



Power XL – Conditional Formatting Best Practices

Introduction

- The purpose of this document is to provide some guidance around how to use conditional formatting in Power XL
- Conditional formatting brings Power XL to the next level, hence its usage is highly encouraged

Same Report with and without Conditional Formatting

1	Product	Quantity	Due Date	Design	Build	Ship	Progress	Paint Color	Order Link	Ship To
2	Personalised Notebook	2,400	30 Mar. 2022	Working on it	Waiting for Approval	Done	75%	#8597af	AUG0001	235 Bowery, New York, NY 10002, United States
3	Leather Journal	1,200	20 Nov. 2021	Waiting for Approval	Working on it	Waiting for Approval	44%	#3a5823	AUG0002	558 Broadway, New York, NY 10012, United St...
4	Vintage Necklace	800	08 Nov. 2021	Waiting for Approval	Done	Working on it	67%	#abd08f	AUG0003	215 Centre St, New York, NY 10013, United St...
5	Scandinavian Print	800	14 Sep. 2021	Delayed	Delayed	Delayed	83%	#f4b185	AUG0004	175 5th Ave, New York, NY 10010, United States
6	Blue Wall Art	1,000	03 Nov. 2021	Delayed	Waiting for Approval	Waiting for Approval	66%	#2f5697	AUG0005	475 Broadway, New York, NY 10013, United St...
7	Christmas Tree Kit.	500	14 Aug. 2021	Done	Delayed	Delayed	39%	#7030A0	AUG0006	29 E 4th St, New York, NY 10003, United States
8	Miniature Dollhouse	800	23 Jul. 2021	Working on it	Working on it	Delayed	36%	#C00000	AUG0007	252 1st Ave., New York, NY 10009, United States
9	New item...									

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One can see, that applying conditional formatting makes the report way more appealing

Add Rules

Rule Types

The screenshot shows the Power XL ribbon with the Conditional Format menu open. The menu options are:

- Highlight Cells Rules
- Top/Bottom Rules
- Data Bars
- Color Scales
- Icon Sets
- New Rule...
- Clear Rules...
- Manage Rules...

Callout text: Similarly as in MS Excel, conditional formatting is available for data bars, background color, font color, icons and a lot more

	Product	Quantity	Due Date	Design	Build	Ship	Progress	Paint Color	Order Link
1									
2	Personalised Notebook	2,400	30 Mar. 2022	Working on it	Waiting for Approval	Done	75%	#8597af	AUG0001
3	Leather Journal	1,200	20 Nov. 2021	Waiting for Approval	Working on it	Waiting for Approval	44%	#3a5823	AUG0002
4	Vintage Necklace	800	08 Nov. 2021	Waiting for Approval	Done	Working on it	67%	#abd08f	AUG0003
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6	Blue Wall Art	1,000	03 Nov. 2021	Delayed	Waiting for Approval	Waiting for Approval	66%	#2f5697	AUG0005
7	Christmas Tree Kit.	500	14 Aug. 2021	Done	Delayed	Delayed	39%	#7030A0	AUG0006
8	Miniature Dollhouse	800	23 Jul. 2021	Working on it	Working on it	Delayed	36%	#C00000	AUG0007
9	New item...								
10									
11									
12									
13									
14									

Add Rules

Rule with Formula

Select the 1st row of a column and add a new rule

Set the rule with a formula

Make sure, that the cell reference points to the 1st row of the table, in the example E2="Working on it" will ensure, that the items in status "Working on it" will be formatted to yellow

Product	Quantity	Due Date	Design	Build	
1					
2					
3					
4					
5	Blue Wall Art	1,000.00	11/03/2021	Delayed	Waiting
6	Christmas Tree Kit.	500.00	08/14/2021	Done	Delayed
7	Miniature Dollhouse	200.00	07/23/2021	Working on it	Working
8					
9	1000000 New Item...				
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					

Add Rules

Manage Rules

The formatting will be applied to the entire column

Conditional Formatting Rules Manager

Formatting rules for this worksheet:

Rule (applied in order shown)	Format	Applies to	Stop If True
Formula: E2="Working on it"	AaBbCcYyZz	=\$E\$2:\$E\$9	<input type="checkbox"/>

In the manage rules section you will see that the rule was automatically filled down to the entire row

Special Rules

Check for empty value

- If data is stored in a database, empty value can surface in different ways, such as NULL, as an empty string ("") or as BLANK()
- Let's say, that we would like to color code a field to red, if that is empty or the value is 0
- In order to best handle the different empty values (NULL, "", BLANK(), etc.) the best way is to check if the length is 0, as following: LEN(A2)=0
- In addition to that, we would like to check if the value is 0, hence the final formula will look like this: **OR(LEN(A2)=0,A2=0)**
- That way Power XL will handle all empty scenarios and handle the scenario in case the value is 0

The screenshot shows a spreadsheet with columns A, B, and C. Column A contains product IDs (1-10), column B contains product names, and column C contains quantities. The 'Quantity' column is highlighted in red for rows 3, 4, 8, and 9, and in green for row 6. The 'Conditional Formatting Rules Manager' dialog box is open, showing a rule with the formula `OR(LEN(C2)=0,C2=0)` applied to the range `=C2:C9`. The rule is named 'AaBbCcYyZz' and is set to stop if true.

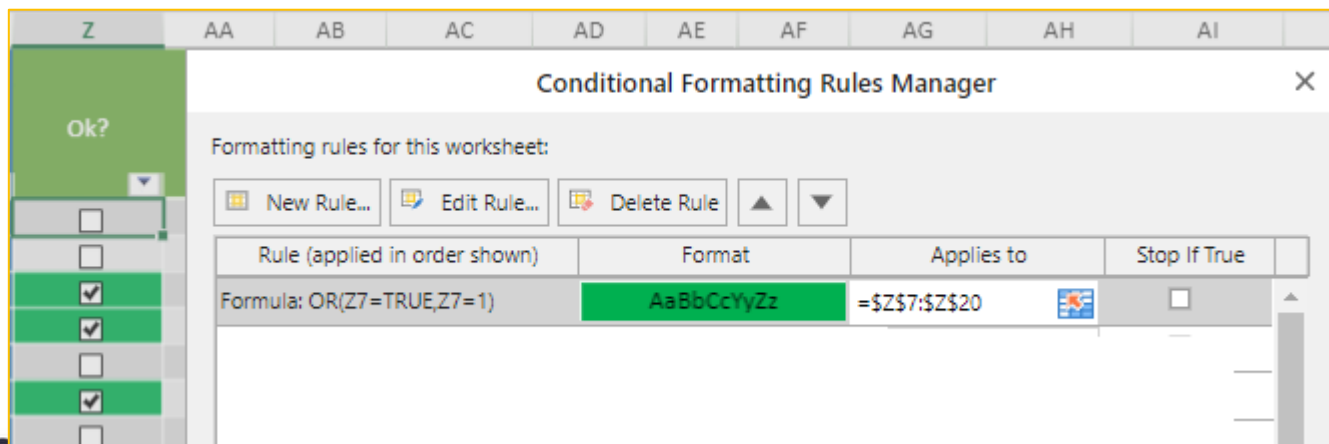
Product ID	Product Name	Quantity
1	Personalised Notebook	2,400.00
2	Leather Journal	1,200.00
3	Vintage Necklace	
4	Scandinavian Print	0.00
5	Blue Wall Art	1,000.00
6	Christmas Tree Kit.	500.00
7	Miniature Dollhouse	800.00
8	1000000 New item...	
9		
10		

Special Rules

Format checkbox type of fields

- When working with true/false type of data, we recommend storing the data in the database in an INT field as 1 or 0
- That way the database will return the values to Power XL as 1 or 0
- But when a checkbox is ticked in Power XL it will set the values as TRUE or FALSE, which the back end will then resolve to 1 or 0
- In order to handle both 1 or TRUE and 0 or FALSE values in Power XL, if you wish to bind conditional formatting against a true/false type of field, the following formula should be applied:

OR(A2=TRUE,A2=1)



Special Rules

Date Values

- When working with dates, such as comparing if a date is bigger than another date, we recommend nesting the values in the DATEVALUE() function
- Let's say we would like to apply color coding, in case the start date is bigger than the end date
- We can do that with the following formula: **DATEVALUE(A2)>DATEVALUE(B2)**

The screenshot shows the 'Conditional Formatting Rules Manager' dialog box in Excel. The background shows a table with 'Start Date' and 'End Date' columns. The 'Conditional Formatting Rules Manager' dialog is open, showing a list of rules. The first rule is selected, with the following details:

Rule (applied in order shown)	Format	Applies to	Stop If True
Formula: DATEVALUE(AC7)>DATEVA...	AaBbCcYyZz	=\$AD\$7:\$AD\$20	<input type="checkbox"/>

Other Take Aways

- When the conditional formatting formula is evaluated, it only matters if the formula returns a true or a false
- True will mean, that the formatting will be applied, false means that the formatting won't be applied
- When applying complex conditional formatting rules, it is recommended to test that rule first as a regular column formula
- That way you can see if the formula works as expected and returns the true/false values as expected and in addition to that you will see if there are no errors in the formula
- Once verified, then the same formula can be lifted from the column into the conditional formatting rule