

Excel conditional formatting

Highlighting subtotals for easy reading

By Ken Puls, CMA

One of the things that always struck me as odd about the subtotals feature in Excel is that the developers only made the words in the subtotals bold, and not the subtotals themselves. In a long list of data this can make it hard to see which numbers are the subtotals. Fortunately this is very easy to fix using conditional formatting.

Assume you have a list of data with date, vendor and amount columns. After going to *Data* → *Subtotals* and selecting *Sum the Amount* for every change in date, you'd end up with a subtotalled list like the image shown in Figure 1.

| | A | B | C |
|----|----------|----------------------------|-----------|
| 5 | Date | Vendor | Amount |
| 6 | 1/2/2006 | Avis & Davis Distributors | 128.25 |
| 7 | 1/2/2006 | Liquor Distribution Branch | 10,450.96 |
| 8 | 1/2/2006 | North Douglas Distributors | 4,429.36 |
| 9 | 1/2/2006 | Total | 15,008.57 |
| 10 | 1/4/2006 | Avis & Davis Distributors | 141.75 |
| 11 | 1/4/2006 | Liquor Distribution Branch | 11,551.06 |
| 12 | 1/4/2006 | North Douglas Distributors | 4,895.61 |
| 13 | 1/4/2006 | Total | 16,588.42 |
| 14 | 1/6/2006 | Avis & Davis Distributors | 135 |

Figure 1: Subtotalled list without bolding.

Let's assume you'd like to see the subtotals in the amount column displayed in bold with a line on the top and bottom.

Start by highlighting column C.

Excel 2003: Go to *Format* → *Conditional Formatting* and change the drop-down to read "Formula Is."

Excel 2007: Go to *Home* → *Conditional Formatting* → *New Rule* → *Use a formula to determine which cells to format*.

Enter this formula: `=Right($A1,5)="Total."`

Click Format.

At this point you'll see the familiar "Format Cells" dialog box, where you can choose what properties you'd like used to display the data in your cells. On the *Font* tab select *Bold* and on the *Borders* tab click the top and bottom border of the cell. Once done, click *OK* until you are back at the spreadsheet. Notice your data list is now much more readable! (See Figure 2.)

There are two things you need to understand to construct effective conditional formats:

| | A | B | C |
|----|----------|----------------------------|-----------|
| 5 | Date | Vendor | Amount |
| 6 | 1/2/2006 | Avis & Davis Distributors | 128.25 |
| 7 | 1/2/2006 | Liquor Distribution Branch | 10,450.96 |
| 8 | 1/2/2006 | North Douglas Distributors | 4,429.36 |
| 9 | 1/2/2006 | Total | 15,008.57 |
| 10 | 1/4/2006 | Avis & Davis Distributors | 141.75 |
| 11 | 1/4/2006 | Liquor Distribution Branch | 11,551.06 |
| 12 | 1/4/2006 | North Douglas Distributors | 4,895.61 |
| 13 | 1/4/2006 | Total | 16,588.42 |
| 14 | 1/6/2006 | Avis & Davis Distributors | 135 |

Figure 2: Subtotalled list with bolded amounts.

- 1) When constructing formulas the references are always based on the active cell. In the case of our example, we selected column C, which meant the active cell became C1. This is why we looked at \$A1 to see if it contained "Total." In cells B2 and C2 we'd be looking at \$A2, and so on down the list. The active cell is usually the first cell in your selection, and it can be easily identified, as its background is always clear compared to the other cells in the selection, which have shaded backgrounds.
- 2) All formulas are evaluated to see if they are true or false. So in our example, we checked to see if the right five characters equalled "Total." If so, the conditional format is applied, and if not, it isn't. As you can see from Figure 2, this test would have returned false on A8, but true on A9.

Conditional formatting is an incredibly useful tool that is not restricted to working with subtotals and can be applied to anything that lives within the spreadsheet grid, including pivot tables. A few examples of where I use conditional formats are: highlighting the largest or smallest numbers in a list, highlighting invalid data that has been entered into a worksheet, colour-banding alternate rows to make large spreadsheets easier to read and highlighting rows in large data sets.

This tool has existed in Excel for many versions, but went through a major upgrade in 2007. Until then you were limited to using only three conditional formats in any cell, but with the release of Excel 2007 this limitation was removed. You can now use as many formats as you wish, the only limit being the memory in your computer. Other additions to Excel 2007's conditional formatting toolset include data bars, icon sets, heat maps, overlapping formats and the ability to stop any further formats from being applied once one is triggered.

Used properly, conditional formats are a truly powerful feature in Excel, and well worth exploring if you haven't done so already. ■



Ken Puls, CMA is Controller and Director of IT at Fairwinds Community and Resort in Nanaimo. He is also a Microsoft MVP for Excel and principal of www.excelguru.ca.