

# Spreadsheet Formatting and Design

In this chapter, we're going to be talking about spreadsheet formatting and design. We will primarily focus on the Home tab around the font, alignment, and number sections.

## Practice Spreadsheet

Use this [workbook](#) for the chapter.

## Heading

When we use Excel, we have a responsibility to make sure that whatever we create is easy for the user or the intended audience to read. One of the ways we do that is by using consistent design in terms of font, alignment, number, and sometimes even the Style boxes on the toolbar. (See **Figure 16.1**)

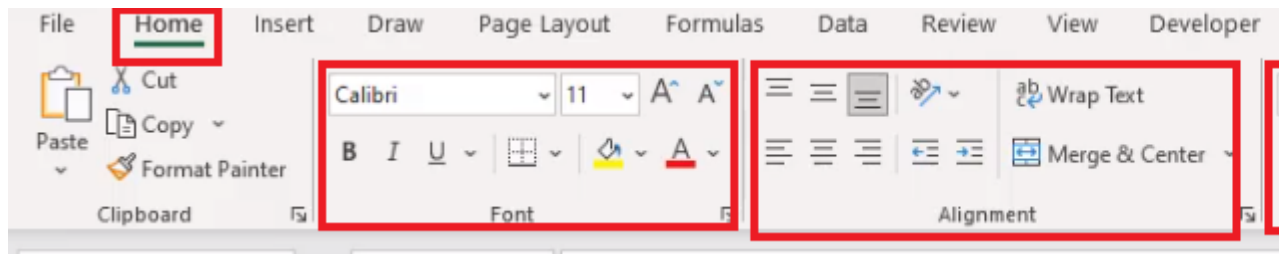


Figure 16.1

Before we dig into the specifics of font and alignment on this tab, we will introduce you to the **Page Layout** tab and the Office Theme section. (See **Figure 16.2**)

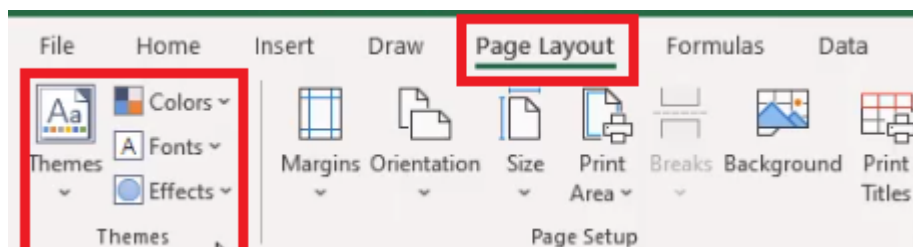


Figure 16.2

This section allows you to understand what colors you might want to use, and you can customize them. You can choose your fonts, and you can change how the page is set up to print. To change the font, use the following steps:

1. Select the **Page Layout** tab.
2. Select **Fonts**.
  - a. This will bring up a drop-down menu.
3. Select the desired font. For this exercise, select **Arial**. (See **Figure 16.3**)

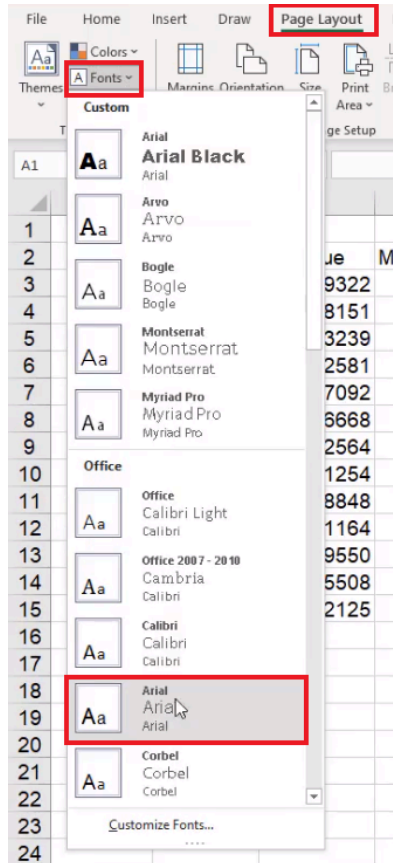


Figure 16.3

Should you ever need to print an Excel file, you can find print options on the Page Layout tab.

Back on the **Home** tab, the first section has to do with font. (See **Figure 16.1**)

After we had changed the font in the directions above, all of the text in the worksheet should be the same font and the same size. In this case, it should be an 11 point font. The first thing you may notice is that the rows are compressed. To change the height of the rows, use the following steps:

1. Select the blank top-left corner, where the first row and the first column meet, to select all of the rows and columns in the worksheet. (See **Figure 16.4**)

	A	B	C	D	E	F
1						
2		Day	Revenue	Market Share	# of Employees	
3		1/1/1960	12899322	0.488	3465	
4		11/3/1961	31518151	0.214	4063	
5		2/7/1963	64223239	0.184	2561	
6		2/14/1964	10002581	0.761	1373	
7		6/15/1965	69237092	0.593	2948	
8		5/22/1967	47226668	0.73	4261	
9		7/26/1968	10572564	0.362	5539	
10		6/17/1970	54861254	0.207	3034	
11		1/25/1972	71258848	0.208	1469	
12		10/3/1973	35011164	0.324	5658	
13		9/4/1975	29039550	0.314	1634	
14		8/14/1977	48935508	0.508	1625	
15		1/16/1979	48932125	0.979	4749	
16						
17						

Figure 16.4

2. Right-click on the selected rows.
  - a. An options bar will appear.
3. Select **Row Height**. (See **Figure 16.5**)
4. Insert the desired height. For this exercise, type **20**.
5. Select **OK**.

The screenshot shows an Excel spreadsheet with a table. The table has four columns: 'Day', 'Revenue', 'Market Share', and '# of Employees'. The first row of data is highlighted. A right-click context menu is open over this row, and the 'Row Height...' option is highlighted with a red rectangle.

	Day	Revenue	Market Share	# of Employees
2	1/1/1960	12899322	0.488	3465
3	11/3/1961	31518151	0.214	4063
4	2/7/1963	64223239	0.184	2561
5	2/14/1964	10002581	0.761	1373
6	3/15/1965	69237092	0.593	2948
7	5/22/1967	47226668	0.73	4261
8	7/26/1968	10572564	0.362	5539
9	3/17/1970	54861254	0.207	3034
10	1/25/1972	71258848	0.208	1469
11	10/3/1973	35011164	0.324	5658
12	9/4/1975	29039550	0.314	1634
13	3/14/1977	48935508	0.508	1625
14	1/16/1979	48932125	0.979	4749
17				

Figure 16.5

Across the top of the table, you can see that there are headers for each set of data. You can use some of the effects in the font section of the Home tab to bold, italicize, or underline the headers for easier identification. You should only use one of the formats at a time; it isn't correct to format text to be bolded, italicized, and underlined. In this exercise, use the bold effect to denote it's a header row. (See **Figure 16.6**)

	A	B	C	D	E	F
1						
2		<b>Day</b>	<b>Revenue</b>	<b>Market Share</b>	<b># of Employees</b>	
3		1/1/1960	12899322	0.488	3465	
4		11/3/1961	31518151	0.214	4063	
5		2/7/1963	64223239	0.184	2561	
6		2/14/1964	10002581	0.761	1373	
7		6/15/1965	69237092	0.593	2948	
8		5/22/1967	47226668	0.73	4261	
9		7/26/1968	10572564	0.362	5539	
10		6/17/1970	54861254	0.207	3034	
11		1/25/1972	71258848	0.208	1469	
12		10/3/1973	35011164	0.324	5658	
13		9/4/1975	29039550	0.314	1634	
14		8/14/1977	48935508	0.508	1625	
15		1/16/1979	48932125	0.979	4749	
16						

Figure 16.6

You can also choose to double underline things in addition to single underline. To do this, use the following steps:

1. Highlight what you want to double underline.
2. Select the dropdown menu on the underline option.
3. Select **Double Underline**. (See **Figure 16.7**)

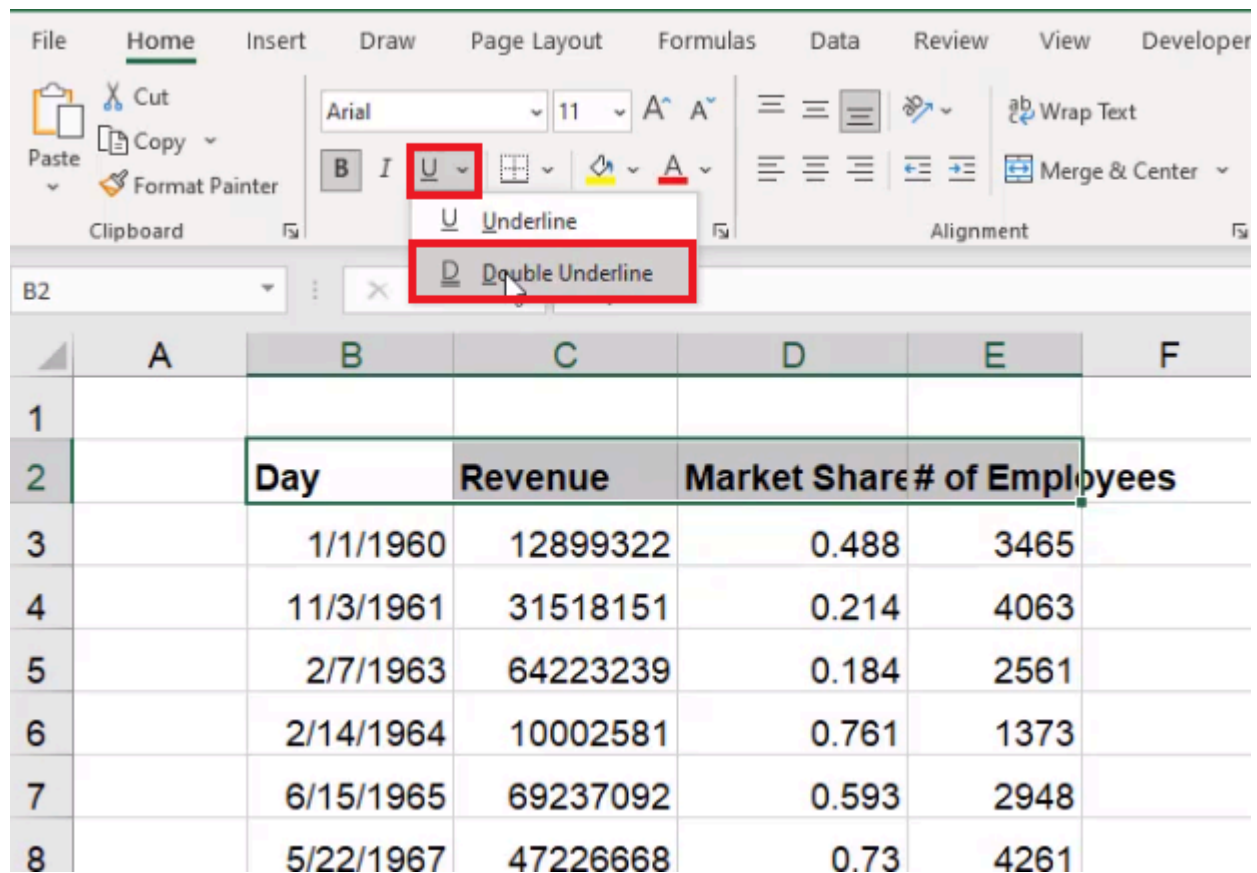


Figure 16.7

## Font Size

The next thing we'll look at is font size. In addition to being able to change to a different font typeface, we can also change the size. We can pick a specific size, or we can use the **Up** and **Down** arrows to automatically move up and down between sizes. (See **Figure 16.8**)

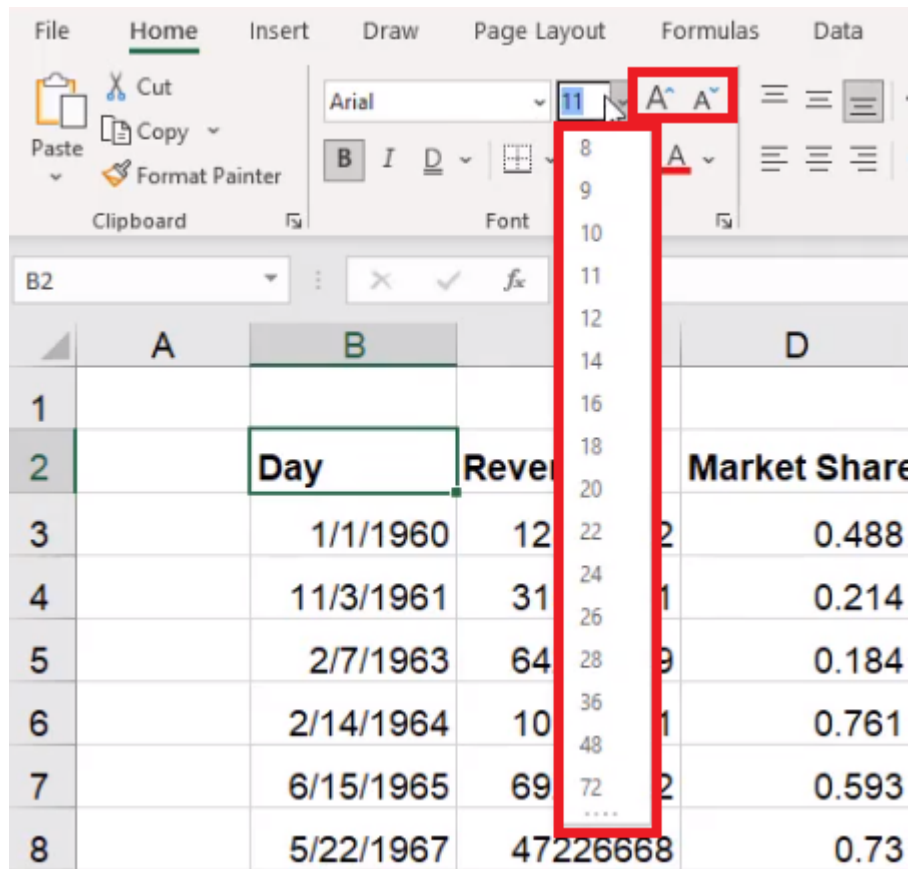


Figure 16.8

If something is bold already, it doesn't also need to be bold and larger. However, if we wanted to choose just a larger font size, we could remove the bold and increase the font size of our header so that it stands out from the rest of the data. For this exercise, however, keep the header bold, and leave it the regular font size.

## Fill Color and Text Color

Excel helps you format your sheet by filling the background color of a cell. To do this, use the following steps:



1. Select the cells you would like to fill with color.
2. Select the **Theme Colors** icon. (See **Figure 16.9**)
3. Select which color you would like to fill the cell with.

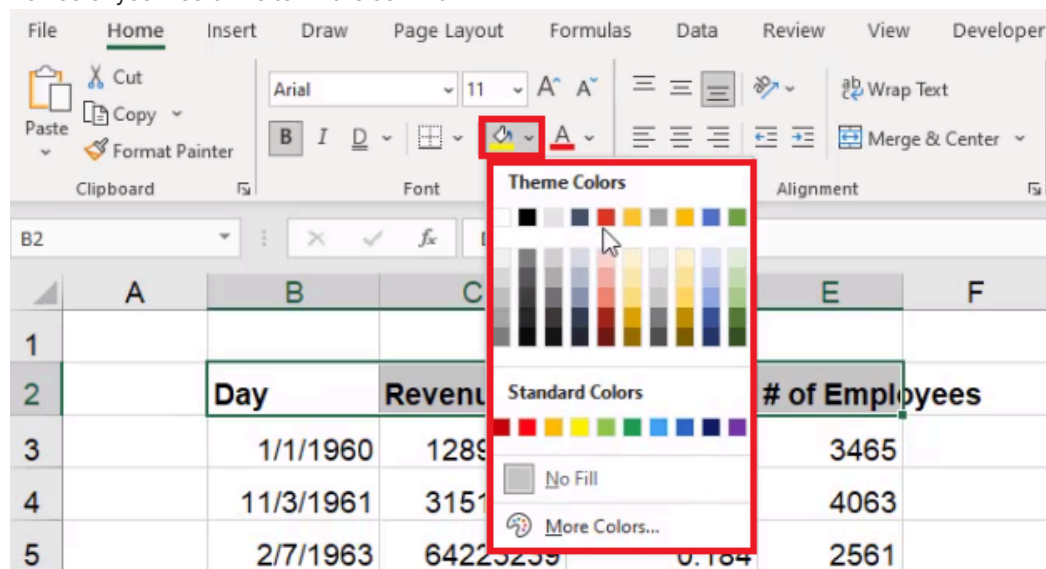


Figure 16.9

To change the text color in cells, use the following steps:

1. Select the text that you want to change.
2. Select the font colors icon. (See **Figure 16.10**)
3. Select the color you want to change the text to.

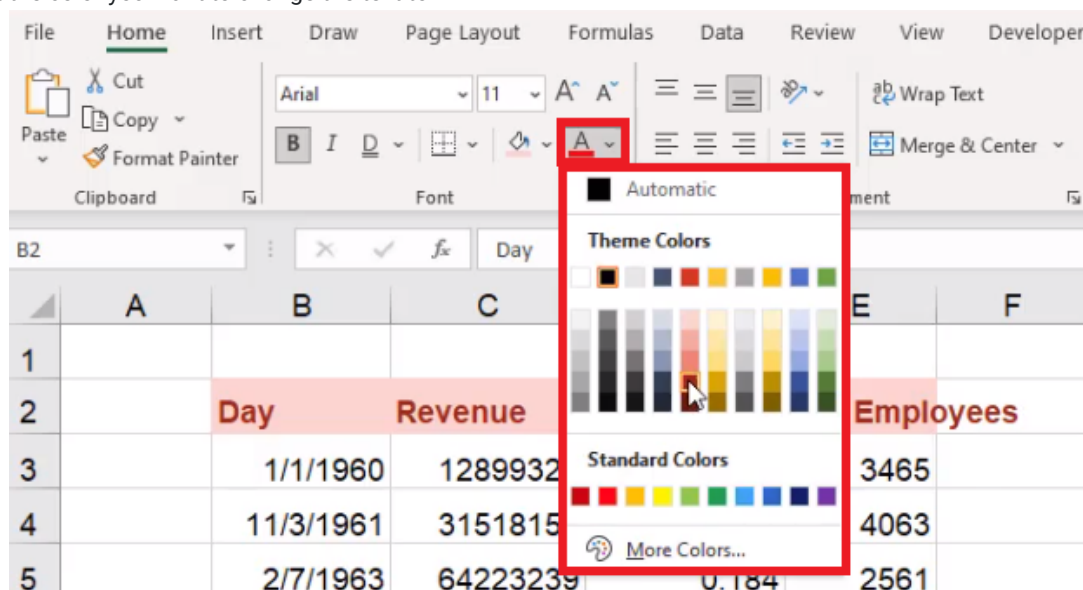


Figure 16.10

Ensure the background and the foreground color are contrasted so that you can read what is in each cell. If you select the pop-out menu in the bottom right of the Font section, Excel takes you to the **Format Cells** font section. (See **Figure 16.11**)

This allows you to add additional effects like strikethrough, superscript, and subscript.



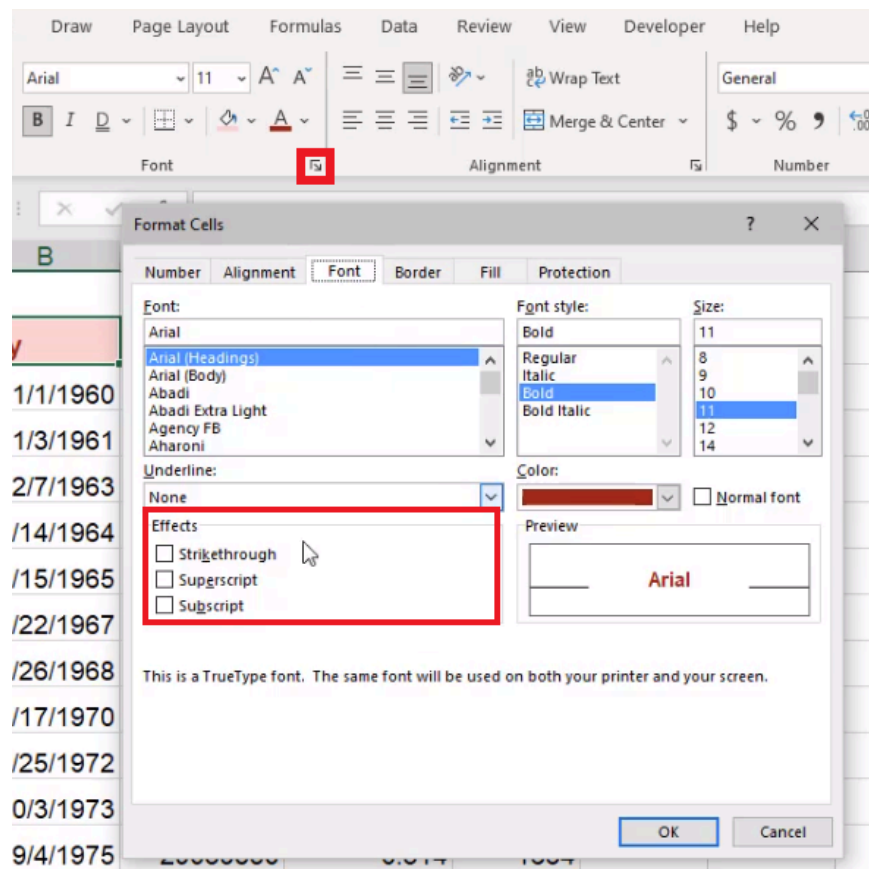


Figure 16.11

## Alignment

When you made the row height taller, you may have noticed that all of the cells, by default, are aligned to be at the bottom of the cell vertically. You can align to the top, the middle, or the bottom. (See **Figure 16.12**)

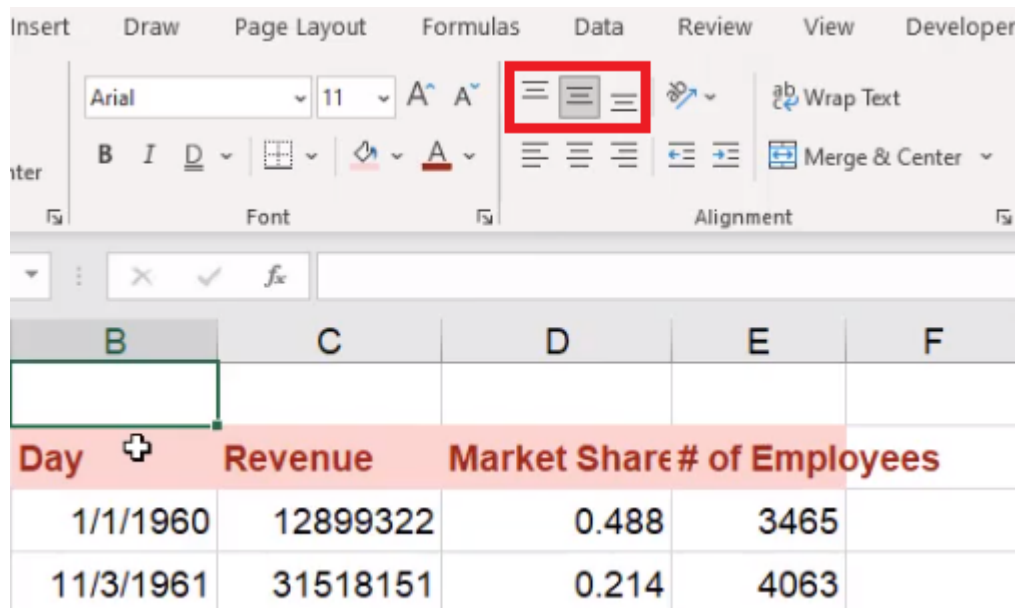


Figure 16.12

For ease of reading, aligning to the middle is the most comfortable for most cases.

We can also change the alignment horizontally. (See **Figure 16.13**)

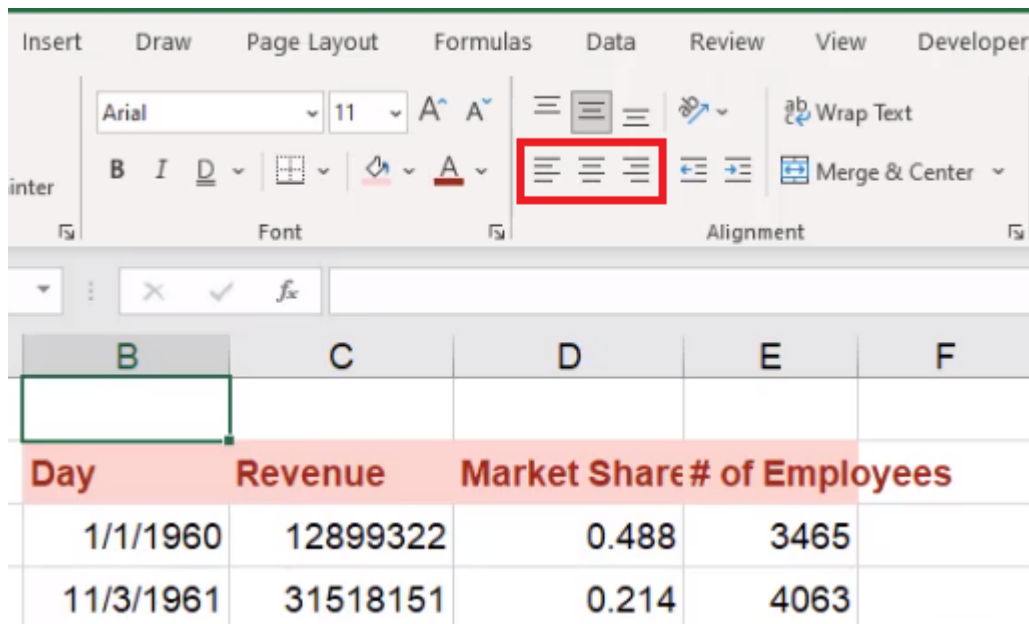
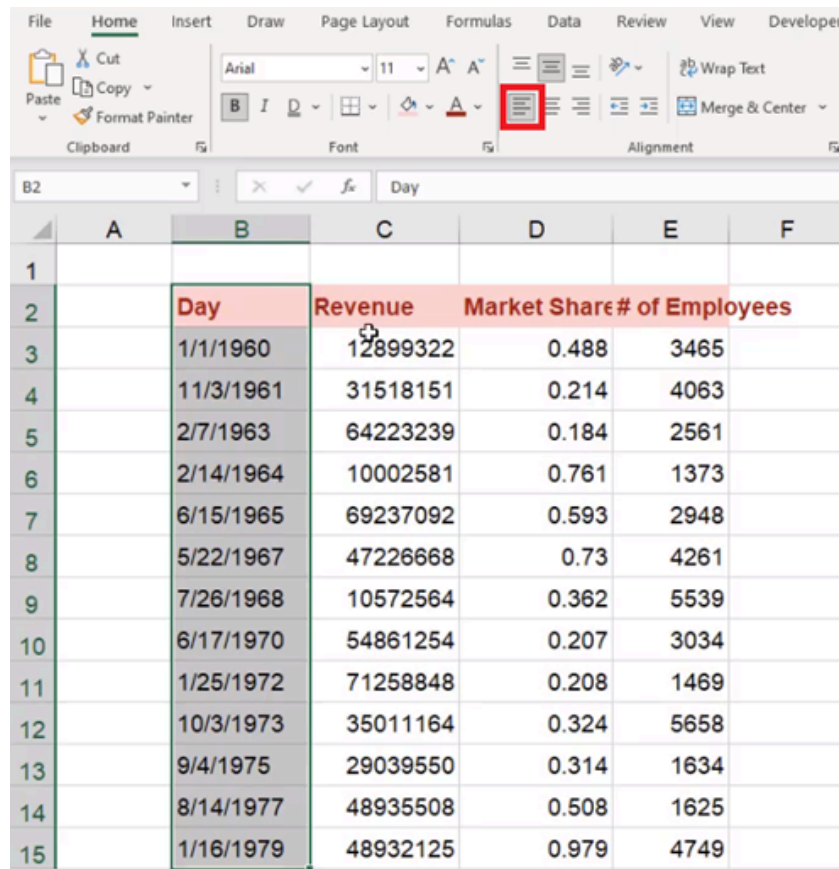


Figure 16.13

Excel recognizes when a value is text, and it automatically left-aligns it. If the value is a number, Excel automatically right-aligns it. Ensure numbers are right-aligned so that the units line up with each other. There will be more discussion about this in the number section. Left-align the dates using the following steps:

1. Select the cells with dates in them.
2. Select the **Left-Align** icon. (See **Figure 16.14**)
  - a. Excel will left-align the values in the selected cells.



	A	B	C	D	E	F
1						
2		Day	Revenue	Market Share	# of Employees	
3		1/1/1960	12899322	0.488	3465	
4		11/3/1961	31518151	0.214	4063	
5		2/7/1963	64223239	0.184	2561	
6		2/14/1964	10002581	0.761	1373	
7		6/15/1965	69237092	0.593	2948	
8		5/22/1967	47226668	0.73	4261	
9		7/26/1968	10572564	0.362	5539	
10		6/17/1970	54861254	0.207	3034	
11		1/25/1972	71258848	0.208	1469	
12		10/3/1973	35011164	0.324	5658	
13		9/4/1975	29039550	0.314	1634	
14		8/14/1977	48935508	0.508	1625	
15		1/16/1979	48932125	0.979	4749	

Figure 16.14

To right-align the numbers, use the following steps:

1. Select the numbers you want to right-align.
2. Select the **Right-Align** icon. (See **Figure 16.15**)
  - a. Excel will right-align the values in the selected cells.



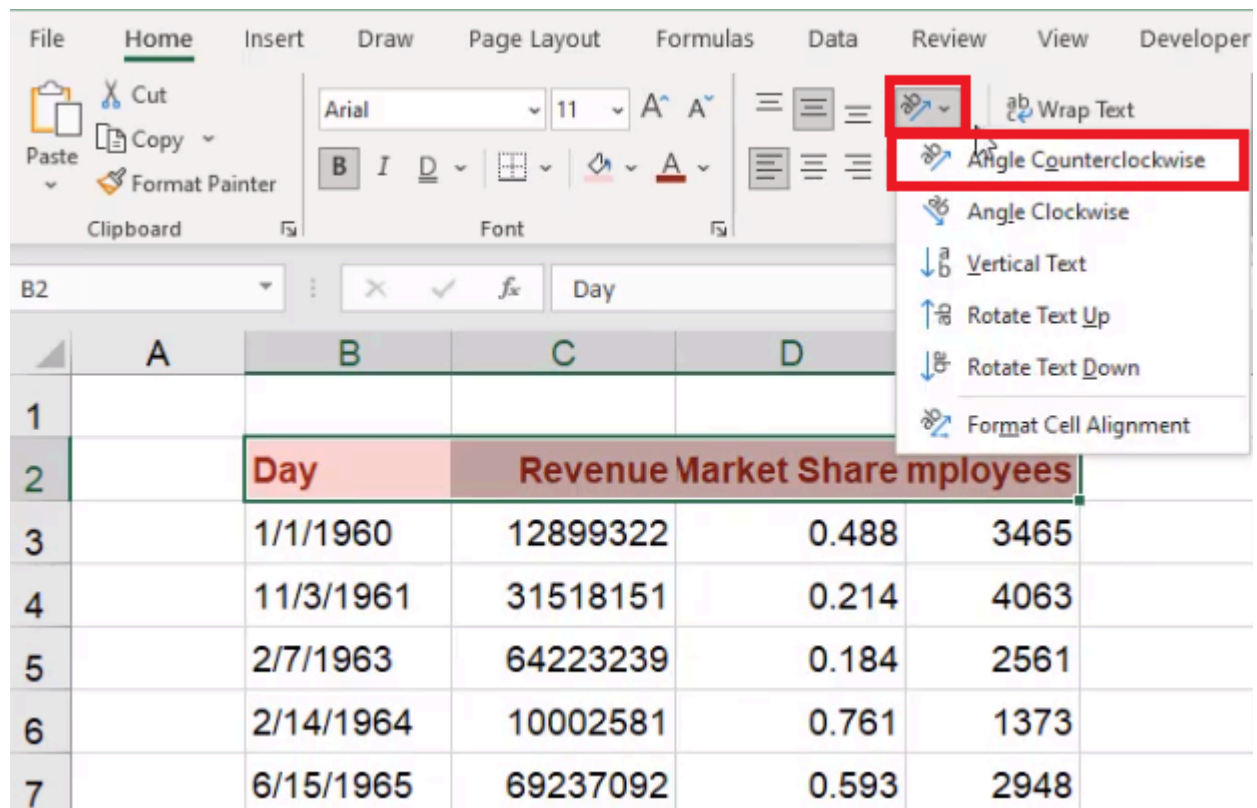


Figure 16.16

## Merging Cells

You can also insert a new row on the top, make a title for the table, and make it span across all four of the columns on the table. To do this, use the following steps:

1. Select the cells you want the title to span across.
2. Select the **Merge & Center** dropdown menu.
3. Select **Merge & Center**. (See **Figure 16.17**)
  - a. Excel will join those cells and center the header.
  - b. Just selecting **Merge Across** will merge the cells, but it won't center the data.

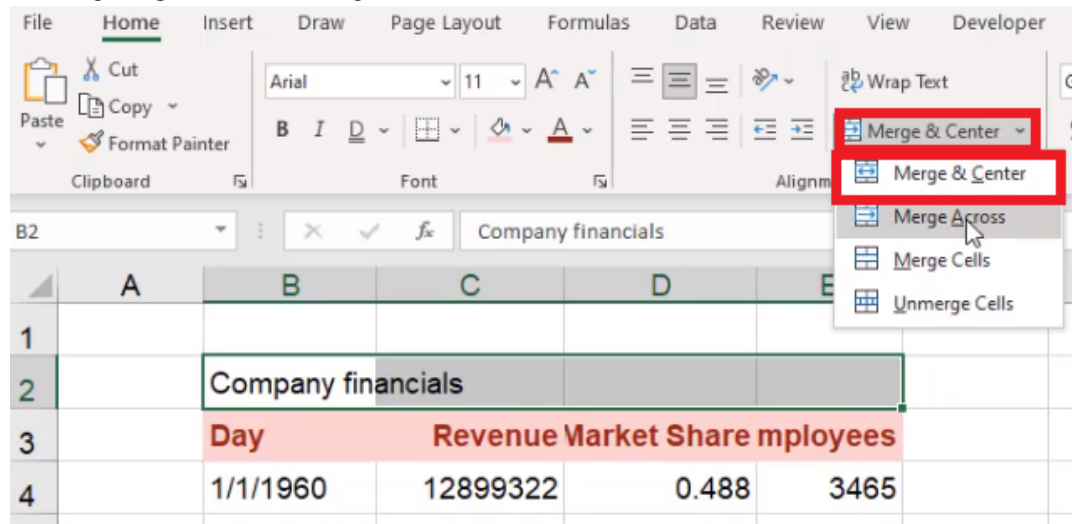


Figure 16.17

Merging cells can cause issues when it comes to using formulas, copying and pasting, and a number of other things. One of the best things you can do is select the pop-out arrow in the bottom-left corner of the **Alignment** section of the toolbar. (See **Figure 16.18**)

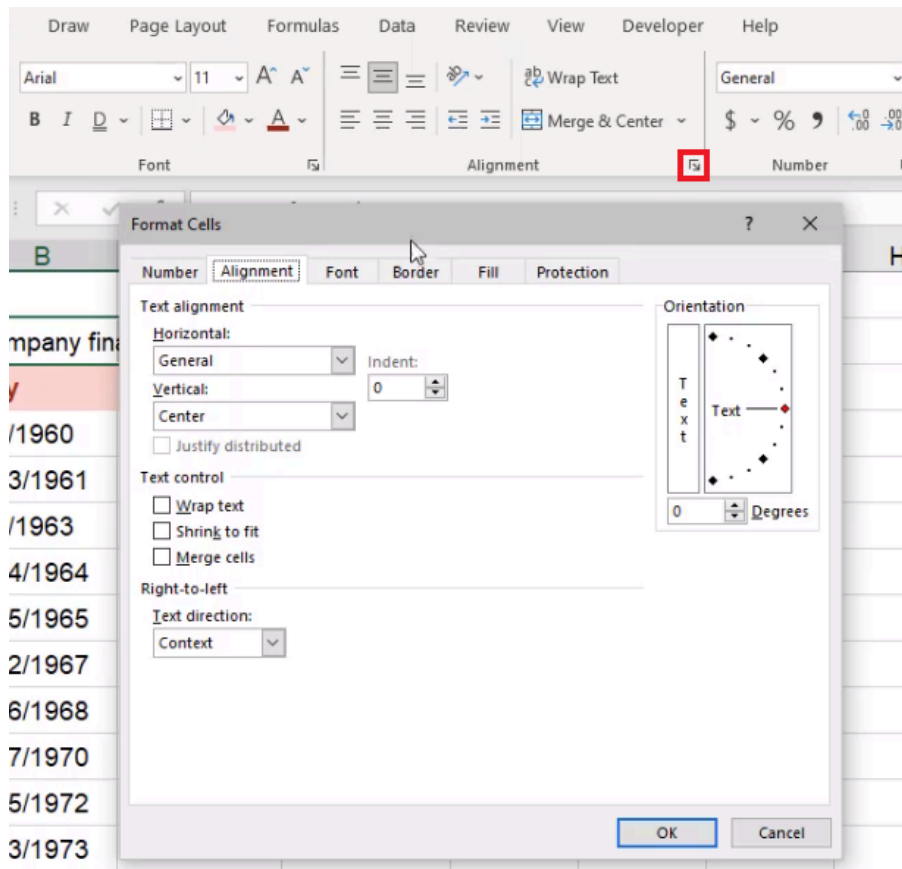


Figure 16.18

Once in the dialog box that pops up, use the following steps:

1. Under **Horizontal**, select **Center Across Selection**. (See Figure 16.19)
2. Select **OK**.
  - a. Excel will center the heading across all four cells, but they remain four distinct cells.



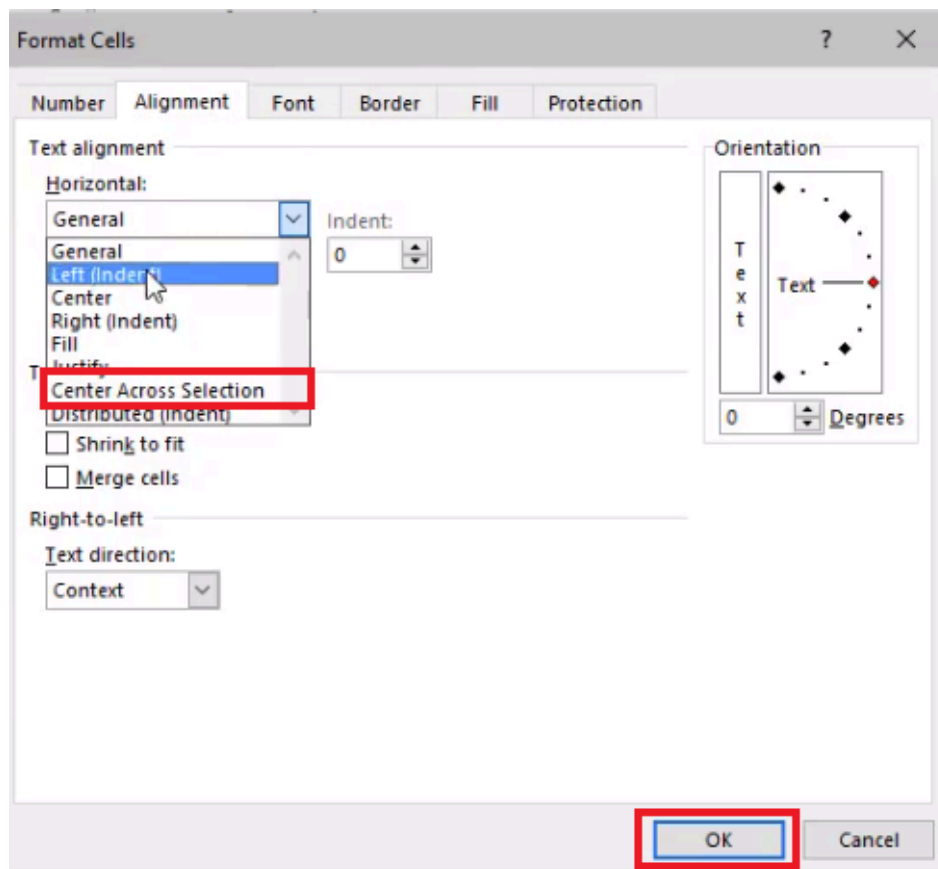


Figure 16.19

When you copy and paste with this formatting feature active, you won't run into any errors.

Another thing you might notice is that the headers are a bit longer than the available space in the cells. When trying to maintain a consistent column width for this exercise, you may notice that the headings "Market Share" and "Number of Employees" do not fit. You could widen the cells to fit the headings, but then you may have a lot of wasted space on the sheet. Instead, you can choose a reasonable column width and use the following steps to wrap the text:

1. Select the cells that have longer titles.
2. Select Wrap Text. (See **Figure 16.20**)
  - a. This allows the text to wrap around onto a second line.

	A	B	C	D	E
1					
2		Company financials			
3		Day	Revenue	Market Share	# of Employees
4		1/1/1960	12899322	0.488	3465
5		11/3/1961	31518151	0.214	4063
6		2/7/1963	64223239	0.184	2561
7		2/14/1964	10002581	0.761	1373
8		6/15/1965	69237092	0.593	2948

Figure 16.20

You may need to accommodate it with a slightly taller row, but it will allow the text to line up. The challenge we run into, though, is that not all of the tops will align. In this case, it might be best to align them all with the top so you can read them clearly.

## Number Formatting

When it comes to number formatting, consistency is important. There are some pre-built formats in Excel, including dates. To format dates as a **Long Date**, use the following steps:

1. Select a cell containing a date.
  - a. The dropdown menu in the **Numbers** section of the toolbar will now say **Date** instead of **General**.
2. Select the dropdown menu in Numbers.
3. Select **Long Date**. (See **Figure 16.21**)
  - a. Excel will write out the entire day of the week, month, date, and year.

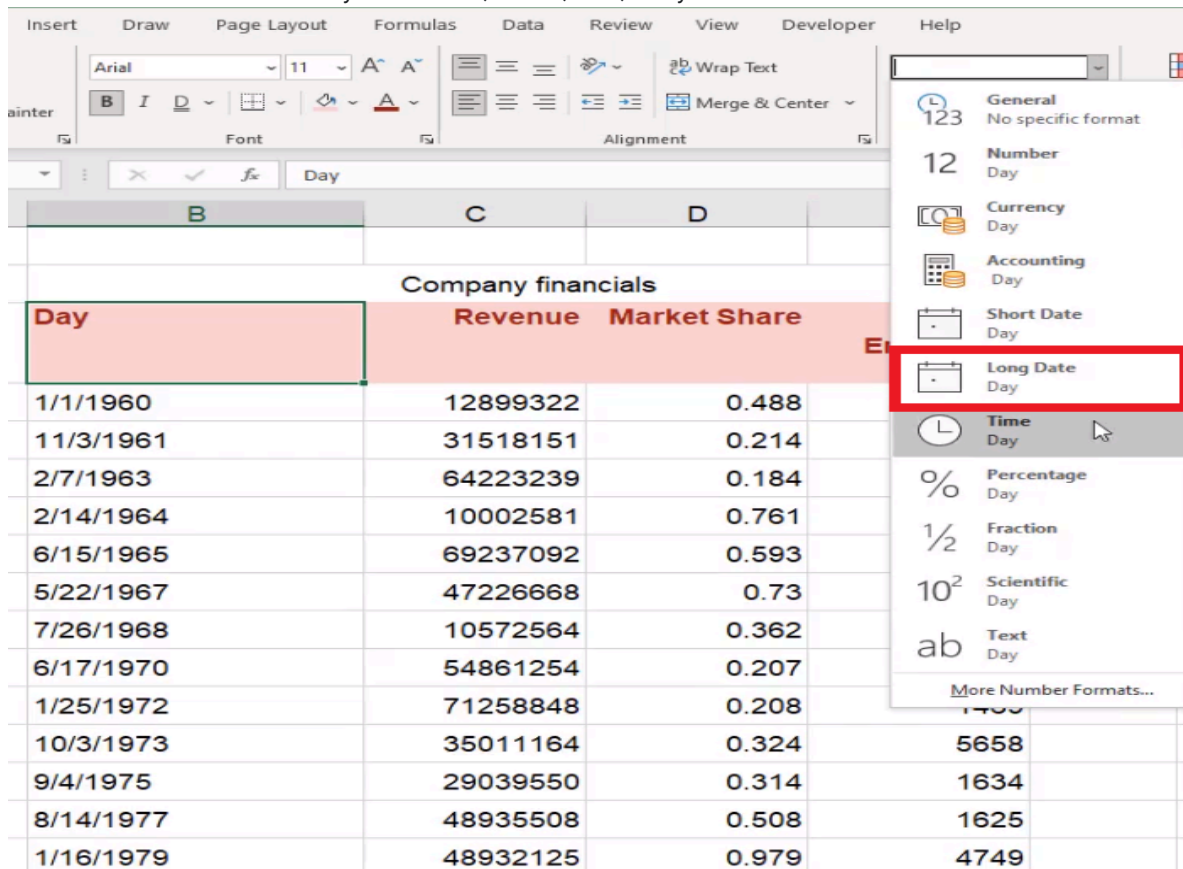


Figure 16.21

If you want to change any of these, you can select the whole range and choose one of the pre-existing formats seen in **Figure 21**. To use the **Format Cells** box, use the following steps:

1. Select the range of cells you want to format.
2. Press **Control + 1** (PC) or **Command + 1** (Mac).
  - a. This will open up the Format Cells box.
3. Select the **Number** tab.
4. Select **Custom**.
  - a. This allows you to use special letters and symbols to make a customized format.
5. Type **ddd, dd mmm yyyy** under **Type**.
  - a. The first three *d*'s will give an abbreviation of weekday.
    - i. Adding a fourth will give you the whole day.
  - b. The three *m*'s indicate the month.
  - c. Four *y*'s indicate the whole year.
6. Select **OK**. (See **Figure 16.22**)
  - a. Excel will change the dates using the custom format.
  - b. The dropdown menu in the number section will say **Custom** when any of these formatted cells are selected.

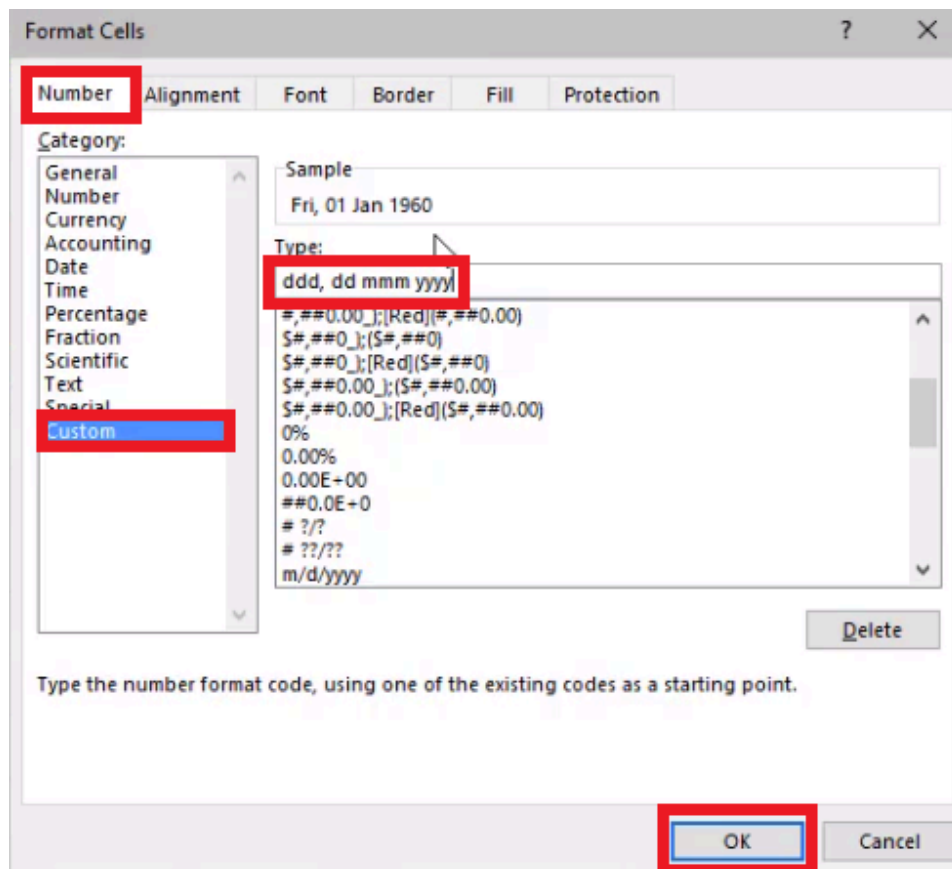


Figure 16.22

The data in the **Revenue** column represents dollars. There are typically two types of dollar formats. The first is the accounting number format in the number section. (See **Figure 16.23**)

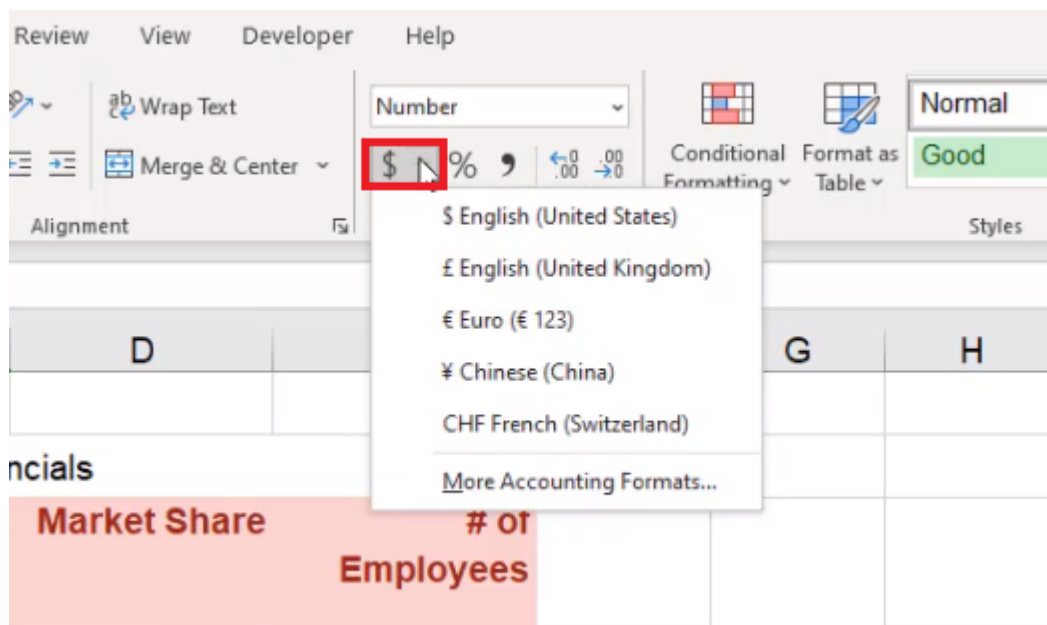


Figure 16.23

The second is the Currency number format. (See **Figure 16.24**)

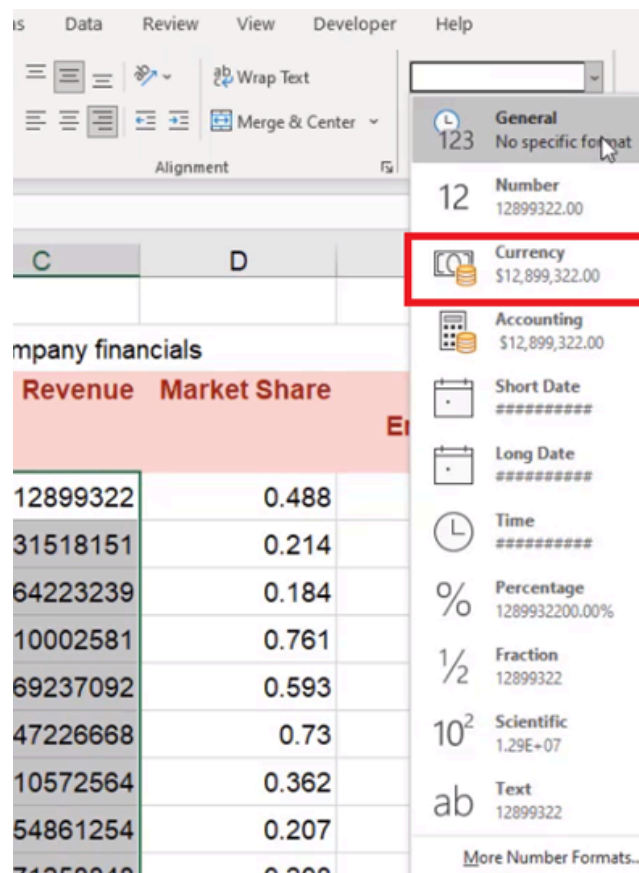


Figure 16.24

Sometimes, you have to choose to decrease the number of decimal points using the **Decrease Decimals** button. (See **Figure 16.25**)

Company financials			
Day	Revenue	Market Share	# of Employees
Fri, 01 Jan 1960	\$12,899,322	0.488	3465
Fri, 03 Nov 1961	\$31,518,151	0.214	4063
Thu, 07 Feb 1963	\$64,223,239	0.184	2561
Fri, 14 Feb 1964	\$10,002,581	0.761	1373
Tue, 15 Jun 1965	\$69,237,092	0.593	2948
Mon, 22 May 1967	\$47,226,668	0.73	4261
Fri, 26 Jul 1968	\$10,572,564	0.362	5539
Wed, 17 Jun 1970	\$54,861,254	0.207	3034
Tue, 25 Jan 1972	\$71,258,848	0.208	1469
Wed, 03 Oct 1973	\$35,011,164	0.324	5658
Thu, 04 Sep 1975	\$29,039,550	0.314	1634
Sun, 14 Aug 1977	\$48,935,508	0.508	1625
Tue, 16 Jan 1979	\$48,932,125	0.979	4749

Figure 16.25

The data in the **Market Share** column is represented as a percentage. To format a set of data as a percent, use the following steps:

1. Select the data you want to turn into a percentage.
2. Select the percentage button. (See **Figure 16.26**)
  - a. This will turn decimals into percentages.

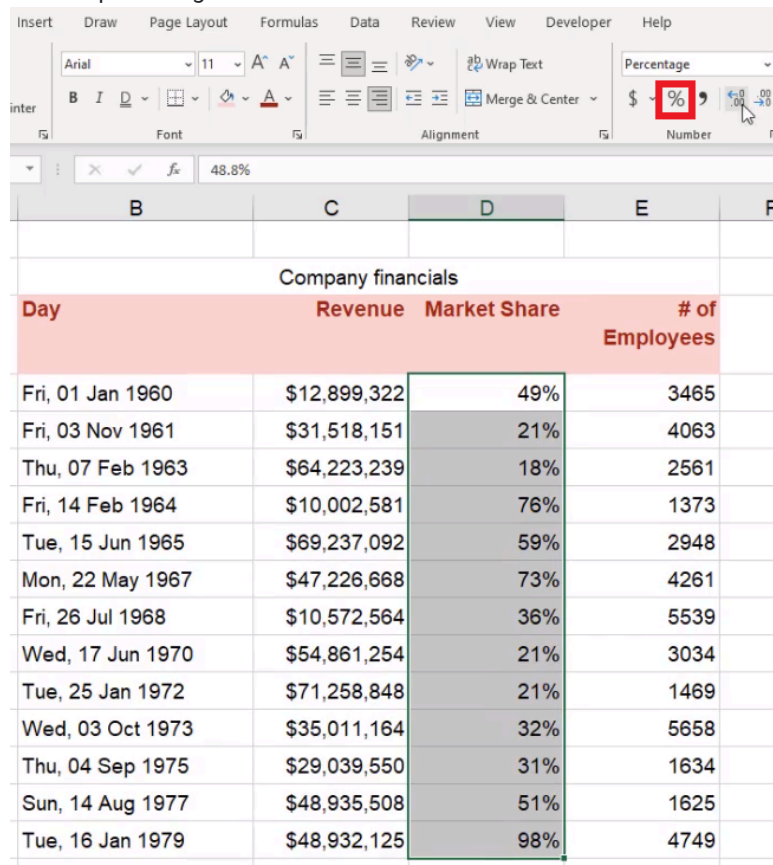


Figure 16.26

3. For this exercise, use the **Increase Decimals** button to increase the percentage of decimal points by one. (See **Figure 16.27**)



Company financials			
Day	Revenue	Market Share	# of Employees
Fri, 01 Jan 1960	\$12,899,322	48.8%	3465
Fri, 03 Nov 1961	\$31,518,151	21.4%	4063
Thu, 07 Feb 1963	\$64,223,239	18.4%	2561
Fri, 14 Feb 1964	\$10,002,581	76.1%	1373
Tue, 15 Jun 1965	\$69,237,092	59.3%	2948
Mon, 22 May 1967	\$47,226,668	73.0%	4261
Fri, 26 Jul 1968	\$10,572,564	36.2%	5539
Wed, 17 Jun 1970	\$54,861,254	20.7%	3034
Tue, 25 Jan 1972	\$71,258,848	20.8%	1469
Wed, 03 Oct 1973	\$35,011,164	32.4%	5658
Thu, 04 Sep 1975	\$29,039,550	31.4%	1634
Sun, 14 Aug 1977	\$48,935,508	50.8%	1625
Tue, 16 Jan 1979	\$48,932,125	97.9%	4749

Figure 16.27

The data under **Employees** is a traditional number, but when you format it using the **Number** preset, they will have unneeded decimal points that need to be taken out. If you select the comma style shown in **Figure 16.28** to add commas, it formats the number back to **Accounting**.

Day	Revenue	Market Share	# of Employees
Fri, 01 Jan 1960	\$12,899,322	48.8%	3,465.00
Fri, 03 Nov 1961	\$31,518,151	21.4%	4,063.00
Thu, 07 Feb 1963	\$64,223,239	18.4%	2,561.00
Fri, 14 Feb 1964	\$10,002,581	76.1%	1,373.00
Tue, 15 Jun 1965	\$69,237,092	59.3%	2,948.00
Mon, 22 May 1967	\$47,226,668	73.0%	4,261.00
Fri, 26 Jul 1968	\$10,572,564	36.2%	5,539.00
Wed, 17 Jun 1970	\$54,861,254	20.7%	3,034.00
Tue, 25 Jan 1972	\$71,258,848	20.8%	1,469.00
Wed, 03 Oct 1973	\$35,011,164	32.4%	5,658.00
Thu, 04 Sep 1975	\$29,039,550	31.4%	1,634.00
Sun, 14 Aug 1977	\$48,935,508	50.8%	1,625.00
Tue, 16 Jan 1979	\$48,932,125	97.9%	4,749.00

Figure 16.28

To include the comma without it changing it to the Accounting format, use the following steps:

1. Select the pop-out icon in the bottom-right corner of the Number section.
  - a. This will bring up the Format Cells dialog box.
2. Select the **Number** tab.
3. Make sure the **Use 1000 Separator ( , )** box is checked.
4. Set **Decimal Places** to **0**. (See **Figure 16.29**)
5. Select **OK**.
  - a. Excel will now include the numbers correctly, with a comma and no decimals.

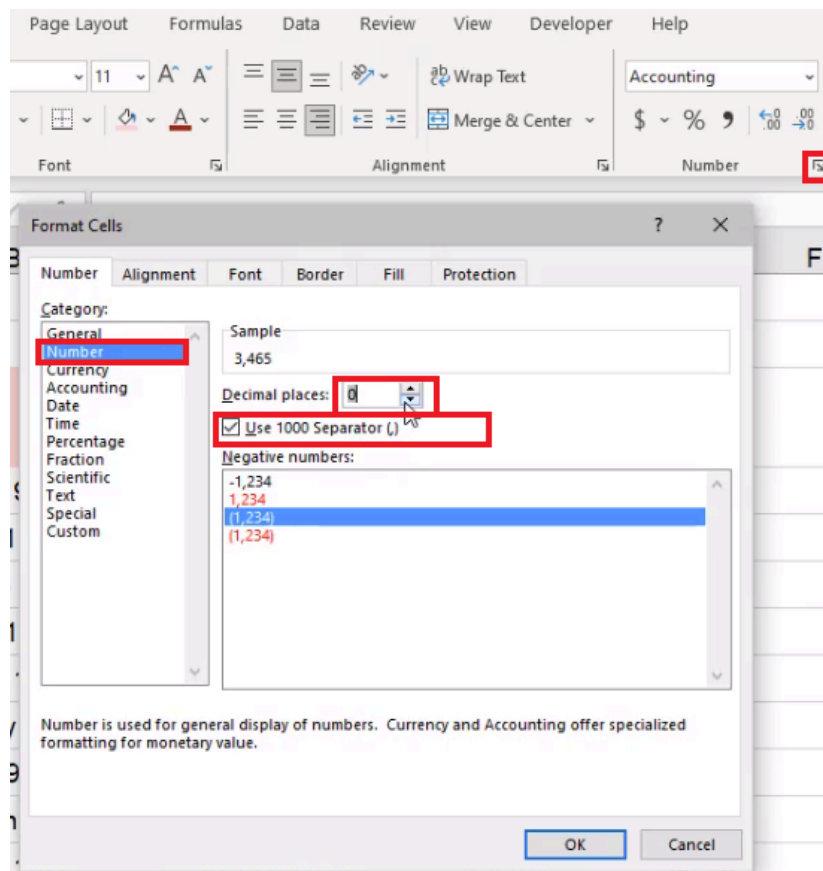


Figure 16.29

There are all sorts of things that you can do with Number Formatting. For example, if you have a negative number, you can determine how that number is displayed. Let's say that one of the percentages in the data is negative. You can make negative numbers show up in parentheses and in different colors. To do this, use the following steps:

1. Select the cell that you want to change the format in.
2. Use **Control + 1** (PC) or **Command + 1** (Mac) to get into the **Format Cells** dialog box.
3. Select the **Custom** tab.
4. Type `;/red)(0.0%)` after the original `0.0%`. (See **Figure 16.30**)
  - a. The semicolon lets Excel know that what comes after it is how you want the number to display if it's negative.
5. Select **OK**.
  - a. The negative number will show up in parentheses, and it will be red.
  - b. You may choose other colors, like blue or green, using this format as well.

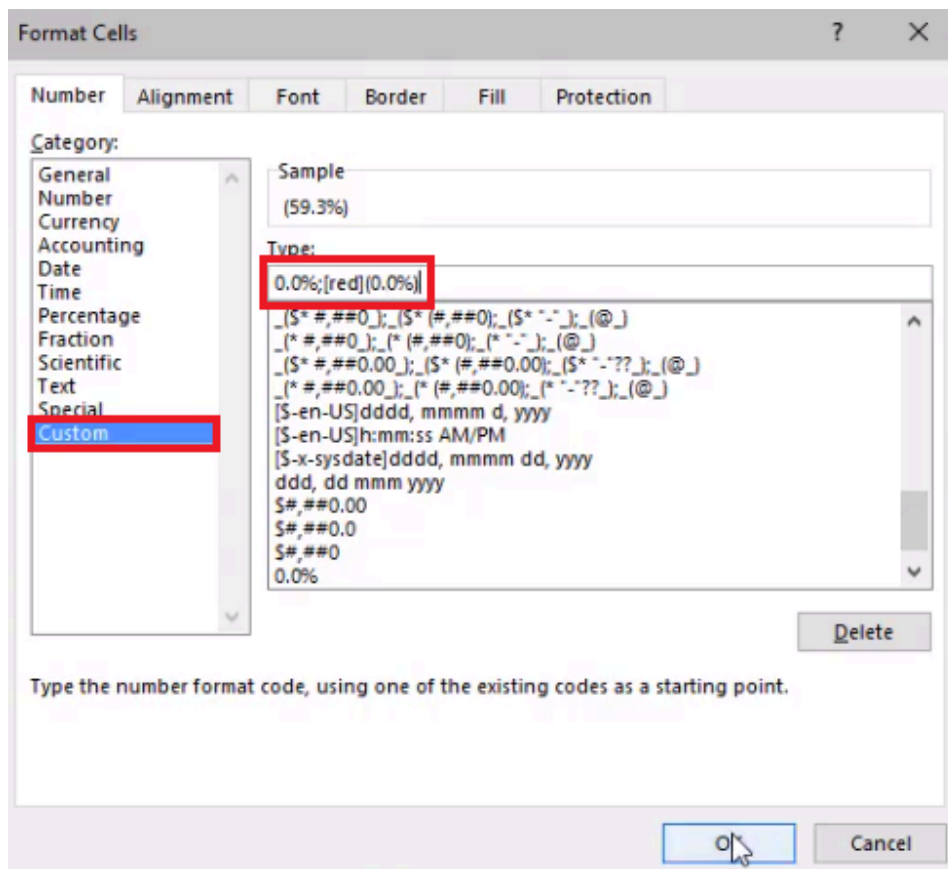


Figure 16.30

## More Professional Designs

There are several ways to make this table we are working on look more professional. The Page Layout tab lets you see the print area.

The View tab lets you uncheck the Gridline so that you don't see any of the gridlines in the worksheet. However, you may still want to see the gridlines that should be in the table.

To use borders to make those gridlines reappear in the table, use the following steps:

1. Select the entire table.
2. Select the **Home** tab.
3. Select the **Borders** dropdown menu.
  - a. This has all sorts of different border options.
4. Select **More Borders**. (See **Figure 16.31**)
  - a. This will take you to the Format Cells dialog box.

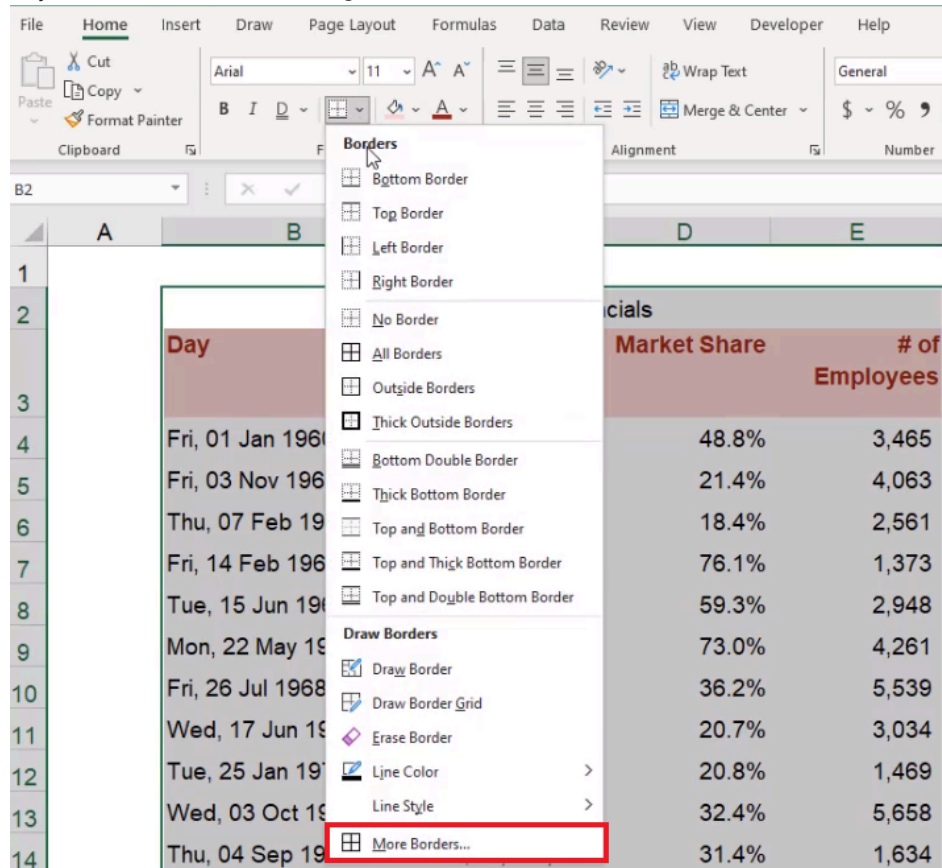


Figure 16.31

5. Select the **Color** dropdown menu and select **gray**.
6. Select **Outline** and **inside horizontal**. (See **Figure 16.32**)
7. Select **OK**.
  - a. The table will be formatted with a border and horizontal lines separating the data.

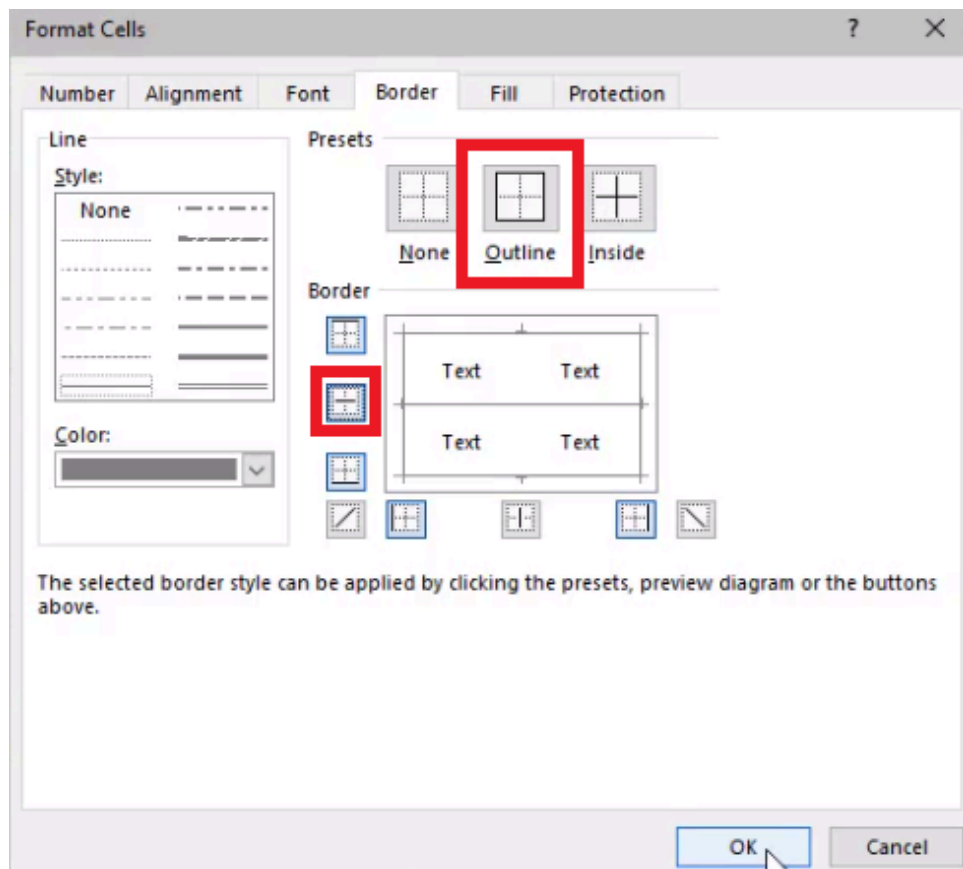


Figure 16.32

You can also change the thickness of the borders, which can be used to make the outside border thicker than the horizontal lines on the inside. When you put vertical borders into the table, you can adjust the width of each column to help the data fit. Wrap the text on the titles so it all fits together. Make the title of the table larger and adjust the width accordingly to help it stand out better. Add 1960–1979 to the title of the table. Because the fill color and text color of the column titles are shades of red, the text doesn't stand out very well. To fix this issue, change the fill color to a lighter gray and the text color to black.

## Cell Styles

These are just some of the formatting options that you can use in Excel. Much of this can be customized even further using Cell Styles on the right-hand side of the toolbar. (See **Figure 16.33**)

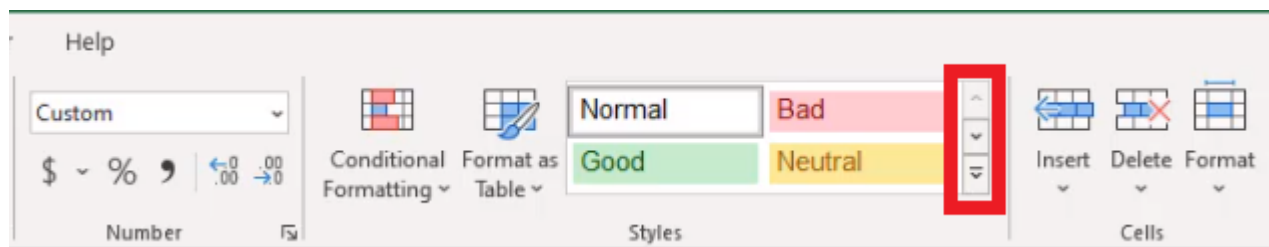


Figure 16.33

These Cell Styles allow you to quickly replicate or duplicate the same type of formatting across the workbook.

For example, if you want all of your headers to look the same, use the following steps:

1. Select the title of the table.
2. Select the Cell Styles dropdown menu. (See **Figure 16.33**)
3. Select the **Heading 1** option.
  - a. Excel will overwrite any existing formatting to use the Heading 1 Formatting.
4. Select the column titles.
5. Select **Heading 2**. (See **Figure 16.34**)
  - a. Excel will overwrite any existing formatting, and the result will be the same style and font as the title, but with smaller font size.

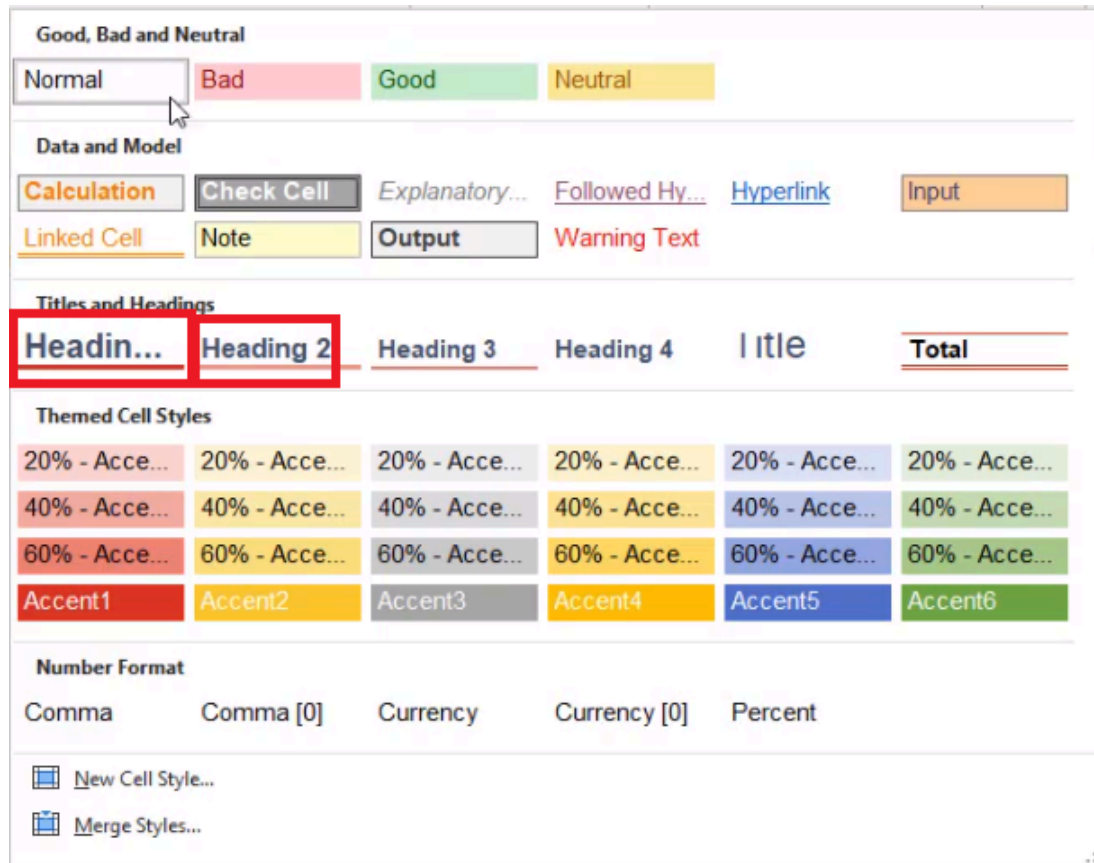


Figure 16.34

You may not like all of the styles, but there are some presets in the Cell Styles menu that can help save you time as you're seeking to format your data and make it look good.

You may notice that in the **Dates** column, the dates are all different widths because of the font. Arial is a variable-width font. This means that if there is an / instead of an F, it takes up less width. To fix this, you can use a fixed-width or mono-width font. Courier New is a fixed-width font. Using Courier New formats the dates to line up perfectly. This helps the content read more easily because the units will always line up: the ones, tens, hundreds, thousands, millions, and so on

The More Borders option provides a way to strikethrough in the middle. To do this, use the following steps:



1. Select the cell you want to have a strikethrough in.
2. Select the **Borders** dropdown menu.
3. Select **More Borders**. (See **Figure 16.31**)
  - a. This will take you to the Format Cells dialog box.
4. Select both of the diagonal inside borders. (See **Figure 16.35**)

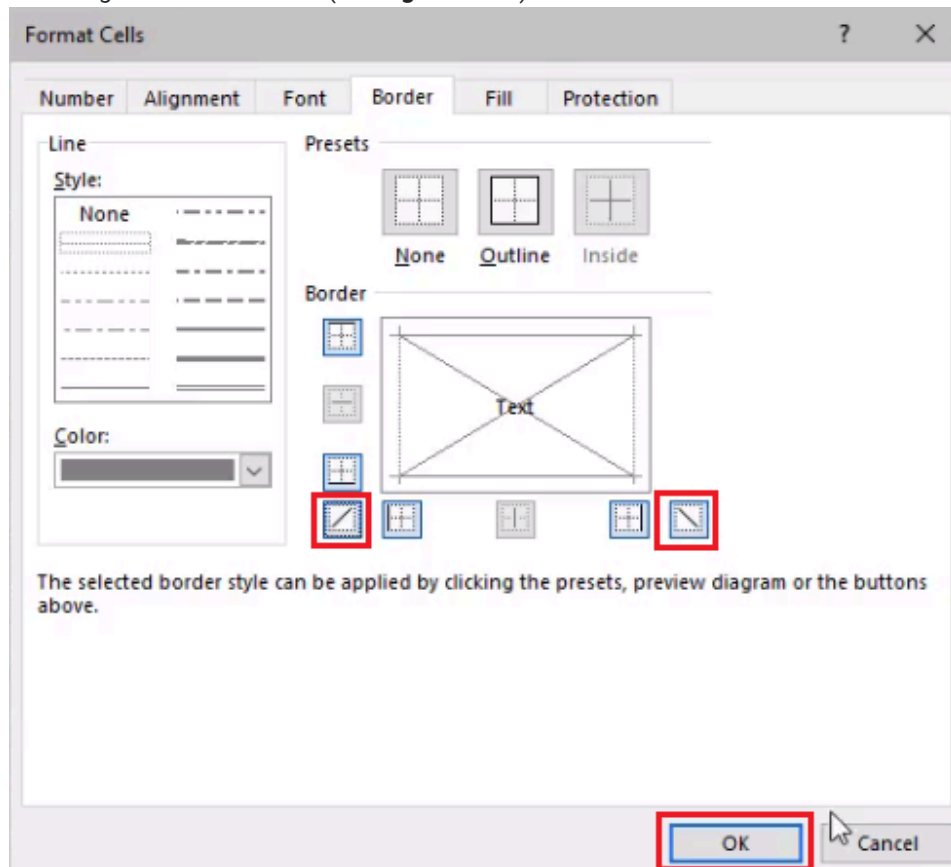


Figure 16.35

5. Select **OK**.
  - a. Excel will put an X through the data in that cell. (See **Figure 16.36**)

## Company financials, 1960 - 1979

Day	Revenue	Market Share	# of Employees
Fri, 01 Jan 1960	\$12,899,322	48.8%	3,465
Fri, 03 Nov 1961	\$31,518,151	21.4%	4,063
Thu, 07 Feb 1963	\$64,223,239	18.4%	2,561
Fri, 14 Feb 1964	\$10,002,581	76.1%	1,373
Tue, 15 Jun 1965	\$69,237,092	59.3%	2,948
Mon, 22 May 1967	\$47,226,668	73.0%	4,261
Fri, 26 Jul 1968	\$10,572,564	36.2%	5,539
Wed, 17 Jun 1970	\$54,861,254	20.7%	3,034
Tue, 25 Jan 1972	\$71,258,848	20.8%	1,469
Wed, 03 Oct 1973	\$35,011,164	32.4%	5,658
Thu, 04 Sep 1975	\$29,039,550	31.4%	1,634
Sun, 14 Aug 1977	\$48,935,508	50.8%	1,625
Tue, 16 Jan 1979	\$48,932,125	97.9%	4,749

Figure 16.36

## Format Painter

Another thing that is important to note is the Format Painter option.

Let's say that you really like the format in the strikethrough cell, but you don't want to go through the menu to get it again. To reproduce a format in another cell quickly, use the following steps:

1. Select the cell with the format you want to reproduce.
2. Select the **Format Painter** button. (See **Figure 16.37**)
3. Select another cell.
  - a. Excel will copy the formatting and reproduce it in that second cell.

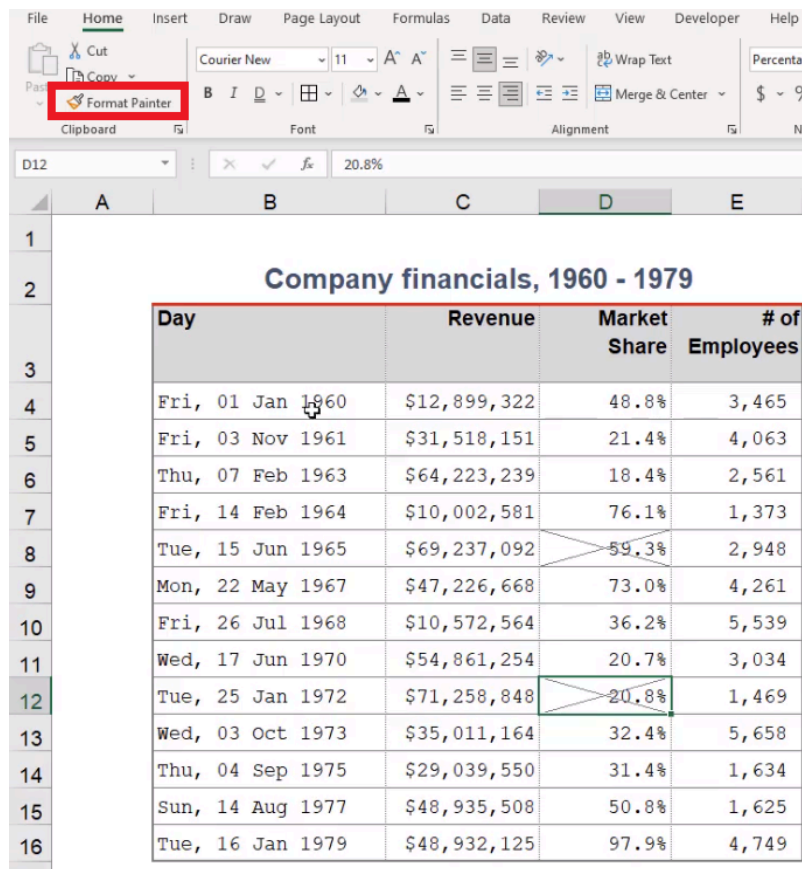


Figure 16.37

In the [Standards of Professionalism](#) chapter, we talked about alignment and how things should look. Review the chapter for information on text alignment and formatting. To some extent, formatting is a matter of personal preference, but you should always make sure that it's clear to the user what it is that they're looking at.

## Supplemental Resource



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