

Part 2

This lesson is very long and difficult .If the tutor feels to do this lesson over 2 sessions then he/she may do so.

Lesson 9 Formatting & Data Analysis

This section address formatting commands that can be used to enhance the visual appearance of a worksheet. It also provides an introduction to mathematical calculations. The skills introduced in this section will give you powerful tools for analysing the data that we have been working with in this workbook and will highlight how Excel is used to make key decisions in virtually any career. Additionally, Excel Spreadsheet Guidelines for format and appearance will be introduced as a format for the course and spreadsheets submitted.

Formatting Data and Cells.

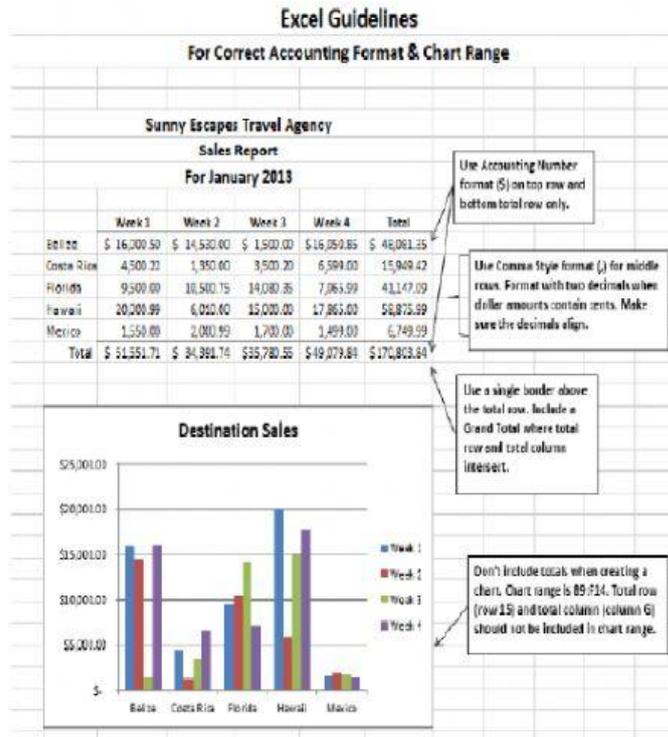
Making the visual appearance of a worksheet professional is an important step in creating a valuable tool for you or your co-workers when making key decisions.

There are accepted professional formatting standards when spreadsheets contain only currency data.

For this course we will use the following Excel Guidelines for Formatting.

The first figure displays how to use “Accounting” number format when ALL figures are currency. Only the first row of data and the totals should be formatted with the “Accounting” format. The other data should be formatted with “Comma” style. There also needs

to be a **Top Border** above the numbers in the total row. If any of the numbers have cents, you need to format all the data with two decimal places. **1**



1

Often your spreadsheet will contain values of both currency and non-currency. When this is the case, you will want to use guidelines in the following. **2**

2

**Sunny Escapes Travel Agency
Sales Report
For January 2013**

	Week 1		Week 2		Week 3		Week 4	
	Number of Trips	Sales(\$)						
Bolton	15	\$ 16,000	12	\$ 14,580	1	\$ 1,900	15	\$ 16,050
Costa Rica	3	\$ 4,500	1	\$ 1,350	2	\$ 2,700	4	\$ 6,500
Florida	4	\$ 9,500	5	\$ 10,500	12	\$ 14,080	5	\$ 7,000
Hawaii	19	\$ 20,000	5	\$ 6,000	15	\$ 15,000	16	\$ 17,600
Mexico	1	\$ 1,550	1	\$ 2,000	1	\$ 1,700	1	\$ 1,400
Total	61	\$ 81,550	26	\$ 34,830	21	\$ 35,780	41	\$ 49,080

Use a three line title if the workbook doesn't include a Documentation sheet. The three lines should include:

- Company Name
- Type of Report
- Date

When mixing columns of units with columns of dollars, format entire dollar columns with Accounting Number format (\$)

Format with no decimals when dollar amounts are whole dollars without cents

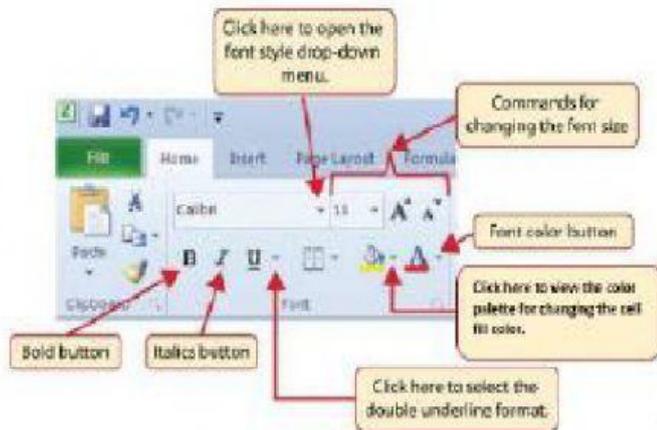
Remember to:

- ✓ Spellcheck your worksheet
- ✓ Print Preview before printing or submitting
- ✓ Use common sense when proofreading - do the results make sense?
- ✓ Make sure the worksheet looks professional

2

These steps following will show several fundamental formatting skills, that will be applied to the worksheet that we are going to develop in this chapter. Several of these formatting skills are the same to the ones that you may have already used before in other Microsoft programmes.

1. Select the range **A2-D2**. Click the **Bold** button in the **Font** group of commands in the **Home** tab.
2. Click the **Border** button in the **Font group** of commands in the **Home** tab. Select the **Bottom Border** option from the list to achieve the goal of a border on the *bottom* of **Row 2** below the *column settings*.**1**



1

Shortcuts

Keyboard Shortcuts

Bold Format

- Hold down the CTRL key while pressing the letter B on your keyboard.

1. Select the range A15-D15.
2. Click the **Bold Button** in the **Font** group of commands in the **Home tab**.
3. Click the **Border button** in the **Font group** of commands in the **Home tab**. Select the **Top Border** option from the list to achieve the goal of a *border* on the *top Row 15* when totals will eventually play.

Shortcuts

Keyboard Shortcuts

Underline Format

- Hold the CTRL key while pressing the letter U on your keyboard.

Italics Format

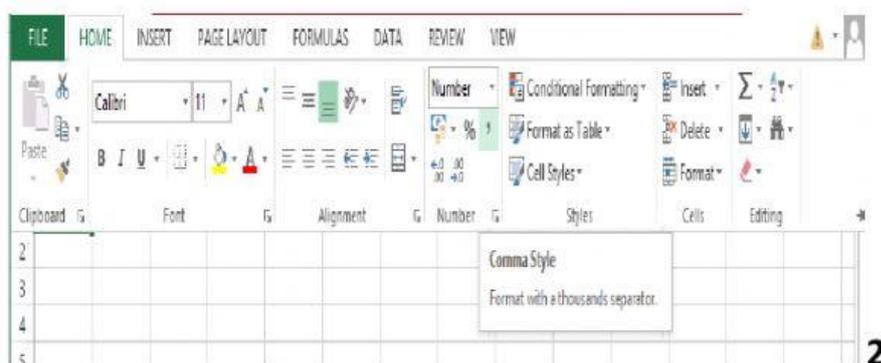
- Hold the CTRL key while pressing the letter I on your keyboard.

Formatting Headings and Totals.

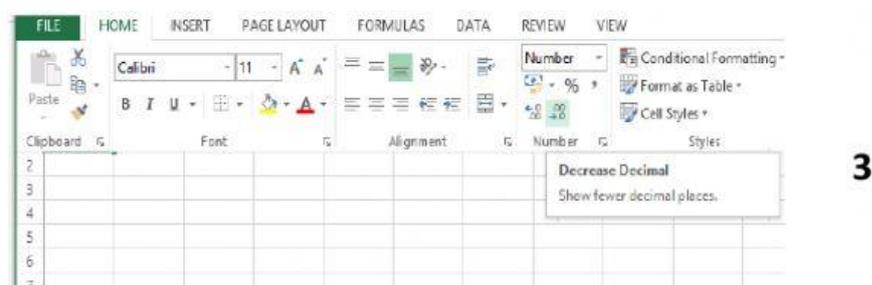
Applying formatting enhancement to the column heading and column totals in a worksheet is a very important technique, especially if you are sharing a workbook with other departments and people. These techniques allow users of the worksheet to clearly see the column headings that define the data. In addition, the column totals usually contain the most important information in a worksheet with respect to making decisions, and formatting techniques allow users to quickly see the information.

1. Select the range **B3-B14**.

2. Select the **Comma style button** in the **Number group** of commands in the *Home tab*. This feature adds a *comma* as well as **two decimal places**.



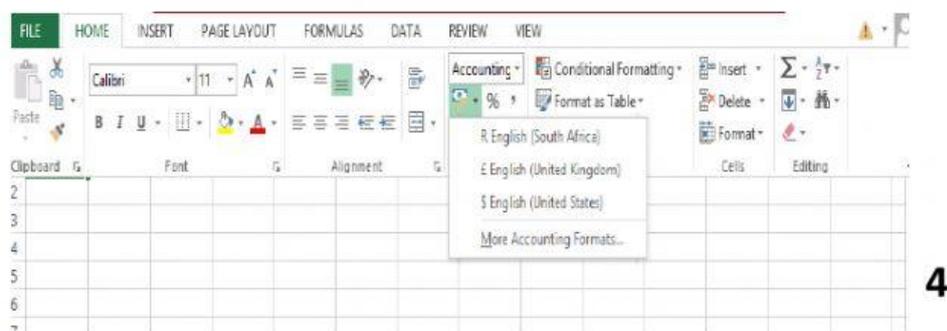
3. Since the figures in this range do not *include cents*, click the **Decrease Decimal** button in the *number group* of commands in the **Home tab**.



4.The *number* will also be *reduced* to **zero decimal** places.

5. *Select* the range **C3-C14**.

6.Click the **Ascending Number Format** button in the *number group* of *commands* in the **Home tab**.⁴ This will add the **currency symbol** and the *two decimal places* to the *values*. This *format is common* when working with *pricing data*.As we have said above in the **Formatting Data and Cells section**,you will want to set the **Ascending Accounting format** on *all values* in the *range* since the worksheet contains *non-currency* as well as *currency data*.⁴



7. *Select* the range **C3-C14**.

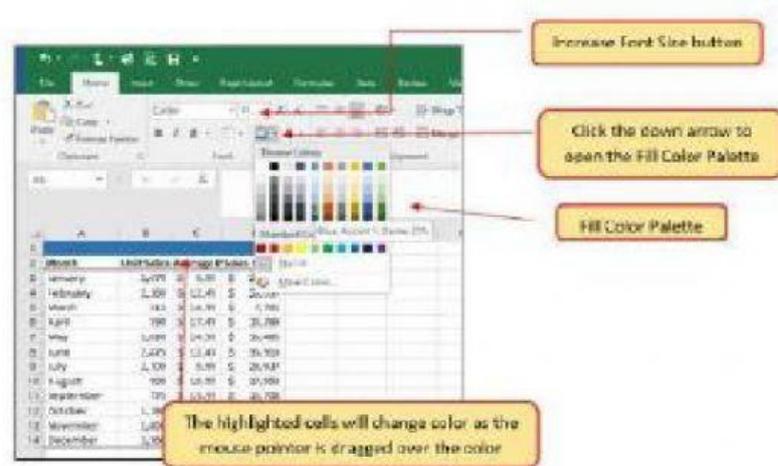
8.**Again**,*select Accounting Number Format*, this will add the *currency symbol* to the *values* as well as *two decimal places*.

9.Click the **Decrease Decimal** button in the **Number** group in the **Home tab**.

10. This will *add* the **Currency symbol** to the *values* and *reduce* the *decimal places* to **zero** since there are no cents.

11. *Select* the range **A1-D1**.

12. Click the **down arrow** next to the **Fill Colour** button in the **Font group** in the **Home tab**. This will add *background Fill colour* the *range* for a worksheet title when entered.⁵



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13. Click the **Blue Accent1 Darker 25%** colour from the *palette* in **picture 5**. Notice that as you move the *mouse pointer* over the *colour palette*, you will see a *preview* of how the colour will appear in the highlighted cells. (**Experiment with this feature.**)

14. Click on **A1** and enter the *Worksheet title* e.g. MerchandiseCity,USA) and click on the *check mark* in the *formula bar* to enter the **information**.

15. **Black font** is difficult to see on *coloured background*, so choose a colour that will stand out from the *background colour* you have chosen. (**White font** is a *good colour* to use with *coloured backgrounds*.)

16. Select the range **A1-D1** and *format* for **Italics** by clicking on **"I"** in the **Font group**.

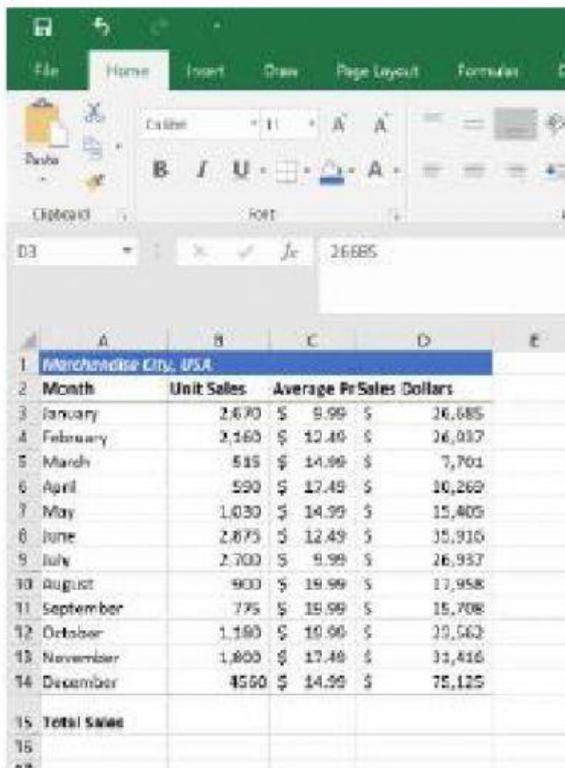
17. Click **the drop-down arrow** right hand side of the **Font button** in the **Home tab**. Select a **font** to your choice for the range and *format* for **"Bold"** click on **"B"** in the **Font Group**.

18. Notice that as you move the *mouse pointer* over the *font style options*, you can see the *font range* in the **highlighted cells**.

19. Expand the Column width of Column D to 14 characters.

Note: When you see hashtags ##### in a column it is too narrow for the long number. In the case of words or text data Excel will only show the characters that fit in the column. However this is not the case with numeric data because it can give the appearance of a number that is much smaller than what is actually in the cell. Increase the column width for that to disappear.

This below shows you how the worksheet should look after you have widened the columns. **6**



Month	Unit Sales	Average Price	Sales Dollars
January	2,670	\$ 9.99	\$ 26,685
February	3,160	\$ 12.40	\$ 39,184
March	515	\$ 14.99	\$ 7,701
April	590	\$ 17.49	\$ 10,269
May	1,030	\$ 14.99	\$ 15,405
June	2,675	\$ 12.49	\$ 33,310
July	2,700	\$ 9.99	\$ 26,982
August	900	\$ 19.99	\$ 17,998
September	775	\$ 19.99	\$ 15,408
October	1,180	\$ 18.99	\$ 22,408
November	1,800	\$ 17.49	\$ 31,482
December	4500	\$ 14.99	\$ 67,455
Total Sales			

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Questions

1. Is it important to format a worksheet? Give your reasons and explain.
2. Choose a format technique and explain in detail how it is done. Make sure that you head the one that you are describing.
3. Why and what happens when a line of hashtags # appear.