

# CONDITIONAL FORMATTING



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# INTRODUCTION

- Conditional Formatting is a great way to flag the results you care about.
- I use it often when I'm looking at a two-variable analysis grid to see what possible outcomes are. By applying a "greater than" rule to my results I can see exactly what combinations of outcome will get me the result I want. (And we'll walk through this in the course, don't worry.)
- You can also combine conditional formatting with filtering in newer versions of Excel, which is very convenient.

# WHAT WE'RE GOING TO COVER

- Conditional Formatting

- Highlight Cell Rules
- Top/Bottom Rules
- Data Bars
- Color Scales
- Icon Sets
- Customize Formatting

- Removing Conditional Formats
- Using multiple formatting rules at once
- Editing existing formatting rules

# 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 *Intermediate Excel* by M.L. Humphrey which provides a broader coverage of intermediate 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.

# CONDITIONAL FORMATTING

# OVERVIEW

- Conditional formatting allows you to change the formatting of cells within worksheet if they meet certain criteria.
  - For example, you could use conditional formatting to flag when a value drops below a certain threshold like I do with my budgeting worksheet to make sure my bank account balance stays above the minimum amount required by the bank.
- Conditional formatting can also be combined with filtering so that you first apply conditional formatting to flag certain results and then filter your data so that only those results are visible.

# AN EXAMPLE: BOOK SALES

- Let's look at a two-variable analysis chart that I've put together calculating potential income based on the number of titles published and the number of copies on average that those titles sell.
  - This is one we build in *Excel for Self-Publishers*
- Now let's assume that any result under \$1,500 is bad and any result over \$3,500 is good and let's apply conditional formatting to the chart to color the bad results red and the good results green.
- We apply conditional formatting by selecting the cells and then going to the Styles section of the Home tab and clicking on the dropdown arrow next to Conditional Formatting.



# HIGHLIGHT CELL RULES

- In the example on the prior page, I used one of the Highlight Cells Rules to flag my results as either good or bad.
- You can see that once you choose that option you can apply formatting to cells based upon whether there are greater than, less than, between, equal to, contain (for text), occur on (for dates), or contain duplicate values.
- In our example we used both greater than and less than.
- Clicking on your chosen option will bring up a dialogue box where you specify your value and your formatting type.

# HIGHLIGHT CELL RULES (Cont.)

- Note that the duplicate values option doesn't distinguish the first of a result from other occurrences of that same result and doesn't distinguish between different values.
  - So if you have 7, 8, and 9 repeated more than once in a list, it will flag all of the 7s, all of the 8s, and all of the 9s in the same color.
  - (Which to my mind makes it pretty useless.)
- The date option is a bit odd as well, because it only lets you flag a date that occurred yesterday, today, tomorrow, in the last seven days, last week, this week, next week, last month, this month, or next month.

# HIGHLIGHT CELL RULES (Cont.)

- The default formatting options you can choose from are Light Red Fill with Dark Red Text, Yellow Fill with Dark Yellow Text, Green Fill with Dark Green Text, Light Red Fill, Red Text, and Red Border.
- I'm usually lazy and stay with one of those options.
- However, you can also choose to apply a custom format. When you click on that option, Excel will take you to a Format Text dialogue box where you can apply any formatting you want. For example, purple text in italics.

# TOP / BOTTOM RULES

- The Top/Bottom Rules option allows you to format values that fall in the top X of your range, the bottom X of your range, the top X% of your range, the bottom X% of your range, above the average for the range, or below the average for the range.
- Even though the options show as Top 10 or Top 10%, when you select each option, you can modify this number.

# DATA BARS

- With data bars, the higher the value in the cell, the longer the bar that will appear in that cell.
- This allows you to quickly visually identify your highest or lowest values and to see relative value between cells quite quickly.

# COLOR SCALES

- Color scales are another way to show the relative value of cells within a range.
- With color scales the color moves from one color through to another.
- The default version is red to yellow to green, but I've been playing with these recently and have customized a few of my worksheets to use shades of blue or shades of green or shades of orange.
- The key when choosing your shades is to make sure that the color progression makes sense to you. If you're busy trying to figure out if blue is better than green, then you should rethink what you've done.

# ICON SETS

- Icon sets also show relative values within a range, but using different icons such as arrows, flags, stars, filled circles, bar charts, etc.

# CUSTOMIZATION

- You can customize the use of Data Bars, Color Scales, and Icon Sets so that they only apply to absolute values. (As opposed to letting Excel determine the range and assign the breaks between each level.)
- To do this, apply the formatting, then highlight the cells, and go to Manage Rules under Conditional Formatting in the Styles section of the Home tab. Choose Edit Rule for the rule you want to edit and then change the parameters to what you want.



# REMOVING CONDITIONAL FORMATTING

- To remove conditional formatting, go to the Conditional Formatting dropdown in the Styles section of the Home tab, and choose Clear Rules.
- Next, choose to either clear the rules from the cells you've highlighted or from the entire worksheet.
- You can instead go to Manage Rules from the dropdown and select the rule that you want removed. (This is the best approach when a cell or range of cells has more than one rule applied to it.)

# USING MULTIPLE RULES

- It's possible to apply more than one conditional format to a cell or range of cells.
- If you do so, be sure to review each rule and determine whether Excel should "Stop if True" when the first rule is met or should continue through all of the rules for the cell.
- You can also change the order in which rules are applied to your cells.
- All of this is done under Manage Rules on the Conditional Formatting dropdown.

# NEW RULES

- Rather than using one of the dropdown options (Highlight Cells Rules, Top/Bottom Rules, etc.) you can also just go to New Rule in the dropdown menu and all of those options will be available in the New Formatting Rule dialogue box as well as other options.
- It's the best choice for complex customized rules, but it's much less intuitive and easy to use as the dropdown choices.

**CONCLUSION**

# CONCLUSION

- So that was conditional formatting.
- Hopefully now you understand the basics of how to use it but if you do get stuck, reach out to me at [mlhumphreywriter@gmail.com](mailto: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](http://www.mlhumphrey.com).