

# 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.

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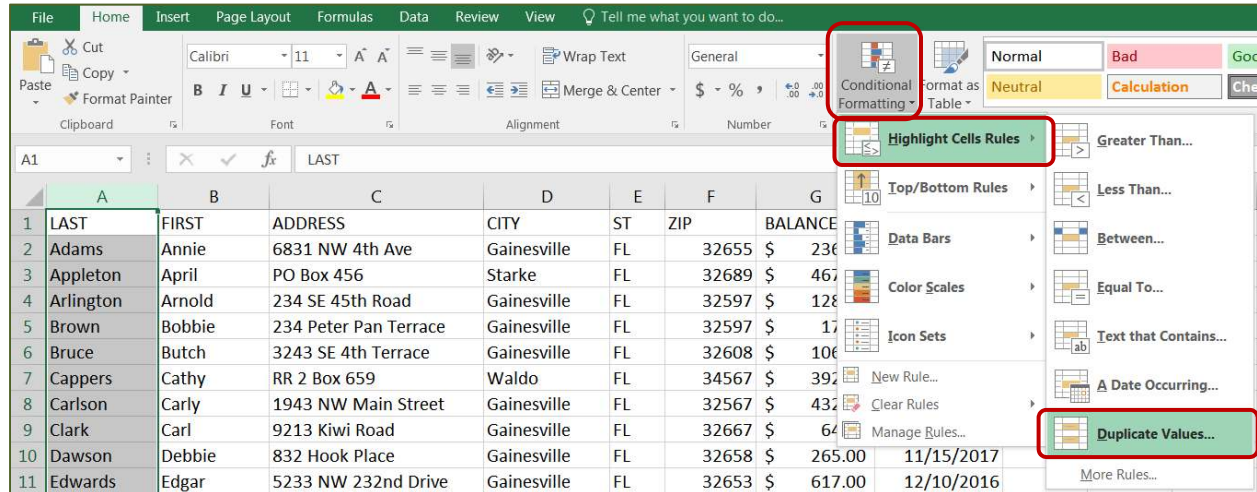
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## Conditional Formatting

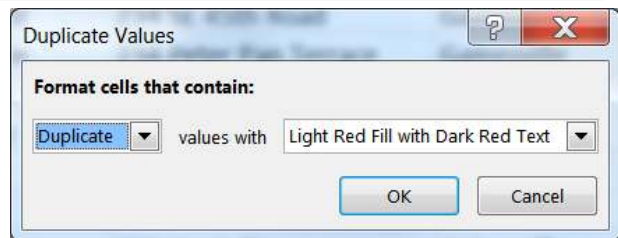
Using criteria, a set of rules, we can have Excel format the cells that match. The following exercises will walk us through some of these powerful formatting aides. This tool works best if you select the cells you want to format before you set any rules.

### 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.

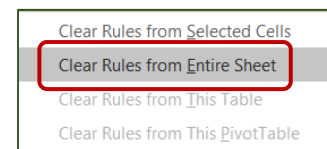


The screenshot shows a spreadsheet with customer records. The 'LAST' column is highlighted in red. The records are as follows:

A	B	C	D	E	F	G	H
25	Jennings	Jasmine	465 SE 465th Place	Gainesville	FL	32653	\$ 522.00 5/5/2017
26	Jinks	Joe	12 South University Ave	Gainesville	FL	32156	\$ 626.00 5/25/2017
27	Jinks	John	9324 Zeus Street	Gainesville	FL	32684	\$ 419.00 5/15/2018
28	Johnson	Jack	2903 Endive Ave	Gainesville	FL	32608	\$ 17.00 4/25/2016
29	Joiner	Jake	9240 Grapefruit Place	Jacksonville	FL	32268	\$ 794.00 8/25/2018
30	Jones	Jill	209 Cantaloupe Way	Gainesville	FL	32597	\$ 380.00 4/5/2017
31	Katz	Kerry	PO Box 3346	Starke	FL	32689	\$ 409.00 3/20/2016
32	Kent	Kevin	2903 New Potato Drive	Gainesville	FL	32608	\$ 415.00 12/5/2016
33	King	Kala	RR 2 box 323	Waldo	FL	34567	\$ 52.00 11/10/2018
34	Knight	Katrina	9204 Avocado Ave	Gainesville	FL	32667	\$ 105.00 9/5/2018
35	Kreck	Kasper	PO Box 3672	Gainesville	FL	32689	\$ 467.00 11/25/2016
36	Lamas	Larry	9405 Date Terrace	Gainesville	FL	32684	\$ 64.00 10/15/2017
37	Lee	Leslie	2930 Apricot Street	Jacksonville	FL	32608	\$ 52.00 8/20/2017
38	Li	Lana	23 Iceberg Drive	Gainesville	FL	32597	\$ 157.00 2/15/2016
39	Livingston	Leonord	789 North University Ave	Waldo	FL	32658	\$ 232.00 4/20/2017
40	Lowe	Lillian	942 Yam Way	Gainesville	FL	32684	\$ 132.00 10/10/2017
41	Mack	Mervin	2934 Turnip Place	Gainesville	FL	32608	\$ 236.00 5/25/2017
42	Martin	Mary	230 Jalapeno Junction	Jacksonville	FL	32297	\$ 671.00 3/10/2016
43	McDade	Madeline	8290 Apollo Ave	Waldo	FL	32658	\$ 219.00 6/10/2016
44	Mellott	Marge	2309 Hercules Road	Gainesville	FL	32597	\$ 242.00 9/20/2018
45	Mellott	Marjorie	2309 Hercules Road	Gainesville	FL	32597	\$ 242.00 9/20/2018

8. Clear the formatting rules.

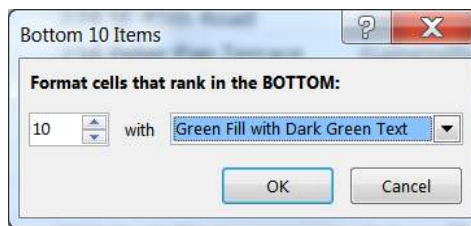
- Open the Conditional Formatting menu again.
- Choose **Clear Rules**, and choose **Clear Rules from Entire Sheet**.



### 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

### 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

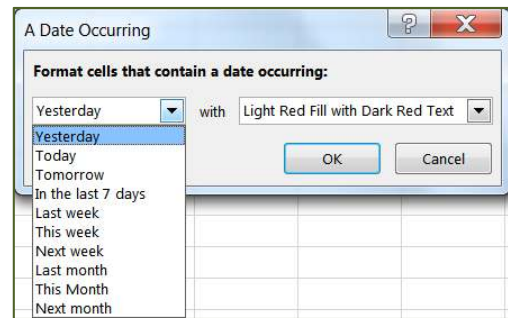
1. Select Column G (Balance)
2. From Conditional Formatting choose **Icon Sets**
3. Hover over the different options to see a live preview of the icons
  - As with the data bars and color scales these icons are relative to the data in the entire column. Up arrows are above average, sideways arrows are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

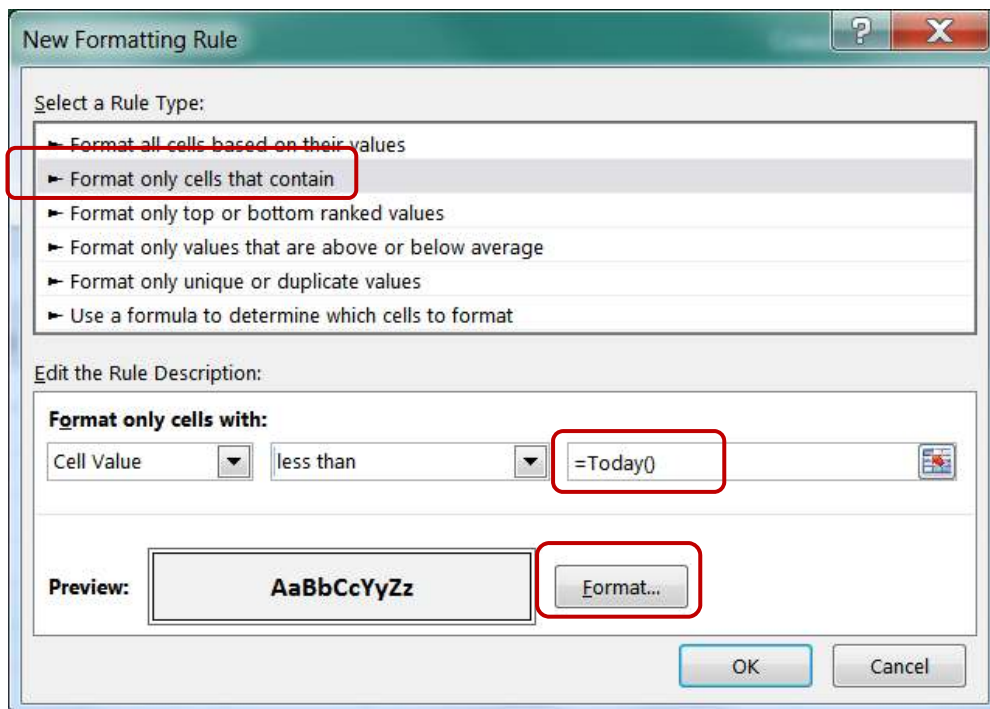
### Custom Rule – Dates past due

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
<b>5/5/2016</b>
<b>9/15/2016</b>
5/25/2018
<b>6/10/2016</b>



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