.

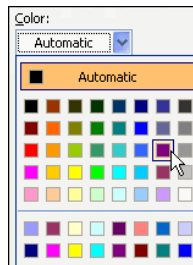


- To change basic text attributes:
 - Click on the name of the **font** you wish to use.
 - Click on the name of the **font style** you want.
 - Click on the **font size** you wish to use.

- To add or change the underlining in the selected cells, click on the down-facing arrow next to the **Underline** box.
- From the **Underline** drop-down menu, select the underline style that you wish.

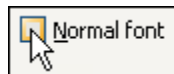


- To change the color of your text, click on the down-facing arrow next to the **Color** box.
- From the **Color** drop-down menu, select the text color that you wish.



Tip: Removing all font formatting

*To remove all font formatting, click to place a check mark in the **Normal font** checkbox in the **Format Cells** window's **Font** tab. This will return the text in the selected cell or cell range to your default font and style.*



Tip: Applying existing formats to unformatted cells

- *Select the formatted cell (or cell range).*
- *Click on the **Format Painter** button on the **standard** toolbar.*



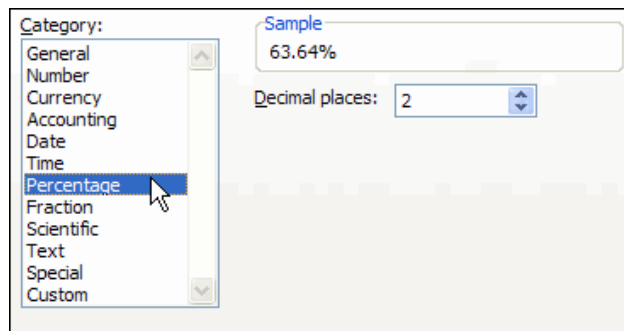
- *Click on an unformatted cell (or drag across an unformatted cell range) to apply the formatting.*

All about number formats

Excel permits numbers to be formatted in many different ways. Without changing the value of the number in a cell, number formats allow numbers to be represented so that they can be used in many different kinds of projects.

Applying number formats

- **Select the cells** containing your number(s).
- From the **Format menu**, choose **Cells**.
- Click on the **Number** tab.
- From the list of categories, select the number format that is best suited to your project.
- Use the **Sample** box to decide whether the format you chose best represents your number.



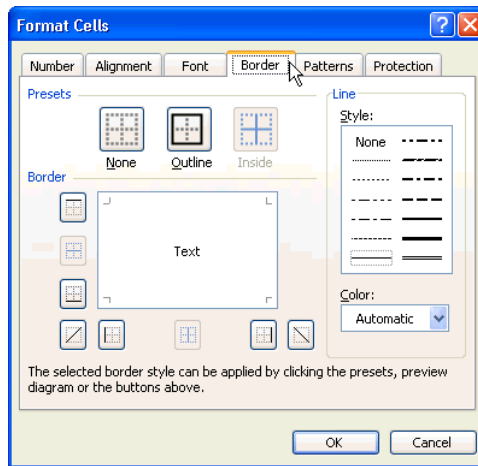
- To learn more about some common number formats, use the table below.

| Category | Looks like.... | Options |
|------------|--|---|
| General | 0.33 | None |
| Number | 0.33 | Number of decimal places shown, negative number format |
| Currency | \$0.33 | Number of decimal places shown, currency symbol, negative number format |
| Accounting | \$0.33 (lines up decimal points in a column of data) | Number of decimal places shown, currency symbol |
| Percentage | 33% | Number of decimal places shown |
| Fraction | 1/3 | Number of digits in denominator, type of fraction |
| Text | 0.33 | Number is displayed exactly as entered |
| Date | 1/1/00 | Several date formats available |
| Time | 15:30; 1:30 pm; etc. | Several time formats available |
| Special | Varies | Zip code, phone number, social security number |

Applying a basic cell border

Borders can provide contrast, serving to highlight cells containing important data. To create a border around one cell or a group of cells:

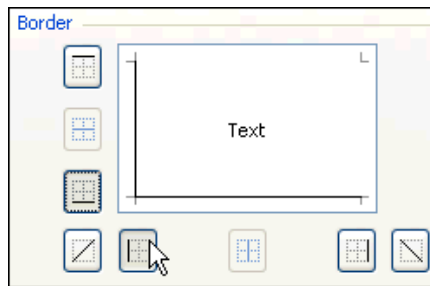
- **Select the cells** to receive the new border formatting.
- From the **Format menu**, choose **Cells**.
- Click on the **Borders** tab.



- **To add a basic border** outside the selected cell range, click on the **Outline** button.
- To add borders between cells within the selected cell range, click on the **Inside** button.
- Click **OK**.

Applying a custom cell border

- **To add a custom border**, first choose a style for your border.
- In the **Style** box at the right side of the **Format Cells** window, click on the line style you want for your cell border.
- Click on the **down-facing arrow** next to the **Color** box to display the **Color menu**. Click on the color that you want for your border.
- Click on the **buttons in the Border area** of the **Format Cells** window to add sections of the cell border using the style and color you selected. Click **OK** to apply your custom border to the selected cell range.



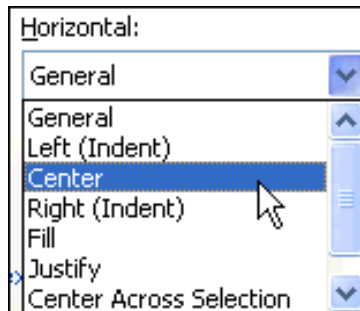
Applying cell background colors

Background colors (called **patterns** in Excel) can provide additional contrast in your worksheets, whether you use them by themselves or to complement existing cell borders. To apply a background color:

- **Select the cells** to receive the new background color.
- From the **Format menu**, choose **Cells**.
- Click on the **Patterns** tab.
- Click on the square containing the color you wish to use as the background to the selected cell or cells.
- Click **OK** to apply this new background color to your cells.

Applying text alignment formatting

- **Select the cells** to receive the new formatting.
- From the **Format menu**, choose **Cells**.
- Click on the **Alignment** tab.
- Click on the drop-down arrow next to the **Horizontal** box to display a drop-down menu of **horizontal alignment** options.

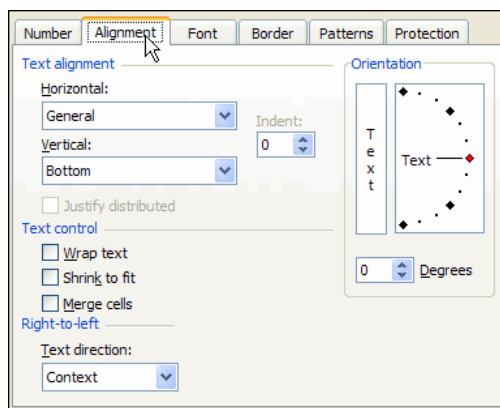


- Click **OK** to apply the alignment formatting to **text within the selected cells**.

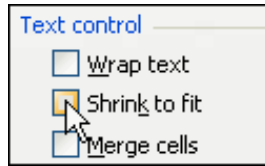
Formatting long text phrases within a cell

In many situations, the line of text you enter in a cell will be wider than the cell itself. In these situations, the text may be hidden beyond the edge of the cell. Although one solution to this problem is to resize the cell, there are two additional solutions: **shrinking the text to fit the cell**, and **wrapping the text** so that it displays on multiple lines within the cell.

- **Select the cells** to receive the new formatting.
- From the **Format menu**, choose **Cells**.
- Click on the **Alignment** tab and go to the **Text control** area of the **Format Cells** window.



- To shrink the text, click in the **Shrink to fit** box.
- To wrap text within the cell, click in the **Wrap text** box.



Merging cells

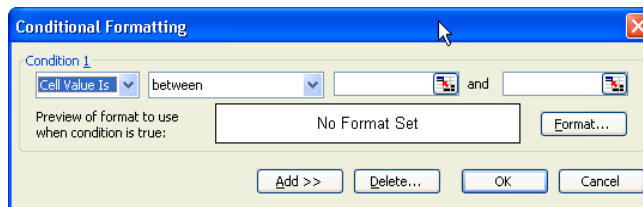
Another solution for handling long text phrases is to merge several cells together so that the text can be fully displayed. To merge several cells:

- **Select the cells** to be merged.
- From the **Format menu**, choose **Cells**.
- Click on the **Alignment** tab.
- In the **Text control** area, click in the **Merge cells** box.

Applying conditional formatting

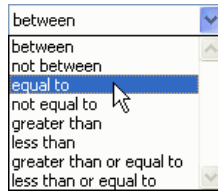
Excel's conditional formatting can apply specific formatting to highlight cells in your worksheet that meet a certain condition. To set up conditional formatting:

- Select the cells that you wish to conditionally format.
- From the **Format** menu, choose **Conditional Formatting**.

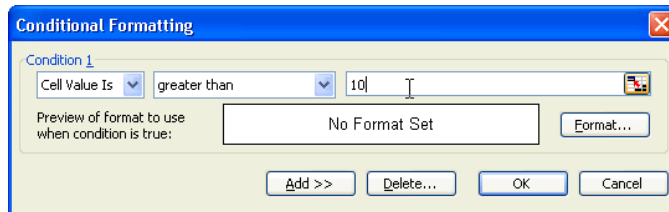


- Next, specify the condition that will trigger your formatting.

- Click on the second **down-facing arrow** from the left to display the **operators** menu. Select the operator that you want.



- Next, enter the condition (or conditions) that will trigger the formatting. *In the example below, any selected cell whose value is greater than 10 will receive special formatting.*



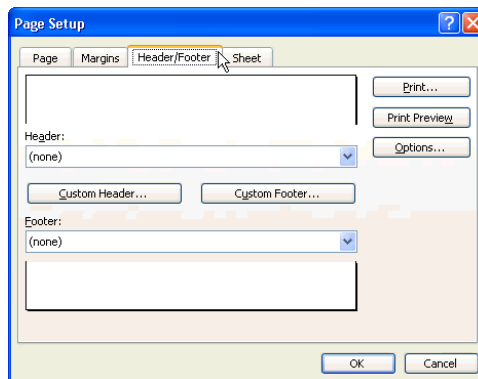
- Finally, click on the **Format** button to specify the formatting that will be applied to cells that meet your condition. You'll be able to apply special font formatting, borders, and colors to these cells.
- When you have finished selecting your formatting, click **OK** to close the **Format Cells** window. Click **OK** again to apply the conditional formatting to your cells.

Creating headers and footers

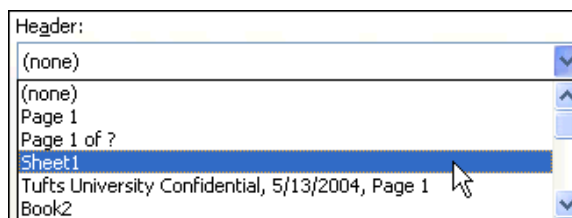
Like Word, Excel allows you to add headers and footers to your spreadsheet. Headers can sometimes serve as appropriate locations for spreadsheet titles, while footers can contain useful document or page information that isn't found elsewhere in your spreadsheet.

Choosing a predefined header

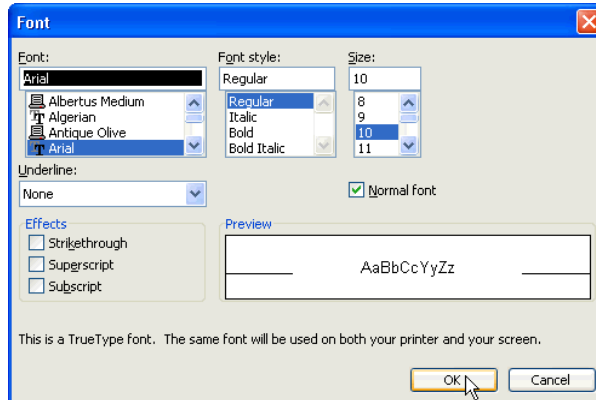
- From the **View** menu, choose **Header and Footer**.
- In the **Page Setup** window, click on the **Header/Footer** tab to bring it to the foreground.



- Click on the down-facing arrow next to the **Header** box to display a menu of predefined headers that can be added to your document. Click to select the header that you prefer.



- From the **Font** window that appears, select the text formatting that you wish, and click **OK**.



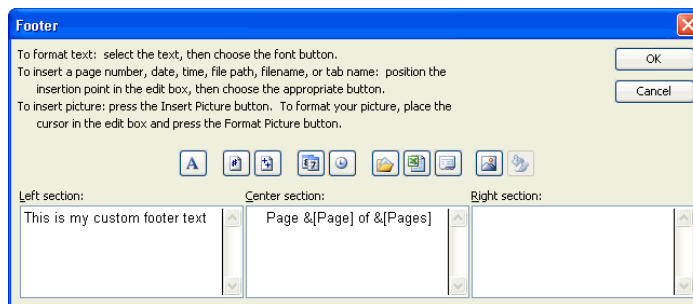
- Click on any of the buttons in the middle of the Header window to insert additional information in your custom header.



- Inserts the current page number
- Inserts the number of pages in the spreadsheet
- Inserts the current date
- Inserts the current time
- Inserts the name of the spreadsheet
- Inserts the name of the current worksheet

Creating a custom footer

- From the **Header/Footer** tab of the **Page Setup** window, click on **Custom Footer**.
- To create your custom footer, use the same techniques that you used when creating your custom header.



Freezing panes in your worksheet

In many situations, the length or width of your worksheets will make it impossible for your column or row headers to be always in view. However, once these headers disappear from view, it's often difficult to be able to work with the data that is visible on your screen. In these situations, Excel allows you to freeze rows and/or columns in your spreadsheet to keep those useful data headers visible:

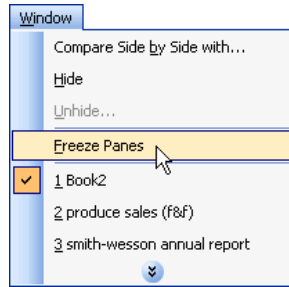
- A **horizontal freeze** will keep one or more rows always in view at the top of your worksheet as you scroll up and down.
- A **vertical freeze** will keep one or more columns always in view at the left of your worksheet as you scroll left and right.

Inserting a horizontal freeze

- Decide which row or rows you wish to constantly display at the top of your worksheet when changing or adding data.
- Click on the header of the row **below** the one (or ones) to be constantly displayed.
 - *Remember that a horizontal freeze will always be inserted **above** the row that you select.*
 - *For example, if I wish to make sure that my worksheet's column headers in row 1 are always displaying, I'll first click on the header for row 2 to select that row.*

| | A | B | C | D | E |
|---|----------------|-----------------|-----------------|--------------|------------------|
| 1 | Product | SaleDate | Quantity | Price | TotalSale |
| 2 | Squash | 11/15/1999 | 40 | \$ 1.50 | \$ 60.00 |
| 3 | Carrots | 11/21/1999 | 15 | \$ 1.20 | \$ 18.00 |
| 4 | Squash | 11/22/1999 | 37 | \$ 1.45 | \$ 53.65 |
| 5 | Carrots | 11/25/1999 | 18 | \$ 1.25 | \$ 22.50 |
| 6 | Squash | 11/29/1999 | 34 | \$ 1.39 | \$ 47.26 |
| 7 | Carrots | 12/05/1999 | 20 | \$ 1.30 | \$ 26.00 |

- From the **Window** menu, select **Freeze panes**.



- Excel will insert a horizontal freeze in your spreadsheet **above the row that you selected**.
- To deselect this row, click on any cell elsewhere in your spreadsheet.
- To remind you that you have frozen a pane within your spreadsheet, Excel will mark the lower edge of the frozen area with a thin black border.
 - *Any cells above the border will be continuously displayed as you scroll up and down on your worksheet.*

Removing an existing freeze

- From the **Window** menu, choose **Unfreeze panes**.

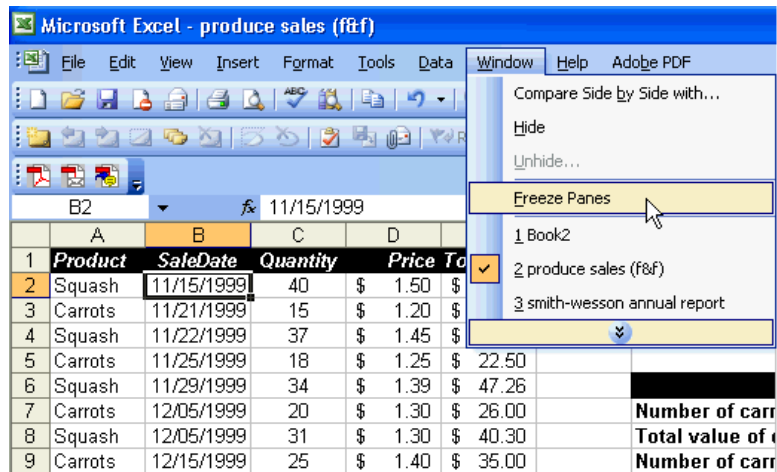
Inserting a vertical freeze

- Decide which column or columns you wish to constantly display at the left of your worksheet when changing or adding data.
- Click on the header of the column **to the right of** the one (or ones) to be constantly displayed.
 - *Remember that a vertical freeze will always be inserted **to the left** of the column that you select.*
- From the **Window** menu, select **Freeze panes**.
- Excel will insert a vertical freeze in your spreadsheet **to the left of the column that you selected**.
- To deselect the column to the right of your freeze, click on any cell outside the selected column.
- To remind you that you have frozen a pane within your spreadsheet, Excel will mark the right edge of the frozen area with a thin black border.

Inserting a combined horizontal and vertical freeze

In most cases, you'll insert a combined freeze when you wish to constantly display both your custom column and custom row headers when editing your worksheet.

- Find the cell at which your row of column headers and your column of row headers intersect.
- Click in the cell to the lower right of this cell.
 - For example, in most cases, your column headers will be in Row 1 and your row headers will be in Column A. Therefore, you'll want to insert a freeze to make sure that both Row 1 and Column A are constantly displayed. Since Row 1 and Column A intersect at cell A1, **click in cell B2** — the cell to the bottom right of cell A1.
- From the **Window menu**, select **Freeze panes**.



- Excel will insert a vertical freeze in your spreadsheet **to the left of the cell that you selected**, and a horizontal freeze **above the cell that you selected**.
 - In the example above, Excel will insert a combined freeze so that Row 1 (the row above cell B2) and Column A (the column to the left of cell B2) will be constantly displayed.
- To remind you that you have frozen a pane within your spreadsheet, Excel will mark the right edge of the frozen vertical area and the bottom edge of the frozen horizontal area with a thin black border.