# Excel formatting

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# Welcome

- this session is for 🌶 Excel beginners

- we'll get going properly at 15.05

- you'll need Excel of some sort to follow along

- if you can't access the chat, you might need to join our Teams channel: **tinyurl.com/kindnetwork**

- you can find session materials at **tinyurl.com/kindtrp**

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# The KIND network

- a social learning space for staff working with **k**nowledge, **i**nformation, and **d**ata across health, social care, and housing in Scotland

- we offer social support, free training, mentoring, community events, …

- Teams channel / mailing list

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# Excel training sessions

| Session | Date | Area | Level |
|---------|------|------|-------|
| Lambda formulas in Excel | 13:00-13:30 Mon 15th July 2024 | Excel | 🌶️🌶️ : **intermediate-level** |
| Lookups in Excel | 13:00-14:30 Thu 1st August 2024 | Excel | 🌶️🌶️ : **intermediate-level** |
| Relative, absolute, mixed, structured, and R1C1 references in Excel | 15:00-16:00 Thu 8th August 2024 | Excel | 🌶️🌶️ : **intermediate-level** |

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# Where does this fit in?
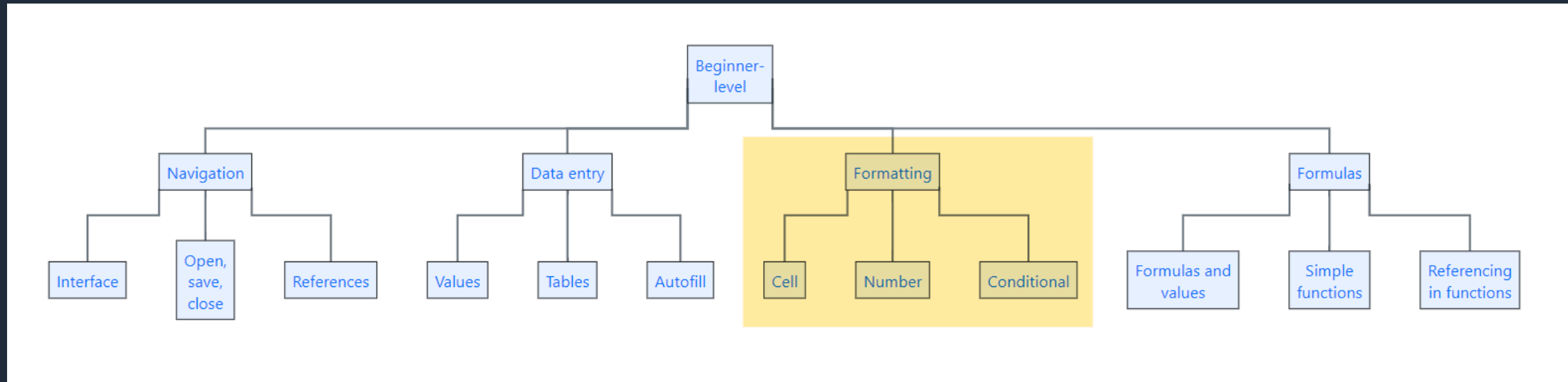


KIND Excel beginner skill tree

- for this session, you'll need to be familiar with the Excel basics (getting around in Excel, opening/saving/closing files)

- you'll also need to be familiar with A1 referencing, values, and tables

- we're going to avoid talking about formulas as much as possible today

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# Session outline

(thanks Deborah Calvin, Brian Orpin, Michael Roarty, Kenneth Mack, Catherine McGrenera, June Livey, Catriona Scott)

- accessibility

- formatting cells

- formatting values (aka **number formatting**)

- formatting vs other things

- shortcuts and tips

- an introduction to conditional formatting

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# Accessibility

- many of us will have legal duties to make parts of our services accessible

  - e.g. The Public Sector Bodies (Websites and Mobile Applications) Accessibility Regulations 2018

- there are useful standards for making sense of accessibility

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# Excel is a mixed bag for accessibility

- it is easy to make non-accessible documents in Excel
    - merged and split cells
    - inconsistent use of tables
    - poor column headings, sheet names, etc
    - unlabelled charts
    - low-contrast themes
    - meaning conveyed by colour and fonts
- there is a built-in accessibility checker in some versions of Excel, which you might find useful

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# Formatting cells

- please create a new Excel workbook

- you can format each cell individually via the right click menu and `Format cells` (or by the `Ctrl` + `1` shortcut)



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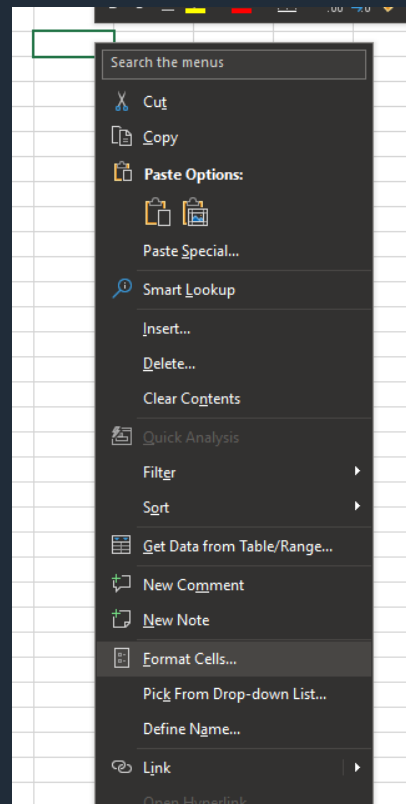
# Format cells dialogue
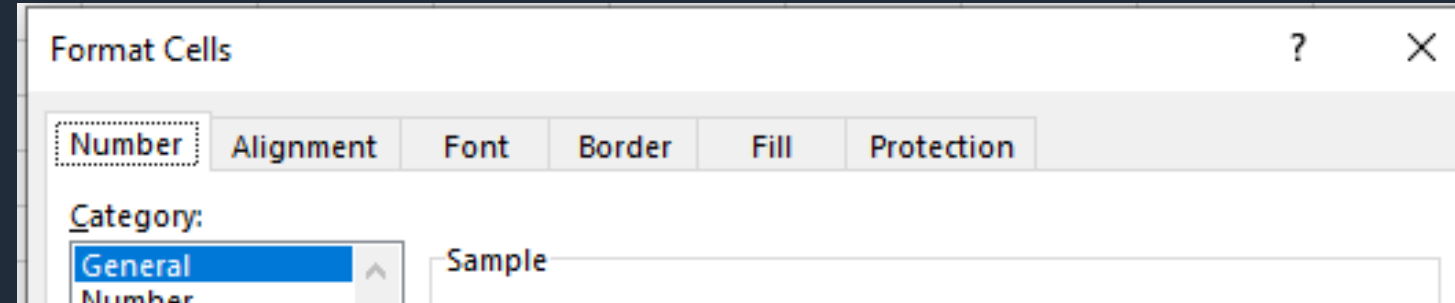


Format cells dialogue

- you can fill cells with custom fonts, alignments, colours, patterns, and gradients (via `Fill Effects...`)

- you can add borders to individual cells

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# Formatting many cells

- this is fine for a few cells, but gets boring (and inconsistent) if you have lots of styling to do

- you can select several cells, and access the `Format cells dialogue` to style them together

- or you can select a cell with a theme you want to copy, and use the `Format Painter` tool to spread that format about the place
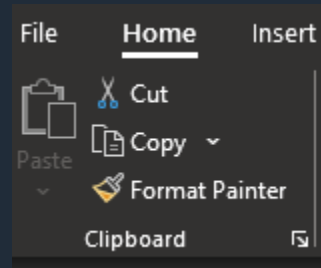
# Theming

- you can also **theme** your whole workbook
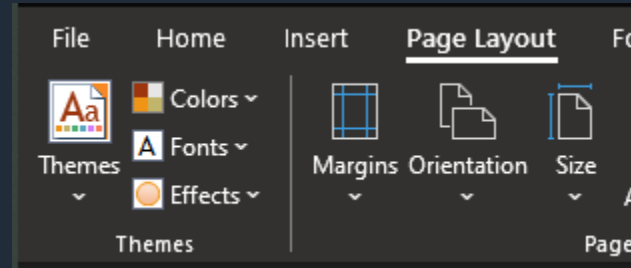


- take care, though, as many of these themes are not accessible and often produce hard-to-read results

- and lots of ugly clunky stuff to find (e.g. default font changes)

- on balance, better to avoid themes unless you're certain they'll be of benefit for you

# Help! I hate my formatting!

# Number formatting

- number formatting is taking a value, and changing its meaning with formatting

- number formatting is how dates work (or fail to work) in Excel

- dates are v. important, so we'll concentrate on them in this part of the session

- you'll also encounter number formatting when working with…

  - money

  - percentages

  - decimal places

  - …

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# Date formatting

- we'll take a number, and apply special formatting to it to make it look like a date

  - so 45483 will become 10/07/2024

- Excel dates are stored as the number of days since Jan 1st 1900

- you can prove this to yourself by typing 1 into a cell, then formatting it as a date using the number formatting menu:
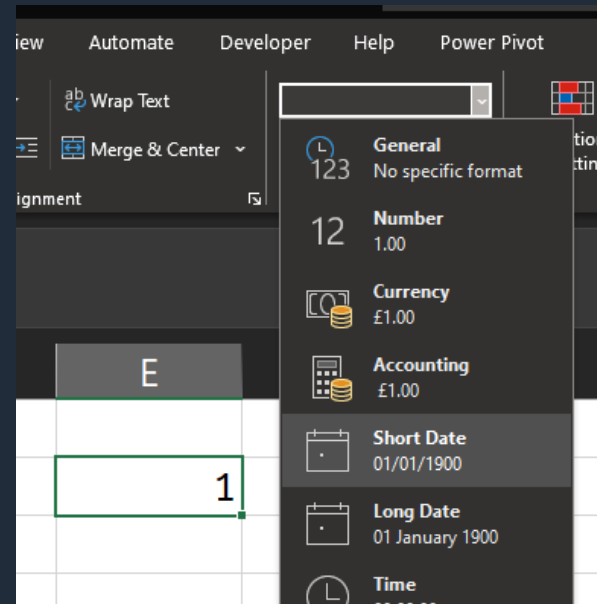


- you can also format as a date via the Format Cells dialogue (Ctrl + 1)

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# Don't try and cheat with dates!

- date formatting is one of the commonest pain points in Excel

- dates are extremely complicated, and we often want to calculate with them

- the advice is simple: dates should always be stored as these numbers, and then formatted to look like dates

  - don't try to cheat by writing dates as text

  - use formatting to produce your preferred date format in the Format Cells tools instead
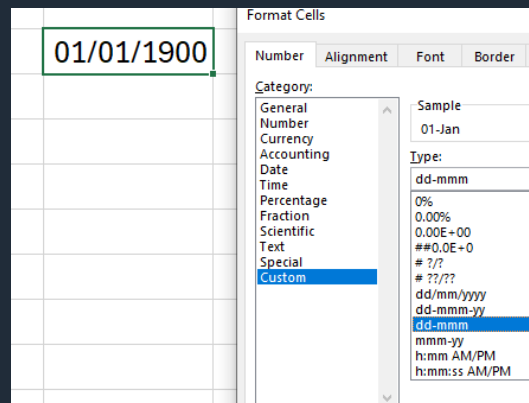
# Formatting vs other things

(or, keep your sheets clean)

- it's common to see Excel sheets that contain lots of extraneous bits
  - headers, copyright info, explanations…
- ideally, all this extra stuff should be kept well away from your data, as it makes it harder to process that data safely
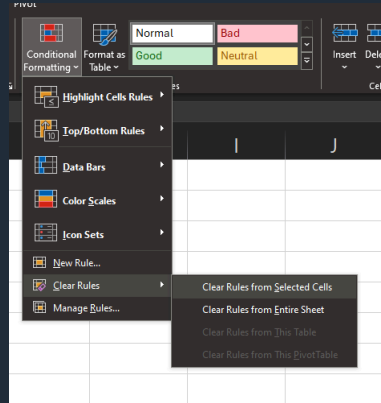- …and you should definitely be using tables to help with this

# Conditional formatting

- this can get complicated, and we'll revisit more fancy conditional formatting in the intermediate training sessions

- the big idea is that conditional formatting alters the format as values change

# Progress bars

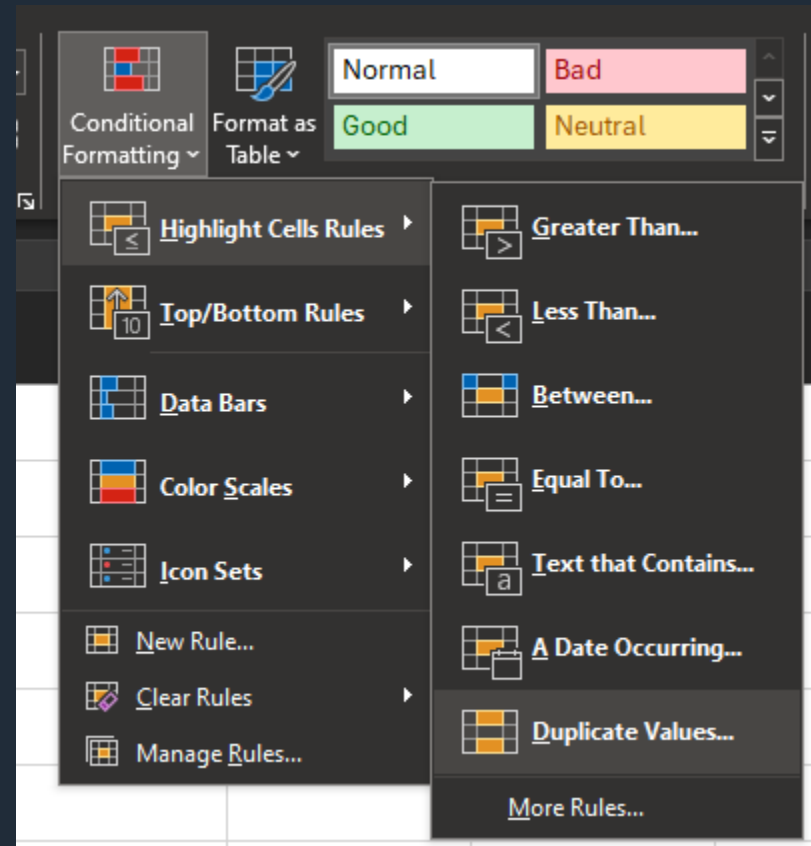# Duplicate values

- Now clear that conditional formatting
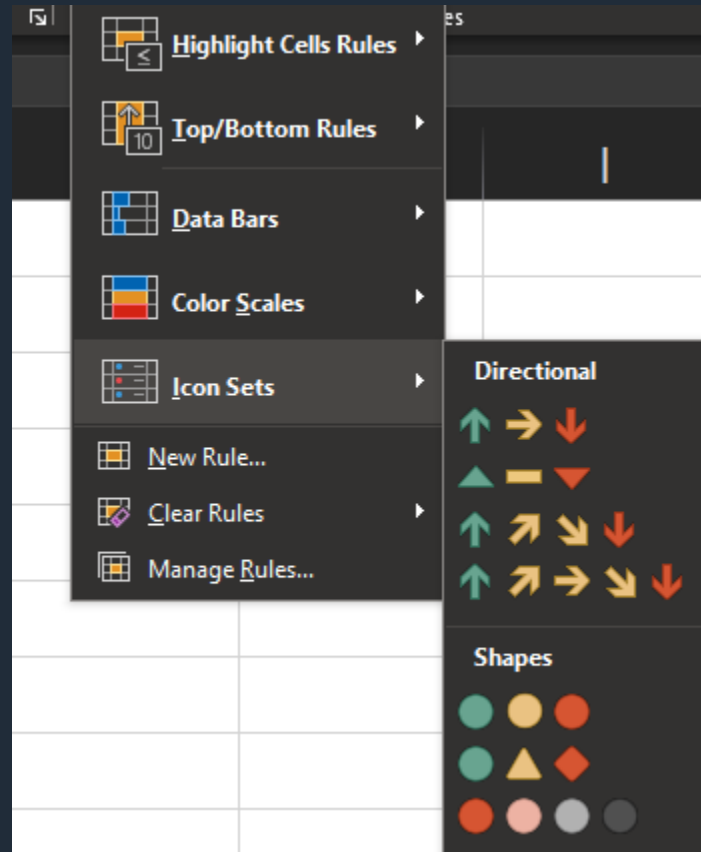


- Add a duplicate value to your numbers



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# Duplicate values

- Highlight duplicate values

# Red-Amber-Green reporting

- RAG reporting with icon sets



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# Key shortcuts

- `Ctrl` + `1` for the Format Cells dialogue

- `Alt`, `H`, `E`, `F` to clear formats

- `Ctrl` + `v`, `Ctrl`, `v` to paste values only

# Formatting tips

- Accessibility is much more important than beauty

- Use number formatting for dates, currency, percentages

- Consider using validation to make sure that cells only contain what you expect them to contain

- Consider locking cells to protect formatting when that formatting is really important

- Use conditional formatting sparingly

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# Feedback and resources

- please can I ask for some feedback - less than 1 minute, completely anonymous, helps people like you find the right training for them

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| and R1C1 references in Excel | | | |