MS Excel Formatting

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MS Excel Training

Topics

- Formatting in Excel

- Formatting cells

- Conditional formatting

Formatting in Excel

Cell Formatting in MS Excel

Formatting is used to provide meaning to the data stored in a cell and the overall sheet or workbook. For e.g., if a date is entered in a cell, it should appear as a date and not as a number. Formatting also involves coloring the cells, merging the cells, alignment, and conditional formatting. The following types of formatting can be done in an Excel sheet:

- Providing background and text color to the data
- Changing the data format of the values
- Providing borders on the cells
- Suffixing numbers with $ and prefixing them with %
- Conditional formatting

To clear the applied formatting, navigate to **Home** tab and select **Clear** from the **Editing** group.

Formatting Cells

Format cells option can be applied to a specific cell or multiple cells in a worksheet.
It is invoked by right-clicking on any cell and selecting **Format Cells** or by using the dialog box launcher (small downward arrow) on the Number group on the Home tab.

It consists of various tabs such as Number, Alignment, Font, Border, Fill, a

and Protection.

Exercise. Using the enclosed Chapter2.FormattingInExcel.xls
Perform following formatting options.
- Make the Header row distinct by providing color and borders.
- Create a new row to group the header columns.
- Format the Sales, Discount, and Profit columns. Display Sales and Profit prefixed
with a $ sign and two places of decimals). Display Discount as a percentage.
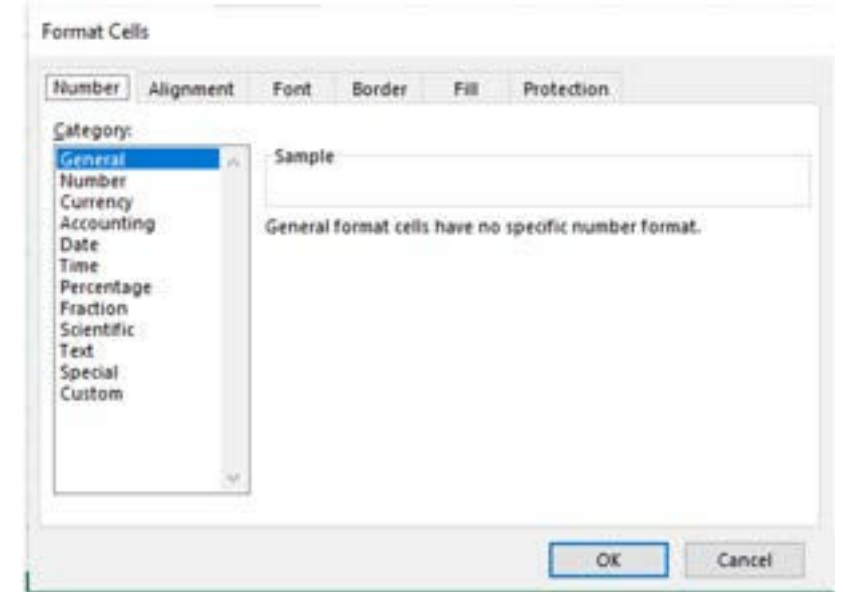
Formatting Cells – Exercise Solution

Steps to format data in a worksheet:

1. Launch MS Excel and open the enclosed Orders.xlsx. Create a copy of the sheet or work on the same sheet.

2. Formatting headers. Headers should be distinct from the rest of the data.

Highlight the header row (Row1, Columns A through M). From the Home tab navigate to Font group
and select Fill Color. Choose the desired color.
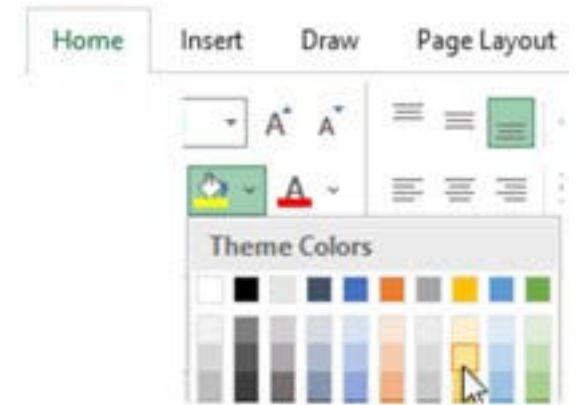
3. Select the header row again and from the **Home** tab, under **Font** group, select **Borders** and then All borders.
This will produce borders around each cell in the header row.

4. **Merge cells**. Use Merge cells to group the headers.

The columns B through E can be grouped as Order Details. Similarly, columns F
through I
can be grouped under Customer Details, and columns J through M can be grouped as Metrics.

- Insert a blank row above the header row.

Select the header row, right-click and select Insert.

- In the new row, type Order Details on the cell with address B1 (first row, B column).

- Select the columns B1 through E1 and from the Home tab, select Merge & Center
(from the Alignment group).
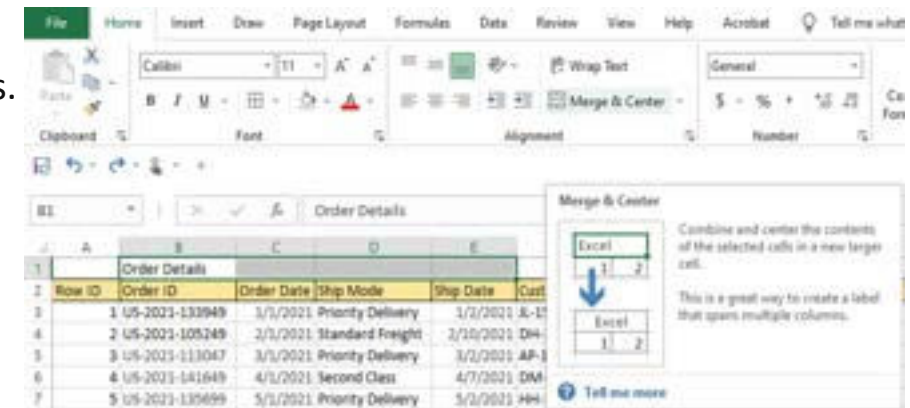
Formatting Cells – Exercise Solution- contd.

- This will display *Order Details* text in the center of the selected cells.

- To learn more details on what options MS-Excel has selected to perform this, select *Order Details*, right-click and select *Format* Cells.

- Similarly, type *Customer Details* on cell F1.
  - Select cells F1 through I1 and from the *Home* tab select *Merge & Center* (from *Alignment* group).

- Type *Metrics* on cell J1.
  - Select cells J1 through M1 and from the *Home* tab select *Merge & Center* (from Alignment group).
  - Use different colors to differentiate the groups.

Order Details				Customer Details				Metrics			
Order ID	Order Date	Ship Mode	Ship Date	Customer ID	Segment	Region	Product ID	Sales	Quantity	Discount	Profit
US-2021-133949	1/1/2021	Priority Delivery	1/2/2021	JL-15175	Home Office	West	TEC-PH-908	475.944	7	0.2	59.493
US-2021-105249	2/1/2021	Standard Freight	2/10/2021	DH-13675	Home Office	West	FUR-BO-330	411.332	4	0.15	-4.8392
US-2021-113047	3/1/2021	Priority Delivery	3/2/2021	AP-10915	Consumer	South	OFF-FA-763	11.85	3	0	3.792

Formatting Cells – Exercise Solution- contd.

5. **Number formatting.** Formatting Sales values to display $ sign.
Sales values are currently displayed without the $ sign and contain three places of decimals. The format can be changed to prefix the values with a $ and the reduce number of decimals to 2.
- Select column J for Sales.
Navigate to the **Home** tab and from the **Number** group, select **$**. This will change the format to Accounting.

If some of the cells display hash (#) that means that value is large and does not fit in the cell. Use the mouse on the columns to extend the column.
**Tip: Number formats can also be changed by right-clicking on the selected cells and selecting Format Cells.**
6. Using format painter.
- The *Profit* column should also have the same format as *Sales*.
- To do so, copy the formatting of the Sales column and paste it on Profit.
- Select any cell on *Column J* (*Sales*) and from the *Home* tab, under the *Clipboard* group,
- select the *Format Painter* icon. This will copy the formatting of the cell.

7. **Formatting Discount column to display in %.**
Select Column L (Discount) and from the Home tab, Number group, select the % icon.
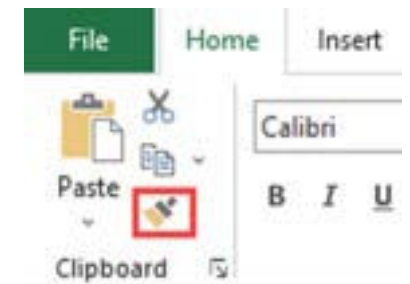
Formatting of data is essential to make sure that the data entered is displayed in the intended format. To review or change the format, right-click on the cell and select Format Cells.

Conditional Formatting

Conditional formatting in Excel allows users to apply formatting on the data based on a certain criterion.
It is similar to Cell formatting but more dynamic as it is based on conditions. Conditional formatting options are available from the **Home > Styles> Conditional Formatting.**

Exercise.

Perform following formatting options in the worksheet data.
- Display the Sales amount in Green where Sales is greater than $500.
- Display negative Profits in red.
- Display Top 20% of Profit in Green.
- Display data bars to display higher and lower quantities sold.

Solution:

Display Sales in Green.

1. Select Column J (Sales). From the ribbon navigate to Home> Styles > Conditional Formatting.
2. From Conditional Formatting, select the option for **Greater Than**. In the Greater Than dialog, specify the condition for greater than 500 and select the color Green fill with Dark Green Text.

Display negative Profits in red.

1. Select Column M (Profit). From the ribbon navigate to Home> Styles > Conditional Formatting.
2. From Conditional Formatting, select the option for **Highlight Cells Rules** and then select **Less Than** and in the **Less Than** dialog box, specify the condition as 0
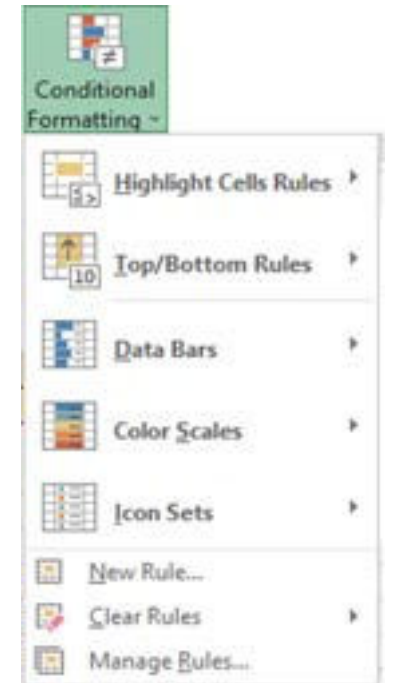
Conditional Formatting solution contd.

Display Top 20% of Profit in Green.

1. Select Column M (Profit). From the ribbon navigate to Home> Styles > Conditional Formatting.
2. From Conditional Formatting, select the option for **Top/Bottom Rules** and select **Top 10%**.

In the Top 10% dialog box, specify the condition for **20%** and change the color to **Green fill with Dark Green Text**.

Display data bars on Quantity.

1. Select Column K (Quantity). From the ribbon, navigate to
2. Home > Styles > Conditional Formatting.

From Conditional Formatting, select the option for **Data Bars** and select **bar colors**.

|	Order Details				Customer Details				Metrics			
Row ID	Order ID	Order Date	Ship Mode	Ship Date	Customer ID	Segment	Region	Product ID	Sales	Quantity	Discount	Profit
1	US-2021-133949	1/1/2021	Priority Delivery	1/2/2021	JL-15175	Home Office	West	TEC-PH-908	$ 475.94	7	20%	$ 59.49
2	US-2021-105249	2/1/2021	Standard Freight	2/10/2021	DH-13675	Home Office	West	FUR-BO-330	$ 411.33	4	15%	$ (4.84)
3	US-2021-113047	3/1/2021	Priority Delivery	3/2/2021	AP-10915	Consumer	South	OFF-FA-763	$ 11.85	3	0%	$ 3.79
4	US-2021-141649	4/1/2021	Second Class	4/7/2021	DM-12955	Corporate	East	OFF-AP-764	$ 795.41	6	20%	$ 59.66
5	US-2021-135699	5/1/2021	Priority Delivery	5/2/2021	HH-15010	Corporate	West	OFF-PA-765	$ 13.36	2	0%	$ 6.41
6	US-2021-131541	6/1/2021	Priority Delivery	6/2/2021	CK-12205	Consumer	South	OFF-AR-766	$ 129.89	6	20%	$ 12.99
7	US-2021-152254	7/1/2021	Standard Freight	7/10/2021	BD-11620	Consumer	South	FUR-TA-332	$ 310.69	7	20%	$ 108.74
8	US-2021-124429	8/1/2021	Priority Delivery	8/2/2021	MH-17785	Corporate	West	FUR-TA-332	$ 567.12	10	20%	$ (28.36)
9	US-2021-120740	9/1/2021	First Class	9/4/2021	PS-18970	Home Office	West	FUR-FU-333	$ 187.76	4	0%	$ 76.98
10	US-2021-130428	10/1/2021	Priority Delivery	10/2/2021	TG-21640	Consumer	South	FUR-CH-334	$ 1,125.49	7	20%	$ 98.48
11	US-2021-129609	11/1/2021	Priority Delivery	11/2/2021	VM-21835	Consumer	Central	OFF-AR-766	$ 16.28	2	0%	$ 6.51
12	US-2021-165589	12/1/2021	Priority Delivery	12/2/2021	TB-21595	Consumer	Central	FUR-FU-335	$ 25.16	5	60%	$ (11.32)
13	US-2022-160304	1/1/2022	Standard Freight	1/10/2022	BM-11575	Corporate	East	FUR-BO-336	$ 173.94	3	0%	$ 38.27
14	US-2022-108504	2/1/2022	Priority Delivery	2/2/2022	PP-18955	Home Office	South	FUR-BO-337	$ 239.98	2	0%	$ 52.80
15	US-2022-143819	3/1/2022	Standard Freight	3/10/2022	KD-16270	Consumer	East	FUR-TA-338	$ 836.59	8	40%	$ (264.92)

Enhance your Excel knowledge

Enhance your Excel Knowledge by exploring the book:

Excel Basics to Advanced

Excel Blogs

Take instructor-led training
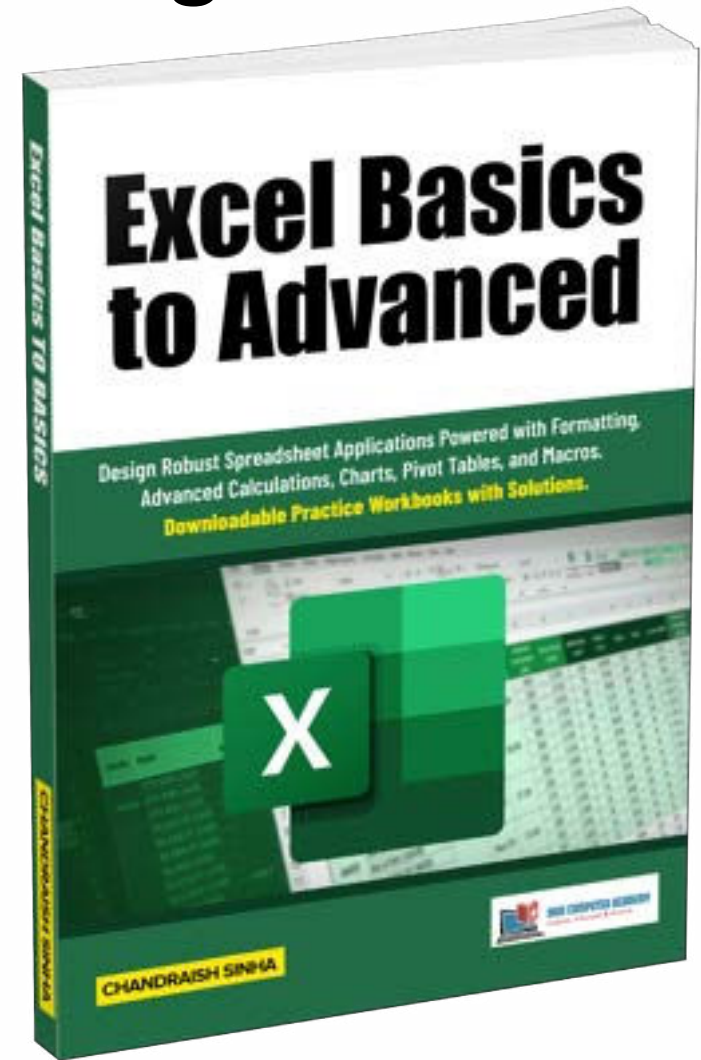
Thank You…

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