Lecture Note #6: Formatting

BUSI 201: Business Data Analysis

Fall 2023

Topic 1. Formatting

Up to this point in class, we covered some formatting techniques. The font, font size, row height, column width, and the format of the data in each cell were some of those topics. Here, we will add some more formatting to assist in data analysis. Today, we will review some of those material, while also introducing some new formatting options.

Formatting in itself is not an absolute necessity when it comes to extracting meaningful information from data. Nonetheless it is extremely important when we are trying to *communicate* our findings by making the facts and figures easier to read. It may also assist in your own work by making content easier to find, minimizing mistakes caused by misreading information, etc.

Font and Font Size

There are various formatting options when it comes to text in cells. The first topic we will be covering is a review of the font and font size. Recall that the font and font size can be edited accessing the Home tab of the ribbon. You may change the font by either selecting or typing in your desired font in the red box in Figure1. The font size can be changed similarly by using the blue box. A quick alternative to selecting the font size using the blue box would be to use the options given in the orange box to enlarge or shrink the font size of the selected cell(s).
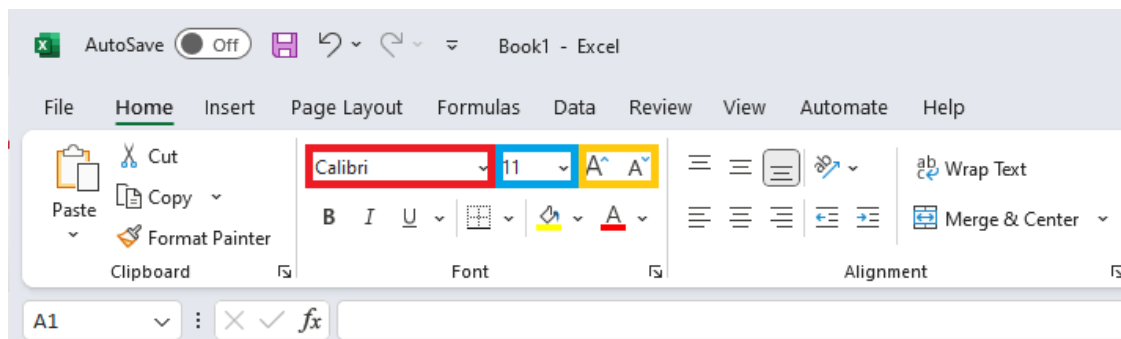

Figure 1: Font and Font Size

Alignment

Users may also change the alignment of the content in a given cell both vertically and horizontally. The contents' vertical alignment within the cell can be changed using the options in the red box of Figure 2. The left aligns contents to the top of the cell, the middle aligns contents to the middle, and the right aligns items to the bottom of each cell. Using the options in the blue box, we can align the content horizontally within the selected cell(s). The two options in the orange box can decrease and increase how much the content is indented in each cell(s). Finally, the green box is an option that can be used to angle the text in various directions.
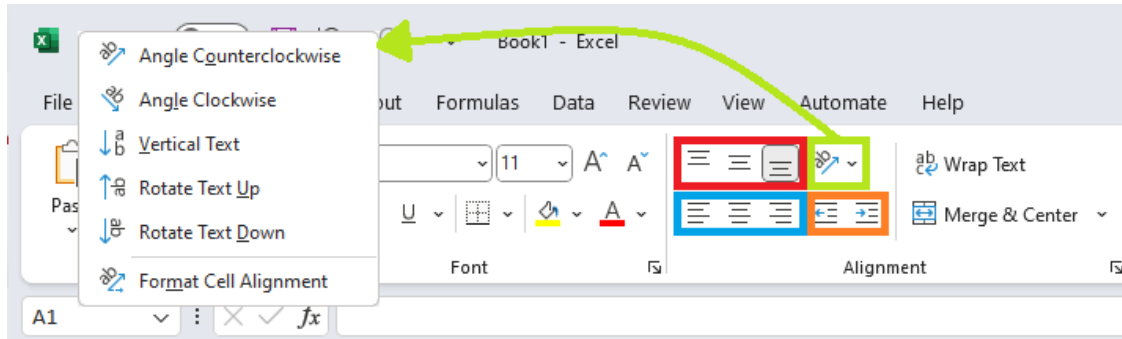

Figure 2: Alignment Options

Colors

Excel allows users to change the color of the content in cells by using the font color options located in the Home tab, highlighted by a red box in Figure 3. The background color of cells can also be changed using the option highlighted by the blue box. Selecting the V on either of the two options will open up the option window shown to the right of Figure 3 where users can choose their color of choice.
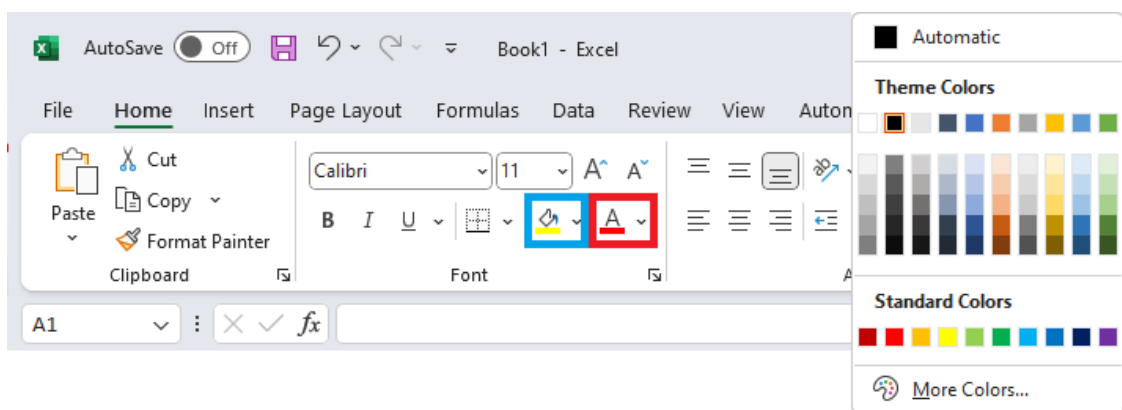

Figure 3: Font and Cell Color Options

Multiple Lines in a Single Cell

Sometimes users may have certain cells that contain a large amount of text so that it does not nicely fit in one cell. While one may expand the cell width to ensure all content is displayed, this unneccessarily limits the amount of information visible in one sheet by taking up space. One way to work around this issue is to have line breaks within a given cell. In these scenarios users can make use of the wrap text option found in the region highlighted by the red box in Figure 4. An alternate method would be to manually break lines using `alt`+`enter` while editing the content of a given cell.
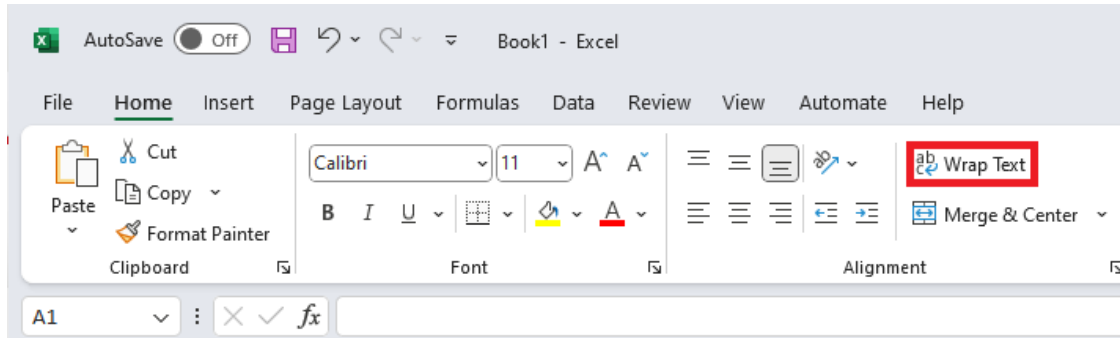
Figure 4: Wrap Text Option

Formatting Contents in Cells

We briefly covered the topic of formats and how it influences the cells' contents. Recall that we can change the content format of the cell by using the dropdown list highlighted in the red box in Figure 5. The blue box is a collection of shortcuts (left to right) to some commonly used formats, being currency(accounting), percentage, and adding commas for each 10^3. Finally the buttons in the orange box can be used to add and remove decimal points.
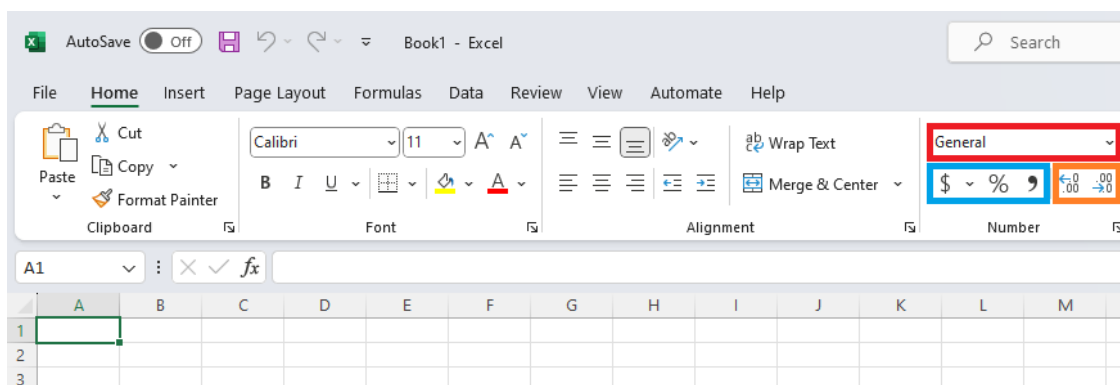
Figure 5: Content Formatting

Merge Cells

The merge cell command can be used to merge multiple cells into one larger cell. This function is typically used to create titles, subtitles, added notes to the bottom of a table, etc. To use this command, users first select the cells that they wish to merge into one, and then click on the merge and center button highlighted by the red box in Figure 6. Accessing the dropdown menu by clicking the $\boxed{V}$, users can choose different options when it comes to merging cells.
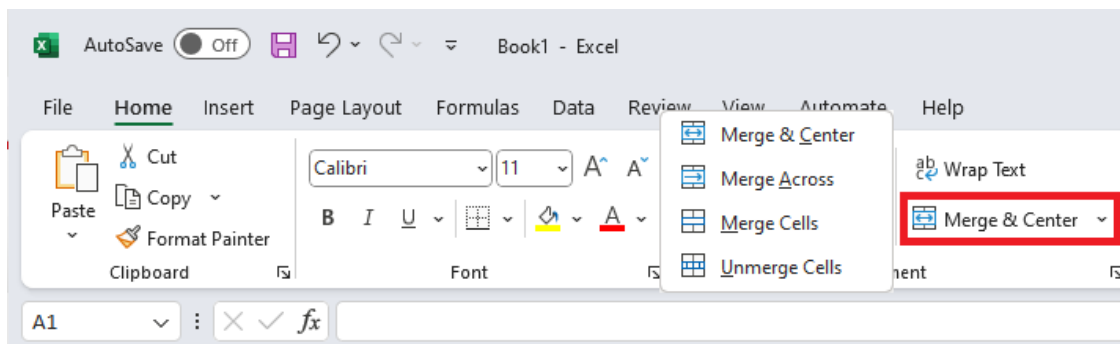

Figure 6: Merging Cells

Merge Alternatives

Merging cells can cause issues when we need to reference cells, copy and pasting, or hiding cells from view. A neat alternative is to use the "center across selection" alignment option. Users should first select the region where the text should be centered in, right click on the selected region, and select the Format Cells option, and select "Center Across Selection."

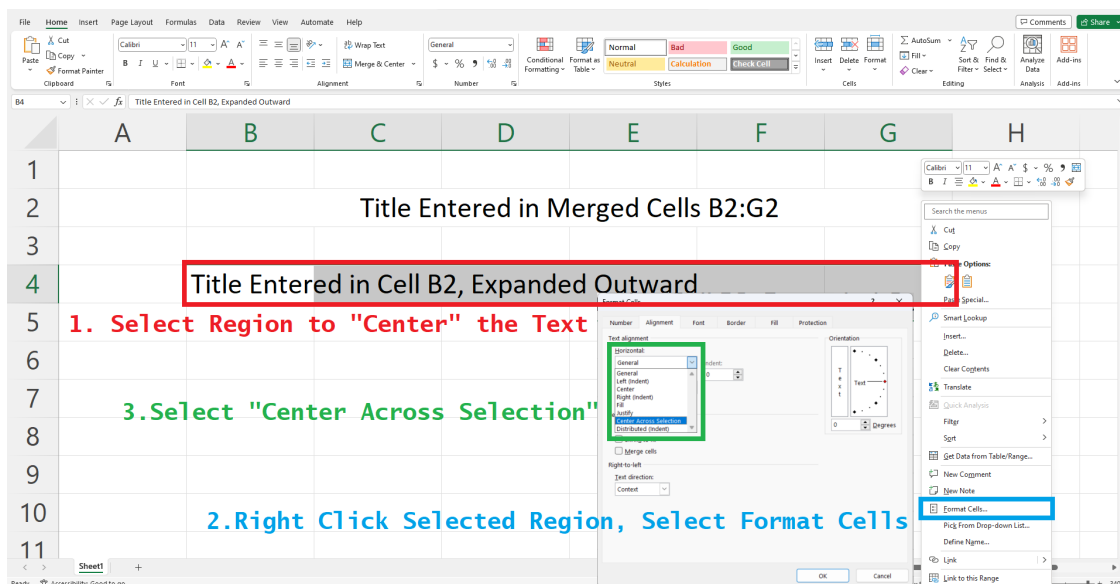
Figure 7: Alternative to Merge and Center

Borders

Boders in the context of Excel refer to any lines that users may place in or around cells. By default, Excel does not print the borders of each cell, instead has light gray gridlines that do not show up when printing the material.[1] In order to add borders to your worksheet, first select the range where you are seeking to add borders. Then, navigate to the borders button in the Home tab highlighted by the red box in Figure 8, and click on the dropdown button ⋁ to see the available options.
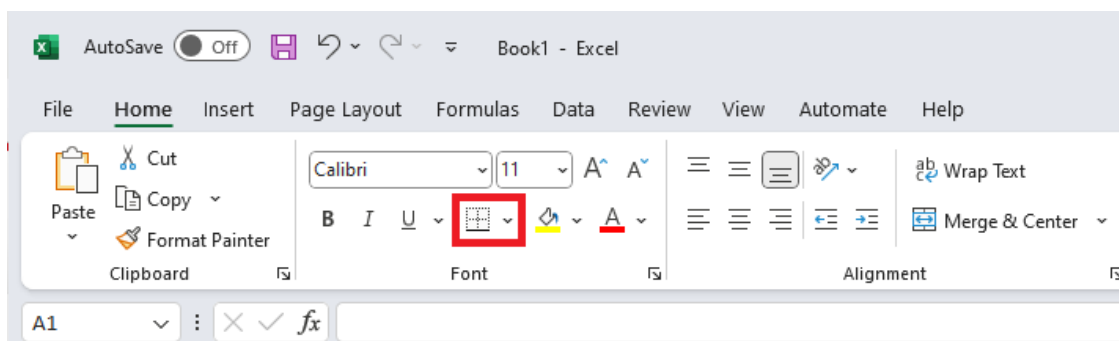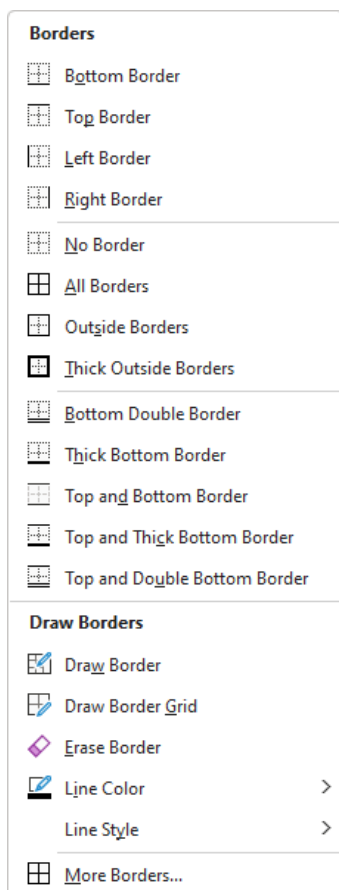

Figure 8: Borders Button Location

Figure 9: Border Dropdown

Figure 9 shows us the available preset options when it comes to the borders. While it is perfectly fine to apply any of these options, we are primarily interested in the last option, "More Borders..." Selecting this option will bring us to Figure 10. Here we can manually tell Excel which borders we want to add, the colors they should be, and the patterns and thickness, etc.
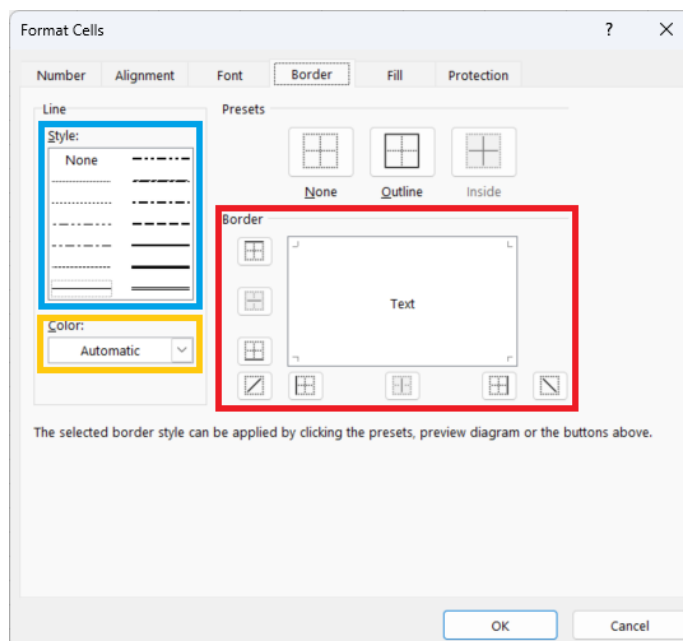

Figure 10: Border Options

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[1] Setting the cells' background color to be white will hide the gridlines from those cells.

Worksheet Tabs

We discussed creating new worksheets, navigating between new worksheets, renaming worksheets, and referencing across worksheets. Here we introduce one more feature: color-coding tabs.
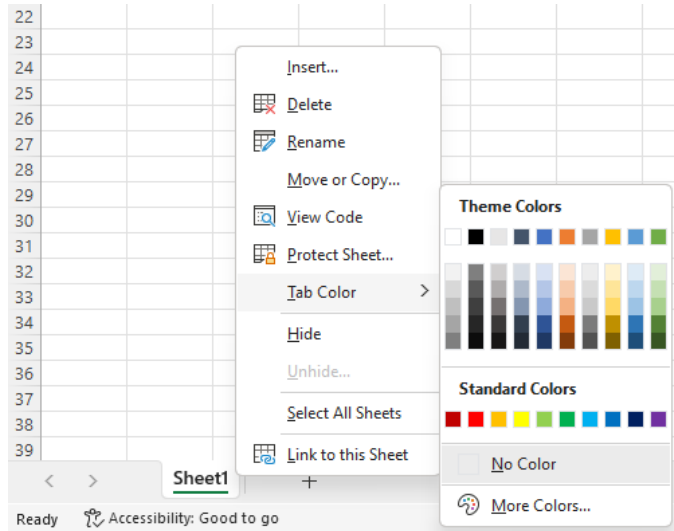

Figure 11: Sheet Tab Options

We can achieve this by right clicking on the worksheet's tab, and choosing a tab color from the menu. Sometimes it is useful to have worksheets that have a common theme be of a certain color to work as a mental shortcut. You may group tabs by time, by function, or by importance, etc.