

Excel Formatting Tips

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Formatting

Excel has many formatting options. That can be a good thing and a bad thing. The large number of formatting options can make it harder to get the format you want.

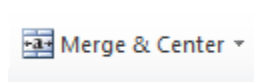
In most cases it pays to keep your formatting simple. Less is more. Formatting shouldn't take the focus off the figures. Formatting can be used to make reports more readable and to make your files more useable.

I will not be covering conditional formatting in this webinar as I have already presented a free webinar on conditional formatting. This is available on my website.

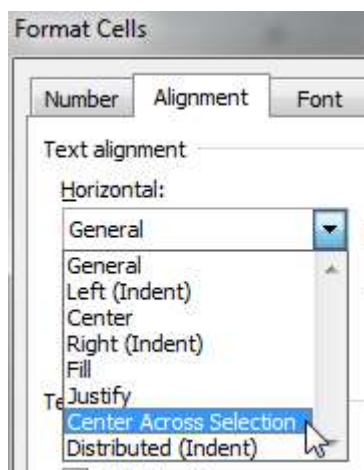
Spelling

Just a note on the word colour. I will be using the Australian spelling when talking about colours. Be aware that Excel options all use the US spelling of color. This applies to other Excel formatting options that use the US spelling eg center.

Avoid Merge & Center



This icon on the Home Ribbon tab should be avoided because it can cause two issues. The Merge & Centre format can stop you from copying and pasting ranges as well as causing macros to crash. There is an alternative format called Center Across Selection which achieves the same result without having the downsides. Unfortunately Center Across Selection does not have its own icon and it won't work vertically, so Merge & Center is the only solution to merge a range vertically.



Center Across Selection is in the Alignment tab of the Format Cell dialog. Use the Horizontal: drop down to access it.

Colour Blindness

Be aware that about 8% of men and 1% of women have some form of colour blindness. Red and Green is the most common form.

Keyboard Shortcuts

Sometimes keyboard shortcuts can be the fastest way to apply formats.

Ctrl Key

The Ctrl key has a lot of selection shortcuts and when you combine these with its formatting shortcuts you can quickly select and format ranges just using the keyboard.

The table below has a listing of useful Ctrl key formatting shortcuts.

| Ctrl + | + Shift | Format Option |
|--------|---------|----------------------------------|
| 1 | | Format Cells Dialog |
| b | | Bold |
| u | | Underline |
| 5 | | Strike Through |
| ! | Shift | Number - comma and 2 decimals |
| # | Shift | Date d-mmm-yyy |
| \$ | Shift | \$ format - comma and 2 decimals |
| % | Shift | % format - no decimal places |
| & | Shift | Thin Outline Border |
| - | Shift | Remove Borders (underscore) |

The Ctrl key has a number of range selection shortcuts.

Ctrl + * will select the current region - great for selecting tables

Using the Shift key with Ctrl can also speed up selection by selecting ranges in batches.

Ctrl + Shift + arrow keys - allow you to select ranges in each of the four directions

Multiple Ranges

The Ctrl key can also be used with the mouse to select multiple ranges in one go. This can speed up formatting. Select the first range as per normal and then hold the Ctrl key down and use the mouse to select other ranges. If you make a mistake you will need to start again.

\$ and % symbols

When entering values into Excel you can use the \$ or % symbols to automatically apply that format to the cell.

F4 Function Key

F4 repeats your last action. Note: it doesn't repeat multiple actions, just the very last action.

Alt + Enter


If you want to force a line break within a cell use Alt+ Enter when typing the entry. This is slightly different to the Wrap Text format. Wrap Text will put a line break based on the column width. Alt + Enter forces the line break all the time.

Mouse Shortcuts

The mouse offers many formatting shortcuts. Right clicking and right dragging can speed up a lot of your formatting work.

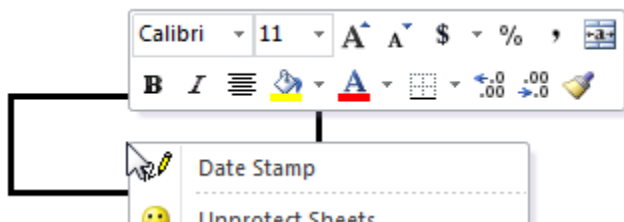
Using the Quick Access Toolbar (QAT) can also allow you to have all of your common formatting icons just a click away.

Format Painter

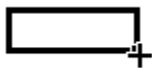
 **Format Painter** Double click this icon to allow for multiple pastes of the selected format.

Right Click

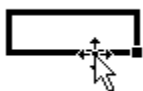
Right clicking a range or cell displays many of the common formats.



When using the mouse it is important to use the correct mouse cursor. The two common cursors are the Fill Handle, and the arrow shaped cursor.



The Fill Handle is used to fill between a start and an end point.

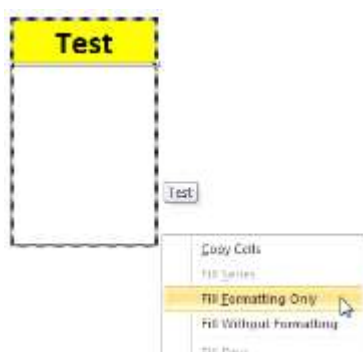


Warning: Dragging this cursor with the left mouse button is a Cut and Paste - be very careful it can cause #REF! errors.

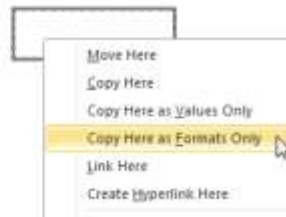
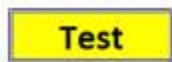
The arrow shaped cursor is used to drag from one spot to another.

Right Mouse Button Drag

Both of these cursors can be dragged with the right mouse button. (This can take a little practice.) When you release the mouse button one of the options is to Paste Formats only.

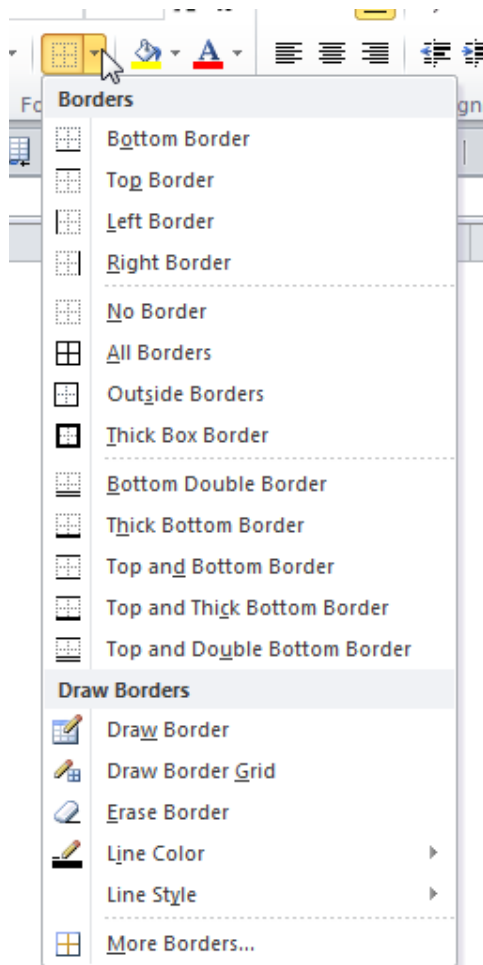


Fill Handle drag



Arrow cursor drag

Borders



The Borders icon drop down has a lot of options and each of the individual icons can be added to your QAT.

I usually turn off gridlines on the sheet – View Ribbon, Show section.

I frequently use the All Borders and the Thick Box Border format.

The Draw Borders options allow you use the mouse to draw your borders directly on the grid.

You can change the Line Color as well as the Line Style.

Clearing Formats

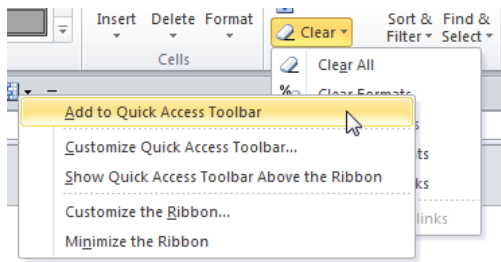


Sometimes you might just want to remove all the formats and start again. There is a Ribbon icon that clears all the formats.

On the far right of the Home Ribbon tab in the Clear drop down is the Clear Formats icon.

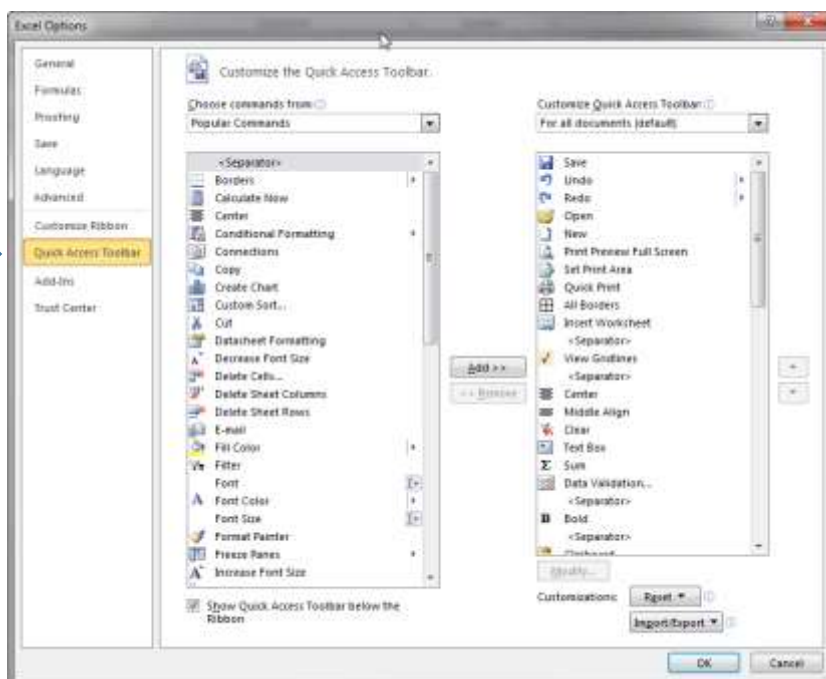
Another icon worth adding to your QAT.

Adding Icons to Your QAT



It's as easy as right clicking the icon and selecting Add to Quick Access Toolbar.

To organise the icons on your QAT you need to customize it. Right click the QAT and choose Customize Quick Access Toolbar.



The Separator icon (top) inserts a thin vertical line on the toolbar to separate sections.

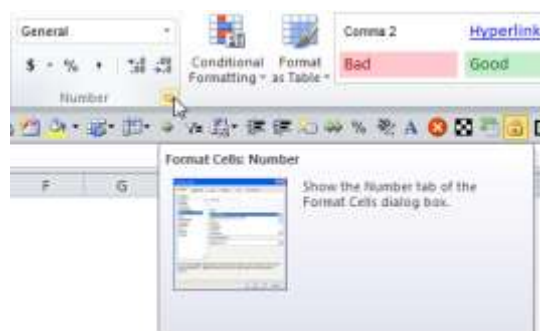
Use these arrows button to select an icon and move it up or down.

Always click the OK button to keep your changes.



Number Section Drop Down

At the top of the Number section of the Home Ribbon tab is a drop down that contains many common useful number formats.



Clicking the small arrow (bottom right corner) of a Ribbon section will open a dialog.

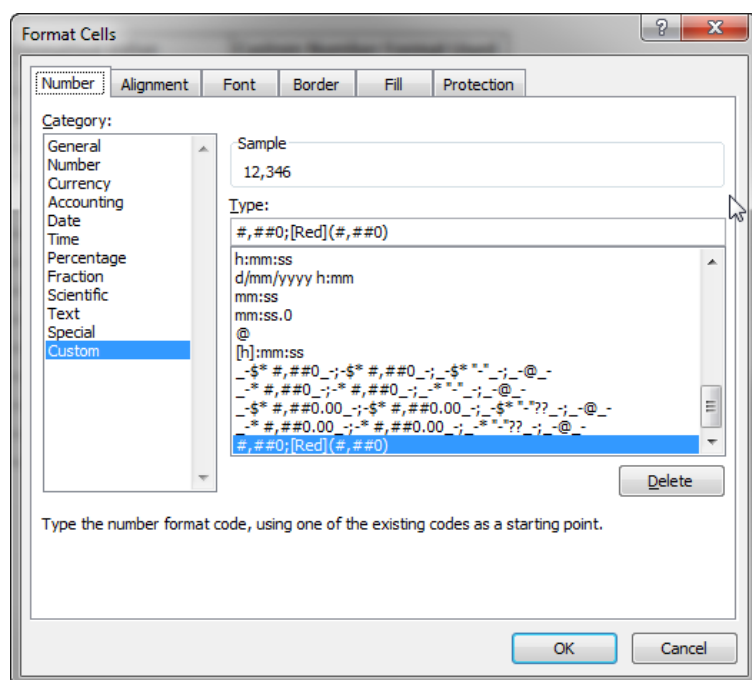
In the case of the Home Ribbon the associated tab in the Format Cells dialog.

Avoid using the Text format - it can cause issues with calculations.

Number Formats

Obviously numbers are the reason Excel exists and using the right number format is important. Even if Excel doesn't have a standard format you can create a custom number format to suit your needs.

Custom number formats have a large variety of different formats that you can use on your numbers. This includes how you handle zeros and negatives. Excel used to have a built-in format to display red brackets for negatives. Unfortunately it is no longer a standard format and you must create a custom number format to allow you to apply red brackets for negatives.



The Custom option on the left allows you to use pre-defined custom formats or to create your own.

You can select an existing custom format and modify it to suit.

When you enter the format in the Type: box the Sample section shows what the selected cell will look like.

| Value No Format | Formatted Value | Custom Number Format Used |
|-----------------|-----------------|-------------------------------|
| 12345.6789 | 12,346 | #,##0;[Red](#,##0) |
| -12345.6789 | (12,346) | #,##0;[Red](#,##0) |
| 12345.6789 | 12,345.68 | #,##0.00;[Red](#,##0.00) |
| -12345.6789 | (12,345.68) | #,##0.00;[Red](#,##0.00) |
| 12345.6789 | 12,345.68 | #,##0.00 _);[Red](#,##0.00) |
| -12345.6789 | (12,345.68) | #,##0.00 _);[Red](#,##0.00) |
| 1000 | 1,000 m | #,##0 "m" |
| 0 | Entry Required | #,##0;-#,##0;"Entry Required" |
| 1234 | 01234 | 00000 |
| 10000000 | 10,000,000 | #,##0 |
| 10000000 | 10,000 | #,##0, |
| 10000000 | 10 | #,##0,, |
| 10000000 | 10,000 k | #,##0, "k" |
| 10000000 | 10 M | #,##0,, "M" |
| 10000000 | | ;;; |

Examples of Custom Number formats

Note: When you link to another cell it will often use the format from the linked cell.

"Hide" values

The last entry in the table shows the special custom number format which allows you to stop anything from displaying in a cell. This won't display on the sheet and it doesn't print out. This is slightly different to using the same Font Color and Fill Color.

Styles

Styles are a feature of Excel that have been improved in recent versions. Styles allow you to standardise your formats so that you can achieve consistent formats throughout your file.

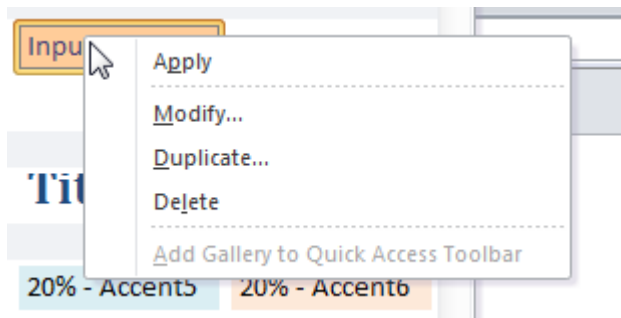


The advantage of using a Style to format a range is that changing the Style's format will automatically flow through to all the ranges that have been formatted with that Style. This makes it incredibly easy to make changes that would otherwise be quite time consuming.

| Formatted Using a Style | Styles Applied |
|--|----------------|
| <div style="background-color: #fce4d6; width: 100px; height: 15px;"></div> | Input |
| <div style="background-color: #fce4d6; width: 100px; height: 15px;"></div> | 0 Linked Cell |
| <div style="background-color: #fce4d6; width: 100px; height: 15px;"></div> | 0 Calculation |
| Title | Title |
| Heading | Heading 1 |
| Another Heading | Heading 2 |
| Heading Again | Heading 3 |
| Last Heading | Heading 4 |
| <div style="background-color: #fce4d6; width: 100px; height: 15px;"></div> | 2 Input |
| <div style="background-color: #fce4d6; width: 100px; height: 15px;"></div> | 3 Input |
| | 5 Total |
| 1,000.00 | Comma 2 |
| 1,000 | Comma [0] |

Standardising your input cell colour is one way to make the user's experience better. If the user can easily identify the cells that they need to update it makes the input process smoother.

Creating a standard input Style is a good idea. This does however involve usually creating three or four similar Styles to handle the different types of input that are common. For example you might have a dollar entry; a date entry; a percentage entry; and a number entry. These all might have the same fill colour but have separate number formats. Hence you may need to create a few different types of input Styles. This is reasonably straightforward as you can take an existing Style and modify it.



You can Modify an existing Style by right clicking the Style button and choosing Modify.

You can also Duplicate it so that you can create another Style based on it whilst leaving the original Style unchanged.



The tick boxes mean that a format on the relevant tab in the Format Cells dialog has been applied.

Clicking on the Format button opens the Format Cells dialog.

Most options are available. A few are disabled, mainly in the Border tab.

Merging Styles

You can use the Merge Styles option (bottom of the Styles Gallery) to copy Styles between files. You need both files open at the same time.

WARNING: I have experienced frequent crashes when I use the Merge Styles option – save your files before using Merge Styles.

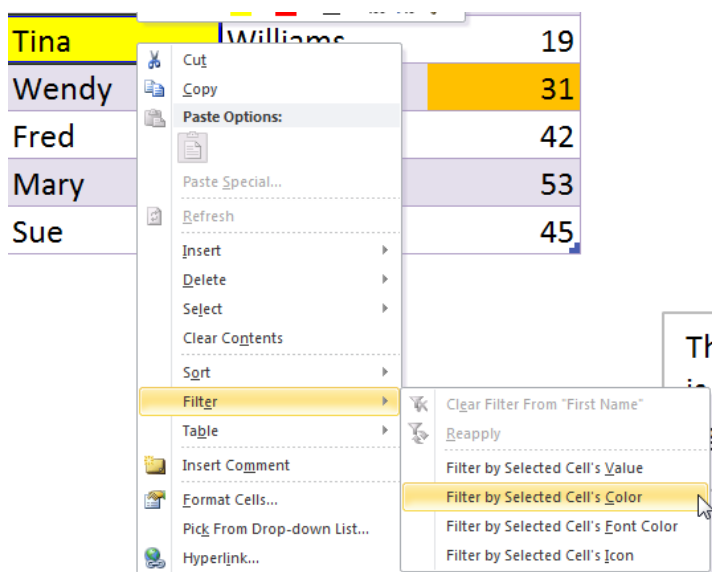
Using Colours

Using Colours correctly in your spreadsheets can make the user's experience a lot easier. Using colours consistently throughout the file can make it easier to understand.

Excel has a couple of features that use and recognise colours that you may not be aware of.

Sort and Filter by Colour

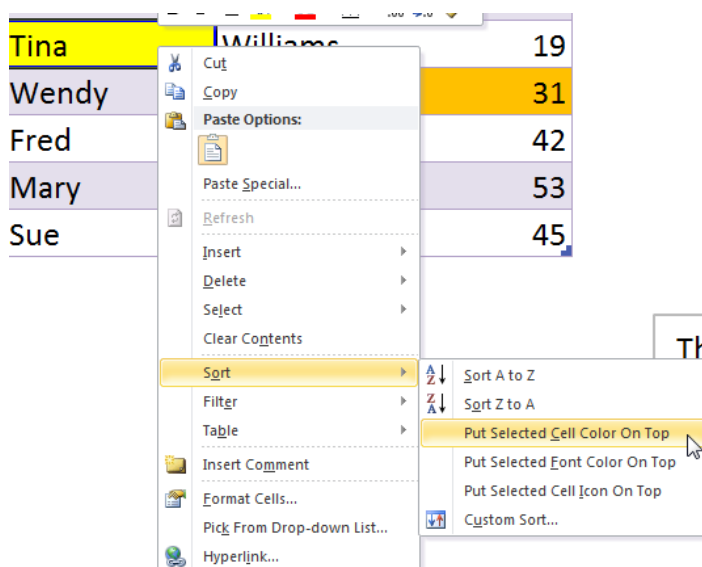
It is possible to filter and sort by colours.



Filtering

The right click menu shows the Filter options.

The Cell's Icon option refers to the icons available in conditional formatting



Sorting

Sorting by colour only sorts the chosen colour. Excel doesn't sort all the colours because it has no way to figure out what order the colours should be sorted into.

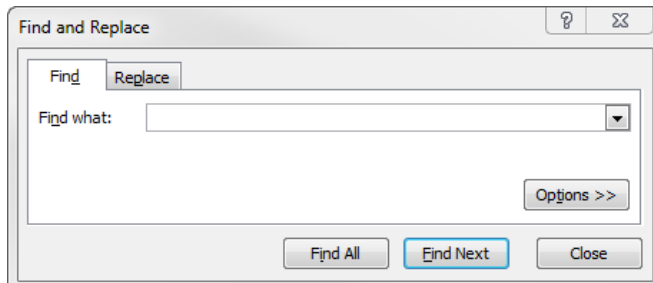
Sorting by colour also has an option for icons

Find by Colour

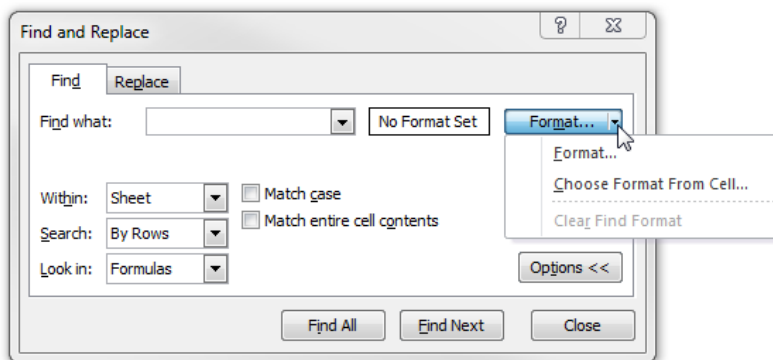
Excel has a find and replace feature that has the ability to identify different colours in cells.

Ctrl + f opens the Find and Replace dialog - Find tab.

Ctrl + h open the Replace and Replace dialog - Replace tab



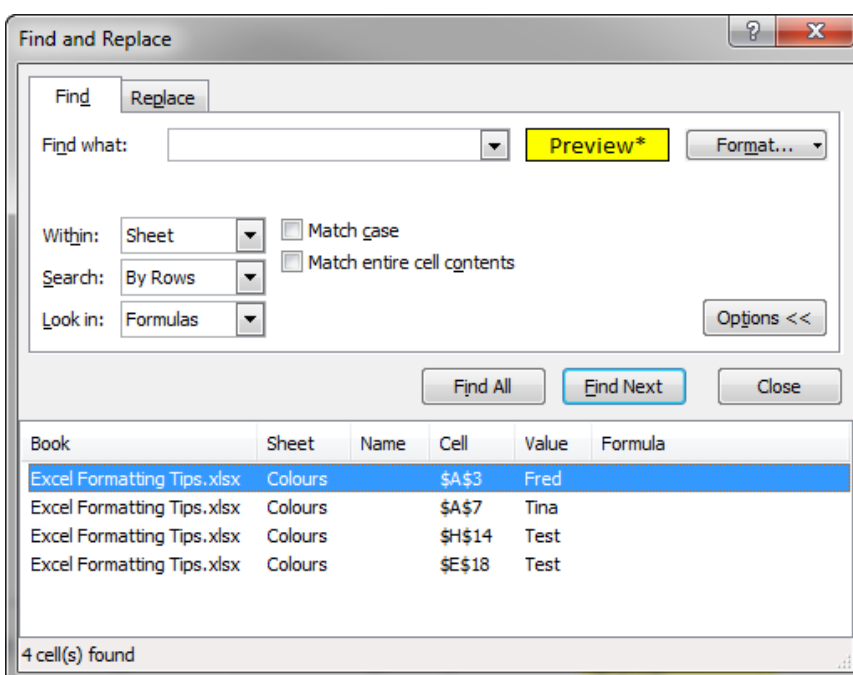
Click the Options >> button



The Format drop down allows you to choose a format from an existing cell or use the Format Cells dialog to define a format to search for.



When you click the Choose Format from Cell option the cursor changes and you use the mouse to click on a cell.



Clicking the Find All button identifies all the cells with the same format.

Pressing Ctrl + a in the bottom section allows you to select all the cells matching the criteria.

You could use this to clear inputs.

Formatting Functions

One function that can perform formatting is the TEXT function.

TEXT Function

The function allows you to apply custom formats to cell values so that you can use them in headings. It converts the values into text. It is mainly used to convert dates into a usable format. Excel stores dates as numbers and you need to use the TEXT function to convert the date number into a common date format.

Syntax

=TEXT(Value,Format)

Value - usually a cell reference to a value or date

Format - format enclosed in quotation marks.

TEXT Examples

| | A | B | C |
|---|--------------|----------------------|----------------------------|
| 1 | Value | TEXT Function | Formula in Column B |
| 2 | 1234 | \$1,234 | =TEXT(A2,"\$#,###") |
| 3 | 12345 | \$12,345.00 | =TEXT(A3,"\$#,###.00") |
| 4 | 0.1 | 10.00% | =TEXT(A4,"0.00%") |
| 5 | 1/10/2013 | Oct | =TEXT(A5,"mmm") |
| 6 | 1/10/2013 | October-2013 | =TEXT(A6,"mmmm-yyyy") |
| 7 | 1/10/2013 | Oct 13 | =TEXT(A7,"mmm yy") |

UPPER, LOWER and PROPER Functions

These three functions convert text to their respective cases. See image below.

| | A | B | C | D |
|---|-------------|--------------|--------------|---------------|
| 1 | Text | UPPER | LOWER | PROPER |
| 2 | john Smith | JOHN SMITH | john smith | John Smith |
| 3 | two words | TWO WORDS | two words | Two Words |

To create headings you can use the & symbol to join text together. See examples below.

| | A | B | C | D |
|---|------------|-----------|-----------------------|-----------------------------------|
| 6 | Report for | 1/10/2013 | Report for October 13 | =A6&" "&TEXT(B6,"mmmm yy") |
| 7 | Report for | 2/10/2013 | Report for OCTOBER 13 | =A7&" "&UPPER(TEXT(B7,"mmmm yy")) |

General Formatting Tips

This final section is dedicated to all the other formatting tips that don't fit into the previous sections. It has a wide variety of different types of tips.

Consider turning your gridlines off on your spreadsheets this can make your spreadsheets look cleaner. The gridlines on the spreadsheet are different to the gridlines on the print setup. They are controlled separately. Once you have turned off gridlines then you can apply your own borders to your sheets.

The Alt key shortcut for sheet gridlines is Alt w v g pressed in sequence.

On the Ribbon the sheet gridlines option is in two places (It's one of the few options that's in two places). One is in the Page Layout tab, the other is in the View tab.

Format As Table

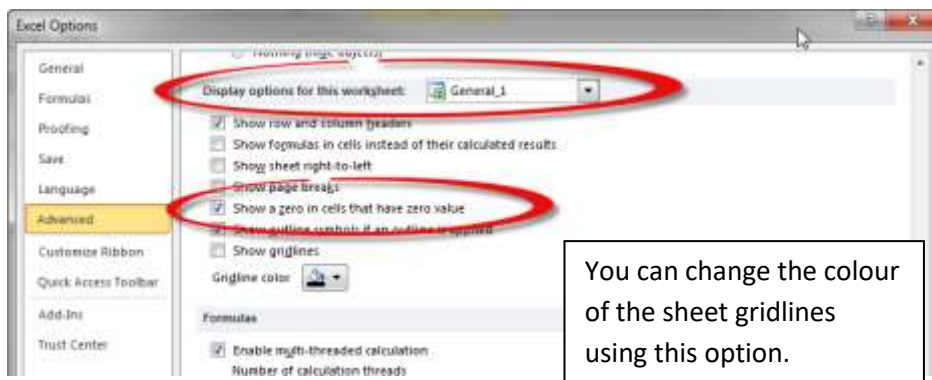


The Format as Table icon on the Home Ribbon tab does a lot more than just apply a format.

It adds special formats to the table including alternating row colours as well as different formats of the heading rows. I mention this to show you it exists and what it does - I have another free Data Handling webinar that covers many of the features that Format as Table incorporates. I highly recommend you use this feature for your tables in Excel.

Handling Zeroes

If you don't wish to display zeros on your spreadsheets then there is a setting that you can change to stop zeros displaying. The setting is in Options and it applies on a sheet by sheet basis.



Alt f t opens the Options dialog or click the File Tab and Options button.

Click the Advanced heading on the left scroll down about two thirds.

Un-tick Show a zero in cells that have zero value and click OK.

| | A | B |
|---|---------|---------|
| 1 | Revenue | 1000.00 |
| 2 | Costs | 1000.00 |
| 3 | Profit | 0.00 |
| 4 | | |
| 5 | Input | 0.00 |

| | A | B |
|---|---------|---------|
| 1 | Revenue | 1000.00 |
| 2 | Costs | 1000.00 |
| 3 | Profit | |
| 4 | | |
| 5 | Input | |

This shows what happens when you turn off displaying zeroes.

Both calculated and entered zeroes do not display.

If you need to only hide zeroes in a range you can use a custom number format to achieve that. See the see the custom number section earlier in the manual.

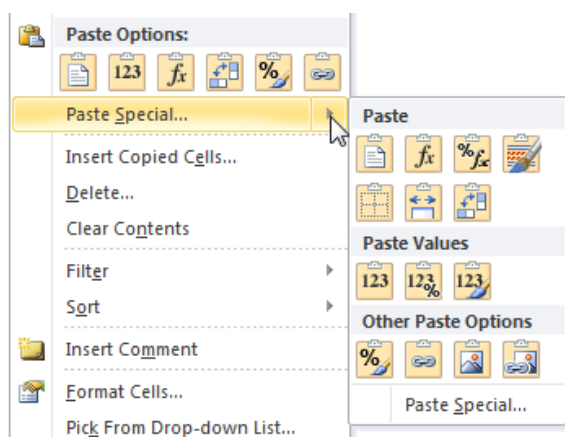
Note: you can show zeroes as a dash using some custom number formats and the dash will still display if you have turned off zeroes.

Formatting Charts

Most people are unaware that you can use many of the formatting icons from the Home Ribbon to format charts. It is as simple as selecting a chart object and clicking on the relevant formatting icon. In many cases this is the quickest way to change the chart's formatting.

Not Pasting Formats


In some cases to get the format right means NOT copying a format from one range to another. You might want to bring a formula from another range but you don't want its format.

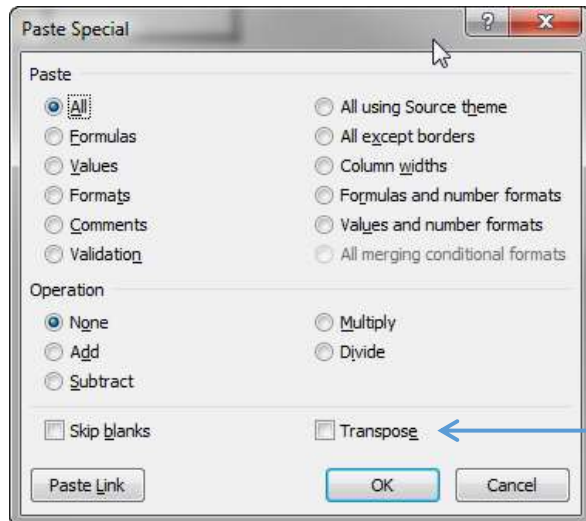


The right click options offer a few ways to avoid formats.

You can paste  just Values

 just Formulas

 Values and number formats



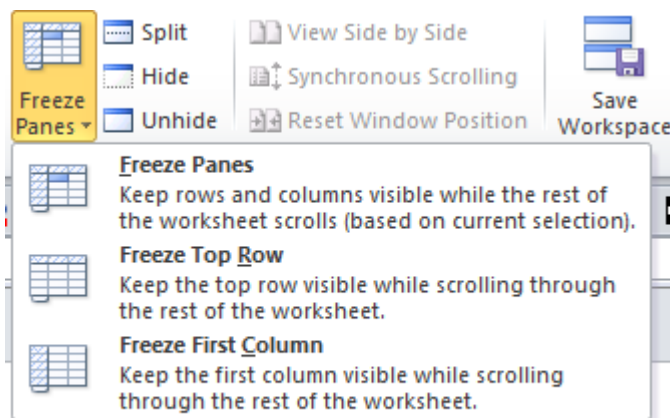
Luckily the Paste Special dialog has a few other options that can help you paste what you need.

Alt h v s in sequence opens the Paste Special dialog.

Note: The Transpose option can be useful. It changes a row based range into a column based range.

Freeze Panes

If you want to keep some column headings at the top and rows headings on the left then use Freeze Pane in the View Menu



It also has an Alt key shortcut

Alt w f f pressed on sequence.