Composing Rock 'n' Roll Stories from the Usage Data Blues

Excel, live in concert: Conditional formatting
(Please note that these instructions were developed with Excel 2003 for Windows)

Using this tool, you can satisfy a common demand:
"I want to know every instance of usage lower than __ per __."

Can't I find low usage by sorting numerically?

Excel is very good at sorting worksheets by one, two, or three attributes. But it's not always practical to rely on sorting alone to reveal what you want to know about your data:

- When you're limited in the attributes by which you can sort
- When you don't know what attribute to sort by
- When you must keep a particular sort order (alphabetical is a good example)

How does conditional formatting work?

Excel takes one or more conditions you set and applies your desired formatting to cells that meet the condition(s). There are only a few things you need to know to apply conditional formatting successfully in any situation:

- Conditions can operate on cells containing numeric values or formulas, but not text.
- Conditions use standard mathematical operations: greater than, less than, between, equal to, etc.
- All of Excel's tools for formatting cells are available for conditional formatting: font, font color and style, background color, cell border, etc.
- A worksheet (tab) can contain up to three unrelated conditions.
- Conditional formatting can be applied to an entire worksheet; when new data is added, the desired formatting is automatically applied to cells that meet the condition(s).
- Conditional formatting works best on a single worksheet or spreadsheet of comparable data. When applying the same conditional formatting across several different spreadsheets, make sure the data is comparable before proceeding.

How can I apply conditional formatting?

1. Identify the data that you'll be working with. If necessary, consolidate it into one worksheet or spreadsheet (see ExcelToolsPart2.doc).
2. Identify the condition or conditions you'll be setting. It helps to write these down ahead of time:
   a. What do you want to know?
   b. Can the answer be expressed in numeric terms?
      i. If not, conditional formatting isn't the best tool for you.
      ii. If so, continue using conditional formatting.
   c. What number and operation do you want to trigger your condition?
      i. Examples: Instances of numbers less than or equal to 5; calculated totals (using a formula) between 1000 and 2000; etc.
   d. What unit of time will your condition operate in?
      i. This question addresses how your worksheet is set up.

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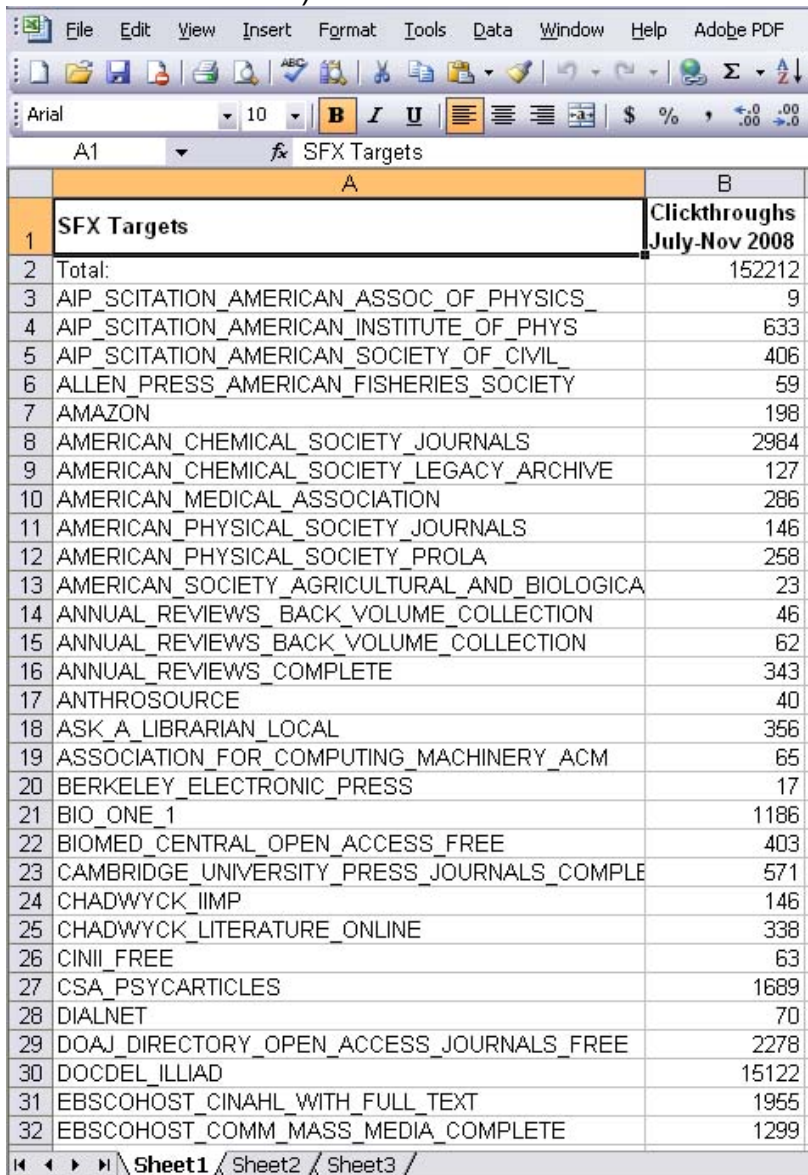(Please note that these instructions were developed with Excel 2003 for Windows)

ii. If you want to conditionally format a certain amount of usage in a given year, you should apply the conditional formatting only to the column(s) or row(s) that represent individual years of usage.

iii. If you want to conditionally format a certain amount of usage every month, you should apply the conditional formatting only to the column(s) or row(s) that represent individual months of usage.

e. What format do you want Excel to apply to cells that meet your condition(s)?

i. Examples: bold or italic font; red text; yellow cell background; etc.

ii. Consider whether the format you choose will interfere with any manual cell formatting.

iii. Consider providing a key to the conditional formatting on the relevant worksheet. This step will assist you and others who refer to the data.

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3. Open the spreadsheet and worksheet (tab) to which you'll be applying conditional formatting:
   (These screenshots use the consolidated SFX target clickthrough data from ExcelToolsPart2.doc)
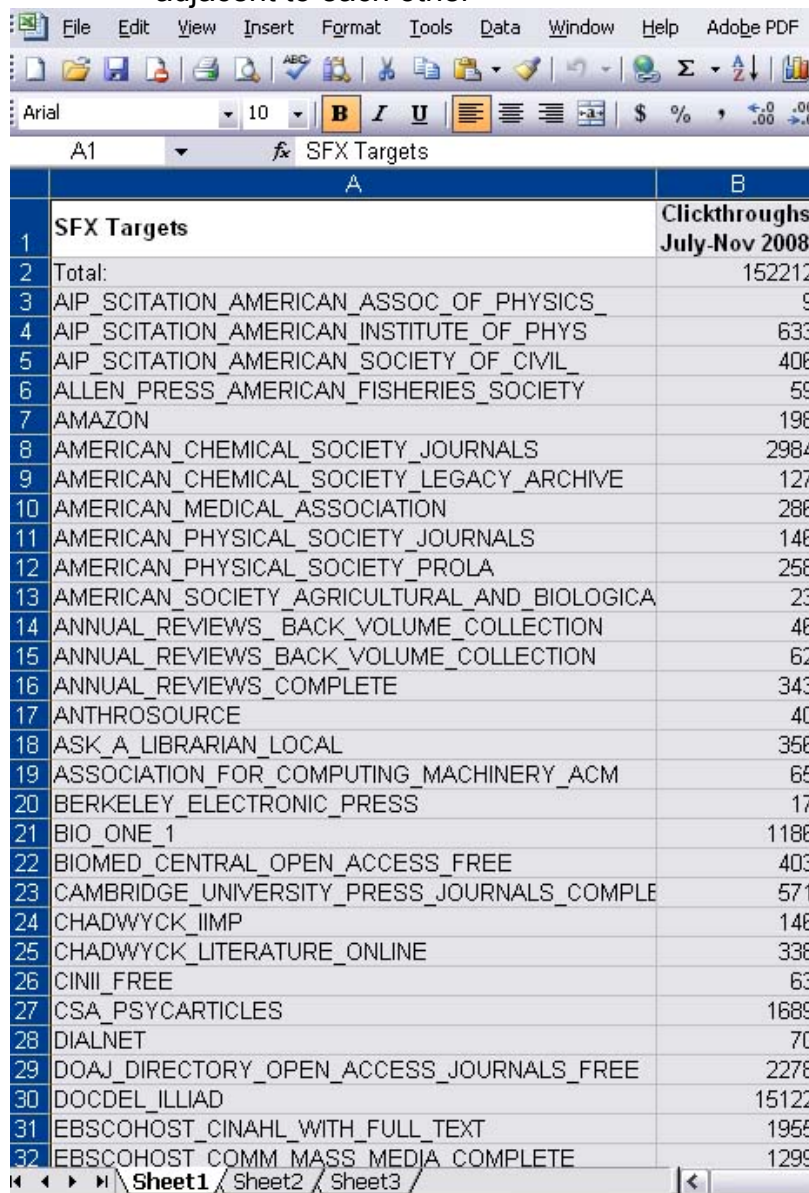
	A	B
	SFX Targets	Clickthroughs July-Nov 2008
1	SFX Targets	
2	Total:	152212
3	AIP_SCITATION_AMERICAN_ASSOC_OF_PHYSICS_	9
4	AIP_SCITATION_AMERICAN_INSTITUTE_OF_PHYS	633
5	AIP_SCITATION_AMERICAN_SOCIETY_OF_CIVIL_	406
6	ALLEN_PRESS_AMERICAN_FISHERIES_SOCIETY	59
7	AMAZON	198
8	AMERICAN_CHEMICAL_SOCIETY_JOURNALS	2984
9	AMERICAN_CHEMICAL_SOCIETY_LEGACY_ARCHIVE	127
10	AMERICAN_MEDICAL_ASSOCIATION	286
11	AMERICAN_PHYSICAL_SOCIETY_JOURNALS	146
12	AMERICAN_PHYSICAL_SOCIETY_PROLA	258
13	AMERICAN_SOCIETY_AGRICULTURAL_AND_BIOLOGICA	23
14	ANNUAL_REVIEWS_ BACK_VOLUME_COLLECTION	46
15	ANNUAL_REVIEWS_BACK_VOLUME_COLLECTION	62
16	ANNUAL_REVIEWS_COMPLETE	343
17	ANTHROSOURCE	40
18	ASK_A_LIBRARIAN_LOCAL	356
19	ASSOCIATION_FOR_COMPUTING_MACHINERY_ACM	65
20	BERKELEY_ELECTRONIC_PRESS	17
21	BIO_ONE_1	1186
22	BIOMED_CENTRAL_OPEN_ACCESS_FREE	403
23	CAMBRIDGE_UNIVERSITY_PRESS_JOURNALS_COMPLE	571
24	CHADWYCK_IIMP	146
25	CHADWYCK_LITERATURE_ONLINE	338
26	CINII_FREE	63
27	CSA_PSYCARTICLES	1689
28	DIALNET	70
29	DOAJ_DIRECTORY_OPEN_ACCESS_JOURNALS_FREE	2278
30	DOCDEL_ILLIAD	15122
31	EBSCOHOST_CINAHL_WITH_FULL_TEXT	1955
32	EBSCOHOST_COMM_MASS_MEDIA_COMPLETE	1299

Sheet1 / Sheet2 / Sheet3 /

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4. Highlight cells in the worksheet based on how you want to apply conditional formatting:
   a. For the entire worksheet, highlight all cells containing information (screenshots show this)
   b. For selected columns, rows, or cells, highlight those only:
      i. Shift + click to highlight columns, rows, or cells adjacent to each other
      ii. Control + click to highlight columns, rows, or cells that aren't adjacent to each other

	A	B
1	SFX Targets	Clickthroughs July-Nov 2008
2	Total:	152212
3	AIP_SCITATION_AMERICAN_ASSOC_OF_PHYSICS_	9
4	AIP_SCITATION_AMERICAN_INSTITUTE_OF_PHYS	633
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5. From the Menu bar, click Format, then click Conditional Formatting:
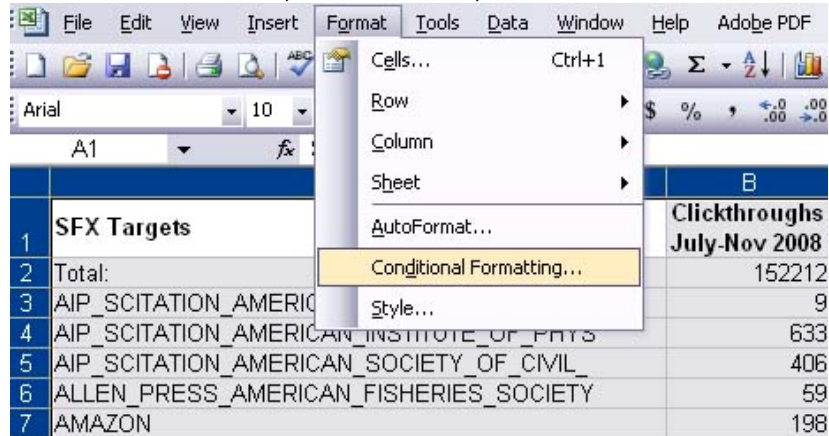

6. The Conditional Formatting dialogue box will appear:

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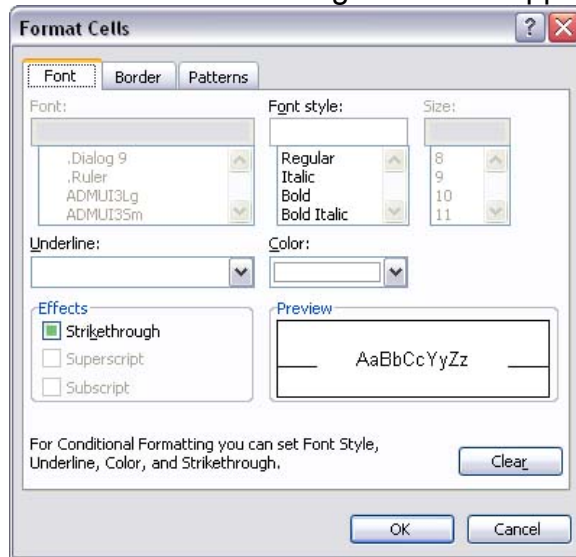University of California Los Angeles
February 9-11, 2009
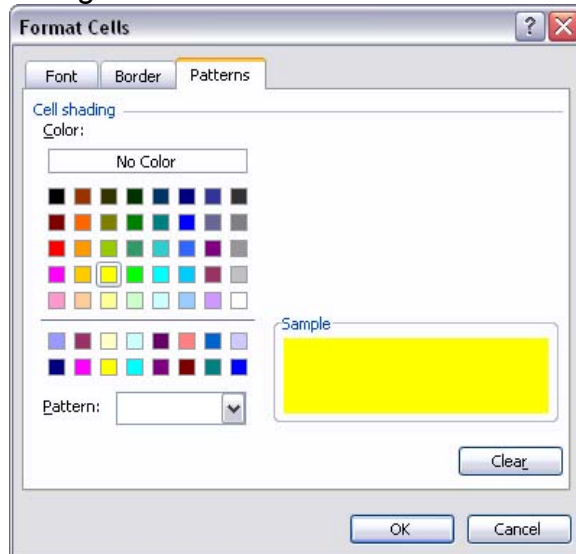
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7. Set the condition, step by step:
    a. There are two choices for the first box:
        i. Cell Value Is – select this choice when you want the condition to apply to values that aren't the result of a formula. This is our choice in the screenshot.
        ii. Formula Is – select this choice when you want the condition to apply to values that Excel calculates from a formula.
    b. There are eight choices for the second box, all mathematical operations:
        i. Between
        ii. Not between
        iii. Equal to
        iv. Not equal to
        v. Greater than
        vi. Less than
        vii. Greater than or equal to
        viii. Less than or equal to – this is our choice in the screenshot
    c. The third box holds the value you identified in 2c. Here, we're using 50 as a target number.
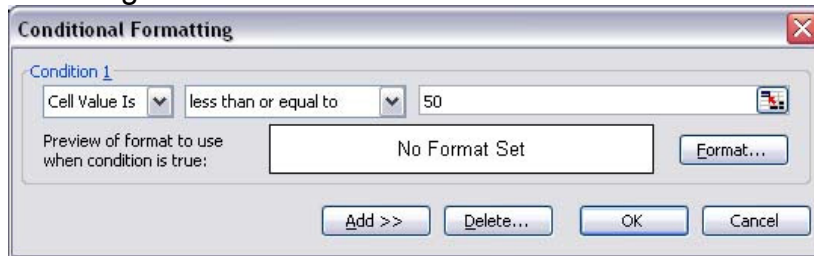
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8. Set the format you want to see when the condition is met:
   a. Inside the Conditional Formatting dialogue box, click Format…
   b. The Format Cells dialogue box will appear:

   c. Select the cell format you want. Here, we're choosing a yellow cell background:
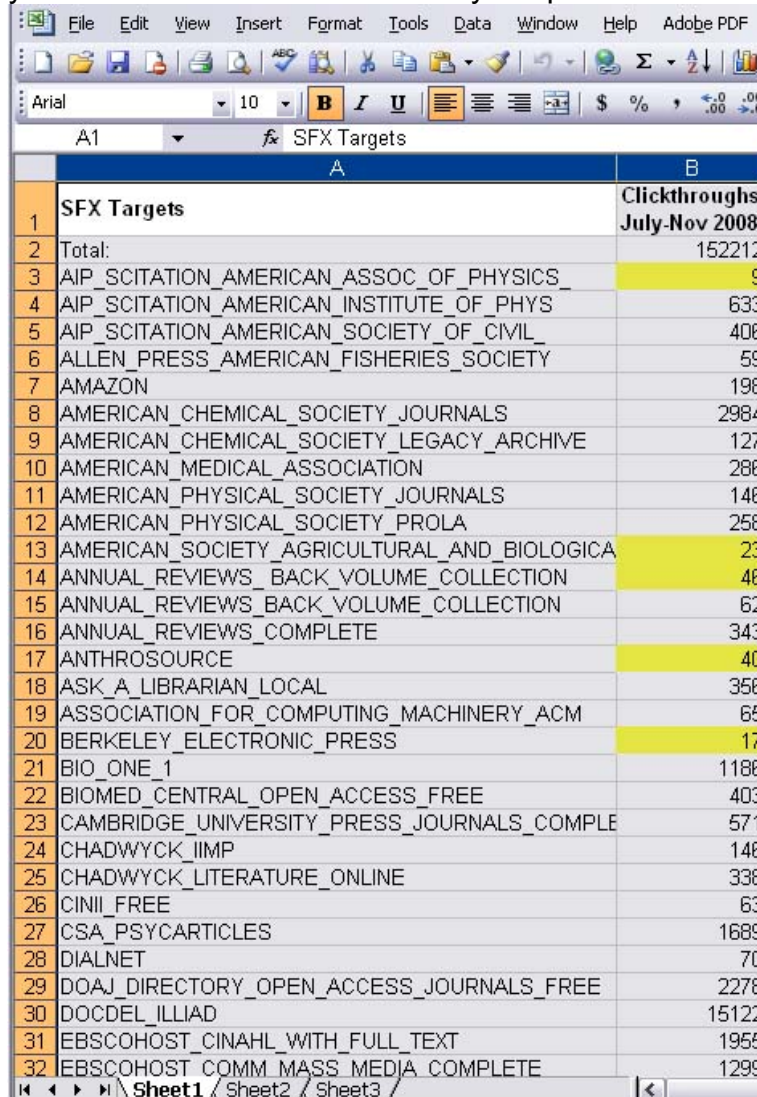
   d. When finished, click OK.

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e. The Conditional Formatting dialogue box will reappear, containing a preview of what the selected format will look like when the condition is met:
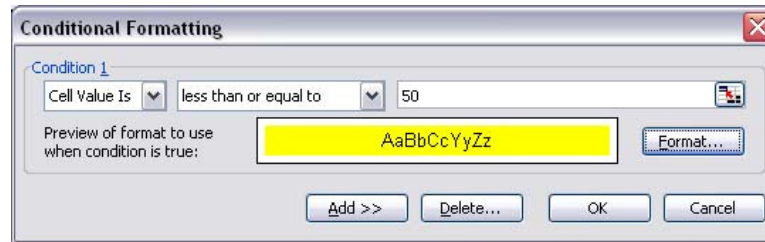
f. If the preview is not what you want, click Format again and change your selections.
g. If the preview is what you want, you're finished with this condition.
h. To apply another condition (you may have up to three on one worksheet), click Add and repeat the process.
i. To apply this condition only, click OK. Here, we're only applying one condition.

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j. The worksheet will reappear, still highlighted, and with the cells meeting your condition now formatted as you specified:

k. Click inside the worksheet to remove the highlighting.
l. Save the file to preserve your conditional formatting.
m. Edit or add conditions at any time by repeating the process beginning at step 3.