

Formatting a Worksheet

CASE

The corporate marketing managers at QST have requested data from all QST locations for advertising expenses incurred during the first quarter of this year. Grace Wong has created a worksheet listing this information. She asks you to format the worksheet to make it easier to read and to call attention to important data.

Unit Objectives

After completing this unit, you will be able to:

- Format values
- Change font and font size
- Change font styles and alignment
- Adjust the column width
- Insert and delete rows and columns
- Apply colors, patterns, and borders
- Apply conditional formatting
- Rename and move a worksheet
- Check spelling

Files You Will Need

EX C-1.xlsx
EX C-2.xlsx
EX C-3.xlsx
EX C-4.xlsx
EX C-5.xlsx

Format Values

Learning Outcomes

- Format a number
- Format a date
- Increase/decrease decimals

STEPS

The **format** of a cell determines how the labels and values look—for example, whether the contents appear boldfaced, italicized, or with dollar signs and commas. Formatting changes only the appearance of a value or label; it does not alter the actual data in any way. To format a cell or range, first you select it, then you apply the formatting using the Ribbon, Mini toolbar, or a keyboard shortcut. You can apply formatting before or after you enter data in a cell or range. **CASE** *Grace has provided you with a worksheet that details advertising expenses, and you're ready to improve its appearance and readability. You start by formatting some of the values so they are displayed as currency, percentages, and dates.*

QUICK TIP

You can use a different type of currency, such as Euros or British pounds, by clicking the Accounting Number Format list arrow, then clicking a different currency type.

QUICK TIP

Select any range of contiguous cells by clicking the upper-left cell of the range, pressing and holding [Shift], then clicking the lower-right cell of the range. Add a column to the selected range by continuing to hold down [Shift] and pressing ; add a row by pressing .

QUICK TIP

Make sure you examine formatted data to confirm that you have applied the appropriate formatting; for example, dates should not have a currency format, and monetary values should not have a date format.

1. Start Excel, open the file **EX C-1.xlsx** from the location where you store your Data Files, then save it as **EX C-QST Advertising Expenses**

This worksheet is difficult to interpret because all the information is crowded and looks the same. In some columns, the contents appear cut off because there is too much data to fit given the current column width. You decide not to widen the columns yet, because the other changes you plan to make might affect column width and row height. The first thing you want to do is format the data showing the cost of each ad.

2. Select the range **D4:D32**, then click the **Accounting Number Format button** in the **Number group on the HOME tab**

The default Accounting **number format** adds dollar signs and two decimal places to the data, as shown in **FIGURE C-1**. Formatting this data in Accounting format makes it clear that its values are monetary values. Excel automatically resizes the column to display the new formatting. The Accounting and Currency number formats are both used for monetary values, but the Accounting format aligns currency symbols and decimal points of numbers in a column.

3. Select the range **F4:H32**, then click the **Comma Style button** in the **Number group**

The values in columns F, G, and H display the Comma Style format, which does not include a dollar sign but can be useful for some types of accounting data.

4. Select the range **J4:J32**, click the **Number Format list arrow**, click **Percentage**, then click the **Increase Decimal button** in the **Number group**

The data in the % of Total column is now formatted with a percent sign (%) and three decimal places. The Number Format list arrow lets you choose from popular number formats and shows an example of what the selected cell or cells would look like in each format (when multiple cells are selected, the example is based on the first cell in the range). Each time you click the Increase Decimal button, you add one decimal place; clicking the button twice would add two decimal places.

5. Click the **Decrease Decimal button** in the **Number group twice**

Two decimal places are removed from the percentage values in column J.

6. Select the range **B4:B31**, then click the **dialog box launcher** in the **Number group**

The Format Cells dialog box opens with the Date category already selected on the Number tab.

7. Select the first **14-Mar-12 format** in the **Type list box** as shown in **FIGURE C-2**, then click **OK**

The dates in column B appear in the 14-Mar-12 format. The second 14-Mar-12 format in the list (visible if you scroll down the list) displays all days in two digits (it adds a leading zero if the day is only a single-digit number), while the one you chose displays single-digit days without a leading zero.

8. Select the range **C4:C31**, right-click the **range**, click **Format Cells** on the shortcut menu, click **14-Mar** in the **Type list box** in the **Format Cells dialog box**, then click **OK**

Compare your worksheet to **FIGURE C-3**.

9. Press **[Ctrl][Home]**, then save your work

FIGURE C-1: Accounting number format applied to range

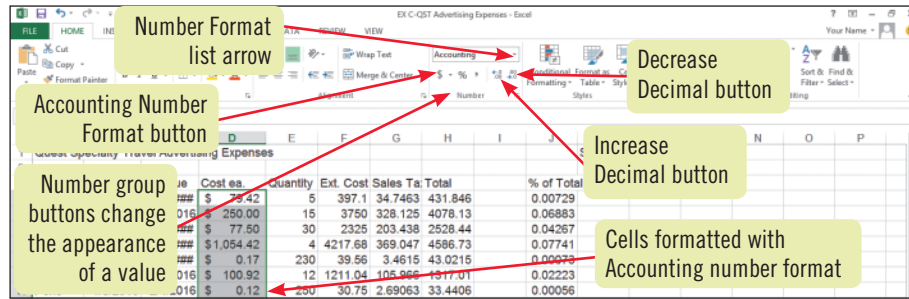


FIGURE C-2: Format Cells dialog box

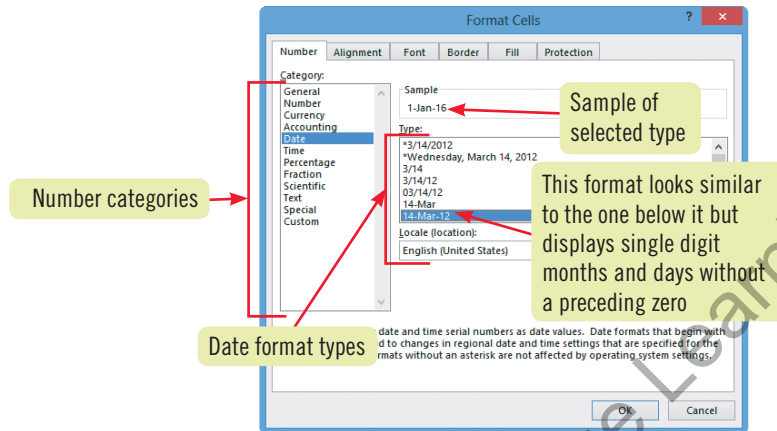
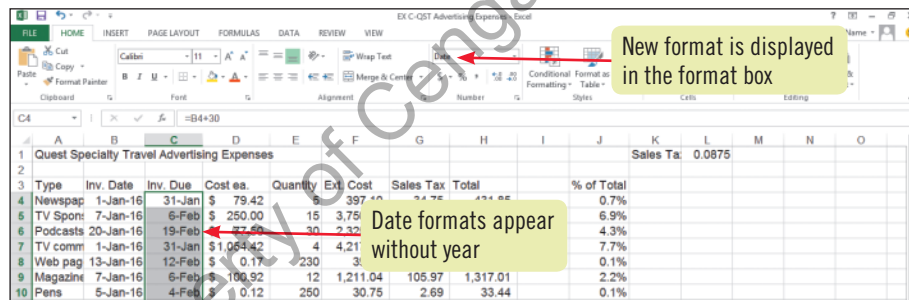


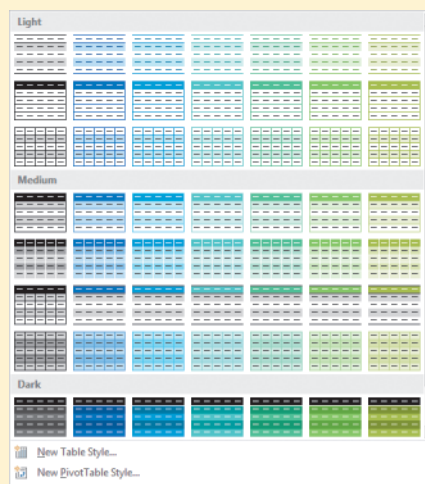
FIGURE C-3: Worksheet with formatted values



Formatting as a table

Excel includes 60 predefined **table styles** to make it easy to format selected worksheet cells as a table. You can apply table styles to any range of cells that you want to format quickly, or even to an entire worksheet, but they're especially useful for those ranges with labels in the left column and top row, and totals in the bottom row or right column. To apply a table style, select the data to be formatted or click anywhere within the intended range (Excel can automatically detect a range of cells filled with data), click the Format as Table button in the Styles group on the HOME tab, then click a style in the gallery, as shown in **FIGURE C-4**. Table styles are organized in three categories: Light, Medium, and Dark. Once you click a style, Excel asks you to confirm the range selection, then applies the style. Once you have formatted a range as a table, you can use Live Preview to preview the table in other styles by pointing to any style in the Table Styles gallery.


FIGURE C-4: Table Styles gallery



Change Font and Font Size

Learning Outcomes

- Change a font
- Change a font size
- Use the Mini toolbar

A **font** is the name for a collection of characters (letters, numbers, symbols, and punctuation marks) with a similar, specific design. The **font size** is the physical size of the text, measured in units called points. A **point** is equal to 1/72 of an inch. The default font and font size in Excel is 11-point Calibri. **TABLE C-1** shows several fonts in different font sizes. You can change the font and font size of any cell or range using the Font and Font Size list arrows. The Font and Font Size list arrows appear on the HOME tab on the Ribbon and on the Mini toolbar, which opens when you right-click a cell or range. **CASE**  You want to change the font and font size of the labels and the worksheet title so that they stand out more from the data.

STEPS

QUICK TIP

When you point to an option in the Font or Font Size list, Live Preview shows the selected cells with the option temporarily applied.

QUICK TIP

You can format an entire row by clicking the row indicator button to select the row before formatting (or select an entire column by clicking the column indicator button before formatting).

QUICK TIP

To quickly move to a font in the Font list, type the first few characters of its name.

1. Click the **Font list arrow** in the Font group on the HOME tab, scroll down in the Font list to see an alphabetical listing of the fonts available on your computer, then click **Times New Roman**, as shown in **FIGURE C-5**
The font in cell A1 changes to Times New Roman. Notice that the font names on the list are displayed in the font they represent.
2. Click the **Font Size list arrow** in the Font group, then click **20**
The worksheet title appears in 20-point Times New Roman, and the Font and Font Size list boxes on the HOME tab display the new font and font size information.
3. Click the **Increase Font Size button**  in the Font group twice
The font size of the title increases to 24 point.
4. Select the range **A3:J3**, right-click, then click the **Font list arrow** on the Mini toolbar
The Mini toolbar includes the most commonly used formatting tools, so it's great for making quick formatting changes.
5. Scroll down in the Font list and click **Times New Roman**, click the **Font Size list arrow** on the Mini toolbar, then click **14**
The Mini toolbar closes when you move the pointer away from the selection. Compare your worksheet to **FIGURE C-6**. Notice that some of the column labels are now too wide to appear fully in the column. Excel does not automatically adjust column widths to accommodate cell formatting; you have to adjust column widths manually. You'll learn to do this in a later lesson.
6. Save your work

TABLE C-1: Examples of fonts and font sizes

font	12 point	24 point
Calibri	Excel	Excel
Playbill	Excel	Excel
Comic Sans MS	Excel	Excel
Times New Roman	Excel	Excel

FIGURE C-5: Font list

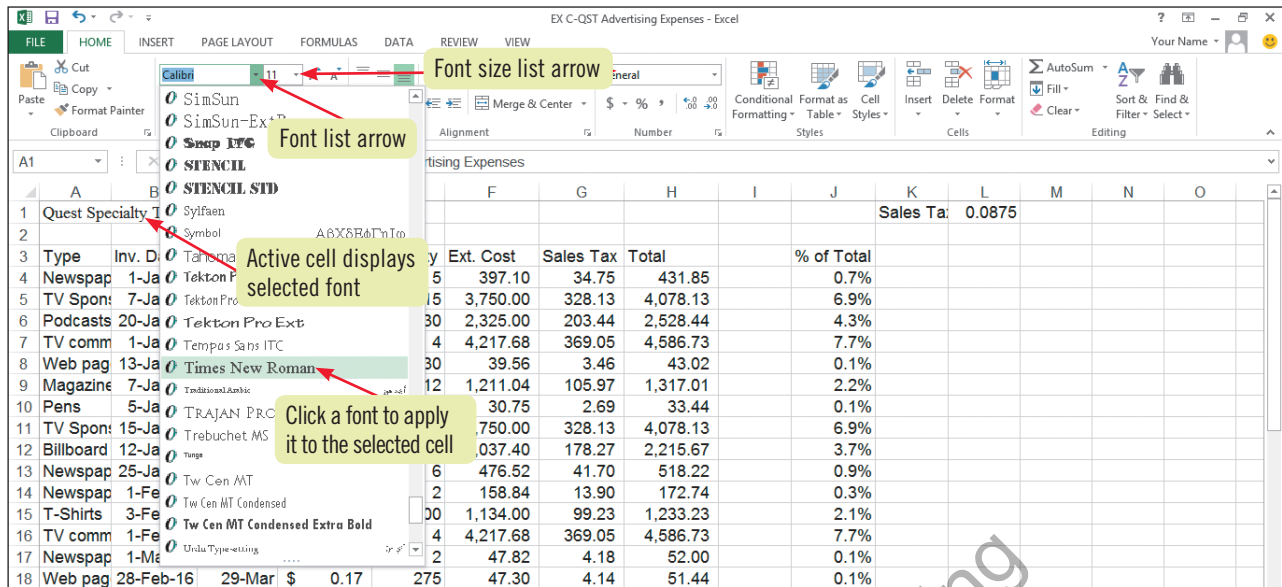
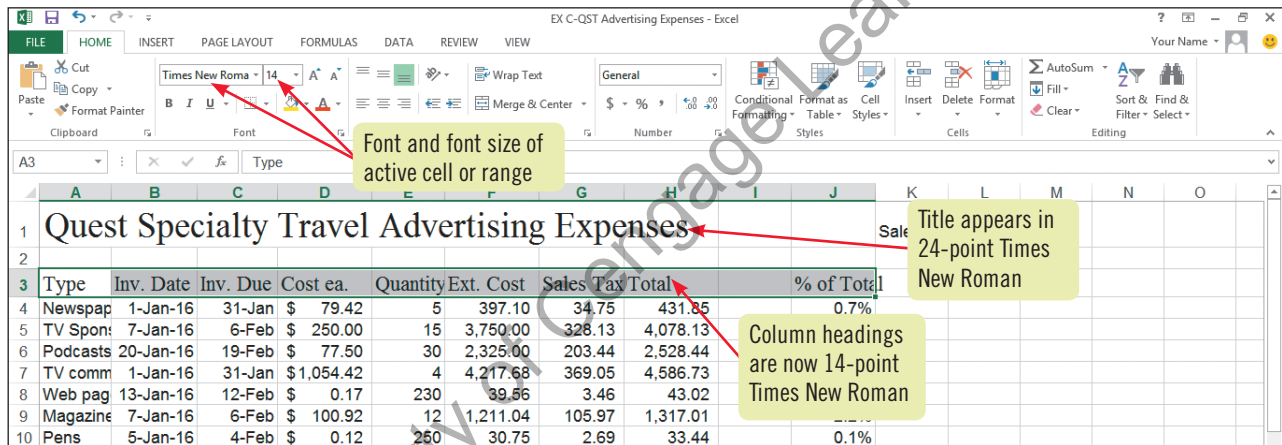


FIGURE C-6: Worksheet with formatted title and column labels



Inserting and adjusting online pictures and other images

You can illustrate your worksheets using online pictures and other images. Office.com makes many photos and animations available for your use. To add a picture to a worksheet, click the Online Pictures button in the Illustrations group on the INSERT tab. The Insert Pictures window opens. Here you can search for online pictures (or Clip Art) in Office.com, through the Bing search engine, or on your SkyDrive by typing one or more **keywords** (words related to your subject) in the appropriate Search text box, then click [Enter]. For example, pictures that relate to the keyword house in a search of Office.com appear in the Office.com window, as shown in **FIGURE C-7**. When you double-click the image you want in the window, the image is inserted at the location of the active cell. To add images on your computer (or computers on your network) to a worksheet, click the INSERT tab on the Ribbon, then click the Pictures button in the Illustrations group. Navigate to the file you want, then click Insert. To resize an


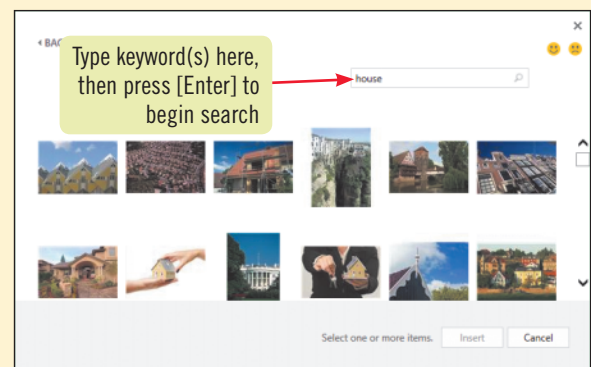
image, drag any corner sizing handle. To move an image, point inside the clip until the pointer changes to , then drag it to a new location.

FIGURE C-7: Results of Online Picture search



Change Font Styles and Alignment

Learning Outcomes

- Apply formatting
- Use the Format Painter
- Change cell alignment

Font styles are formats such as bold, italic, and underlining that you can apply to affect the way text and numbers look in a worksheet. You can also change the **alignment** of labels and values in cells to position them in relation to the cells' edges—such as left-aligned, right-aligned, or centered. You can apply font styles and alignment options using the HOME tab, the Format Cells dialog box, or the Mini toolbar. See **TABLE C-2** for a description of common font style and alignment buttons that are available on the HOME tab and the Mini toolbar. Once you have formatted a cell the way you want it, you can “paint” or copy the cell's formats into other cells by using the Format Painter button in the Clipboard group on the HOME tab. This is similar to using copy and paste, but instead of copying cell contents, it copies only the cell's formatting. **CASE** ▶ You want to further enhance the worksheet's appearance by adding bold and underline formatting and centering some of the labels.

STEPS


QUICK TIP

You can use the following keyboard shortcuts to format a selected cell or range: [Ctrl][B] to bold, [Ctrl][I] to italicize, and [Ctrl][U] to underline.

QUICK TIP

Overuse of any font style and random formatting can make a workbook difficult to read. Be consistent and add the same formatting to similar items throughout a worksheet or in related worksheets.

QUICK TIP

To clear all formatting from a selected range, click the Clear button  in the Editing group on the HOME tab, then click Clear Formats.











1. Press [Ctrl][Home], then click the **Bold button**  in the Font group on the HOME tab
The title in cell A1 appears in bold.
2. Click cell A3, then click the **Underline button**  in the Font group
The column label is now underlined, though this may be difficult to see with the cell selected.
3. Click the **Italic button**  in the Font group, then click 
The heading now appears in boldface, underlined, italic type. Notice that the Bold, Italic, and Underline buttons in the Font group are all selected.
4. Click the **Italic button**  to deselect it
The italic font style is removed from cell A3, but the bold and underline font styles remain.
5. Click the **Format Painter button**  in the Clipboard group, then select the range B3:J3
The formatting in cell A3 is copied to the rest of the column labels. To paint the formats on more than one selection, double-click the Format Painter button to keep it activated until you turn it off. You can turn off the Format Painter by pressing [Esc] or by clicking . You decide the title would look better if it were centered over the data columns.
6. Select the range A1:H1, then click the **Merge & Center button**  in the Alignment group
The Merge & Center button creates one cell out of the eight cells across the row, then centers the text in that newly created, merged cell. The title “Quest Specialty Travel Advertising Expenses” is centered across the eight columns you selected. To split a merged cell into its original components, select the merged cell, then click the Merge & Center button to deselect it. The merged and centered text might look awkward now, but you'll be changing the column widths shortly. Occasionally, you may find that you want cell contents to wrap within a cell. You can do this by selecting the cells containing the text you want to wrap, then clicking the Wrap Text button  in the Alignment group on the HOME tab on the Ribbon.
7. Select the range A3:J3, right-click, then click the **Center button**  on the Mini toolbar
Compare your screen to **FIGURE C-8**. Although they may be difficult to read, notice that all the headings are centered within their cells.
8. Save your work

FIGURE C-8: Worksheet with font styles and alignment applied

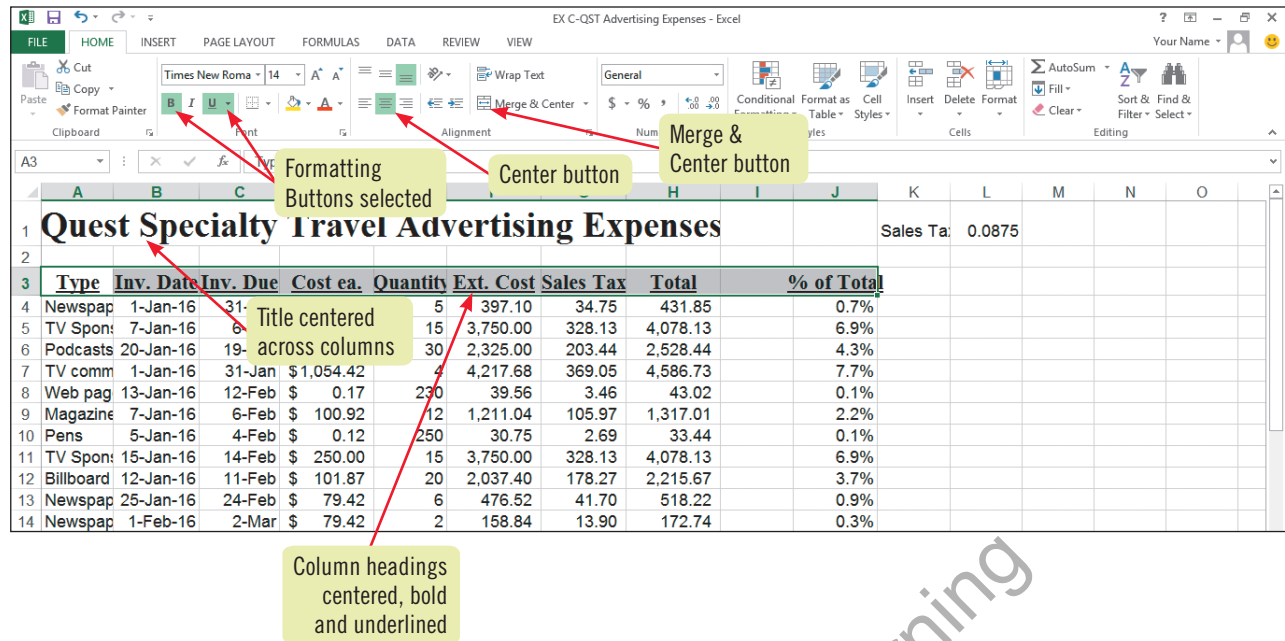


TABLE C-2: Common font style and alignment buttons

button	description
	Bolds text
	Italicizes text
	Underlines text
	Centers text across columns, and combines two or more selected, adjacent cells into one cell
	Aligns text at the left edge of the cell
	Centers text horizontally within the cell
	Aligns text at the right edge of the cell
	Wraps long text into multiple lines

Rotating and indenting cell entries

In addition to applying fonts and font styles, you can rotate or indent data within a cell to further change its appearance. You can rotate text within a cell by altering its alignment. To change alignment, select the cells you want to modify, then click the dialog box launcher in the Alignment group to open the Alignment tab of the Format Cells dialog box. Click a position in

the Orientation box or type a number in the Degrees text box to rotate text from its default horizontal orientation, then click OK. You can indent cell contents using the Increase Indent button in the Alignment group, which moves cell contents to the right one space, or the Decrease Indent button , which moves cell contents to the left one space.


Adjust the Column Width

Learning Outcomes


- Change a column width by dragging
- Resize a column with AutoFit
- Change the width of multiple columns

STEPS

As you format a worksheet, you might need to adjust the width of one or more columns to accommodate changes in the amount of text, the font size, or font style. The default column width is 8.43 characters, a little less than 1". With Excel, you can adjust the width of one or more columns by using the mouse, the Format button in the Cells group on the HOME tab, or the shortcut menu. Using the mouse, you can drag or double-click the right edge of a column heading. The Format button and shortcut menu include commands for making more precise width adjustments. **TABLE C-3** describes common column formatting commands. **CASE** You have noticed that some of the labels in columns A through J don't fit in the cells. You want to adjust the widths of the columns so that the labels appear in their entirety.

1. **Position the mouse pointer on the line between the column A and column B headings until it changes to **

See **FIGURE C-9**. The **column heading** is the box at the top of each column containing a letter. Before you can adjust column width using the mouse, you need to position the pointer on the right edge of the column heading for the column you want to adjust. The cell entry "TV commercials" is the widest in the column.

2. **Click and drag the  to the right until the column displays the "TV commercials" cell entries fully (approximately 15.29 characters, 1.23", or 112 pixels)**

As you change the column width, a ScreenTip is displayed listing the column width. In Normal view, the ScreenTip lists the width in characters and pixels; in Page Layout view, the ScreenTip lists the width in inches and pixels.

3. **Position the pointer on the line between columns B and C until it changes to , then double-click**

Double-clicking the right edge of a column heading activates the **AutoFit** feature, which automatically resizes the column to accommodate the widest entry in the column. Column B automatically widens to fit the widest entry, which is the column label "Inv. Date".

4. **Use AutoFit to resize columns C, D, and J**

5. **Select the range E5:H5**

You can change the width of multiple columns at once, by first selecting either the column headings or at least one cell in each column.

6. **Click the **Format** button in the Cells group, then click **Column Width****

The Column Width dialog box opens. Column width measurement is based on the number of characters that will fit in the column when formatted in the Normal font and font size (in this case, 11 pt Calibri).

7. **Drag the dialog box by its title bar if its placement obscures your view of the worksheet, type 11 in the Column width text box, then click **OK****

The widths of columns E, F, G, and H change to reflect the new setting. See **FIGURE C-10**.

8. **Save your work**

QUICK TIP

If "#####" appears after you adjust a column of values, the column is too narrow to display the values completely; increase the column width until the values appear.

QUICK TIP

If an entire column rather than a column cell is selected, you can change the width of the column by right-clicking the column heading, then clicking Column Width on the shortcut menu.

FIGURE C-9: Preparing to change the column width

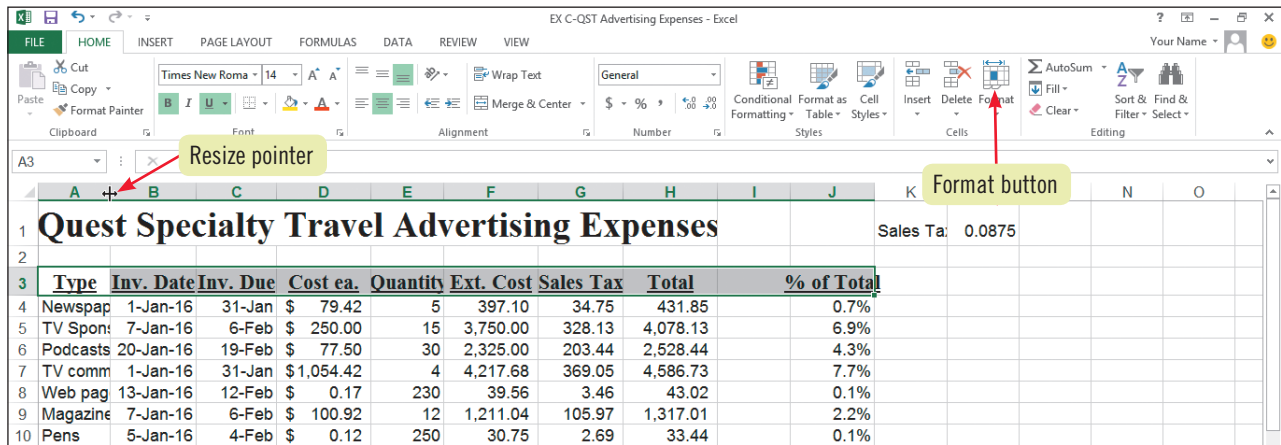


FIGURE C-10: Worksheet with column widths adjusted

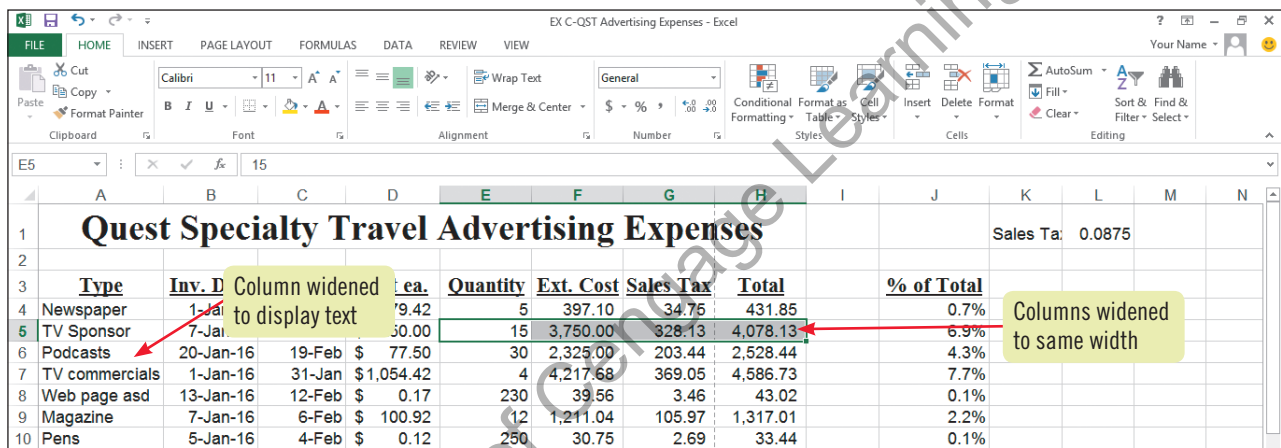



TABLE C-3: Common column formatting commands

command	description	available using
Column Width	Sets the width to a specific number of characters	Format button; shortcut menu
AutoFit Column Width	Fits to the widest entry in a column	Format button; mouse
Hide & Unhide	Hides or displays hidden column(s)	Format button; shortcut menu
Default Width	Resets column to worksheet's default column width	Format button

Changing row height


Changing row height is as easy as changing column width. Row height is calculated in points, the same units of measure used for fonts. The row height must exceed the size of the font you are using. Normally, you don't need to adjust row heights manually, because row heights adjust automatically to accommodate font size changes. If you format something in a row to be a larger point size, Excel adjusts the row to fit the largest point size in the row. However, you have just as many options for changing row

height as you do column width. Using the mouse, you can place the  pointer on the line dividing a row heading from the heading below, and then drag to the desired height; double-clicking the line AutoFits the row height where necessary. You can also select one or more rows, then use the Row Height command on the shortcut menu, or click the Format button on the HOME tab and click the Row Height or AutoFit Row Height command.

Insert and Delete Rows and Columns

Learning Outcomes

- Use the Insert dialog box
- Use column and row heading buttons to insert and delete

As you modify a worksheet, you might find it necessary to insert or delete rows and columns to keep your worksheet current. For example, you might need to insert rows to accommodate new inventory products or remove a column of yearly totals that are no longer necessary. When you insert a new row, the row is inserted above the cell pointer and the contents of the worksheet shift down from the newly inserted row. When you insert a new column, the column is inserted to the left of the cell pointer and the contents of the worksheet shift to the right of the new column. To insert multiple rows, select the same number of row headings as you want to insert before using the Insert command. **CASE**  You want to improve the overall appearance of the worksheet by inserting a row between the last row of data and the totals. Also, you have learned that row 27 and column J need to be deleted from the worksheet.

STEPS

QUICK TIP

To insert a single row or column, right-click the row heading immediately below where you want the new row, or right-click the column heading to the right of where you want the new column, then click Insert on the shortcut menu.

QUICK TIP

If you inadvertently click the Delete list arrow instead of the button itself, click Delete Sheet Rows in the menu that opens.


QUICK TIP

After inserting or deleting rows or columns in a worksheet, be sure to proof formulas that contain relative cell references.

1. Right-click cell A32, then click Insert on the shortcut menu

The Insert dialog box opens. See **FIGURE C-11**. You can choose to insert a column or a row; insert a single cell and shift the cells in the active column to the right; or insert a single cell and shift the cells in the active row down. An additional row between the last row of data and the totals will visually separate the totals.

2. Click the Entire row option button, then click OK

A blank row appears between the Billboard data and the totals, and the formula result in cell E33 has not changed. The Insert Options button  appears beside cell A33. Pointing to the button displays a list arrow, which you can click and then choose from the following options: Format Same As Above (the default setting, already selected), Format Same As Below, or Clear Formatting.

3. Click the row 27 heading

All of row 27 is selected, as shown in **FIGURE C-12**.

4. Click the Delete button in the Cells group; do not click the list arrow

Excel deletes row 27, and all rows below it shift up one row. You must use the Delete button or the Delete command on the shortcut menu to delete a row or column; pressing [Delete] on the keyboard removes only the *contents* of a selected row or column.

5. Click the column J heading

The percentage information is calculated elsewhere and is no longer necessary in this worksheet.

6. Click the Delete button in the Cells group

Excel deletes column J. The remaining columns to the right shift left one column.

7. Use AutoFit to resize columns F and H, then save your work

FIGURE C-11: Insert dialog box

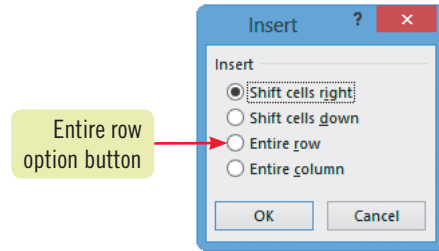
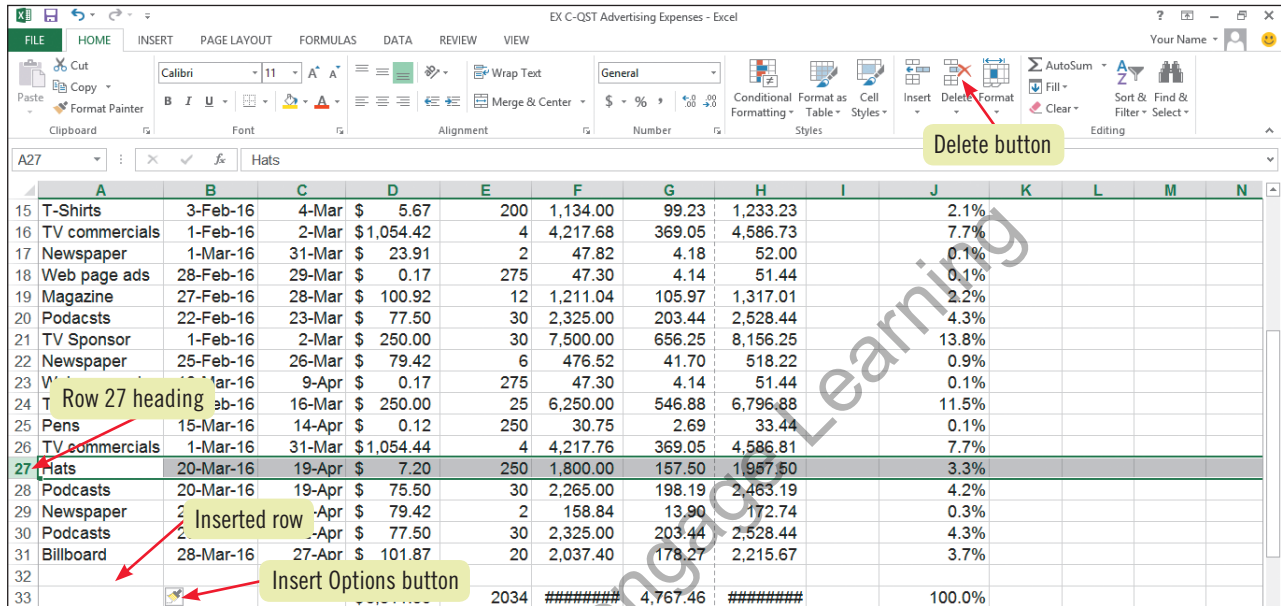


FIGURE C-12: Worksheet with row 27 selected



Hiding and unhiding columns and rows

When you don't want data in a column or row to be visible, but you don't want to delete it, you can hide the column or row. To hide a selected column, click the Format button in the Cells group on the HOME tab, point to Hide & Unhide, then click Hide Columns. A hidden column is indicated by a dark green vertical line in its original position. This green line disappears when you

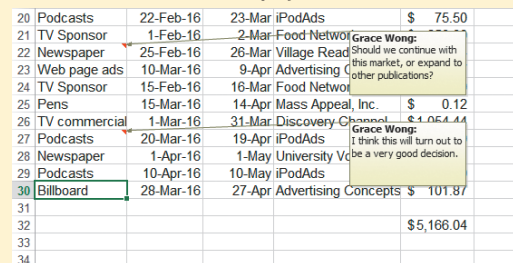
click elsewhere in the worksheet. You can display a hidden column by selecting the columns on either side of the hidden column, clicking the Format button in the Cells group, pointing to Hide & Unhide, and then clicking Unhide Columns. (To hide or unhide one or more rows, substitute Hide Rows and Unhide Rows for the Hide Columns and Unhide Columns commands.)

Adding and editing comments

Much of your work in Excel may be in collaboration with teammates with whom you share worksheets. You can share ideas with other worksheet users by adding comments within selected cells. To include a comment in a worksheet, click the cell where you want to place the comment, click the REVIEW tab on the Ribbon, then click the New Comment button in the Comments group. You can type your comments in the resizable text box that opens containing the computer user's name. A small, red triangle appears in the upper-right corner of a cell containing a comment. If comments are not already displayed in a workbook, other users can point to the triangle to display the comment. To see all worksheet comments, as shown in **FIGURE C-13**, click the Show All Comments button in the Comments group. To edit a

comment, click the cell containing the comment, then click the Edit Comment button in the Comments group. To delete a comment, click the cell containing the comment, then click the Delete button in the Comments group.


FIGURE C-13: Comments displayed in a worksheet






Apply Colors, Patterns, and Borders

Learning Outcomes

- Use Live Preview to apply color to cells
- Format cells using the shortcut menu
- Apply a border and pattern to a cell

You can use colors, patterns, and borders to enhance the overall appearance of a worksheet and make it easier to read. You can add these enhancements by using the Borders, Font Color, and Fill Color buttons in the Font group on the HOME tab of the Ribbon and on the Mini toolbar, or by using the Fill tab and the Border tab in the Format Cells dialog box. You can open the Format Cells dialog box by clicking the dialog box launcher in the Font, Alignment, or Number group on the HOME tab, or by right-clicking a selection, then clicking Format Cells on the shortcut menu. You can apply a color to the background of a cell or a range or to cell contents (such as letters and numbers), and you can apply a pattern to a cell or range. You can apply borders to all the cells in a worksheet or only to selected cells to call attention to selected information. To save time, you can also apply **cell styles**, predesigned combinations of formats. **CASE**  You want to add a pattern, a border, and color to the title of the worksheet to give the worksheet a more professional appearance.

STEPS

1. Select cell **A1**, click the **Fill Color list arrow**  in the Font group, then hover the pointer over the **Turquoise, Accent 2 color** (first row, sixth column from the left)
See **FIGURE C-14**. Live Preview shows you how the color will look *before* you apply it. (Remember that cell A1 spans columns A through H because the Merge & Center command was applied.)
2. Click the **Turquoise, Accent 2 color**
The color is applied to the background (or fill) of this cell. When you change fill or font color, the color on the Fill Color or Font Color button changes to the last color you selected.
3. Right-click cell **A1**, then click **Format Cells** on the shortcut menu
The Format Cells dialog box opens.
4. Click the **Fill tab**, click the **Pattern Style list arrow**, click the **6.25% Gray style** (first row, sixth column from the left), then click **OK**
5. Click the **Borders list arrow**  in the Font group, then click **Thick Bottom Border**
Unlike underlining, which is a text-formatting tool, borders extend to the width of the cell, and can appear at the bottom of the cell, at the top, on either side, or on any combination of the four sides. It can be difficult to see a border when the cell is selected.
6. Select the range **A3:H3**, click the **Font Color list arrow**  in the Font group, then click the **Blue, Accent 1 color** (first Theme color row, fifth column from the left) on the palette
The new color is applied to the labels in the selected range.
7. Select the range **J1:K1**, click the **Cell Styles button** in the Styles group, click the **Neutral cell style** (first row, fourth column from the left) in the gallery, then AutoFit column J
The font and color change in the range is shown in **FIGURE C-15**.
8. Save your work

QUICK TIP

Use fill colors and patterns sparingly. Too many colors can be distracting or make it hard to see which information is important.

QUICK TIP

You can also create custom cell borders. Click the Borders list arrow in the Font group, click More Borders, then click the individual border buttons to apply the borders you want to the selected cell(s).

FIGURE C-14: Live Preview of fill color

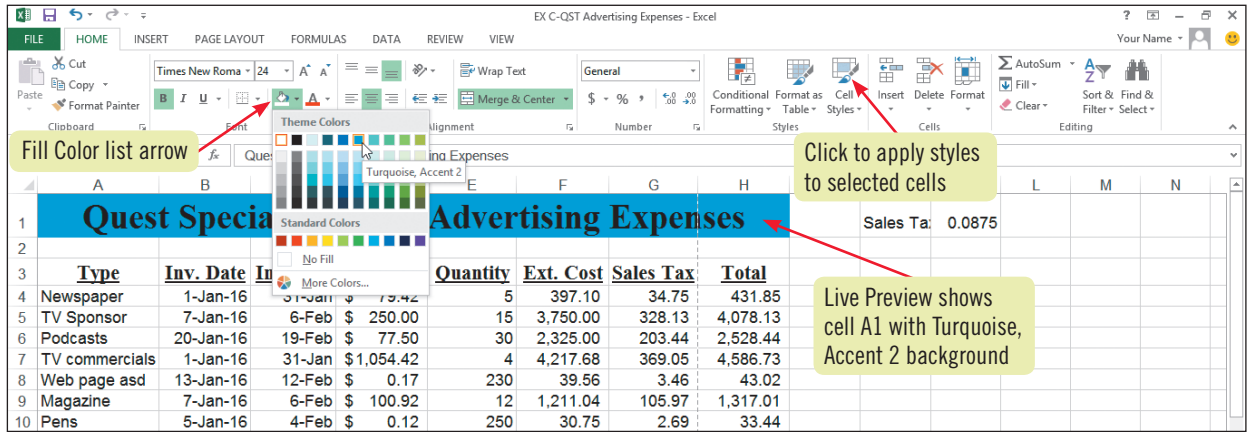
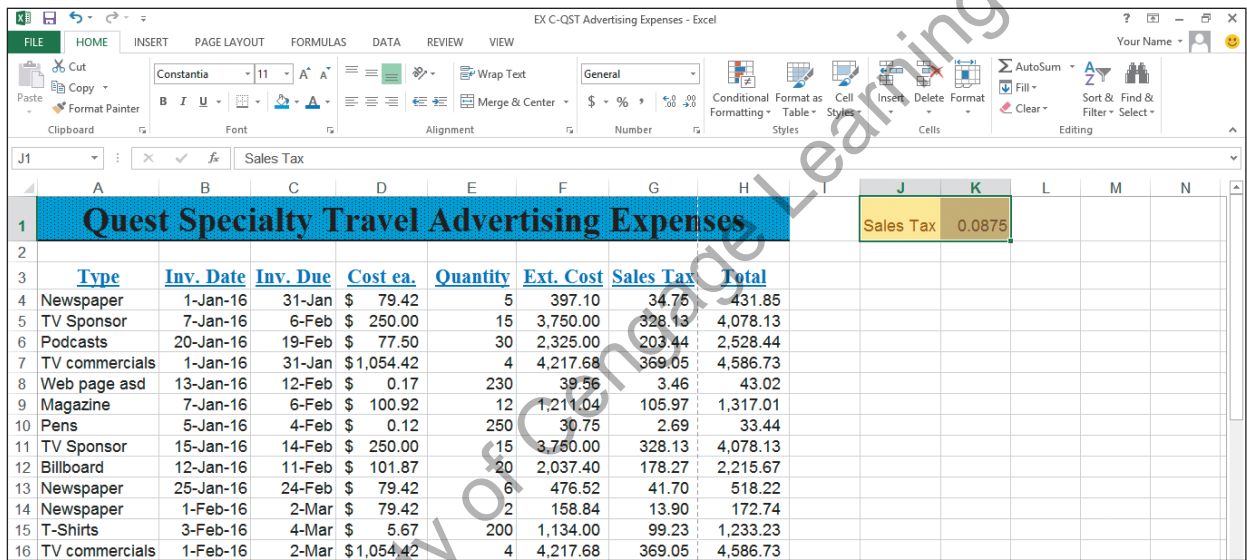


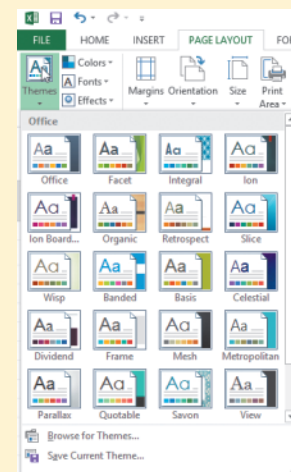
FIGURE C-15: Worksheet with color, patterns, border, and cell style applied



Working with themes and cell styles

Using themes and cell styles makes it easier to ensure that your worksheets are consistent. A **theme** is a predefined set of formats that gives your Excel worksheet a professional look. Formatting choices included in a theme are colors, fonts, and line and fill effects. To apply a theme, click the Themes button in the Themes group on the PAGE LAYOUT tab to open the Themes gallery, as shown in **FIGURE C-16**, then click a theme in the gallery. **Cell styles** are sets of cell formats based on themes, so they are automatically updated if you change a theme. For example, if you apply the 20% - Accent1 cell style to cell A1 in a worksheet that has no theme applied, the fill color changes to light blue with no pattern, and the font changes to Constantia. If you change the theme of the worksheet to Ion Boardroom, cell A1's fill color changes to red and the font changes to Century Gothic, because these are the new theme's associated formats.

FIGURE C-16: Themes gallery



Apply Conditional Formatting

Learning Outcomes

- Create conditional formatting in a range
- Change formatting and parameters in conditional formatting

So far, you've used formatting to change the appearance of different types of data, but you can also use formatting to highlight important aspects of the data itself. For example, you can apply formatting that changes the font color to red for any cells where ad costs exceed \$100 and to green where ad costs are below \$50. This is called **conditional formatting** because Excel automatically applies different formats to data if the data meets conditions you specify. The formatting is updated if you change data in the worksheet. You can also copy conditional formats the same way you copy other formats. **CASE** *Grace is concerned about advertising costs exceeding the yearly budget. You decide to use conditional formatting to highlight certain trends and patterns in the data so that it's easy to spot the most expensive advertising.*

STEPS

QUICK TIP

You can also use the Quick Analysis tool to create data bars, but with fewer choices.

QUICK TIP

You can apply an Icon Set to a selected range by clicking the Conditional Formatting button in the Styles group, then pointing to Icon Sets; icons appear within the cells to illustrate differences in values.

QUICK TIP

To define custom formatting for data that meets the condition, click Custom Format at the bottom of the with list, and then use the Format Cells dialog box to set the formatting to be applied.

1. **Select the range H4:H30, click the Conditional Formatting button in the Styles group on the HOME tab, point to Data Bars, then point to the Light Blue Data Bar (second row, second from left)**
Data bars are colored horizontal bars that visually illustrate differences between values in a range of cells. Live Preview shows how this formatting will appear in the worksheet, as shown in **FIGURE C-17**.
2. **Point to the Green Data Bar (first row, second from left), then click it**
3. **Select the range F4:F30, click the Conditional Formatting button in the Styles group, then point to Highlight Cells Rules**
The Highlight Cells Rules submenu displays choices for creating different formatting conditions. For example, you can create a rule for values that are greater than or less than a certain amount, or between two amounts.
4. **Click Between on the submenu**
The Between dialog box opens, displaying input boxes you can use to define the condition and a default format (Light Red Fill with Dark Red Text) selected for cells that meet that condition. Depending on the condition you select in the Highlight Cells Rules submenu (such as "Greater Than" or "Less Than"), this dialog box displays different input boxes. You define the condition using the input boxes and then assign the formatting you want to use for cells that meet that condition. Values used in input boxes for a condition can be constants, formulas, cell references, or dates.
5. **Type 2000 in the first text box, type 4000 in the second text box, click the with list arrow, click Light Red Fill, compare your settings to FIGURE C-18, then click OK**
All cells with values between 2000 and 4000 in column F appear with a light red fill.
6. **Click cell F7, type 3975.55, then press [Enter]**
When the value in cell F7 changes, the formatting also changes because the new value meets the condition you set. Compare your results to **FIGURE C-19**.
7. **Press [Ctrl][Home] to select cell A1, then save your work**

FIGURE C-17: Previewing data bars in a range

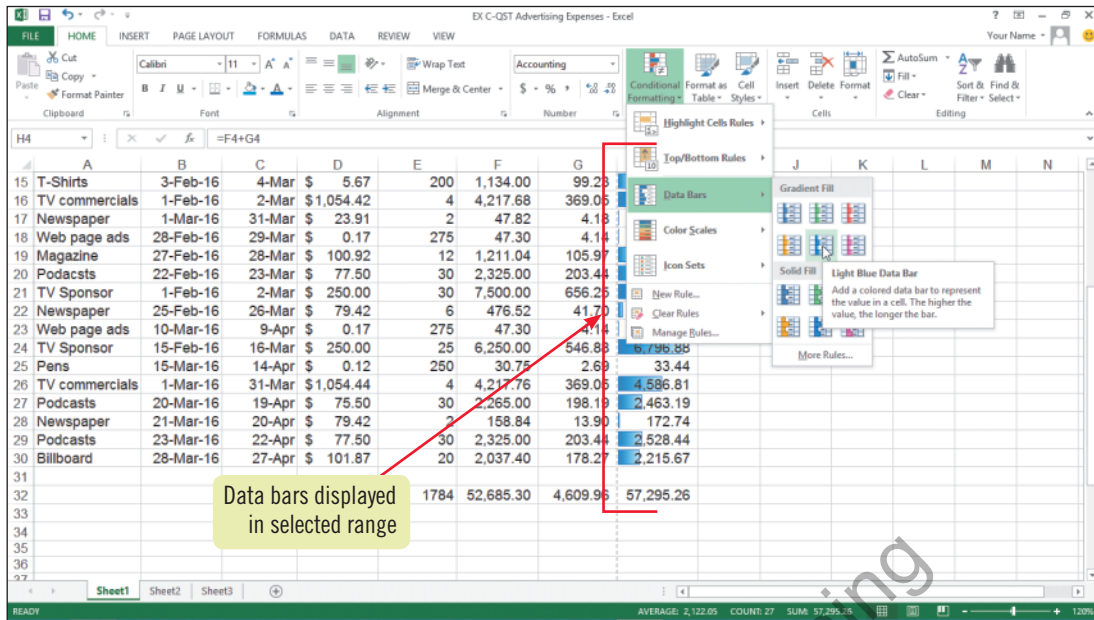


FIGURE C-18: Between dialog box

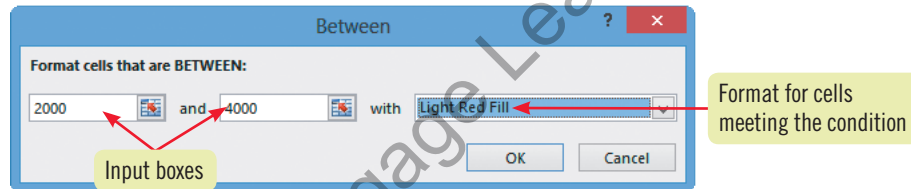
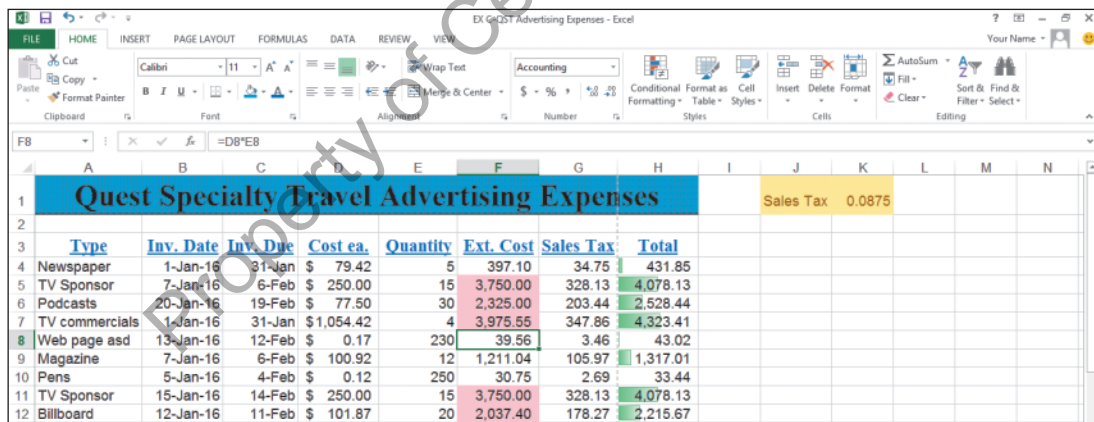


FIGURE C-19: Worksheet with conditional formatting



Managing conditional formatting rules

If you create a conditional formatting rule and then want to change the condition to reflect a different value or format, you don't need to create a new rule; instead, you can modify the rule using the Rules Manager. Select the cell(s) containing conditional formatting, click the Conditional Formatting button in the Styles group, then click Manage Rules. The Conditional Formatting Rules Manager dialog box opens. Select the rule you want to edit, click Edit Rule, and then modify the settings in the Edit the Rule Description area in the Edit Formatting Rule dialog box. To change

the formatting for a rule, click the Format button in the Edit the Rule Description area, select the formatting styles you want the text to have, then click OK three times to close the Format Cells dialog box, the Edit Formatting Rule dialog box, and then the Conditional Formatting Rules Manager dialog box. The rule is modified, and the new conditional formatting is applied to the selected cells. To delete a rule, select the rule in the Conditional Formatting Rules Manager dialog box, then click the Delete Rule button.

Rename and Move a Worksheet

Learning Outcomes

- Rename a sheet
- Apply color to a sheet tab
- Reorder sheets in a workbook

By default, an Excel workbook initially contains one worksheet named Sheet1, although you can add sheets at any time. Each sheet name appears on a sheet tab at the bottom of the worksheet. When you open a new workbook, the first worksheet, Sheet1, is the active sheet. To move from sheet to sheet, you can click any sheet tab at the bottom of the worksheet window. The sheet tab scrolling buttons, located to the left of the sheet tabs, are useful when a workbook contains too many sheet tabs to display at once. To make it easier to identify the sheets in a workbook, you can rename each sheet and add color to the tabs. You can also organize them in a logical way. For instance, to better track performance goals, you could name each workbook sheet for an individual salesperson, and you could move the sheets so they appear in alphabetical order. **CASE** *In the current worksheet, Sheet1 contains information about actual advertising expenses. Sheet2 contains an advertising budget, and Sheet3 contains no data. You want to rename the two sheets in the workbook to reflect their contents, add color to a sheet tab to easily distinguish one from the other, and change their order.*

STEPS



QUICK TIP

You can also rename a sheet by right-clicking the tab, clicking Rename on the shortcut menu, typing the new name, then pressing [Enter].

QUICK TIP

To delete a sheet, click its tab, click the Delete list arrow in the Cells group, then click Delete Sheet. To insert a worksheet, click the New sheet button  to the right of the sheet tabs.

QUICK TIP

If you have more sheet tabs than are visible, you can move between sheets by using the tab scrolling buttons to the left of the sheet tabs: the Previous Worksheet button  and the Next Worksheet button .



1. Click the **Sheet2 tab**
Sheet2 becomes active, appearing in front of the Sheet1 tab; this is the worksheet that contains the budgeted advertising expenses. See **FIGURE C-20**.
2. Click the **Sheet1 tab**
Sheet1, which contains the actual advertising expenses, becomes active again.
3. **Double-click the Sheet2 tab, type Budget, then press [Enter]**
The new name for Sheet2 automatically replaces the default name on the tab. Worksheet names can have up to 31 characters, including spaces and punctuation.
4. **Right-click the Budget tab, point to Tab Color on the shortcut menu, then click the Bright Green, Accent 4, Lighter 40% color (fourth row, third column from the right) as shown in FIGURE C-21**
5. **Double-click the Sheet1 tab, type Actual, then press [Enter]**
Notice that the color of the Budget tab changes depending on whether it is the active tab; when the Actual tab is active, the color of the Budget tab changes to the green tab color you selected. You decide to rearrange the order of the sheets, so that the Budget tab is to the left of the Actual tab.
6. **Click the Budget tab, hold down the mouse button, drag it to the left of the Actual tab, as shown in FIGURE C-22, then release the mouse button**
As you drag, the pointer changes to , the sheet relocation pointer, and a small, black triangle just above the tabs shows the position the moved sheet will be in when you release the mouse button. The first sheet in the workbook is now the Budget sheet. See **FIGURE C-23**. You can move multiple sheets by pressing and holding [Shift] while clicking the sheets you want to move, then dragging the sheets to their new location.
7. **Click the Actual sheet tab, click the Page Layout button  on the status bar to open Page Layout view, enter your name in the left header text box, then click anywhere in the worksheet to deselect the header**
8. **Click the PAGE LAYOUT tab on the Ribbon, click the Orientation button in the Page Setup group, then click Landscape**
9. **Right-click the Sheet3 tab, click Delete on the shortcut menu, press [Ctrl][Home], then save your work**

FIGURE C-20: Sheet tabs in workbook

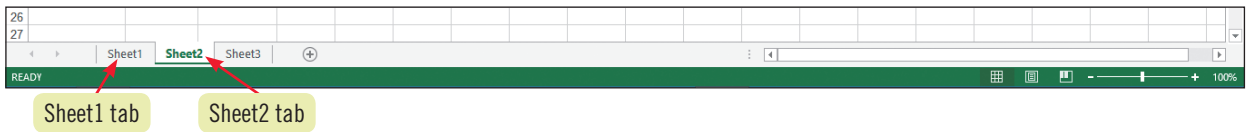


FIGURE C-21: Tab Color palette

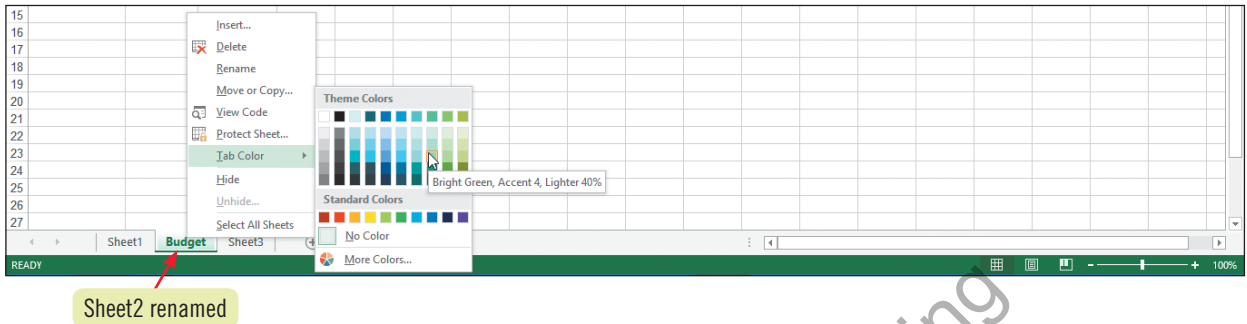


FIGURE C-22: Moving the Budget sheet

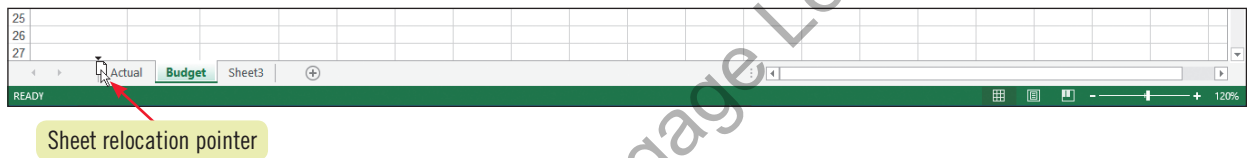
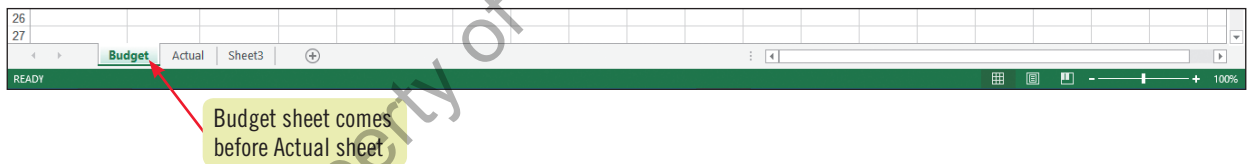


FIGURE C-23: Reordered sheets



Copying, Adding, and Deleting worksheets

There are times when you may want to copy a worksheet. For example, a workbook might contain a sheet with Quarter 1 expenses, and you want to use that sheet as the basis for a sheet containing Quarter 2 expenses. To copy a sheet within the same workbook, press and hold [Ctrl], drag the sheet tab to the desired tab location, release the mouse button, then release [Ctrl]. A duplicate sheet appears with the same name as the copied sheet followed by "(2)" indicating it is a copy. You can then rename the sheet to a more meaningful name. To copy a sheet to a different workbook, both the source and destination workbooks must be open. Select the sheet to copy or move, right-click the sheet tab, then click Move or Copy in the shortcut menu. Complete the information in the Move or Copy dialog

box. Be sure to click the Create a copy check box if you are copying rather than moving the worksheet. Carefully check your calculation results whenever you move or copy a worksheet. You can add multiple worksheets to a workbook by clicking the HOME tab on the Ribbon, pressing and holding [Shift], then clicking the number of existing worksheet tabs that correspond with the number of sheets you want to add, clicking the Insert list arrow in the Cells group on the HOME tab, then clicking Insert Sheet. You can delete multiple worksheets from a workbook by clicking the HOME tab on the Ribbon, pressing and holding [Shift], clicking the sheet tabs of the worksheets you want to delete, clicking the Delete list arrow in the Cells group on the HOME tab, then clicking Delete Sheet.

Check Spelling

Learning Outcomes

- Describe how spell checking works
- Change the spelling using a suggestion
- Replace a word using Find & Select

STEPS

QUICK TIP

The Spelling dialog box lists the name of the language currently being used in its title bar.

Excel includes a spell checker to help you ensure that the words in your worksheet are spelled correctly. The spell checker scans your worksheet, displays words it doesn't find in its built-in dictionary, and suggests replacements when they are available. To check all of the sheets in a multiple-sheet workbook, you need to display each sheet individually and run the spell checker for each one. Because the built-in dictionary cannot possibly include all the words that anyone needs, you can add words to the dictionary, such as your company name, an acronym, or an unusual technical term. Once you add a word or term, the spell checker no longer considers that word misspelled. Any words you've added to the dictionary using Word, Access, or PowerPoint are also available in Excel. **CASE** *Before you distribute this workbook to Grace and the marketing managers, you check its spelling.*

1. Click the **REVIEW** tab on the Ribbon, then click the **Spelling** button in the **Proofing** group

The Spelling: English (U.S.) dialog box opens, as shown in **FIGURE C-24**, with "asd" selected as the first misspelled word in the worksheet, and with "ads" selected in the Suggestions list as a possible replacement. For any word, you have the option to Ignore this case of the flagged word, Ignore All cases of the flagged word, Change the word to the selected suggestion, Change All instances of the flagged word to the selected suggestion, or add the flagged word to the dictionary using Add to Dictionary.

2. Click **Change**

Next, the spell checker finds the word "Podacsts" and suggests "Podcasts" as an alternative.

3. Verify that the word **Podcasts** is selected in the **Suggestions** list, then click **Change**

When no more incorrect words are found, Excel displays a message indicating that the spell check is complete.

4. Click **OK**

5. Click the **HOME** tab, click **Find & Select** in the **Editing** group, then click **Replace**

The Find and Replace dialog box opens. You can use this dialog box to replace a word or phrase. It might be a misspelling of a proper name that the spell checker didn't recognize as misspelled, or it could simply be a term that you want to change throughout the worksheet. Grace has just told you that each instance of "Billboard" in the worksheet should be changed to "Sign."

6. Type **Billboard** in the **Find what** text box, press **[Tab]**, then type **Sign** in the **Replace with** text box

Compare your dialog box to **FIGURE C-25**.

7. Click **Replace All**, click **OK** to close the Microsoft Excel dialog box, then click **Close** to close the **Find and Replace** dialog box

Excel has made two replacements.

8. Click the **FILE** tab, click **Print** on the navigation bar, click the **No Scaling** setting in the **Settings** section on the **Print** tab, then click **Fit Sheet on One Page**

9. Click the **Return** button to return to your worksheet, save your work, submit it to your instructor as directed, close the workbook, then exit Excel

The completed worksheet is shown in **FIGURE C-26**.

Emailing a workbook

You can send an entire workbook from within Excel using your installed email program, such as Microsoft Outlook. To send a workbook as an email message attachment, open the workbook, click the **FILE** tab, then click **Share** on the navigation bar. With the **Email** option selected in the **Share** section in **Backstage** view, click

Send as Attachment in the right pane. An email message opens in your default email program with the workbook automatically attached; the filename appears in the **Attached** field. Complete the **To** and optional **Cc** fields, include a message if you wish, then click **Send**.

FIGURE C-24: Spelling: English (U.S.) dialog box

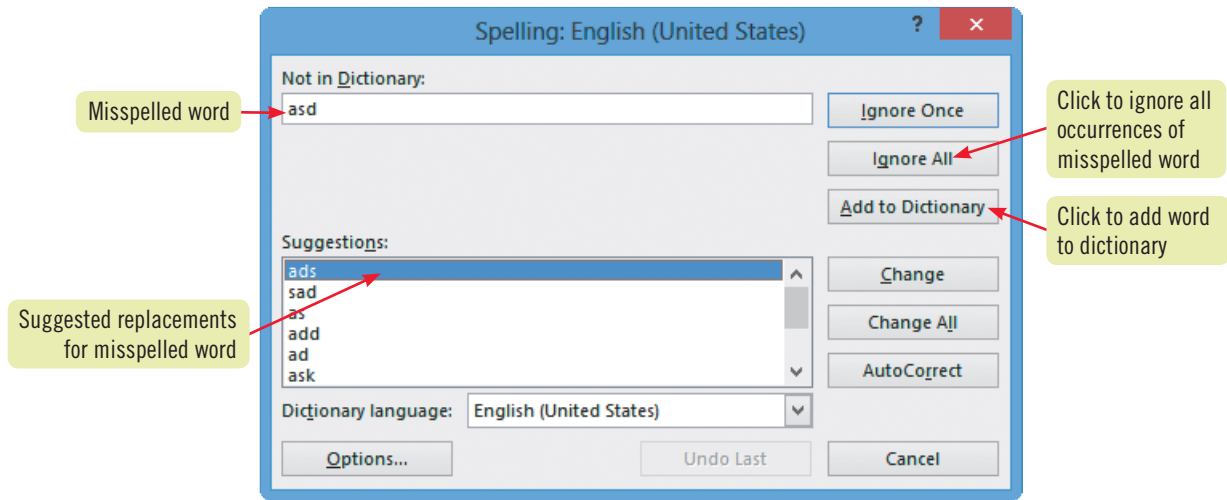


FIGURE C-25: Find and Replace dialog box

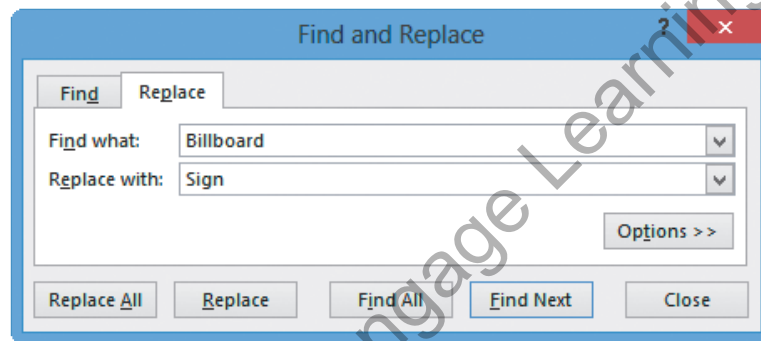


FIGURE C-26: Completed worksheet

Your Name

Quest Specialty Travel Advertising Expenses								Sales Tax
Type	Inv. Date	Inv. Due	Cost ea.	Quantity	Ext. Cost	Sales Tax	Total	
Newspaper	1-Jan-16	31-Jan	\$ 79.42	5	397.10	34.75	431.85	
TV Sponsor	7-Jan-16	6-Feb	\$ 250.00	15	3,750.00	328.13	4,078.13	
Podcasts	20-Jan-16	19-Feb	\$ 77.50	30	2,325.00	203.44	2,528.44	
TV commercials	1-Jan-16	31-Jan	\$ 1,054.42	4	3,975.55	347.86	4,323.41	
Web page ads	13-Jan-16	12-Feb	\$ 0.17	230	39.56	3.46	43.02	
Magazine	7-Jan-16	6-Feb	\$ 100.92	12	1,211.04	105.97	1,317.01	
Pens	5-Jan-16	4-Feb	\$ 0.12	250	30.75	2.69	33.44	
TV Sponsor	15-Jan-16	14-Feb	\$ 250.00	15	3,750.00	328.13	4,078.13	
Sign	12-Jan-16	11-Feb	\$ 101.87	20	2,037.40	178.27	2,215.67	
Newspaper	25-Jan-16	24-Feb	\$ 79.42	6	476.52	41.70	518.22	
Newspaper	1-Feb-16	2-Mar	\$ 79.42	2	158.84	13.90	172.74	
T-Shirts	3-Feb-16	4-Mar	\$ 5.67	200	1,134.00	99.23	1,233.23	
TV commercials	1-Feb-16	2-Mar	\$ 1,054.42	4	4,217.68	369.05	4,586.73	
Newspaper	1-Mar-16	31-Mar	\$ 23.91	2	47.82	4.18	52.00	
Web page ads	28-Feb-16	29-Mar	\$ 0.17	275	47.30	4.14	51.44	
Magazine	27-Feb-16	28-Mar	\$ 100.92	12	1,211.04	105.97	1,317.01	
Podcasts	22-Feb-16	23-Mar	\$ 77.50	30	2,325.00	203.44	2,528.44	
TV Sponsor	1-Feb-16	2-Mar	\$ 250.00	30	7,500.00	656.25	8,156.25	
Newspaper	25-Feb-16	26-Mar	\$ 79.42	6	476.52	41.70	518.22	
Web page ads	10-Mar-16	9-Apr	\$ 0.17	275	47.30	4.14	51.44	
TV Sponsor	15-Feb-16	16-Mar	\$ 250.00	25	6,250.00	546.88	6,796.88	
Pens	15-Mar-16	14-Apr	\$ 0.12	250	30.75	2.69	33.44	
TV commercials	1-Mar-16	31-Mar	\$ 1,054.44	4	4,217.76	369.05	4,586.81	
Podcasts	20-Mar-16	19-Apr	\$ 75.50	30	2,265.00	198.19	2,463.19	
Newspaper	21-Mar-16	20-Apr	\$ 79.42	2	158.84	13.90	172.74	
Podcasts	23-Mar-16	22-Apr	\$ 77.50	30	2,325.00	203.44	2,528.44	
Sign	28-Mar-16	27-Apr	\$ 101.87	20	2,037.40	178.27	2,215.67	
			\$ 5,304.30	1784	52,443.17	4,588.78	57,031.95	