

Excel 2016

Formatting Beyond the Basics



Excel 2016: Formatting Beyond the Basics

1.5 hours

In this workshop we will learn to use conditional formatting to have Excel automatically format our data sets based on the cell contents; how to use tables which provide filters and automatic alternating row colors; apply themes to change the color schemes associated within our workbook; create comments to make notes within the cells; and protect the worksheets and workbooks. This intermediate workshop assumes prior experience with Microsoft Excel.

Conditional Formatting	1
<i>Finding Duplicates</i>	1
<i>Top and Bottom Values</i>	2
<i>Data Bars</i>	2
<i>Color Scales</i>	2
<i>Icon Sets</i>	3
<i>Custom Rule – Dates past due</i>	3
Tables.....	4
<i>Create a Table structure</i>	4
<i>Removing the Table structure (Convert to range)</i>	5
<i>Adding/Deleting Rows in Tables</i>	5
<i>Doing Math in Tables</i>	6
Protecting Worksheets/Workbooks.....	6
<i>Protect Sheet</i>	7
Comments	7
Themes	8
Numbers Exercises	8
<i>Customize Color Scales</i>	8
<i>Find Min, Max, and Average with Conditional Formatting</i>	9
<i>Too Much Data to Chart</i>	9
Sparklines	10
<i>Quick Totals</i>	10
More about Custom Conditional Formatting	11
More about Excel Tables	12
More about Sparklines	13



Pandora Rose Cowart
Education/Training Specialist
UF Health IT Training

C3-013 Communicore
PO Box 100152
Gainesville, FL 32610-0152

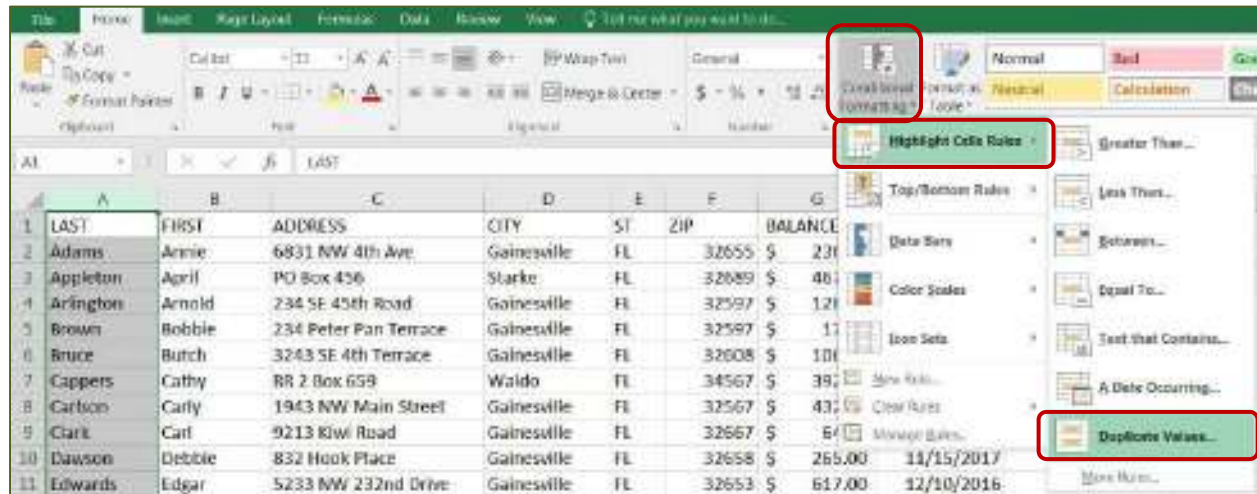
(352) 273-5051
prcowart@ufl.edu
<http://training.health.ufl.edu>

Conditional Formatting

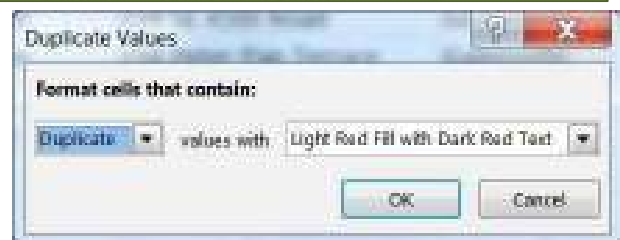
Using criteria, a set of rules, we can have Excel format the cells that match. The following exercises will walk us through some of these powerful formatting aides. This tool works best if you select the cells you want to format before you set any rules.

Finding Duplicates

1. Open Customers
2. Select Column A (Last)
3. On the Home Tab, in the Styles group, choose **Conditional Formatting**
4. Select **Highlight Cell Rules**, and then **Duplicate Values...**



5. In the Duplicate Values Window, leave the light red fill setting and, click OK
6. Scroll down to see the M's
7. Joe and John Jinks are different records, but Marge and Marjorie look to be the same.

A screenshot of an Excel spreadsheet showing a list of customer records. The 'LAST' column (Column A) is highlighted. The records for 'Jinks', 'Marge', and 'Marjorie' are highlighted in light red, indicating they are duplicates. The records for 'Marge' and 'Marjorie' are identical, while 'Joe' and 'John Jinks' are different records.

LAST	FIRST	ADDRESS	CITY	ST	ZIP	BALANCE	DATE
Jinks	Joe	12 South University Ave	Gainesville	FL	32156	\$ 626.00	5/25/2017
Jinks	John	9324 Zeas Street	Gainesville	FL	32684	\$ 419.00	5/15/2018
Johnson	Jack	2903 Endrive Ave	Gainesville	FL	32608	\$ 17.00	4/25/2016
Joiner	Jake	9240 Grapefruit Place	Jacksonville	FL	32208	\$ 794.00	8/25/2018
Jones	Jill	209 Caraboupe Way	Gainesville	FL	32597	\$ 380.00	4/5/2017
Kate	Kenny	PO Box 3346	Starke	FL	32680	\$ 400.00	3/20/2016
Koel	Kevin	2985 New Potato Drive	Gainesville	FL	32608	\$ 415.00	12/5/2016
King	Kala	RR 2 box 323	Waldo	FL	34567	\$ 52.00	11/10/2018
Knight	Katrina	6204 Avocado Ave	Gainesville	FL	32667	\$ 105.00	5/5/2018
Knock	Kasper	PO Box 3672	Gainesville	FL	32680	\$ 467.00	11/25/2016
Lamas	Larry	6405 Date Terrace	Gainesville	FL	32684	\$ 64.00	10/15/2017
Lee	Leslie	2930 Apricot Street	Jacksonville	FL	32608	\$ 52.00	8/20/2017
Li	Lana	23 Koberg Drive	Gainesville	FL	32597	\$ 157.00	2/15/2016
Livingston	Leonard	789 North University Ave	Waldo	FL	32658	\$ 232.00	4/20/2017
Lowe	Lillian	942 Yam Way	Gainesville	FL	32684	\$ 132.00	10/10/2017
Mack	Menin	2924 Turnip Place	Gainesville	FL	32608	\$ 236.00	5/25/2017
Martin	Mary	230 Jalapeno Junction	Jacksonville	FL	32297	\$ 671.00	3/10/2016
McClode	Madeline	8290 Apollo Ave	Waldo	FL	32658	\$ 239.00	-6/10/2016
McIntosh	Marge	2309 Hercules Road	Gainesville	FL	32597	\$ 242.00	9/20/2018
McIntosh	Marjorie	2309 Hercules Road	Gainesville	FL	32597	\$ 242.00	9/20/2018

8. Clear the formatting rules.
 - Open the Conditional Formatting menu again.
 - Choose **Clear Rules**, and choose **Clear Rules from Entire Sheet**.



Top and Bottom Values

We can sort the Balance column to find the top and bottom values listed, or we can have Excel format the cells to help them pop out.

1. Select Column G (balance)
2. From Conditional Formatting choose Top/Bottom Rules
3. Choose **Top 10 Items**
 - Notice you can change the number of items to be the top 3 or any number between 1 and 1000.
4. Leave the default settings of 10 items, with a Light Red Fill. Click OK.
5. Go back to the Conditional Formatting, choose Top/Bottom Rules
6. Choose Bottom 10 Items
7. Change the color setting to Green Fill and click OK.



G	
BALANCE	
\$	236.00
\$	467.00
\$	128.00
\$	17.00
\$	106.00
\$	392.00
\$	432.00
\$	64.00
\$	265.00
\$	617.00
\$	364.00
\$	311.00
\$	157.00
\$	368.00
\$	415.00
\$	68.00
\$	501.00
\$	319.00
\$	486.00
\$	409.00
\$	109.00

8. Clear the formatting rules from the Conditional Formatting menu

Data Bars

1. Select Column G (Balance)
2. From Conditional Formatting choose **Data Bars**
3. Hover over the different options to see a live preview of the embedded bar chart in the cells. The larger the number, the longer the bar.
 - You can widen the column as much as you want, and the bars will stretch with your column width.
4. Choose one that you like
 - Set the number format to general to see them without the \$ and decimals.

G	
BALANCE	
	236
	467
	128
	17
	106
	392
	432
	64
	265
	617
	364
	311
	157
	368
	415
	68
	501
	319
	486
	409
	109

Color Scales

1. Select Column G (Balance)
2. From Conditional Formatting choose **Color Scales**
3. Hover over the different options to see a live preview of the shading. Notice the data bars are still showing.
4. Clear all Conditional Formatting
5. Try the color scales again.
6. Sort the column to see the shading in action
7. Undo the sort and Conditional Formatting

G	G
BALANCE	BALANCE
236	794
467	671
128	626
17	617
106	574
392	532
432	522
64	501

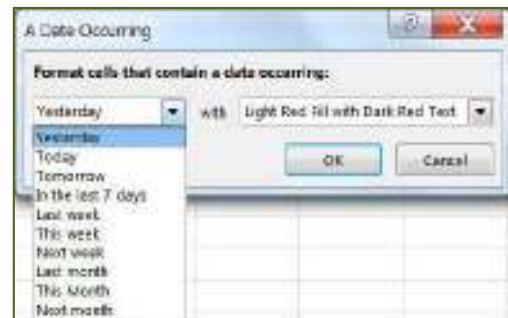
Icon Sets

1. Select Column G (Balance)
2. From Conditional Formatting choose **Icon Sets**
3. Hover over the different options to see a live preview of the icons
 - As with the data bars and color scales these icons are relative to the data in the entire column. Up arrows are above average, sideways arrows are near average and down arrows are below average.
4. Clear the formatting rules from the Conditional Formatting menu

G		G	
BALANCE		BALANCE	
↘	432	↘	432
↘	64	↘	64
↘	265	↘	265
↕	617	↕	617
↗	364	↗	364
↗	311	↗	311
↘	157	↘	157
↘	368	↘	368

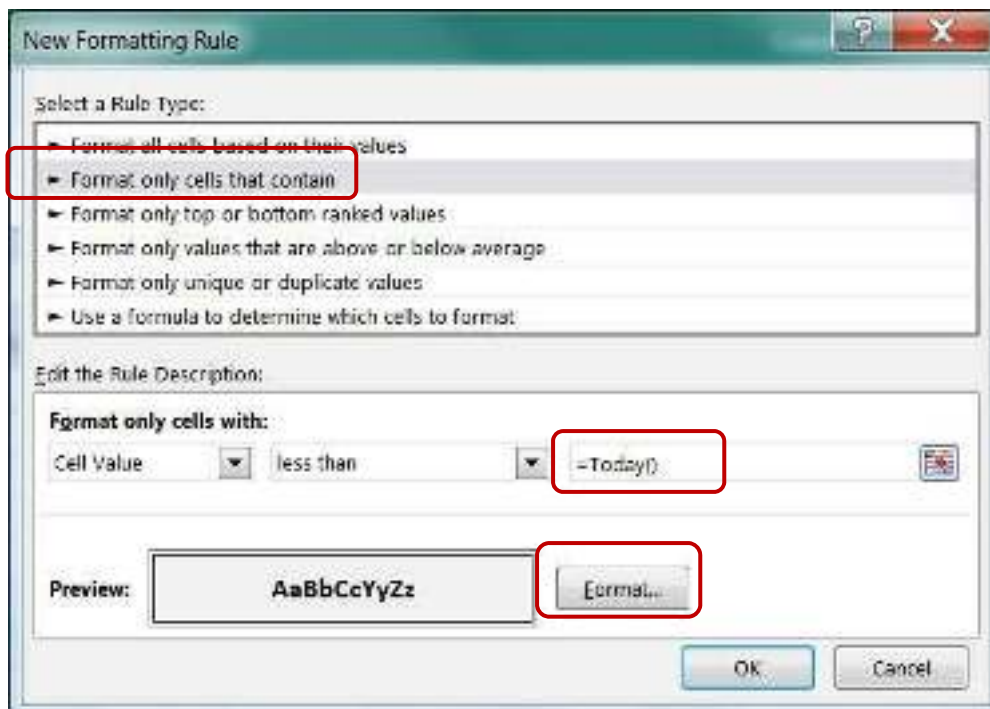
Custom Rule – Dates past due

There are date rules available in the Conditional Formatting, Highlight Cell Rules, you can choose **A Date Occurring...** However, the rules here are limited. What I would like us to find is all the records (rows) where the date is past due.



1. Select Column H (Due Date)
2. From Conditional Formatting choose **New Rule...**
3. From the top of the New Formatting Rule window, choose **Format only cells that contain**
 - Change the second drop down list to **less than**
 - In the third box type:
=Today()
 - Don't forget the equal sign and the parentheses
4. Click the **Format** button
 - Set the format to be Bold, with an Outline border, and a light grey fill
 - Click OK to accept the format, and click OK to accept the rule.
5. Leave this format

H
DUE DATE
2/10/2017
9/25/2018
12/5/2017
3/25/2017
5/5/2016
9/15/2016
5/25/2018
6/10/2016

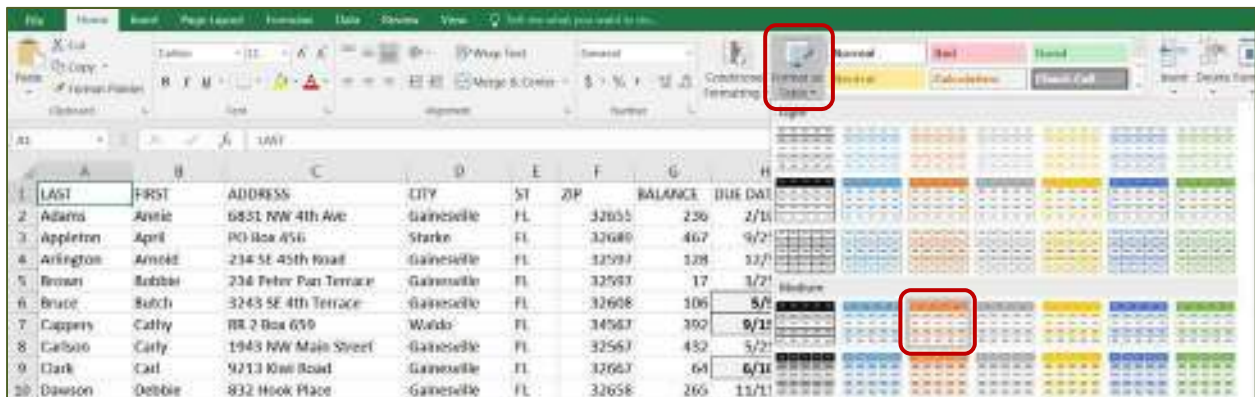


Tables

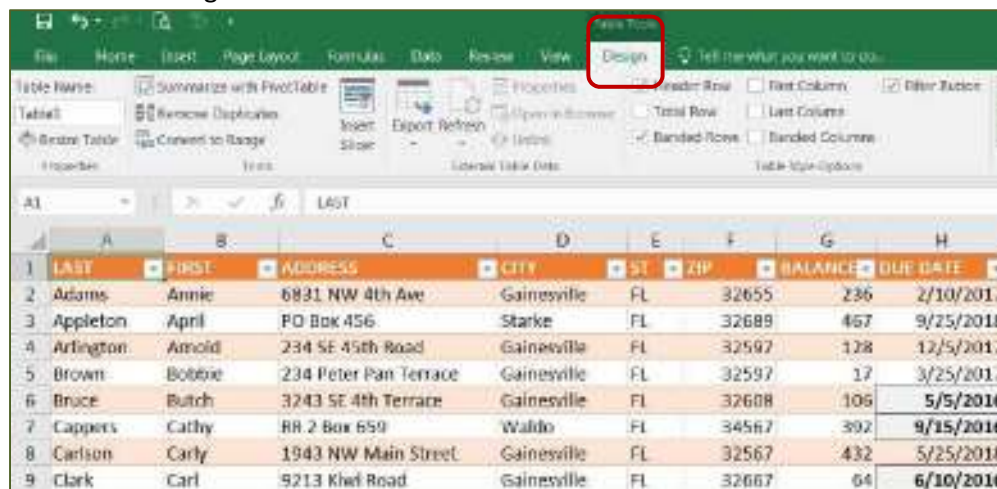
We can format Excel ourselves using the tools found in the Font group. There are font styles, fill colors, and borders. When we set up the format ourselves, we sometimes have to be careful about moving cells around. It's very easy to lose a border format, or shade in the wrong color. If you need a formatted structure with consistent colors, you may fall in love with Tables.

Create a Table structure

1. Return to Cell A1 (Ctrl Home)
2. From the Home tab, next to the Conditional Formatting button, choose **Format as Table**
3. Choose an option that has alternating colors for each row.



4. Excel should pick up the entire dataset. We have titles, headers, so we'll leave that option checked. Click OK to see the result.
5. Our conditional formatting remains on the Due Dates.
6. We now have a new tab in the ribbon to help us modify the Design of the table.



7. Try the different table style options and table styles to see how it changes the format of our table. One of the best features is the Total Row.
 - With the **total row** turned on, scroll to the bottom of the dataset. The 77 represents how many records we have. Click inside the Total for the Balance column and change it to **Sum**.

This is a sample, click download link to get the full Tutorial

CLICK BELOW

