

ESR Business Intelligence

Conditional Formatting

Introduction

In tables, pivot tables and graphs conditional formatting helps direct attention to a data element if it meets a certain condition. The format of items such as cells and text in tables or bars and pies in graphs can be changed to highlights data to the user.

Adding Conditional Formatting to a Column

Conditional formatting can be applied directly to a column in order to alter the format of that column based on set criteria. To apply conditional formatting to a column:

| Step | Screen | Description | |
|------|--|--|--|
| 1 | Time Absence Facts Month 🗮 🖪 Absence Days 🗮 | Select the required columns in the Criteria tab | |
| 2 | Absence Facts Absence Days Image: Sort | Select Column Properties from the column options | |
| 3 | Style Column Format Data Format Conditional Format Add Condition > Month Absence Days | Select the Conditional Format tab from the Column Properties window and click 'Add Condition'. Select the column that the condition is to be based on. | |



| | Edit Condition | |
|---|--|--|
| 4 | Column Absence Days Operator is equal to / is in Value 31 Add More Options v Clear All | Enter the parameters of the new condition. In the example we have selected where the column Absence Days equals a value of 31 |
| | Help OK Cancel | |
| | Table | Enter the formatting options as required and click OK. Go to the results tab and the formatting will |
| 5 | Month Absence Days | appear where the criteria is met. In |
| | 2010 / 10 27.0 | the example we have changed the |
| | 2010 / 11 30.0 | cell colour to red and the font |
| | 2010 / 12 31.0 | colour to white where the value |
| | | equals 31. |

Note: The format of the data can also be changed along with the style using the Data Format tab Style Data Format when in the Edit Format window.

Adding Conditional Formatting to a Graph

Conditional Formatting can be added to a graph to alter the style of the graph based on set criteria. To add conditional formatting to a graph:

| Step | Screen | Description |
|------|--|---|
| 1 | Absence Days | Under the Results tab, add a graph view to the compound layout and click on the icon to open the Edit View. |
| 2 | General Style Scale Titles and Labels | Click on the icon on the upper toolbar to open the graph properties window and select the Style tab |
| 3 | Graph Data Style Default 💌 Style and Conditional Formatting 🔯 🔲 3D | The style of the graph can be altered under this |

| | | tab. Click on the icon to open the style and conditional formatting window |
|---|--|--|
| 4 | Style and Conditional Formatting Style Formatting Conditional Formatting Absence Days Month No conditional formats applied | Select the Conditional Formatting tab, select the column the format is to be applied against and click 'Add Conditional Format' to select the column the condition is to be based on. |
| 5 | New Condition Column Absence Days Operator is equal to / is in Value 31 Add More Options v Clear All | Setup the parameters of the condition in the New Condition window. In the example we have selected where Absence Days equals 31. |
| 6 | 1 Absence Days is equal to / is in 31 🥢 🗾 🏾 🗙 | Change the bar colour using the selector and click Ok until you return to the edit view. Click Done and return to the compound layout. |
| 7 | Crach Absence Days | The graph will now reflect the conditional formatting setup against it. In the example the two bars showing the value 31 have been changed to red. |



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