



Excel 2007: Formatting Learning Guide

Excel Design Concepts

The Goal

Your goal is 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 the following tools to create contrast and emphasis in your documents.

- Colors
- Borders
- Fonts
- Text styles

The Rules

- Do not use too many fonts in your spreadsheet.
- Only use color if you will print or display your spreadsheet on a color device; otherwise, opt for black and white shading.
- 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. Do not simply create one because it looks cool.
- Know when to break the rules.

Formatting Cells: Font

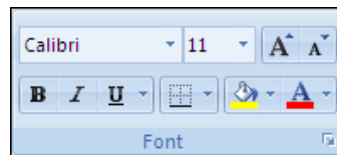
The Home Ribbon

The **Home** ribbon, replacing the Format menu and the Formatting toolbar in Excel 2003, allows you to format text, numbers, and/or border styles.

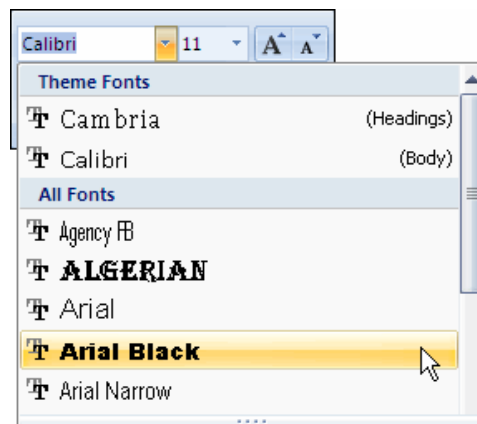
Changing Font and Font Size

Changing the Font

- Select the cell or range of cells you wish to format
- Locate the **Font** area of the **Home** ribbon



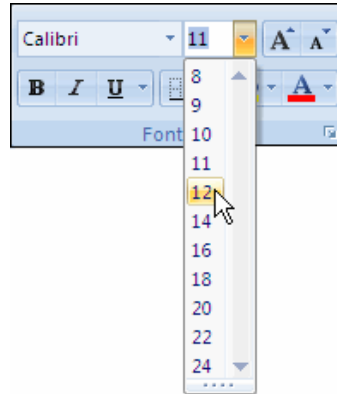
- Click on the down-facing arrow next to the drop-down **font** list
- From the list that appears, click on the **name** of the font you want



Changing the Font Size

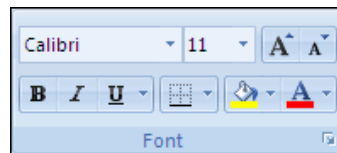
To change the font size:

- Select the cell or range of cells you wish to format
- Locate the **Font** area of the **Home** ribbon
- Click on the down-facing arrow next to the font size menu
- From the list that appears, click on the **size** of the font you want



Adding Bold, Italic, and/or Underline

- Select the cell or range of cells you wish to format
- Locate the **Font** area of the **Home** ribbon

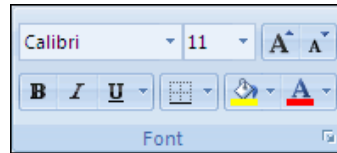


- Click on one of the following buttons to apply text formatting

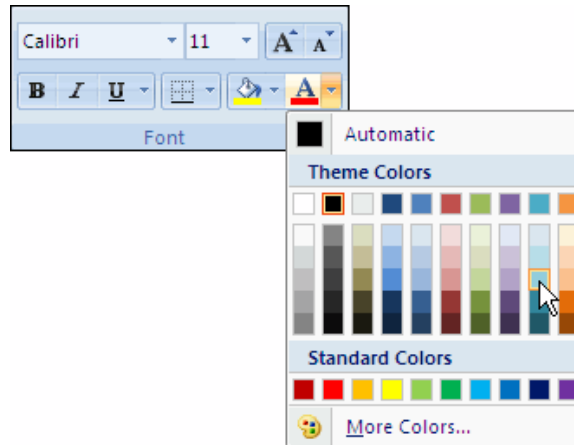
To format your text...	Click on...
Bold	B
Italic	<i>I</i>
Underline	<u>U</u>

Changing the Text Color

- Select the cell or range of cells you wish to format
- Locate the **Font** area of the **Home** ribbon



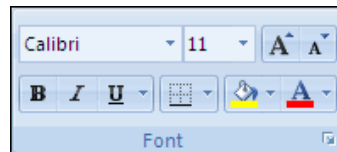
- Click on the down-facing arrow of the **Font Color** button
- From the font colors that appear, select the color you want



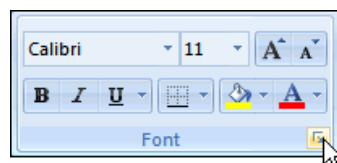
Applying Advanced Formatting

If you would like to apply formatting and do not see the appropriate buttons on the **Home** ribbon:

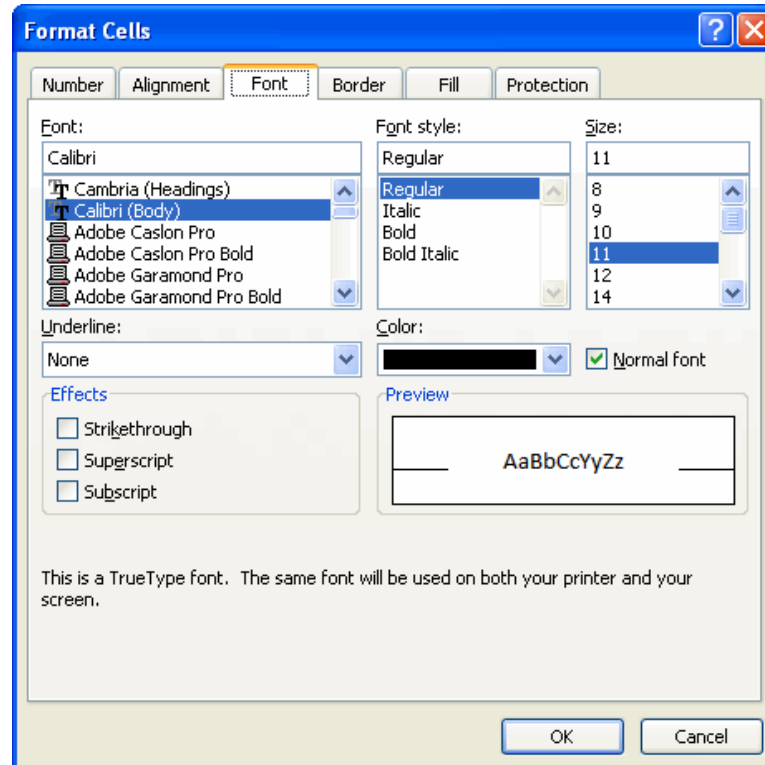
- Select the cell or range of cells you wish to format
- Locate the **Font** area of the **Home** ribbon



- On the bottom-right hand corner, click on the **Format Cells: Font** button



- The **Font** tab of the **Format Cells** window will appear



- Select the additional formatting you wish to apply to the cell(s) you selected
- Click on the button labeled **OK**




Formatting Cells: Alignment

Applying Horizontal Alignment

- Select the cell or range of cells you wish to format
- Locate the **Alignment** area of the **Home** ribbon

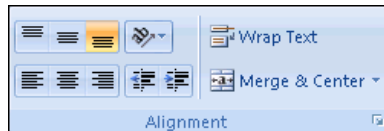


- Click on one of the following buttons to apply horizontal text alignment




To align your text to the ...	Click on ...
Left of the cell	
Middle of the cell	
Right of the cell	

Applying Vertical Alignment

- Select the cell or range of cells you wish to format
- Locate the **Alignment** area of the **Home** ribbon



- Click on one of the following buttons to apply vertical text alignment

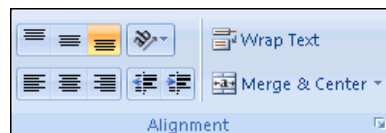
To align your text to the ...	Click on ...
Top of the cell	
Middle of the cell	
Bottom of the cell	

Formatting Long Text Phrases within a Cell

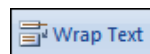
In many situations, the line of text you enter into a cell will be wider than the cell itself. In these situations, the text may be hidden beyond the edge of the cell. Although one solution to this problem is to resize the cell, there are several additional solutions: shrinking the text to fit the cell,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

Wrapping Text within a Cell

- Select the cell or range of cells you wish to format
- Locate the **Alignment** area of the **Home** ribbon



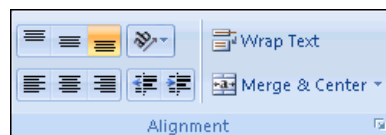
- Click on the button labeled **Wrap Text**



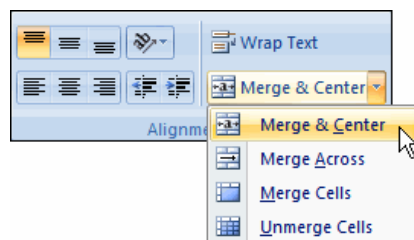
Merging Cells

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

- Select the cell or range of cells you wish to format
- Locate the **Alignment** area of the **Home** ribbon



- Click on the down-facing arrow located next to the button labeled **Merge & Center**
- From the list that appears, select the formatting you wish to apply (for example, Merge & Center)

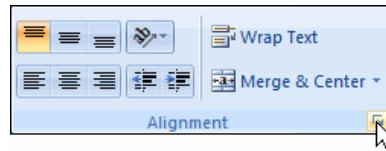


Shrinking Text to Fit within a Cell

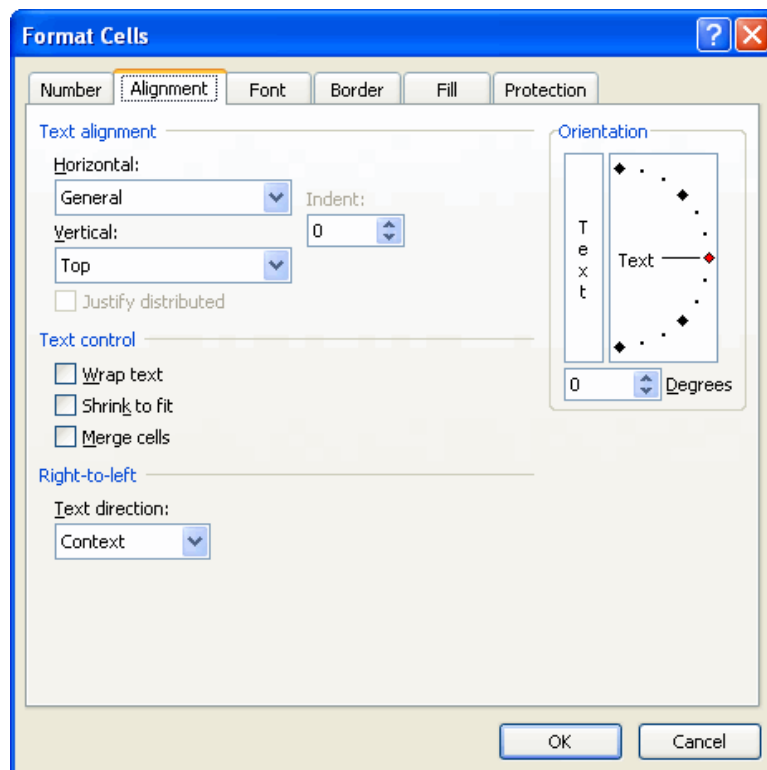
- Select the cell or range of cells you wish to format
- Locate the **Alignment** area of the **Home** ribbon



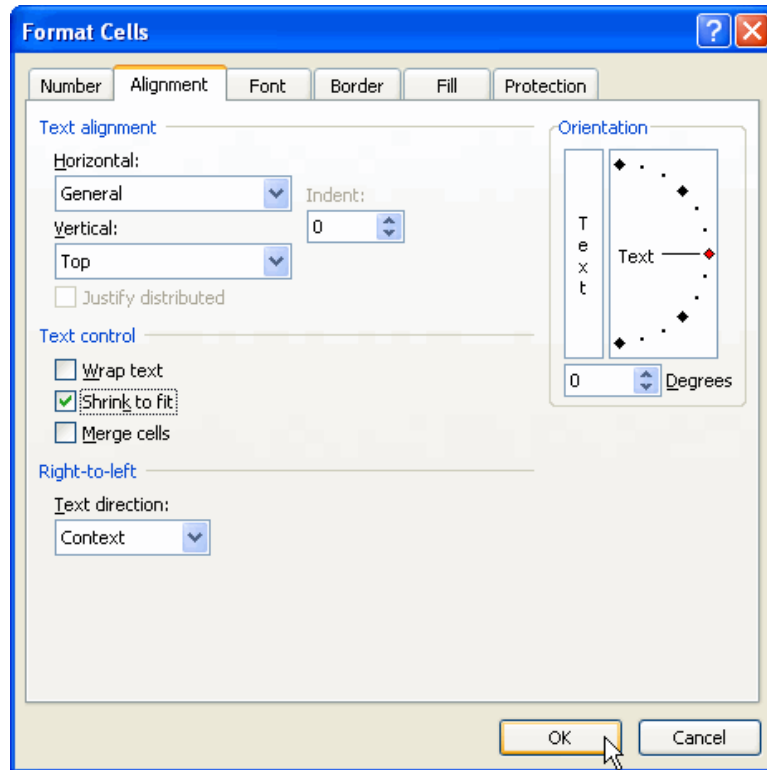
- On the bottom-right hand corner, click on the **Format Cells: Alignment** button



- The **Alignment** tab of the **Format Cells** window will appear



- Locate the **Text control** area
- Click to place a check-mark in the box labeled **Shrink to fit**
- Click on the button labeled **OK**



Formatting Cells: Numbers

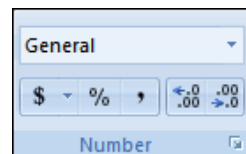
Types of Number Formats

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

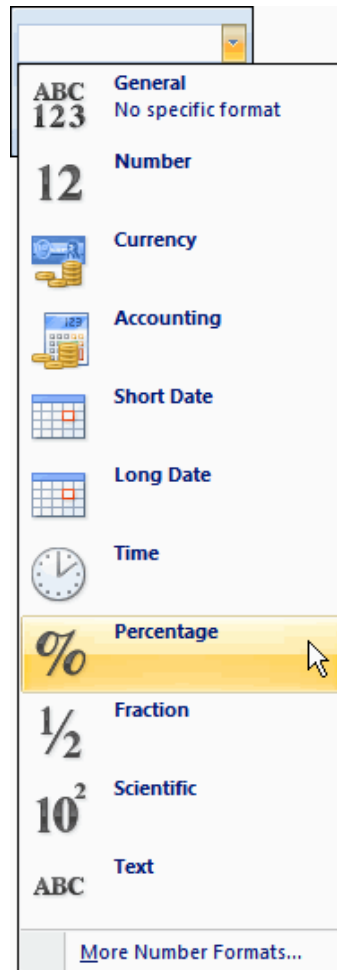
Type	Looks like ...	Options
General	0.33	None
Number	0.33	Number of decimal places shown, negative number format
Currency	\$0.33	Number of decimal places shown, currency symbol, negative number format
Accounting	\$0.33 (lines up decimal points in a column of data)	Number of decimal places shown, currency 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 Number Formats

- Select the cell or range of cells you wish to format
- Locate the **Number** area of the **Home** ribbon



- Click on the down-facing arrow next to the **Number Format** button
- From the list that appears, select the number format you wish to apply to the cell(s) you selected (for example, **Percentage**)



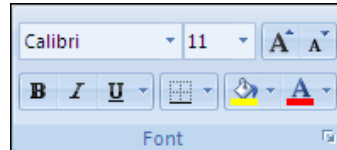
Formatting Cells: Cell Borders and Background Colors

Borders can provide contrast, serving to highlight cells containing important data.

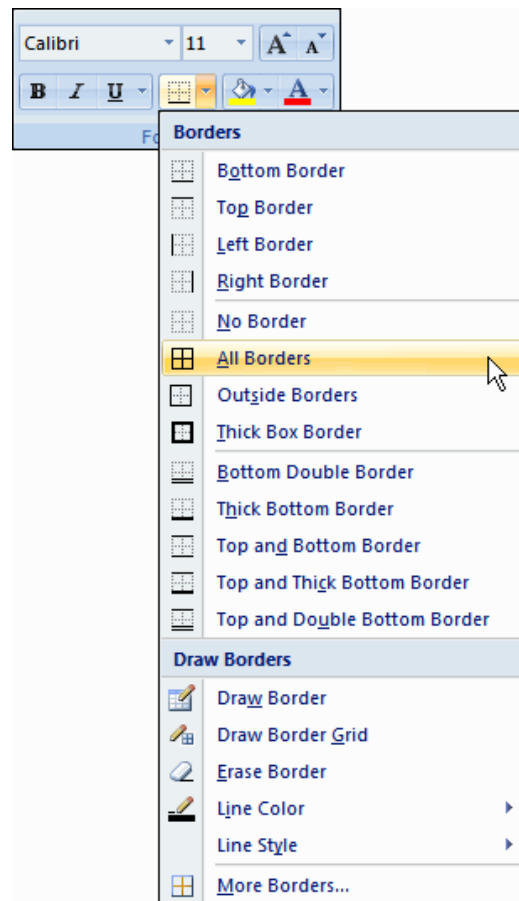
Applying a Basic Cell Border

To create a border around one cell or around a group of cells:

- Select the cell or range of cells you wish to have a border
- Locate the **Font** area of the **Home** ribbon

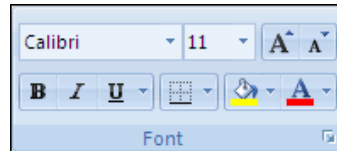


- Click on the down-facing arrow of the **Border** button
- From the list that appears, select the border style you wish to apply to your cells (for example, **All Borders**)

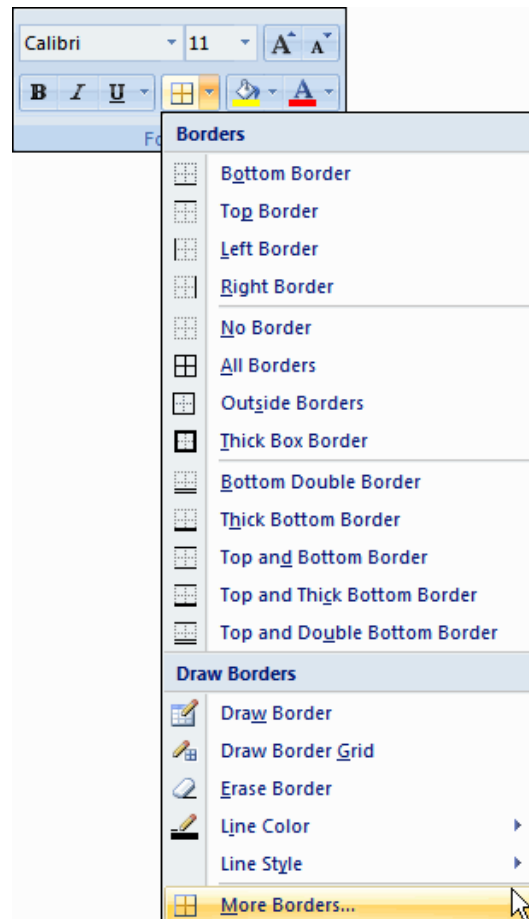


Applying a Custom Cell Border

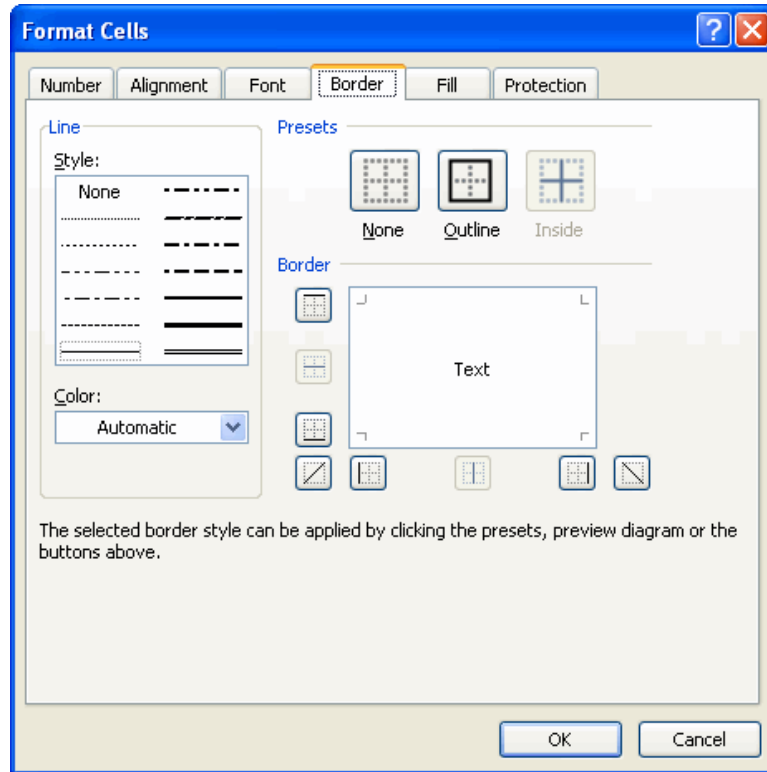
- Select the cell or range of cells you wish to have a border
- Locate the **Font** area of the **Home** ribbon



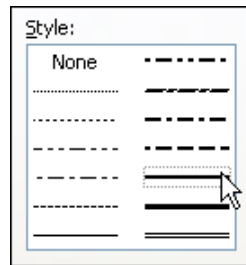
- Click on the down-facing arrow of the **Border** button
- From the list that appears, select **More Borders**



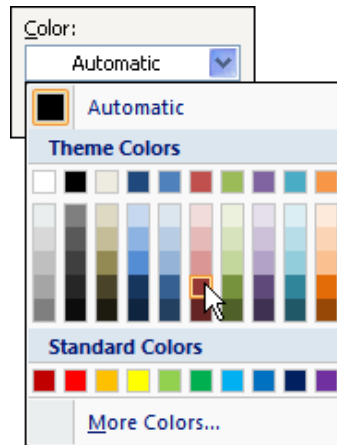
- The **Border** tab of the **Format Cells** window will appear



- In the **Style** section of the **Line** area, choose the line style you wish to use for your cell border



- Click on the down-facing arrow next to the box labeled **Color**
- From the options that appear, select the color you wish to use for your border

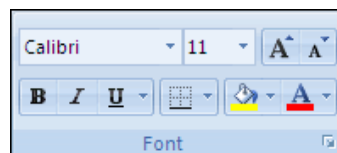


- From the **Border** area, click on the section of the border you wish to add
- Repeat the previous step until you have added all desired border sections

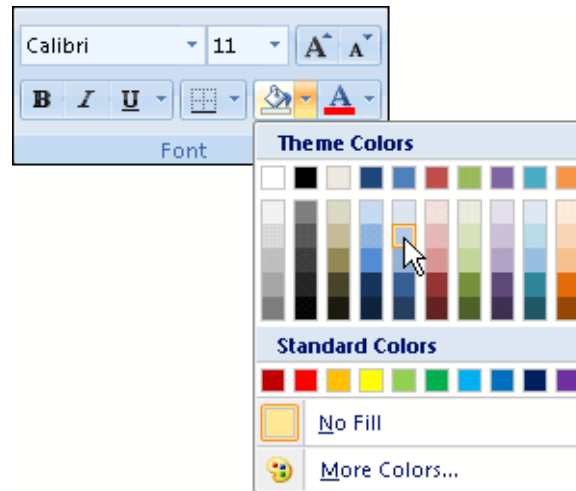
Applying a Background Color

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

- Select the cell or range of cells you wish to apply a background color
- Locate the **Font** area of the **Home** ribbon



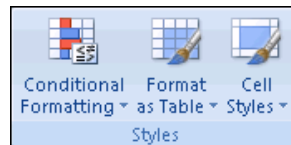
- Click on the down-facing arrow of the **Fill Color** button
- From the options that appear, select the color you wish to apply to your background



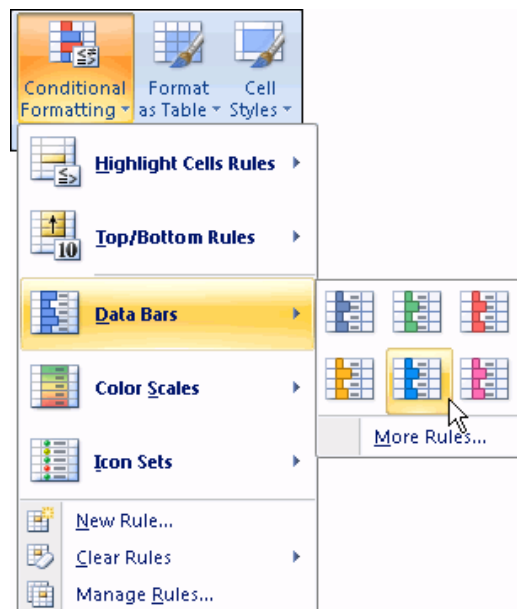
Applying Conditional Formatting

Excel's conditional formatting can apply colors and icons to highlight cells in your worksheet that meet certain criteria. To set up conditional formatting:

- Select the cell or range of cells you wish to apply conditional formatting
- Locate the **Styles** area of the **Home** ribbon



- Click on the down-facing arrow of the button labeled **Conditional Formatting**
- From the menu that appears, select the type of conditional formatting you wish to use
- From the submenu that appears, select the color scheme you wish to use

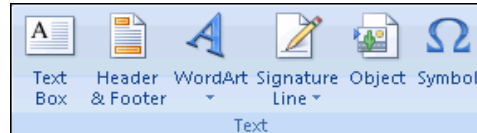


Inserting Headers and Footers

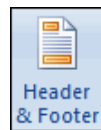
Like Word, Excel allows you to add headers and footers to your spreadsheet. Headers can sometimes serve as appropriate locations for spreadsheet titles, while footers can contain useful document or page information that is not found elsewhere in your spreadsheet.

Inserting a Predefined Header

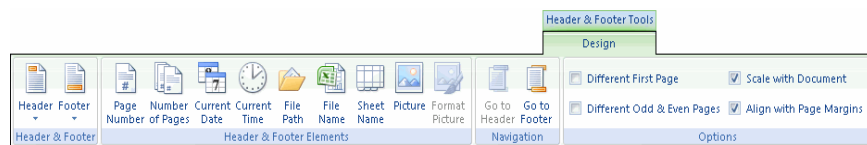
- Locate the **Text** area of the **Insert** ribbon



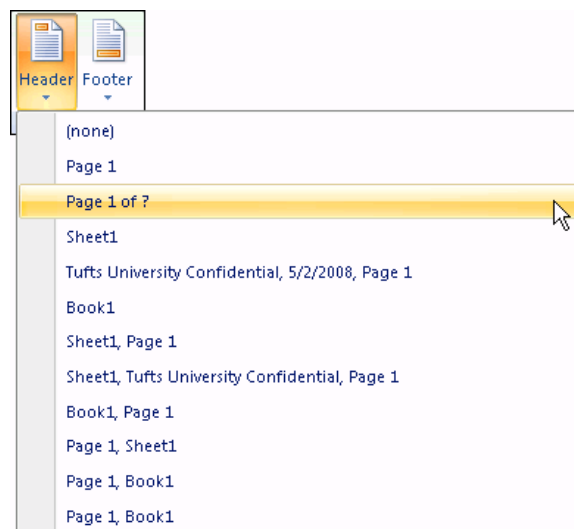
- Click on the button labeled **Header & Footer**



- The **Design (Header & Footer Tools)** ribbon will appear

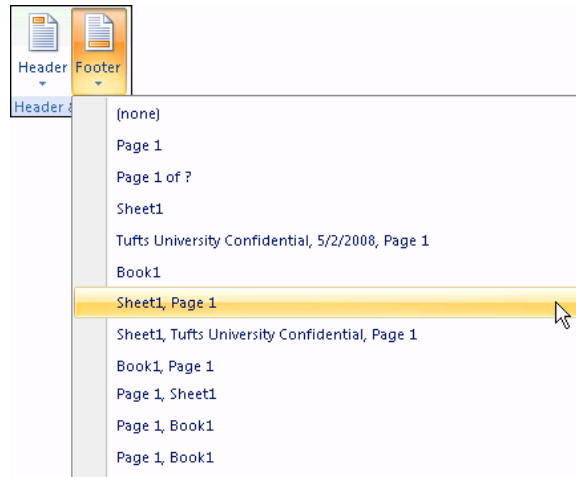


- Click on the down-facing arrow of the button labeled **Header**
- From the list that appears, select the header you wish to use



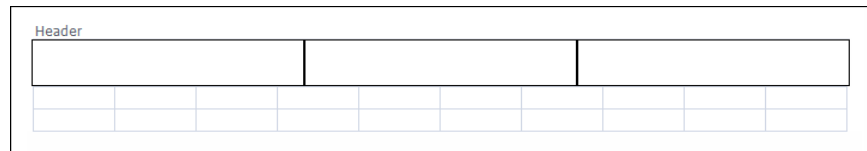
Inserting a Predefined Footer

- Locate the **Text** area of the **Insert** ribbon
- Click on the button labeled **Header & Footer**
- The **Design (Header & Footer Tools)** ribbon will appear
- Click on the down-facing arrow of the button labeled **Footer**
- From the list that appears, select the footer you wish to use



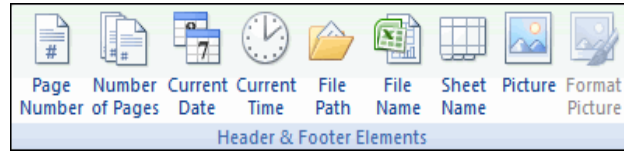
Inserting a Custom Header or Footer

- Locate the **Text** area of the **Insert** ribbon
- Click on the button labeled **Header & Footer**
- The **Design (Header & Footer Tools)** ribbon will appear along with sections to insert your text into your header

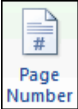
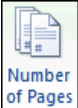
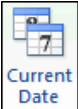


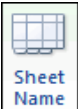


- Click in the **Left section** box to add left-justified text to your header
- Click in the **Center section** box to add centered text to your header
- Click in the **Right section** box to add right-justified text to your header

- Locate the **Header & Footer Elements** area of **Design (Header & Footer Tools)**

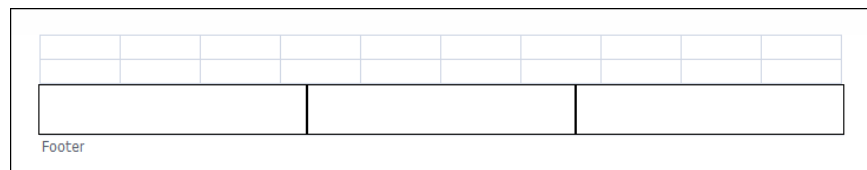


- Click on one of the following buttons to insert additional information into your custom header

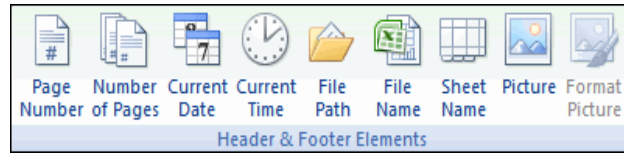
To insert the ...	Click on ...
Current page number	 Page Number
Number of pages in the spreadsheet	 Number of Pages
Current date	 Current Date
Current time	 Current Time
Name of the spreadsheet	 File Name
Name of the current worksheet	 Sheet Name

Creating a Custom Footer

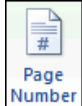
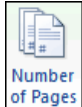
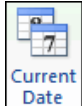
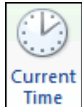
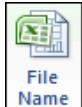
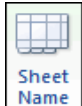
- Locate the **Text** area of the **Insert** ribbon
- Click on the button labeled **Header & Footer**
- The **Design (Header & Footer Tools)** ribbon will appear along with sections to insert your text into your footer



- Click in the **Left section** box to add left-justified text to your footer
- Click in the **Center section** box to add centered text to your footer
- Click in the **Right section** box to add right-justified text to your footer
- Locate the area **Header & Footer Elements** area of **Design (Header & Footer Tools)**



- Click on one of the following buttons to insert additional information into your custom footer

To insert the ...	Click on ...
Current page number	 Page Number
Number of pages in the spreadsheet	 Number of Pages
Current date	 Current Date
Current time	 Current Time
Name of the spreadsheet	 File Name
Name of the current worksheet	 Sheet Name

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

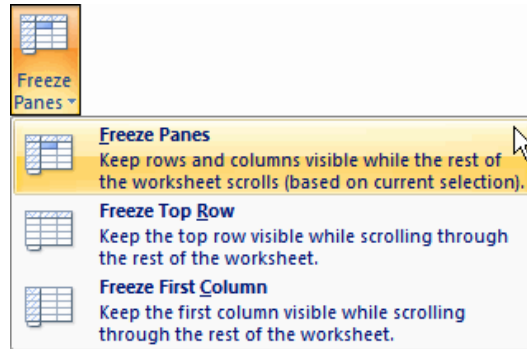
- Decide which row(s) you wish to constantly display at the top of your worksheet when changing or adding data
- Highlight the header of the row **below** the one you wish to constantly display
 - Remember that a horizontal freeze will always be inserted **above** the row that you select
 - For example, if you wish to make sure that the column header in row 1 is always displayed, highlight the header of row 2

	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

- Locate the **Windows** area of the **View** ribbon



- Click on the button labeled **Freeze Panes**
- From the list that appears, select **Freeze Pane**



- Excel will insert a horizontal freeze in to your spreadsheet above the row that you selected
- Click on any cell outside the selected row to deselect this row
- Excel will mark the lower edge of the frozen area with a thin black border

Inserting a Vertical Freeze

- Decide which column(s) you wish to constantly display at the left of your worksheet when changing or adding data.
- Highlight the header of the column **to the right of** the one you wish to constantly display
 - *Remember that a vertical freeze will always be inserted **to the left** of the column that you select*

	A	B
1	Product	SaleDate
2	Squash	11/15/1999
3	Carrots	11/21/1999
4	Squash	11/22/1999
5	Carrots	11/25/1999
6	Squash	11/29/1999

- Locate the **Windows** area of the **View** ribbon
- Click on the button labeled **Freeze Panes**
- From the list that appears, select **Freeze Panes**
- Excel will insert a vertical freeze in your spreadsheet **to the left of the column that you selected**
- Click on any cell outside the selected column to deselect the column
- 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 will insert a combined freeze when you wish to constantly display both your custom column and your row headers. To insert a combined freeze pane:

- Find the cell at which your row of column headers and your column of row headers intersect.
- Click in 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 will 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*

	A	B
1	Product	SaleDate
2	Squash	11/15/1999
3	Carrots	11/21/1999
4	Squash	11/22/1999
5	Carrots	11/25/1999
6	Squash	11/29/1999
7	Carrots	12/05/1999

- Locate the **Windows** area of the **View** ribbon
- Click on the button labeled **Freeze Panes**
- From the list that appears, 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**
- 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