Lecture Note #10: Conditional Formatting Part #2

BUSI 201: Business Data Analysis

Spring 2024

Topic 1. Conditional Formatting: More Options

Last lecture we examined how conditional formatting can assist data analysis by visualizing certain elements, or certain rows that met our conditions. This time, we will be examining three more types of conditional formatting which are more graph-adjacent. These three types are data bars, color schemes, and icon sets.

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Figure 1: Conditional Formatting

The main difference between the topics we covered in the previous lecture and these is related to the difference between tables and data. Last lecture's tools were more geared towards directly analyzing the data, and noticing patterns, selecting out certain values, etc. Today's tools are heavily geared towards the analysis of tables.

That being said, there is no clear rule stating that certain conditional formatting can exclusively be used in the analysis of data vs. tables, and each case should be carefully considered on an individual basis.

Topic 2. Conditional Formatting: Data Bars

Please navigate to SALES sheet of the workbook BUSI201-LEC11-Workbook. This worksheet consists of a fictitious sales data for 12 sales representatives over a given period of time. We can use data bars to add a background effect to a cell based on the number that the cell contains. The bar (by default) will be longer the larger the number, and shorter the smaller the number.

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6	Ethan Davis	2,800,000	1,288,000	4 More Rules	590,000		46	%
7	Olivia Martinez	2,400,000	1,200,000	50%	-390,000		-33	%
8	Noah Anderson	2,500,000	2,450,000	98%	310,000		13	%
9	Sophia Wilson	2,000,000	1,440,000	72%	170,000		12	%
10	Liam Brown	2,300,000	2,001,000	87%	-350,000		-17	%
11	Ava Smith	2,300,000	2,323,000	101%	-400,000		-17	%
12	Mason Taylor	2,000,000	1,440,000	72%	420,000		29	%
13	Isabella Jackson	2,200,000	1,892,000	86%	130,000		7	%
14	Benjamin Harris	2,500,000	2,825,000	113%	70,000		2	%
15	Mia Thompson	2,100,000	2,121,000	101%	370,000		17	%
16	William Turner	3,200,000	1,856,000	58%	30,000		2	%
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Figure 2: Data Bars

We will try out Data Bars on the table, specifically on the information on the realized sales value of each employee. First, select the zone where the data bars should be applied, highlighted by the red box in Figure 2. Then select Conditional Formatting in the blue box, Data Bars in the purple box, and finally choose any color under Solid Fill in the orange box.

	Α	В	С	D	E	F	G	Н
1								
2				Ann	ual Sales Upda	te		
3								
4		Employee	Target Sales	Realized Sales	Completion	Net F	Profit	Profit Rate
5		Emma Johnson	2,700,000	2,457,0 <mark>00</mark>	91%	280,000		11%
6		Ethan Davis	2,800,000	1,288,000	46%	590,000		46%
7		Olivia Martinez	2,400,000	1,200,000	50%	-390,000		-33%
8		Noah Anderson	2,500,000	2,450,0 <mark>00</mark>	98%	310,000		13%
9		Sophia Wilson	2,000,000	1,440,000	72%	170,000		12%
10		Liam Brown	2,300,000	<mark>2,00</mark> 1,000	87%	-350,000		-17%
11		Ava Smith	2,300,000	<mark>2,323,0</mark> 00	101%	-400,000		-17%
12		Mason Taylor	2,000,000	1,440,000	72%	420,000		29%
13		Isabella Jackson	2,200,000	1,892,000	86%	130,000		7%
14		Benjamin Harris	2,500,000	2,825,000	113%	70,000		2%
15		Mia Thompson	2,100,000	<mark>2,121</mark> ,000	101%	370,000		17%
16		William Turner	3,200,000	1,8 <mark>5</mark> 6,000	58%	30,000		2%
17								

Figure 3: Orange Data Bars

Data Bar Rules: Min / Max Values

The default data bars have an automatically set minimum and maximum value. This window of minimum and maximum values are often set quite wide, which allows some flexibility in case any numbers change in the table. However it is not helpful if we want to accentuate the difference in performance among the employees.

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8	Format only cells that contain Format only top or bottom ranked values	000	2,450,000	98%	310,000		13%		
9	Format only values that are above or below average Format only unique or duplicate values	000	1,440,000	72%	170.000		12%		
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12	Minimum Maximum	000	1,440,000	72%	420.000		29%		
13	Spec Automatic Automatic Science (Automatic Science)	200	1.892.000	86%	130.000		7%		
14	Bar Appearance:	200	2,825,000	113%	70.000		2%		
15	Sold Fill V No Border V	200	2 121 000	101%	370,000		17%		
16	Negative Value and Axis Bar Direction: Context	200	1 856 000	58%	30,000		2%		
17	OK Cancel	550	1,050,000	5070	30,000		270		

Figure 4: Data Bar Min/Max Values

Select the cells that contain the data bars, and navigate to Conditional Formatting > Manage Rules highlighted by the red box in Figure 4. In the window that popped up, double-click the data bar rule highlighted in the blue box to call up the Edit Formatting Rule window. The area in the purple box contains the options to change the minimum and maximum reference values. Change the current Automatic to Lowest Value and Maximum Value.

	А	В	С	D	E	F	G	Н		
1		_								
2				Annı	ial Sales Updat	e				
3										
4		Employee	Target Sales	Realized Sales	Completion	Net Pro	fit	Profit Rate		
5		Emma Johnson	2,700,000	<mark>2,457</mark> ,000	91%	280,000		11%		
6		Ethan Davis	2,800,000	1,288,000	46%	590,000		46%		
7		Olivia Martinez	2,400,000	1,200,000	50%	-390,000		-33%		
8		Noah Anderson	2,500,000	<mark>2,450</mark> ,000	98%	310,000		13%		
9		Sophia Wilson	2,000,000	1,440,000	72%	170,000		12%		
10		Liam Brown	2,300,000	2 ,001,000	87%	-350,000		-17%		
11		Ava Smith	2,300,000	<mark>2,32</mark> 3,000	101%	-400,000		-17%		
12		Mason Taylor	2,000,000	1,440,000	72%	420,000		29%		
13		Isabella Jackson	2,200,000	1,892,000	86%	130,000		7%		
14		Benjamin Harris	2,500,000	2,825,000	113%	70,000		2%		
15		Mia Thompson	2,100,000	<mark>2,</mark> 121,000	101%	370,000		17%		
16		William Turner	3,200,000	1,856,000	58%	30,000		2%		
17										

Figure 5: Data Bar Min/Max Values Applied

Data Bar Rules: Colors and Borders

Choosing an inappropriate color would make reading the numbers in the cell a bit difficult. For a white background with black text, the orange data bars would be suitable as shown in Figure 3. If you wish to change the colors or add borders to the data bars, you can navigate to the Edit Formatting Rule window following the steps in Figure 4. Use the tools given in the orange box under Bar Apprearance. Figure 6 shows an alternate style using gradients, and borders in the data bar.

	Α	В	С	D	E	F	G	Н
1								
2				Anni	ual Sales Upda	te		
3								
4		Employee	Target Sales	Realized Sales	Completion	Net	Profit	Profit Rate
5		Emma Johnson	2,700,000	2,457,000	91%	280,000		11%
6		Ethan Davis	2,800,000	1,288,000	46%	590,000		46%
7		Olivia Martinez	2,400,000	1,200,000	50%	-390,000		-33%
8		Noah Anderson	2,500,000	2,450,000	98%	310,000		13%
9		Sophia Wilson	2,000,000	1,440,000	72%	170,000		12%
10		Liam Brown	2,300,000	2,001,000	87%	-350,000		-17%
11		Ava Smith	2,300,000	2,323,000	101%	-400,000		-17%
12		Mason Taylor	2,000,000	1,440,000	72%	420,000		29%
13		Isabella Jackson	2,200,000	1,892,000	86%	130,000		7%
14		Benjamin Harris	2,500,000	2,825,000	113%	70,000		2%
15		Mia Thompson	2,100,000	2,121,000	101%	370,000		17%
16		William Turner	3,200,000	1,856,000	58%	30,000		2%
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Figure 6: Data Bar Color Options Applied

Data Bars in Adjacent Cells

Data bars do not necessarily have to populate the cells that contain the data itself. Depending on the surrounding formatting style, having the data bar in the same cells may not be the most effective method to visualize the data. In this section we will learn how to create a data bar corresponding to the data in adjacent cells. While there is no (as far as the instructor knows) canned procedure, we will try a workaround.

	Α	В	С	D	E	F	G	Н
1								
2				Annu	ual Sales Upda	te		
3								
4		Employee	Target Sales	Realized Sales	Completion	Net	Profit	Profit Rate
5		Emma Johnson	2,700,000	2,457,000	91%	280,000	=F5	11%
6		Ethan Davis	2,800,000	1,288,000	46%	590,000		46%
7		Olivia Martinez	2,400,000	1,200,000	50%	-390,000	-390,000	-33%
8		Noah Anderson	2,500,000	2,450,000	98%	310,000	310,000	13%
9		Sophia Wilson	2,000,000	1,440,000	72%	170,000	170,000	12%
10		Liam Brown	2,300,000	2,001,000	87%	-350,000	-350,000	-17%
11		Ava Smith	2,300,000	2,323,000	101%	-400,000	-400,000	-17%
12		Mason Taylor	2,000,000	1,440,000	72%	420,000	420,000	29%
13		Isabella Jackson	2,200,000	1,892,000	86%	130,000	130,000	7%
14		Benjamin Harris	2,500,000	2,825,000	113%	70,000	70,000	2%
15		Mia Thompson	2,100,000	2,121,000	101%	370,000	370,000	17%
16		William Turner	3,200,000	1,856,000	58%	30,000	30,000	2%
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Figure 7: Adjacent Cells

Copy the values under Net Profit to the empty cells to the right as shown in Figure 7.¹ Then, select the newly added values, and navigate to Conditional Formatting > Data Bars > More Rules in the red box. Check the Show Bar Only in the blue box, and check the options for negative values by clicking Negative Value and Axis in the purple box.

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5	Emma Johnson	Edit the Rule Description:		Manage Bules	280,000	280,000	11%
6	Ethan Davis	Format all cells based on their values: Format Style: Data Bar V Bar Only	2	4 <u>M</u> ore Rules	590,000	590,000	46%
7	Olivia Martinez	Minimum Maxim Type: Automatic V Autor	mum matic	E 00/	300 000	-390,000	-33%
8	Noah Anderson	Value: (Automatic)	ematic)	Negative bar fill color		310,000	13%
9	Sophia Wilson	Bar Appearance: Eil <u>C</u> olor	Bogder Cojor	O [jil color: 💁 -	0	170,000	12%
10	Liam Brown	Solid Fill	No Border	Apply same fill color as positive bar Negative bar border color		-350,000	-17%
11	Ava Smith	Preview:	bar girection.) Border color:	10	-400,000	-17%
12	Mason Taylor		OK Cancel	Axis settings	10	420,000	29%
13	Isabella Jackson	2,200,000	1,892,000	Select axis position in cell to change the appearance of Automatic (display at variable position based on neg	bars for negative values ative values)	130,000	7%
14	Benjamin Harris	2,500,000	2,825,000	O Cell <u>midpoint</u> Non <u>e</u> (show negative value bars in same direction as	positive)	70,000	2%
15	Mia Thompson	2,100,000	2,121,000	Agis color: 🔽 🗸	K Cancel 10	370,000	17%
16	William Turner	3,200,000	1,856,000	58%	30,000	30,000	2%
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Figure 8: Data Bars in Adjacent Cells Options

At the moment, we will not change any options for negative values or the axis. Finalizing the options, and applying the conditional formatting, the data bars displayed in Figure 9. Compare your experience reading the original Net Profit, and the result we have now.

	Α	В	С	D	E	F	G	Н
1								
2				Ann	ual Sales Upda	ate		
3								
4		Employee	Target Sales	Realized Sales	Completion	Net	Profit	Profit Rate
5		Emma Johnson	2,700,000	2,457,000	91%	280,000		11%
6		Ethan Davis	2,800,000	1,288,000	46%	590,000		46%
7		Olivia Martinez	2,400,000	1,200,000	50%	-390,000		-33%
8		Noah Anderson	2,500,000	2,450,000	98%	310,000		13%
9		Sophia Wilson	2,000,000	1,440,000	72%	170,000		12%
10		Liam Brown	2,300,000	2,001,000	87%	-350,000		-17%
11		Ava Smith	2,300,000	2,323,000	101%	-400,000		-17%
12		Mason Taylor	2,000,000	1,440,000	72%	420,000		29%
13		Isabella Jackson	2,200,000	1,892,000	86%	130,000		7%
14		Benjamin Harris	2,500,000	2,825,000	113%	70,000		2%
15		Mia Thompson	2,100,000	2,121,000	101%	370,000		17%
16		William Turner	3,200,000	1,856,000	58%	30,000		2%
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Figure 9: Data Bars in Adjacent Cells Applied

¹If there are no empty cells to the right, add a column by Right Clicking Column H, and choosing Insert.

Topic 3. Conditional Formatting: Icon Sets

In addition to adding data bars, Excel also allows its users to add icons to assist in data visualization. To illustrate the use of icon sets, we will use icon sets to classify the employees' sales completion rates.

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6	Ethan Davis	2,800,000	1,288,000	4		00	46%
7	Olivia Martinez	2,400,000	1,200,000	5 🔵 🖌		00	-33%
8	Noah Anderson	2,500,000	2,450,000	9;●		00	13%
9	Sophia Wilson	2,000,000	1,440,000	7	kators	00	12%
10	Liam Brown	2,300,000	2,001,000	8. 🕨 🛛		00	-17%
11	Ava Smith	2,300,000	2,323,000	10 Rati	ings ∧∧ell_ell_ell_ell	00	-17%
12	Mason Taylor	2,000,000	1,440,000	7		00	29%
13	Isabella Jackson	2,200,000	1,892,000	8		00	7%
14	Benjamin Harris	2,500,000	2,825,000	11	More Rules	00	2%
15	Mia Thompson	2,100,000	2,121,000	101%	370,00	00	17%
16	William Turner	3,200,000	1,856,000	58%	30,00	00	2%
17					2		

Figure 10: Icon Sets

To apply conditional formatting to display icons, select the cells that contains the data, and navigate to Conditional Formatting > Icon Sets in the red box in Figure 10. You may use any of the preset icons that show up, but for the purpose of this activity we will select More Rules in the blue box.

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Select a Rule Type:									
- Format all cells based on their values									
- Format only cells that contain									
Format only top or bottom ranked value	es								
Format only values that are above or b	elow average								
► Format only unique or duplicate values									
► Use a formula to determine which cells	to format								
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Figure 11: New Formatting Rule

Opening the New Formatting Rule window, we may set up the rules for the icons. First, in the red box we can choose different icon styles, or completely replace the cell values with the icons as we did in Figure 9.

Then we can change the icons in the icon set using the options in the blue box, and edit the cutoff thresholds by changing the values and options in the orange box. Try out setting an arbitrary cutoff for the green, yellow, and red circles to complement the numerical completion rate.

	А	В	С	D	E	F	G	Н
1								
2				Annu	al Sales Upda	te		
3								
4		Employee	Target Sales	Realized Sales	Completion	Net	Profit	Profit Rate
5		Emma Johnson	2,700,000	2,457,000 🔵	91%	280,000	1	11%
6		Ethan Davis	2,800,000	1,288,000 🔴	46%	590,000)	46%
7		Olivia Martinez	2,400,000	1,200,000 🔵	50%	-390,000		-33%
8		Noah Anderson	2,500,000	2,450,000 🔵	98%	310,000	1	13%
9		Sophia Wilson	2,000,000	1,440,000 🔵	72%	170,000	1	12%
10		Liam Brown	2,300,000	2,001,000 🔵	87%	-350,000		-17%
11		Ava Smith	2,300,000	2,323,000 🌑	101%	-400,000		-17%
12		Mason Taylor	2,000,000	1,440,000 🔵	72%	420,000)	29%
13		Isabella Jackson	2,200,000	1,892,000 🔵	86%	130,000)	7%
14		Benjamin Harris	2,500,000	2,825,000 🔵	113%	70,000	1	2%
15		Mia Thompson	2,100,000	2,121,000 🔵	101%	370,000)	17%
16		William Turner	3,200,000	1,856,000 🔵	58%	30,000		2%
17								

Figure 12: Icon Sets Applied

Using the number 0.8 as the cutoff for the green circle, and the number 0.5 as the cutoff for the yellow circle, we obtain the result in Figure 12.

Topic 4. Data Visualization: Sparklines

This next topic is not quite conditional formatting, but shares some similarities. Sparklines are small graphs that we can embed within a cell that can be used to visualize trends over time. To try this feature out, please navigate to the SALESQ worksheet, which contains some sales data for a year, divided up by employee-quarters.

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1	Emma Johnson	9,626	9,172	10,359	11,96										
	Ethan Davis	9,911	10,181	9,833	11,040										
	Olivia Martinez	8,620	9,339	9,823	9,82										
	Noah Anderson	9,639	8,483	10,937	9,37										
	Sophia Wilson	10,799	10,541	10,592	10,76	1									
	Liam Brown	10,899	10,682	9,499	9,67										
	Ava Smith	10,908	9,757	9,546	10,16										
	Mason Taylor	10,937	11,160	8,567	9,18										
3	Isabella Jackson	11,085	11,044	9,718	10,70										
	Benjamin Harris	9,784	10,456	11,870	11,02										
5	Mia Thompson	8,676	11,911	10,302	9,11										
5	William Turner	9,026	10,908	10,663	8,87										

Figure 13: Sparklines

To apply sparklines, first select the cells where we want to add the graphs. In Figure 13, it is highlighted by the red box. Then select Insert in the blue box, and then observe the three different types of sparklines highlighted in the orange box. For this example, we will be using the Line option:

1	A B	C	D	E	F	G	Create Sparklines ? ×	L	M N	0	P Q
2			Annual Sales	Update			Choose the data that you want Data Range: CS:F16	E			
4	Employee	Q1	Q2	Q3	Q4	Trend	Choose where you want the sparklines to be placed Location Range: SGS5:SGS16	E			
5	Emma Johnson	9,626	9,172	10,359	11,966		OK Cancel				
6	Ethan Davis	9,911	10,181	9,833	11,040						
7	Olivia Martinez	8,620	9,339	9,823	9,822						
8	Noah Anderson	9,639	8,483	10,937	9,379						
9	Sophia Wilson	10,799	10,541	10,592	10,761						
10	Liam Brown	10,899	10,682	9,499	9,677						
11	Ava Smith	10,908	9,757	9,546	10,166						
12	Mason Taylor	10,937	11,160	8,567	9,180						
13	Isabella Jackson	11,085	11,044	9,718	10,709						
14	Benjamin Harris	9,784	10,456	11,870	11,022						
15	Mia Thompson	8,676	11,911	10,302	9,115						
16	William Turner	9,026	10,908	10,663	8,872						

Figure 14: Sparklines Setup

Select the range that contains the data that we will be using for the sparkline as shown in Figure 14, and click OK to apply the sparklines.

1	A B	С	D	E	F	G
2			Annual Sales	Update		
3	Employee	Q1	Q2	Q3	Q4	Trend
5	Emma Johnson	9,626	9,172	10,359	11,966	
	Ethan Davis	9,911	10,181	9,833	11,040	\sim
	Olivia Martinez	8,620	9,339	9,823	9,822	
	Noah Anderson	9,639	8,483	10,937	9,379	$\overline{\ }$
	Sophia Wilson	10,799	10,541	10,592	10,761	$\overline{}$
	Liam Brown	10,899	10,682	9,499	9,677	
	Ava Smith	10,908	9,757	9,546	10,166	$\overline{}$
	Mason Taylor	10,937	11,160	8,567	9,180	~
	Isabella Jackson	11,085	11,044	9,718	10,709	
	Benjamin Harris	9,784	10,456	11,870	11,022	
5	Mia Thompson	8,676	11,911	10,302	9,115	
6	William Turner	9,026	10,908	10,663	8,872	

Figure 15: Sparklines Applied

Accessing Sparkline Options

The three types of sparklines each have their "best-use" cases. The Line types are often used to show or highlight a trend in the data, Column can be used to show trends as well, but it is often used to highlight the highest / lowest value in the time series. Finally, Win/Loss visualizes data based on positive/negative values, regardless of the magnitude of the numbers. To try out other formats, click on one of the newly added sparklines, and a Sparkline tab will appear as shown in Figure 16.

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2																
3	Employee	Q1	Q2	Q3	Q4	Trend										
5	Emma Johnson	9,626	9,172	10,359	11,966											
6	Ethan Davis	9,911	10,181	9,833	11,040											
7	Olivia Martinez	8,620	9,339	9,823	9,822											
8	Noah Anderson	9,639	8,483	10,937	9,379	\sim										
9	Sophia Wilson	10,799	10,541	10,592	10,761											
10	Liam Brown	10,899	10,682	9,499	9,677											
11	Ava Smith	10,908	9,757	9,546	10,166	\searrow										
12	Mason Taylor	10,937	11,160	8,567	9,180											
13	Isabella Jackson	11,085	11,044	9,718	10,709											
14	Benjamin Harris	9,784	10,456	11,870	11,022											
15	Mia Thompson	8,676	11,911	10,302	9,115											
16	William Turner	9,026	10,908	10,663	8,872											

Figure 16: Sparkline Options

Sparkline Options: Lines

There are a number of options that allow us to customize the sparklines. First, the **purple box** contains some options to accentuate certain values in the time series. It allows the user to show the high point, low point, first occurrence, last occurrence, negative points, and markers for the individual data points. Try activating and deactivating each option to see what each option will add to your graph.

Next clicking the red box opens up a set of some predetermined graph options. If none of the given options are unsatisfactory, you may manually set the sparkline color and marker colors through the options in the blue box and orange box, respectively.



Figure 17: Sparkline Options: Lines

Sparkline Options: Columns

16

We can freely alternate between the different types of sparklines by clicking on the options Type. For instance, clicking on the Column option in the red box in Figure 18, we can change the lines to a bar graph. See the changes in the orange box, and notice the changes in the Style option in the blue box.

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		Annual Sales U	Jpdate											
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Emma Johnson	9,626	9,172	10,359	11,966										
Ethan Davis	9,911	10,181	9,833	11,040										
Olivia Martinez	8,620	9,339	9,823	9,822										
Noah Anderson	9,639	8,483	10,937	9,379										
Sophia Wilson	10,799	10,541	10,592	10,761										
Liam Brown	10,899	10,682	9,499	9,677										
Ava Smith	10,908	9,757	9,546	10,166										
Mason Taylor	10,937	11,160	8,567	9,180										
Isabella Jackson	11,085	11,044	9,718	10,709										
Benjamin Harris	9,784	10,456	11,870	11,022										
Mia Thompson	8,676	11,911	10,302	9,115										
William Turner	0.026	10.009	10.662	0 072										

Figure 18: Sparkline Options: Lines