FORMATTING

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INTRODUCTION

- It's not enough to enter information into Excel. You also need to format it.

- Borders, bolding, fill colors, they all make a difference in how easy it is to read and understand your data.

- And if you're going to print anything from Excel you really need to consider formatting your entries before you do so.

WHAT WE'RE GOING TO COVER

- How to format your data
  - Text alignment
  - Bold, italics, and underline
  - Borders around cells
  - Adding fill color to a cell
  - Changing the font or font size or color
  - Formatting your data as currency, percent, number, or a date
  - Changing row height or column width
  - Merging cells and centering text
  - Wrapping text
  - Using the format painter

INTRODUCTION

- This course is part of the Easy Excel Essentials series of courses and is based on the books of the same name.

- Each course is meant to cover one specific topic.

- The assumption is that you already familiar with Excel but want to broaden your understanding in that one area.

- The videos in this course are extracted from the course *Excel for Beginners* by M.L. Humphrey which provides a broader coverage of introductory Excel topics.

INTRODUCTION

- I'm using Excel 2013 for this course
  - It should look familiar to users of Excel 2007 or later

- What qualifies me to teach this course:
  - I have an Econ degree from Stanford and an MBA from Wharton.
  - More importantly, I've been using Excel for over twenty years in a personal and professional capacity.

FORMATTING DATA

FORMATTING DATA
Text Alignment

ALIGNING TEXT WITHIN A CELL

- By default, text within a cell is left-aligned and bottom-aligned. But you actually have nine possible alignment options to choose from.

- To change the alignment of text within a cell or cells, choose your cell(s) and go to the Alignment section of the Home tab. You'll see six different images with lines showing different alignment choices. The first row has top, middle, and bottom alignment options. The second row has left, centered, and right alignment options.

- You can choose one option from each row.

TEXT ALIGNMENT USING THE FORMAT CELLS DIALOGUE BOX

- You can also change the direction that text runs within a cell. To do this, choose the text you want to change and go to Orientation option (the ab with a line under it) in the Alignment section of the Home tab.

- Click on the arrow to choose from Angle Counterclockwise, Angle Clockwise, Vertical Text, Rotate Text Up, and Rotate Text Down.

CHANGING THE DIRECTION OF TEXT IN A CELL

- Another option for changing the alignment of text within a cell or cells is the Format Cells dialogue box.

- It can be accessed either from the bottom of the Orientation dropdown by clicking on Format Cell Alignment or by right-clicking and choosing Format Cells from the dropdown menu and then going to the Alignment tab.

- The Horizontal and Vertical dropdowns allow you to choose the position of text within a cell (top, bottom, left, right, etc.)

- The Orientation option on the right-hand side allows you to change the orientation of text in the cell(s).

FORMATTING DATA
Bold, Italics, Underline

BOLDING TEXT

- To bold the contents of a cell or cell(s), highlight the cell(s), and:
  - Click on the large capital B in the Font section of the Home tab; OR
  - Type Ctrl + B; OR
  - Right-click, choose Format Cells from the dropdown menu, go to the Font tab, and choose Bold from the Font Style options section.
    - If you want text that is both bolded and italicized choose Bold Italic.
- To bold just part of the contents of a cell, highlight just that portion and then use one of the options above.

ITALICIZING TEXT

- To italicize the contents of a cell or cell(s), highlight the cell(s), and:
  - Click on the slanted capital I in the Font section of the Home tab; OR
  - Type Ctrl + I; OR
  - Right-click, choose Format Cells from the dropdown menu, go to the Font tab, and choose Italic from the Font Style options section.
    - If you want text that is both bolded and italicized choose Bold Italic.
- To italicize just part of the contents of a cell, highlight just that portion and then use one of the options above.

UNDERLINING TEXT

- To underline text within a cell or cell(s), highlight the cell(s), and:
  - Click on the underlined U in the Font section of the Home tab; OR
  - Type Ctrl + U; OR
  - Right-click, choose Format Cells from the dropdown menu, go to the Font tab, and choose one of the underline options from the Underline dropdown menu.
- If you want something other than a single underline, you'll need to use the third option.
- To underline just part of the contents of a cell, highlight just that portion and then use one of the options above.

REMOVING BOLD, ITALICS, OR UNDERLINE FROM TEXT

- To remove bolding, italics, or underlining from text, select the text and use either the Ctrl command (Ctrl + B, Ctrl +I, Ctrl + U) or click on the appropriate image in the Font section of the Home tab.

- For any text that already has that formatting, doing this will remove it.

- If you select text that is partially formatted and partially not formatted that way, you'll have to do it twice because the first time the formatting will be applied to all of the text.

FORMATTING DATA
Borders and Colors

FORMAT BORDERS AROUND CELLS

- If you're going to print your data, chances are you'll want to place borders around the cells to make it easier to distinguish.

- To do so, select the cell or cell(s) you want to have a border, and
  - Go to the Font section of the Home tab and choose from the Borders dropdown menu. (It's a four-square grid next to the U for underlining.) From there, click on the option you want. If you need to change the line style, color, etc. do this before you choose the location of the border; OR
  - Right-click and choose Format Cells from the dropdown menu and then go to the Border tab. Choose your style and color first before choosing which lines you want.

BORDERS AROUND CELLS (Cont.)

- With both options, you can combine line types. I often put a thick box border around my data and use a normal all borders grid inside. Just be sure if you're going to do that that you do it in the right order. (Do the all borders grid first.)

- If you want angled lines within a cell or cell(s), you'll need to use the Format Cells dialogue box.

- Be sure to choose your line color and style before you choose your line type or else your borders will be formatted with the default style.

COLORING A CELL (FILL COLOR)

- I often use this for header rows of tables.
- To color an entire cell a specific color, select the cell, go to the Font section of the Home tab, and click on the arrow to the right of the pain bucket that has a yellow line under it.
- This will bring up a palette of 70 colors to choose from. Click on the color you want.
- If that's not enough, you can choose More Colors to bring up the Colors dialogue box where you can choose from more colors or specify the RGB values of the color you want.

FORMATTING DATA
Font Choice, Size and Color

CHOOSING A FONT

- Option 1: Select the cell(s) and go to the Font section of the Home tab. Select a different font from the dropdown menu.

- Option 2: Select the cell(s), right-click, and choose Format Cells from the dropdown menu. Go to the Font tab and choose your font from the Font section.

- To apply a font to an entire worksheet, select the entire worksheet first and then select your font.

CHOOSING A FONT SIZE

- Option 1: Select the cell(s) and go to the Font section of the Home tab. Select the desired font size from the dropdown menu.

- Option 2: Select the cell(s) and go to the Font section of the Home tab. Use the increase or decrease font size buttons until you get the desired font size.

- Option 3: Select the cell(s) and go to the Font section of the Home tab. Manually change the current font size to the one you want by typing it into the font size box.

- Option 4: Select the cell(s), right-click, and choose Format Cells from the dropdown menu. Go to the Font tab and choose the font size you want or manually enter it.

CHOOSING A FONT COLOR

- Option 1: Select the cell(s) and go to the Font section of the Home tab. Click on the arrow next to the Font Color option (the capital A with a solid line under it) and choose your desired color.

- Option 2: Select the cell(s), right-click and choose Format Cells, go to the Font tab, and then click on the arrow to bring up the color dropdown menu.

- You can choose More Colors if you need a custom color not included in the initial 70 options.

FORMATTING DATA

Currency, Date, Number, Percent, Etc.

CURRENCY FORMATTING

- Option 1: Select the cell(s), go to the Number section of the Home tab, and click on the $ sign.

- Option 2: Select the cell(s), go to the Number section of the Home tab, and choose either Currency or Accounting from the dropdown menu.

- Option 3: Select the cell(s), right-click, choose Format Cells from the dropdown, go to the Number tab, and choose Currency or Accounting from there.

DATE FORMATTING

- Option 1: Select the cell(s), go to the Number section of the Home tab, and choose either Short Date (or Long Date if preferred) from the dropdown menu.

- Option 3: Select the cell(s), right-click, choose Format Cells from the dropdown, go to the Number tab, and choose your preferred data format from there by clicking on Date and then choosing an option from under the Type section.

- One thing to be cautious about with dates: Excel will always assign a year to a date even if you don't add one or want it.

NUMBER FORMATTING

- Option 1: Select the cell(s), go to the Number section of the Home tab, and choose Number from the dropdown menu. This creates a number with two decimal places. You can then use the zeroes with arrows to adjust to your desired number of decimal places.

- Option 3: Select the cell(s), right-click, choose Format Cells from the dropdown, go to the Number tab, and choose Number on the left-hand side and then in the middle choose your number of decimal places and whether or not to use a comma to separate out your thousands.

PERCENT FORMATTING

- Option 1: Select the cell(s), go to the Number section of the Home tab, and click on the % symbol.

- Option 2: Select the cell(s), go to the Number section of the Home tab, and choose Percentage from the dropdown menu.

- Option 3: Select the cell(s), right-click, choose Format Cells from the dropdown, go to the Number tab, and choose Percentage on the left-hand side and then in the middle choose your number of decimal places.

FORMATTING
DATA
Column Width / Row Height

COLUMN WIDTH

- Option 1: Right-click on the column and choose Column Width from the dropdown menu. Enter the new value in the provided box.
- Option 2: Place your cursor on the right side of the column name and then left-click and hold while you move the cursor until the column is the desired width.
- Option 3: Place your cursor on the right side of the column name and double left-click. This will make the column the width of the longest text in the column. (Usually.)
- To auto-adjust all column widths at once, highlight the entire worksheet and double left-click on any column border.
- To set all column widths in a document to the same value, highlight the entire worksheet, left-click and drag the border of one column to the desired width.

ROW HEIGHT

- Option 1: Right-click on the row and choose Row Height from the dropdown menu. Enter the new value in the provided box.
- Option 2: Place your cursor along the lower border of the row number and then left-click and hold while you move the cursor until the row is the desired height.
- Option 3: Place your cursor along the lower border of the row and double left-click. This will fit the row height to the text within the cells in that row. (Usually.)
- To auto-adjust all row heights at once, highlight the entire worksheet and double left-click on any row border.
- To set all row heights in a document to the same value, highlight the entire worksheet, left-click and drag the border of one row to the desired height.

FORMATTING DATA

Merge & Center and Wrap Text

MERGE AND CENTER

- Merge and Center is useful for when you have a table of data and want to have one header row across multiple columns. (But don't use it if you plan to do a lot of data analysis in that worksheet, because it will mess up filtering, sorting, and pivot tables.)

- To merge and center text, highlight the cells you want to merge into one, and then go to the Alignment section of the Home tab and choose Merge & Center.

- This will take the contents of the top leftmost cell you're merging and center it across all of the selected cells, turning them into one cell instead of multiple cells.

MERGE AND CENTER (Cont.)

- Because of the way Excel merges cells (only keeping the contents of the top leftmost cell), be sure that the text you want to keep is only in that one cell before you do this. (If your forget, Ctrl + Z is your friend.)

- You can merge as many cells as you want as long as their contiguous and an equal number across rows or across columns.

- Other options under Merge & Center include Merge Across or just Merge Cells.

- To unmerge a set of merged cells, go back to the Merge & Center dropdown and choose Unmerge Cells.

MERGE AND CENTER (Cont.)

- You can also merge cells by selecting those cells, right-clicking, choosing Format Cells from the dropdown menu, and then going to the Alignment tab and choosing Merge Cells from there.

- This will just merge the cells it won't center the text. You'll have to do that separately.

- Merge & Center as a combined option is not available in older versions of Excel.

WRAPPING TEXT

- Option 1: Select the cell(s) and go to the Alignment section of the Home tab. Click on the Wrap Text option in the alignment section.

- Option 2: Select the cell(s), right-click and choose Format Cells from the dropdown menu. Go to the Alignment tab and choose Wrap Text from under Text Control.

- If you have a lot of text within a cell, wrap text will still not display all of the text in the cell. In that case, manually adjust the row height to show all of the text.

FORMATTING DATA
Format Painter

COPYING FORMATTING

- This is very useful. Maybe more so in Word than Excel, but still worth knowing.

- If you already have a cell formatted the way you want it to be, you can copy that formatting to other cells in the worksheet, workbook, or another workbook by using the Format Painter tool.

- The Format Painter is located in the Clipboard section of the Home tab and looks like a little paintbrush. (Or broom, but given the name I think it's supposed to be a paintbrush.)

USING THE FORMAT PAINTER

- First, highlight the cell or cells that have the formatting you want to copy.

- Next, click on the Format Painter.

- Finally, click on the cell(s) where you want to copy the formatting.

- This will copy the font, font color, font size, cell borders, any italics/bolding/underline, text alignment, and text orientation from the original cell to the final cell while keeping the contents unchanged.

USING THE FORMAT PAINTER (Cont.)

- Be careful, because ALL of the formatting will change.
- Also, be sure that after clicking on the Format Painter tool that your next click is on the cell or cells that you want to have that formatting. Do not try to use the arrow keys to navigate to it. You must use the mouse or trackpad.
- You can double-click on the Format Painter tool if you have more than one location where you want to copy your formatting to.
  - If you do this, click on the Format Painter tool again to turn it off or use Esc.
- If a cell has mixed formatting, only part of that formatting will transfer.

USING THE FORMAT PAINTER (Cont.)

- You can copy formatting from multiple cells to multiple cells, but be sure to double-check the results to make sure the correct formatting transferred to each cell.

- You can copy formatting from one cell to multiple cells just by selecting all of the cells you want to have that formatting in the final step.

- Remember that Ctrl + Z is your friend. But if you use it, be sure to then hit Esc because Excel will treat the source cells as if they were copied until you do.

CONCLUSION

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- So that was how you format data in Excel.

- If you get stuck, reach out to me at mlhumphreywriter@gmail.com and I'm happy to help.

- And if you want to cover more Excel topics, then drop by my website for links to other classes and/or books on Excel at www.mlhumphrey.com.