

EXCEL <<<<<<<

By Bill Jelen

Simpler Conditional Formatting

>>> During a recent Power Excel seminar for an IMA chapter, one of the audience members wished for a return to the simpler conditional formatting choices available in Excel 2003. He felt that the new visualization choices and fly-out menus introduced in Excel 2007 have made conditional formatting difficult to use and understand.

Conditional formatting is a feature in Excel where you can automatically change the color of a cell based on the result of the formula in that cell. Every time Excel recalculates the spreadsheet, the color of the cell is adjusted based on rules that you set up. For example, you might turn a cell red once the Receivable Aging goes past the standard terms. Or you might highlight all cells where the next Action Date is equal to =TODAY().

The old conditional formatting rules are still available, even if they are fairly hidden in the new Ribbon interface. If you knew and loved the old conditional formatting choices, there's still a way access a dialog reminiscent of the Excel 2003 conditional formatting.

When you open the Conditional Formatting dropdown on the Home tab of the ribbon, skip the five new choices at

the top and select New Rule... near the bottom of the list. Initially, the New Formatting Rule dialog looks very different than the old dialog, but if you click on the the second option, "Format only cells that contain," the dialog will revert back to nearly the same dialog in Excel 2003 (see Figure 1).

In the dialog to edit the rule description, the second dropdown menu offers the familiar choices for less than, greater than, equal to, between, and the other comparison operators that were popular in Excel 2003. The Format button is also the same. You can use it to choose the font, fill, or borders when the condition is true.

There are still some differences. The first dropdown includes options other than cell value. They include blanks, errors, or dates occurring last month. The Format dialog also has new features, including the ability to apply a custom number format. Perhaps you could use the ;;; custom number format to suppress the display of error cells.

Using the "Formula Is" Settings

Back in Excel 2003, the Conditional

Formatting dialog box offered a dropdown that you could change from "Cell Value Is" to "Formula Is." Although it was rarely used, the formula-based conditions allow for creative formulas where the color of an entire row could be changed based on one value in that row. You also could build formulas that relied on external lookup tables to determine what should be formatted. The equivalent functionality in Excel 2007-2013 is found by opening the New Formatting Rule dialog and then selecting "Use A Formula To Determine Which Cells to Format."

The formula has to evaluate to True or False. Be careful to use the correct mix of dollar signs in each reference. The formula shown in Figure 2 initially applies to the active cell of A2, but the similar logic will be copied to each cell in the selection. In this example, you're trying to format the entire row for the largest invoice. Since the invoice amount is stored in column C, the formula always uses a \$ before every C in the formula. But there isn't a dollar sign before the 2 in \$C2 because that portion of the formula has to be free to point to rows 3, 4, 5, and 6 as the

conditional formatting formula is copied through the selection.

One important tip when building

complicated formula-based conditions: It might be easier to craft and test the formula in the Excel grid first. If you

build the formula in a blank adjacent column to your data, you can verify that the results are showing True values in the rows that match the condition. Once the formula is working in the grid, select the cell and highlight the formula in the formula bar. When you actually select the formula characters from the formula bar, you can copy with Ctrl+C and then later paste it with Ctrl+V into the New Conditional Formatting Rule dialog. If you instead copy the entire cell, it won't work. You have to "scoop" the formula from the formula bar in order to have it paste correctly into the New Conditional Formatting Rule dialog.

While Excel 2007 introduced many types of new conditional formatting, such as Top 10%, Above Average, and Duplicate Values, the old, simpler conditional formatting that you might have used in Excel 97 through Excel 2003 is still available. **SF**

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Figure 1

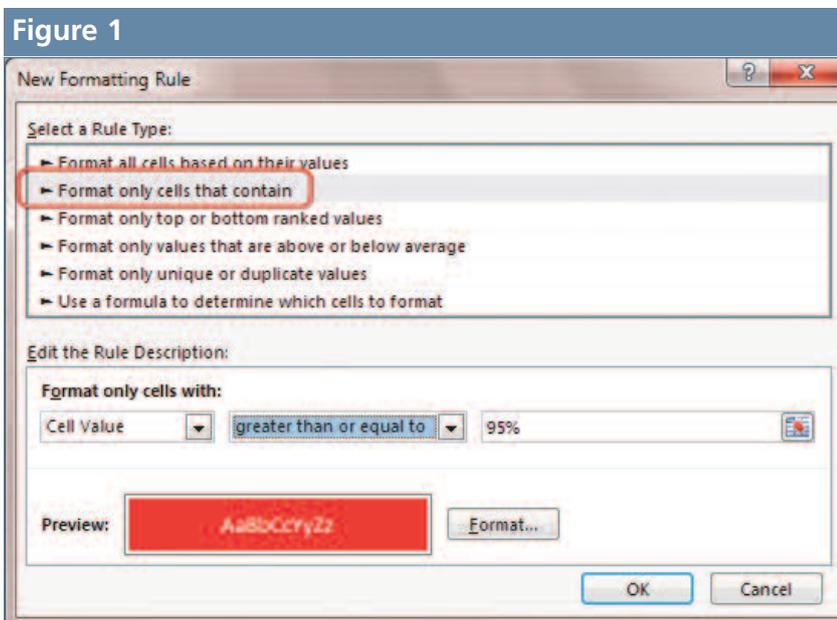


Figure 2

