



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
Finding Duplicates1
Top and Bottom Values
Data Bars
Color Scales
Icon Sets
Custom Rule – Dates past due
Tables
Create a Table structure
Removing the Table structure (Convert to range)5
Adding/Deleting Rows in Tables
Doing Math in Tables
Protecting Worksheets/Workbooks
Protect Sheet
Comments
Themes
Numbers Exercises
Customize Color Scales
Find Min, Max, and Average with Conditional Formatting9
Too Much Data to Chart
Sparklines 10
Quick Totals
More about Custom Conditional Formatting 11
More about Excel Tables 12
More about Sparklines

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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...

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1	LAST	FIRST	ADDRESS	CITY	ST	ZIP	BALANC						
2	Adams	Annie	6831 NW 4th Ave	Gainesville	FL	32655	\$ 23	E Data	Bars	,		Between	
3	Appleton	April	PO Box 456	Starke	FL	32689	\$ 46	Color	Scalar		— ,		
4	Arlington	Arnold	234 SE 45th Road	Gainesville	FL	32597	\$ 12	ε 🔳 Color	Scales				
5	Brown	Bobbie	234 Peter Pan Terrace	Gainesville	FL	32597	\$ 1	Icon S	Sets			Text that Contains	
6	Bruce	Butch	3243 SE 4th Terrace	Gainesville	FL	32608	\$ 10	6			ittab -		
7	Cappers	Cathy	RR 2 Box 659	Waldo	FL	34567	\$ 39	2 📃 New Rule	e			A Date Occurring	
8	Carlson	Carly	1943 NW Main Street	Gainesville	FL	32567	\$ 43	2 📑 <u>C</u> lear Rul	les	- ×			
9	Clark	Carl	9213 Kiwi Road	Gainesville	FL	32667	\$ 6	🛙 🧮 Manage	<u>R</u> ules			Duplicate Values	
10	Dawson	Debbie	832 Hook Place	Gainesville	FL	32658	\$ 26	5.00 11	/15/2017	L C			
11	Edwards	Edgar	5233 NW 232nd Drive	Gainesville	FL	32 <mark>6</mark> 53	\$ 61	7.00 12	/10/2016		Mo	re Rules	
					1				1				~

- 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.

	COOL CONTRACTOR AND A 199		Duplicate values
\$	265.00	11/15/2017	
\$	617.00	12/10/2016	More Rules
Val	lues	Nan Yoursel	2 ×
ells:	that conta	in:	
e /	 values 	with Light Red	Fill with Dark Red Text
			OK Cancel
			OK Cancel
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4	A	в	C	D	E	F		G	н
25	Jennings	Jasmine	465 SE 465th Place	Gainesville	FL	32653	\$	522.00	5/5/201
26	Jinks	Joe	12 South University Ave	Gainesville	FL	32156	\$	626.00	5/25/201
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	4/25/2010
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	4/5/2013
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	12/5/2010
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	10/15/2013
37	Lee	Leslie	2930 Apricot Street	Jacksonville	FL	32608	Ş	52.00	8/20/2013
38	ti	Lana	23 Iceberg Drive	Gainesville	FL	32597	\$	157.00	2/15/2010
39	Livingston	Leonord	789 North University Ave	Waldo	FL	32658	\$	232.00	4/20/2013
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	5/25/2013
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.

Clear Rules from Selected Cells
Clear Rules from Entire Sheet
Clear Rules from <u>This</u> Table
Clear Rules from This <u>P</u> ivotTable

Top an	nd Bottom Values		G
We ca	n sort the Balance column to find the top and bottom values listed, or we can	BAL	ANCE
have E	xcel format the cells to help them pop out.	\$	236.00
1.	Select Column G (balance)	\$	467.00
2.	From Conditional Formatting choose Top/Bottom Rules	\$	128.00
3.	Choose Top 10 Items	\$	17.00
•		Ş	106.00
	- Notice you can change the number of items to be the top 3 or any number	\$	392.00
	between 1 and 1000.	\$	432.00
4	Leave the default settings of 10 items, with a Light Red Fill, Click OK	\$	64.00
т.		\$	265.00
5.	Go back to the Conditional Formatting, choose Top/Bottom Rules	\$	617.00
6.	Choose Bottom 10 Items	\$	364.00
7.	Change the color setting to Green Fill and click OK.	\$	311.00
(\$	157.00
Top 10	Items Bottom 10 Items	\$	368.00
Format	cells that rank in the TOP: Format cells that rank in the BOTTOM:	\$	415.00
10		\$	68.00
10		\$	501.00
	OK Cancel OK Cancel	\$	319.00
		\$	486.00
8.	Clear the formatting rules from the Conditional Formatting menu	\$	409.00

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.

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

6	G						
BALA	BALANCE						
	236						
	467						
	128						
	17						
	106						
	392						
	432						
	64						

109.00

\$

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

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

elect a Rule Type	2
Eormat all cell	s based on their values
- Format only ce	ells that contain
 Format only to 	op or bottom ranked values
Format only va	alues that are above or below average
Format only u	nique or duplicate values
🕨 Use a formula	to determine which cells to format
Format only cel Cell Value	Ils with:
Preview:	AaBbCcYyZz



? X

Cancel

with Light Red Fill with Dark Red Text

OK

A Date Occurring

In the last 7 days Last week This week

Yesterday

Yesterday Today Tomorrow

Next week Last month

This Month

Next month

Format cells that contain a date occurring:

-

Н
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
0,10,2010

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