WORLD'S #1 QUICK REFERENCE SOFTWARE GUIDE

Microsoft Excel 365 ADVANCED

CONDITIONAL FORMATS

- **Conditional Formats:** Formatting that changes based on the value in the cell, unlike traditional formats.
- Your rules can:
  - Reflect whether values are above or below a specific threshold
  - Indicate how large a value is when compared to other values to which the same rule is applied
  - Identify the smallest and largest values in the selected range

Display the Conditional Formatting list:
- Select the appropriate cells.
- Go to the *Styles* group on the *Home* tab.
- Click ***Conditional Formatting***.

HIGHLIGHTING RULES

Create a cell-highlighting rule:
- Display the *Conditional Formatting* list.
- Point to ***Highlight Cells Rules*** and then click the type of rule you want to create.
- Go to the dialog box that appears.
  - Define a rule to specify when Excel should apply the format.
    - Click the list box's down arrow and click a predefined format

OR
- Click ***Custom Format***.
- Go to the *Format Cells* dialog box.
- Define the format.
- Click ***OK***.
- Click ***OK***.

Create a top or bottom rule:
- Display the *Conditional Formatting* list.
- Point to ***Top/Bottom Rules***.
- Click the type of rule you want to create.
- Go to the dialog box.
- Create the rule to specify when Excel should apply the format.
  - Click the list box's down arrow and click a predefined format

OR
- Click ***Custom Format***.
- Go to the *Format Cells* dialog box.
- Define the format.
- Click ***OK***.
- Click ***OK***.

Highlight unique or duplicate values in a range:
- Display the *Conditional Formatting* list.
- Point to ***Highlight Cells Rules***.
- Click ***Duplicate Values***.
- Go to the *Duplicate Values* dialog box.
  - Click the *Format cells that contain* list box's down arrow.
  - Click ***Duplicate*** or ***Unique***.
  - Click the list box's down arrow and click a predefined format.

OR
- Click ***Custom Format***, use the controls in the *Format Cells* dialog box to define the format, and then click ***OK*** twice.

DATA BAR, COLOR SCALE & ICON SET FORMATS

Data Bars

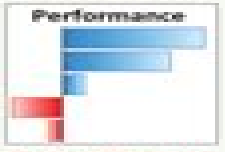
Comparing two numbers in an Excel worksheet is easy, but it's difficult to compare multiple numbers with a quick glance.
- **Data bar conditional format:** Formatting that displays a color bar in the background of a cell so you can quickly compare the relative magnitude of values in a list.
- The length of the data bar represents the size of that cell's value in relation to the other cells to which you applied the conditional format.

Create a data bar conditional format:
- Display the *Conditional Formatting* list.
- Point to ***Data Bars***.
- Click the format you want to apply.

Types of Data Bars
- **Gradient Fill formats:**
  - Gradually change from a solid fill at the left edge of the cell to white as the data bar goes across the cell
  - Were introduced in Excel 2007
- **Solid Fill formats:**
  - Remain a solid color for the entire length of the data bar
  - Were added to Excel 2010 after user feedback indicated Gradient Fill data bars were hard to interpret

Year	Sales
2019	$ 1,300,000
2020	$ 2,900,000
2021	$ 1,850,000

Solid Fill Data Bar



Gradient Fill Data Bar

Show a data bar without showing the cell's contents:
- Display the *Conditional Formatting* list.
- Point to ***Data Bars***.
- Click ***More Rules***.
- Go to the *New Formatting Rule* dialog box.
- Check the ***Show Bar Only*** box.
- Click ***OK***.

Show negative values using a data bar:
- Display the *Conditional Formatting* list.
- Point to ***Data Bars***.
- Click ***More Rules***.
- Go to the *New Formatting Rule* dialog box.
- Click the ***Negative Value and Axis*** button.
- Go to the *Negative Value and Axis Settings* dialog box.
- Click the ***Fill Color*** button and select a fill color for negative values.

OR
- Select the ***Apply same fill color as positive bar*** option.
- In the *Axis* settings section of the dialog box, select any of these options to position the axis separating positive and negative values:
  - ***Automatic*** (display at variable position based on negative values)
  - ***Cell midpoint***
  - ***None*** (show negative values in the same direction as positive)
- Click the ***Axis color*** button and select a color for the axis.
- Click ***OK*** twice to close the dialog boxes.

Color Scales

Color scales use gradually changing colors, called **gradients**, to represent changes in cell values.

EX: A color scale that displays cells with small values in white and larger values in red would fill the background of the cell that contains the smallest value with a pure white background and add bits of red to represent larger values. The cell that contains the largest value in the range would have a background of pure red.

Create a color scale conditional format:
- Display the *Conditional Formatting* list.
- Point to ***Color Scales***.
- Click the format you want to apply.

NOTE: You can select two-color or three-color Color Scales. If your data falls into two distinct ranges, use a **two-color scale**. If your data falls into three distinct ranges, such as poor, fair, and good performance, use a **three-color scale**.

Row	Station1	Station2	Station3	Station4
1	23	91	89	78
2	58	74	37	32
3	9	14	84	15
4	8	31	43	52
5	72	80	62	88

Two-Color Color Scale

Base color scales on specific minimum & maximum values:
- Display the *Conditional Formatting* list.
- Point to ***Color Scales***.
- Click ***More Rules***.
- Go to the *New Formatting Rule* dialog box.
- Click the *Minimum* column's *Type* list box's down arrow.
- Click ***Number***.
- Go to the *Minimum* column's *Value* box.
- Enter a minimum scale value.
- Click the *Maximum* column's *Type* list box's down arrow.
- Click ***Number***.
- Go to the *Maximum* column's *Value* box.
- Enter a maximum scale value.
- Click ***OK***.

NOTE: Any values below the minimum you set will be formatted as if they were the minimum value. Excel treats values larger than the maximum you set in a similar way.
- Display the *Conditional Formatting* list.
- Point to ***Color Scales***.
- Click ***More Rules***.
- Go to the *New Formatting Rule* dialog box.
- Click the *Minimum* column's *Color* control's down arrow.
- Click the color you want to apply.
- Click the *Maximum* column's *Color* control's down arrow.
- Click the color you want to apply.
- Click ***OK***.

Icon Sets

- **Icon sets:** Collections of small graphics, or icons, that visually represent how the contents of a worksheet cell compare to a set of criteria you define.
- Quick visual summaries are perfect for dashboards and worksheets that summarize an organization's operational data in relation to metrics established by the organization.
  - Most dashboards use a variation of green, yellow, and red traffic lights to indicate good, fair, and poor performance

Create an icon set conditional format:
- Display the *Conditional Formatting* list.
- Point to ***Icon Sets***.
- Click the format you want to apply.

Month	On-Time %
January	83
February	72
March	94
April	70

Three-Indicator Icon Set

Apply icons by number instead of percent:
- Display the *Conditional Formatting* list.
- Point to ***Icon Sets***.
- Click ***More Rules***.
- Go to the *New Formatting Rule* dialog box.
- Click the first *Type* list box's down arrow.
- Click ***Number***.

NOTE: You should change the rule type first when creating or editing an icon set rule where Excel compares values to a number rather than a percent of the value. If you change the ***Value*** and comparison operators and then change the type to ***Number***, Excel will reset the comparison operator and contents of the *Value* box.
- Click the first comparison operator list box's down arrow.
- Select the operator to use in the comparison.

Microsoft Excel Study Guide

RJ Shavelson

Microsoft Excel Study Guide:

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Table of Contents Microsoft Excel Study Guide

1. Understanding the eBook Microsoft Excel Study Guide
    - The Rise of Digital Reading Microsoft Excel Study Guide
    - Advantages of eBooks Over Traditional Books
2. Identifying Microsoft Excel Study Guide
    - Exploring Different Genres
    - Considering Fiction vs. Non-Fiction
    - Determining Your Reading Goals
3. Choosing the Right eBook Platform
    - Popular eBook Platforms
    - Features to Look for in an Microsoft Excel Study Guide
    - User-Friendly Interface
4. Exploring eBook Recommendations from Microsoft Excel Study Guide
    - Personalized Recommendations
    - Microsoft Excel Study Guide User Reviews and Ratings
    - Microsoft Excel Study Guide and Bestseller Lists
5. Accessing Microsoft Excel Study Guide Free and Paid eBooks

- Microsoft Excel Study Guide Public Domain eBooks
- Microsoft Excel Study Guide eBook Subscription Services
- Microsoft Excel Study Guide Budget-Friendly Options

6. Navigating Microsoft Excel Study Guide eBook Formats
   - ePub, PDF, MOBI, and More
   - Microsoft Excel Study Guide Compatibility with Devices
   - Microsoft Excel Study Guide Enhanced eBook Features
7. Enhancing Your Reading Experience
   - Adjustable Fonts and Text Sizes of Microsoft Excel Study Guide
   - Highlighting and Note-Taking Microsoft Excel Study Guide
   - Interactive Elements Microsoft Excel Study Guide
8. Staying Engaged with Microsoft Excel Study Guide
   - Joining Online Reading Communities
   - Participating in Virtual Book Clubs
   - Following Authors and Publishers Microsoft Excel Study Guide
9. Balancing eBooks and Physical Books Microsoft Excel Study Guide
   - Benefits of a Digital Library
   - Creating a Diverse Reading Collection Microsoft Excel Study Guide
10. Overcoming Reading Challenges
    - Dealing with Digital Eye Strain
    - Minimizing Distractions
    - Managing Screen Time
11. Cultivating a Reading Routine Microsoft Excel Study Guide
    - Setting Reading Goals Microsoft Excel Study Guide
    - Carving Out Dedicated Reading Time
12. Sourcing Reliable Information of Microsoft Excel Study Guide
    - Fact-Checking eBook Content of Microsoft Excel Study Guide
    - Distinguishing Credible Sources
13. Promoting Lifelong Learning
    - Utilizing eBooks for Skill Development

- Exploring Educational eBooks

14. Embracing eBook Trends
    - Integration of Multimedia Elements
    - Interactive and Gamified eBooks

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