

# Microsoft Excel Formatting Tips & Techniques

## Excel design concepts

### The Goal

Your goal is always to designing 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.**

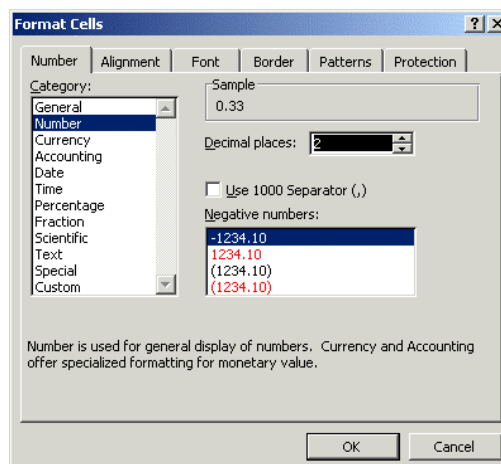
## Formatting Cells

### 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.



## Common Number Formats

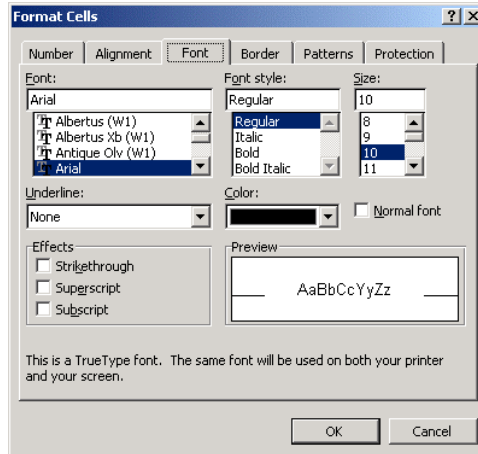
Format Name	Number looks like....	Options
General	0.33	None
Number	0.33	Number of decimal places shown, negative number format
Currency	\$0.33	Number of decimal places shown, currency symbol, negative number format
Accounting	\$0.33 (lines up decimal points in a column of data)	Number of decimal places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

## Other Formats

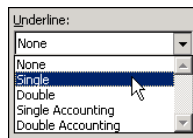
Format Name	Data looks like....	Options
Date	1/1/00	Several date formats available
Time	15:30; 1:30 pm; etc.	Several time formats available
Special	Varies	Zip code, phone number, social security number
Custom	User-defined	

## Applying text formats

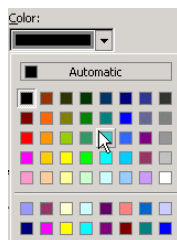
- Select the cells to receive the new text formatting.
- From the **Format** menu, choose **Cells**.
- Click on the **Font** tab.



- 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.

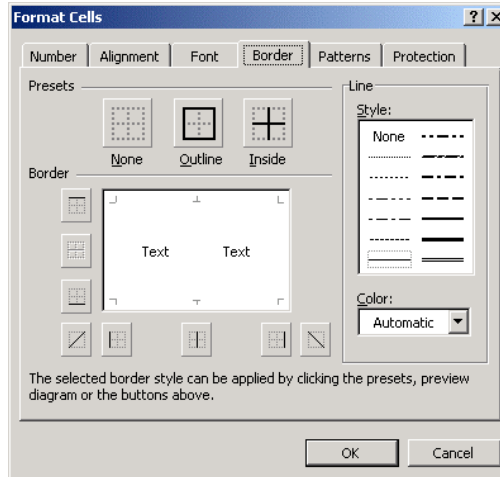


- To change the color of your text, click on the down-facing arrow next to the **Color** box.
- From the **Color** drop-down menu, select the text color that you wish.

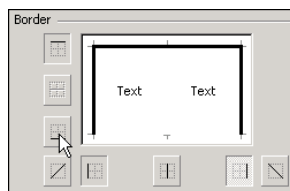


## Applying cell borders

- **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**.
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- **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.



**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**

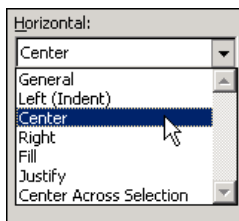
- Select the formatted cell (or cell range).
- Click on the **Format Painter** button on the **standard** toolbar.



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

**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.

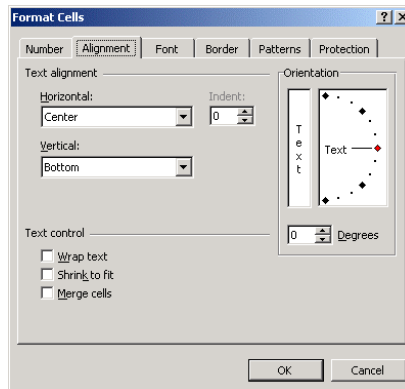


- Click **OK** to apply the alignment formatting to **text within the selected cells**.

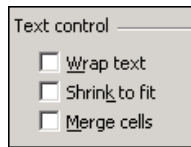
## Formatting long text phrases within a cell

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

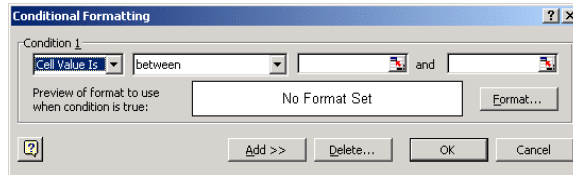
Another solution for handling long text phrases is to merge several cells together so that the text can be fully displayed. To merge several cells:

- **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.

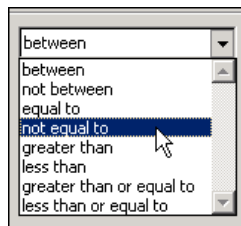
## Applying conditional formatting

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

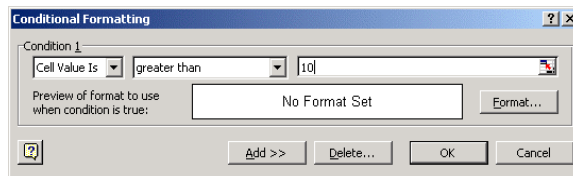
- Select the cells that you wish to conditionally format.
- From the **Format** menu, choose **Conditional Formatting**.



- 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.