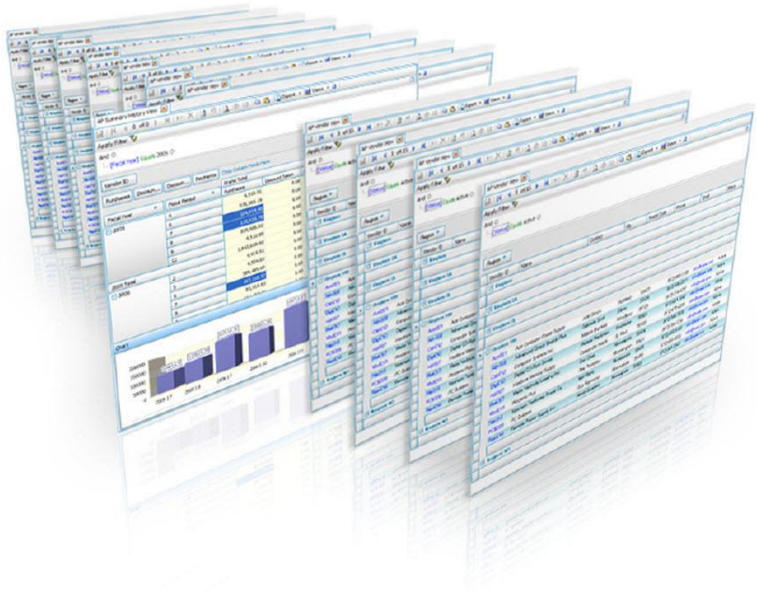
Interactive Views Tutorial

A Tutorial for Using Interactive Views and Conditional Formatting Rules

Knowledge Base Article

TRAVERSE v11.2 Edition



This document describes the intended features and technology for TRAVERSE 11 as of December, 2018. Features and technology are subject to change and there is no guarantee that any particular feature or technology described in this presentation will be present in this or subsequent versions of TRAVERSE.

December 2018

©Copyright 2018 Open Systems Holdings Corp.
All rights reserved.

OPEN SYSTEMS and TRAVERSE are registered trademarks of Open Systems Holdings Corp. All other marks are trademarks or registered trademarks of their respective holders.

Contents

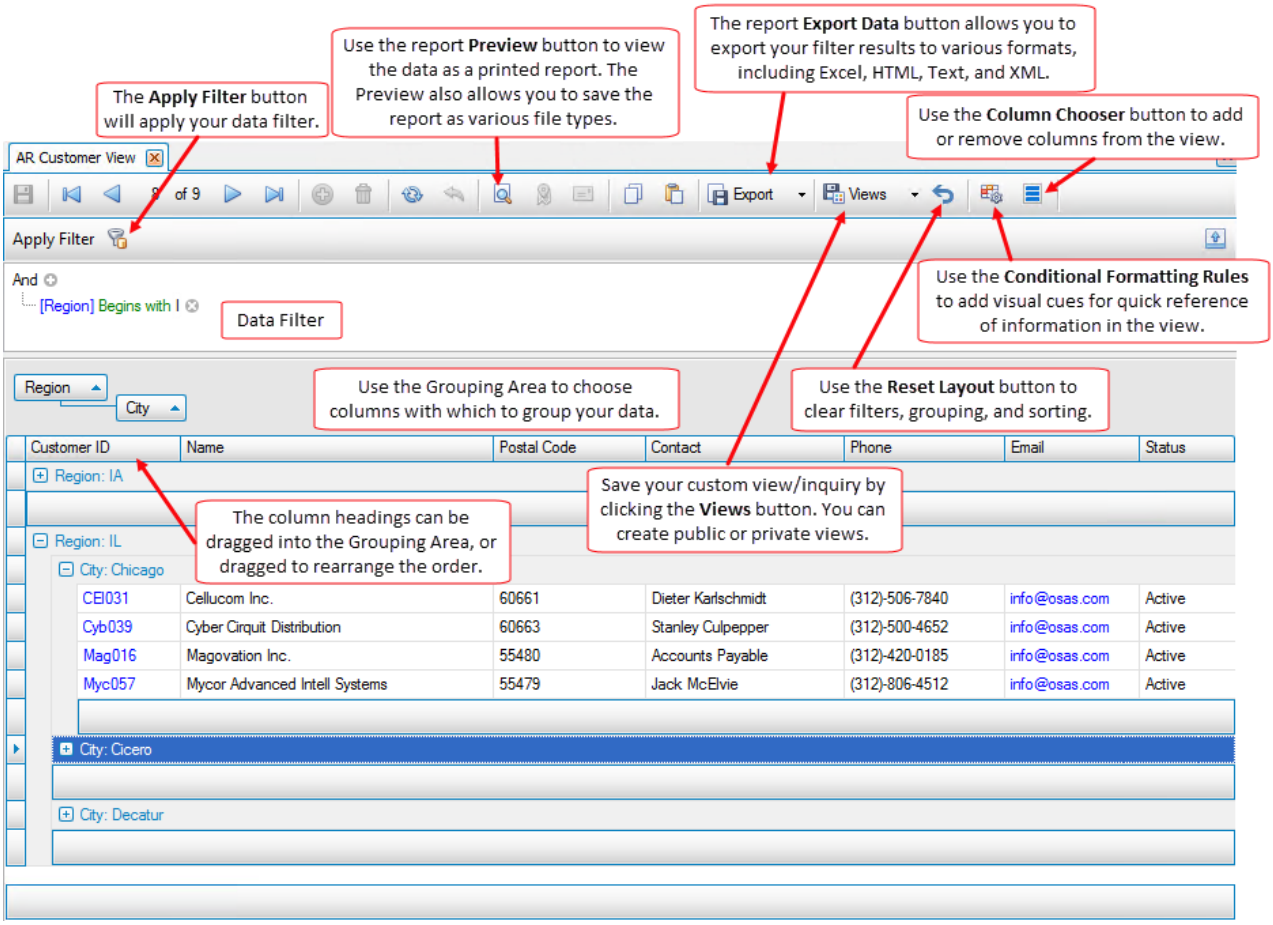
Introduction 5
Parts of an Interactive View 6
Organizing Data in Ascending and Descending Order 6
Filtering Column Data 7
Using the Data Filter 7
Filter Conditions 8
Using And 9
Using OR 9
Grouping Data 10
Group Data by a Single Column 10
Group Data by Multiple Columns 11
Sorting Grouped Data by Summary 11
Customizing Column Display (Column Chooser) 13
Filter Data by Selection 14
Show All Entries with a Blank Value 14
Show All Entries that are Not Blank 15
Show All Entries with a Selected Value 15
Create a Custom Selection Filter 16
Named Views 17
Save Named View 17
Edit Views 18
Delete Named Views 18
Open a Named View 19
Print or Export a Report 19
Print the Report Data 19
Export the Report Data 20
Right-click Menu 21
Sort 21
Group 21
Columns 21

Filters 22
Conditional Formatting 23
Rule Types and Formatting Options 24
Format all cells based on their values 25
Only format cells that contain 31
Only format top or bottom ranked values 35
Only format values that are above or below average 36
Only format unique or duplicate values 38
Use a formula to determine which cells to format 40
Using the Conditional Formatting Right-Click menu 41
Highlight Cell Rules 42
Top/Bottom Rules 43
Unique/Duplicate Rules 45
Data Bars 46
Color Scales 47
Icon Sets 48
Clear Rules 49
Manage Rules… 49

Introduction

TRAVERSE Interactive Views display information in an interactive format. These highly-configurable data screens allow you to sort, group, and output information according to your unique needs. An interactive view is like an inquiry screen you can customize to show the information you want to see.

Parts of an Interactive View

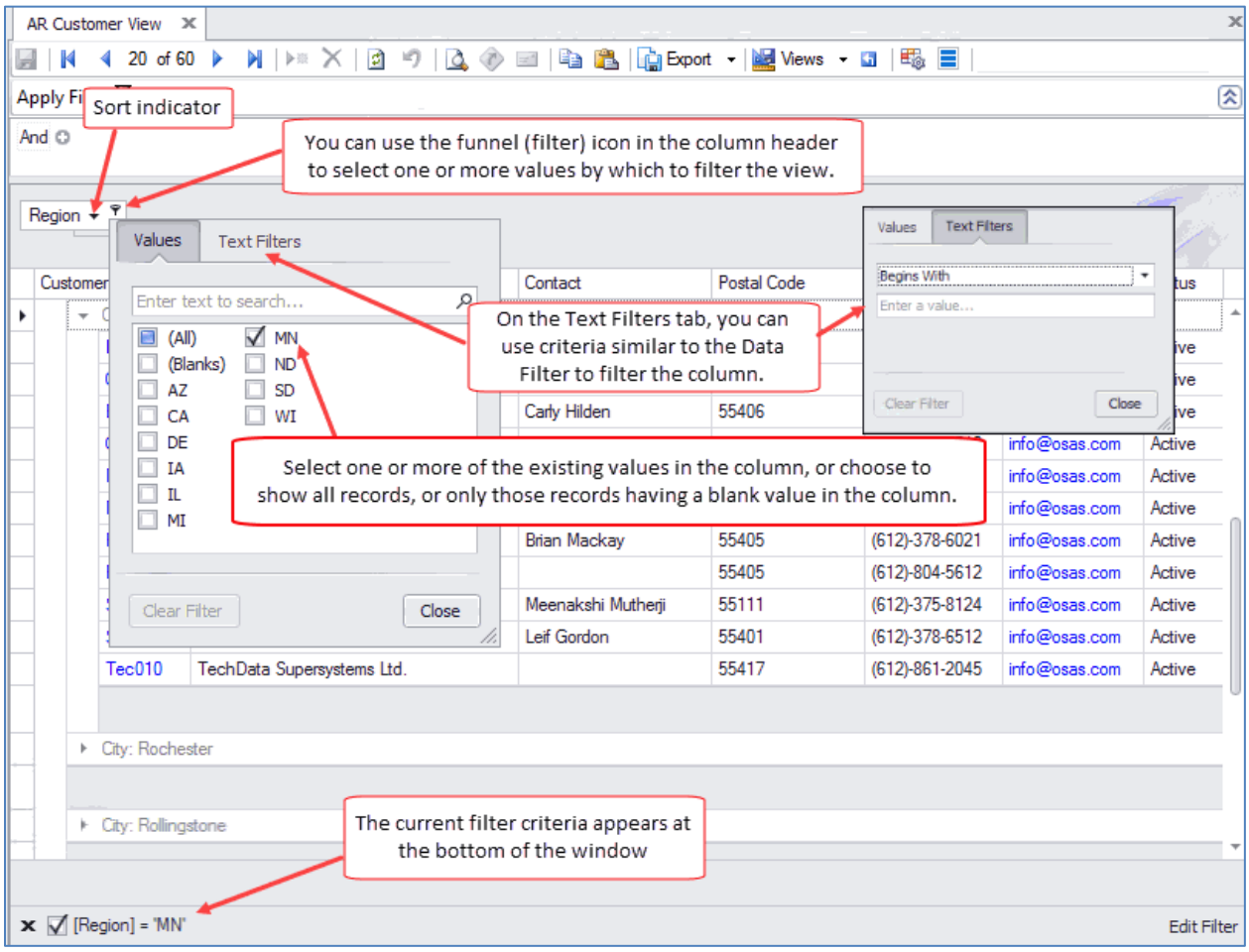


Organizing Data in Ascending and Descending Order

Click the **arrow icon** on the grouped column button to change the organization of the data from **ascending** to **descending order.**

Filtering Column Data

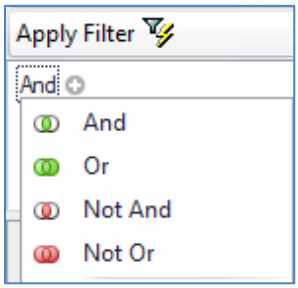
You can also sort columns by clicking on the heading, or filter columns by clicking on the funnel icon and selecting a value.



Using the Data Filter

Use the Data Filter to reduce the amount of data that needs to be pulled to your workstation. When there is a large amount of data available, this is important to reduce network traffic and speed up the retrieval of data.

Filter Conditions



- **AND** -- **All** records must match **all** conditions you set. If you set conditions that contradict each other, such as "City begins with P AND City begins with R", your view will have no results, because a city cannot begin with both P and R at the same time.

  If you set conditions that can exist at the same time, you will get results from your filter. For example, this filter: "City begins with P AND City ends with E", will include records for **P**hoenixvill**e**, **P**ine Grov**e**, and **P**ipersvill**e**, but not **P**hiladelphia, **P**aoli, or Adamsvill**e**.

- **OR** -- Records match **only one** condition you set. If you set conditions that contradict each other, such as "City begins with P OR City begins with R", your view will have results that include only cities that begin with either P or R.

  For example, this filter: "City begins with P OR City ends with E", will include records for **P**hoenixvill**e**, Crum Lynn**e**, **P**hiladelphia, **P**aoli, and Adamsvill**e**, but not Bryn Mawr or Appleton.

- **NOT AND** -- **Eliminates all** records that meet **both** conditions. If you set conditions that contradict each other, such as "City begins with P NOT AND City begins with R", your view will have the same results as only setting the condition of "City begins with P", because a city cannot begin with both P and R at the same time anyway.

  For example, this filter: "City begins with P NOT AND City ends with E", will include records for **P**hiladelphia, Appleton, Osceola, and New Prag**u**e, but not **P**hoenixvill**e**, **P**ine Grov**e**, or **P**ipersvill**e**.

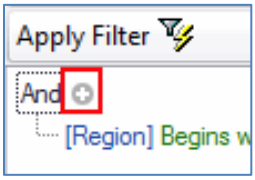
- **NOT OR** -- Records **do not** match **any** conditions you set. This is an elimination conditional.

  For example, this filter: "City begins with P NOT OR City ends with E", will include records for Appleton, Osceola, and Bryn Mawr, but not **P**hoenixvill**e**, New Prag**u**e, **P**hiladelphia, or Bernvill**e**.

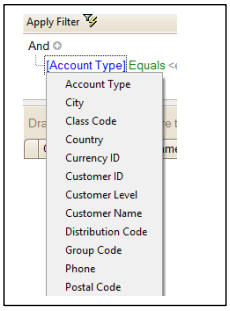
Using And

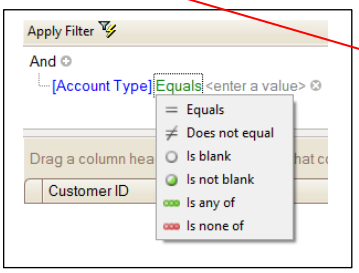
The **AND** conditional is used to filter your data to meet more than one condition.

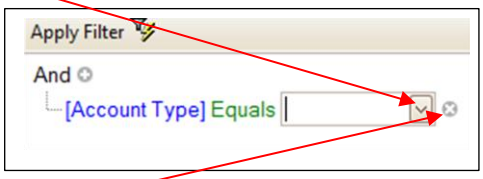
1. Click on the **plus icon** to add an additional filter.



2. Click on the **blue**, **green,** and **gray** text to show drop down menus for customizing your filter.
   a. Select a criterion from the **blue** text menu.
   b. Select a criterion from the **green** text menu.
   c. Enter an **alphanumerical value** in the **gray** text box. Some **Views** will include a **drop down menu arrow** in the text box where you can select predetermined criteria.





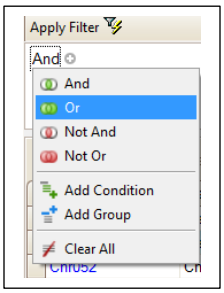


3. Click **Apply Filter** to display your data.
4. To remove a condition, click on the **x icon** to the far right.
5. If you want to **remove all** of the filter conditions, click the **reset layout** button , located to the right of the **Views** button.

Using OR

The **OR** conditional is used to filter your data to meet one condition, but you may want to see multiple conditions.

1. To change from **AND** to **OR**, click **AND**, then a drop down menu will appear where you can select **OR.**



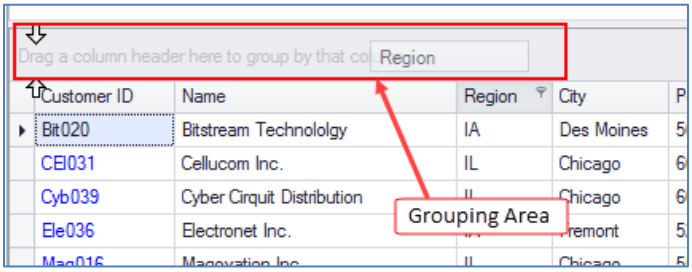
2. Select the desired criteria from the **blue**, **green,** and **gray** drop down menus as you did for **AND**.
3. Click **Apply Filter**

Grouping Data

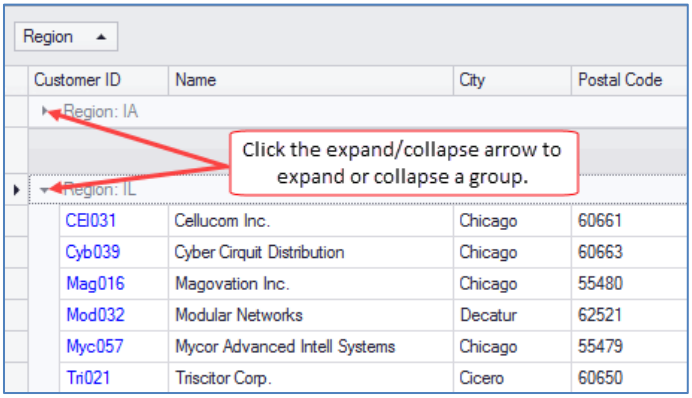
Group the data by column to change how the information is organized.

Group Data by a Single Column

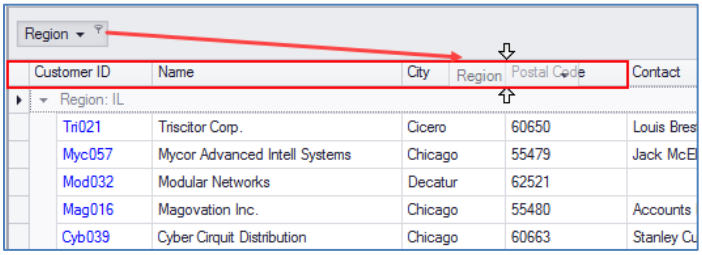
1. Click and drag the desired **Column Header** into the "**grouping area**." (aka Group By Box) When a **pair of arrows** appears, release the **Column Header** to place it in the **grouping area.**



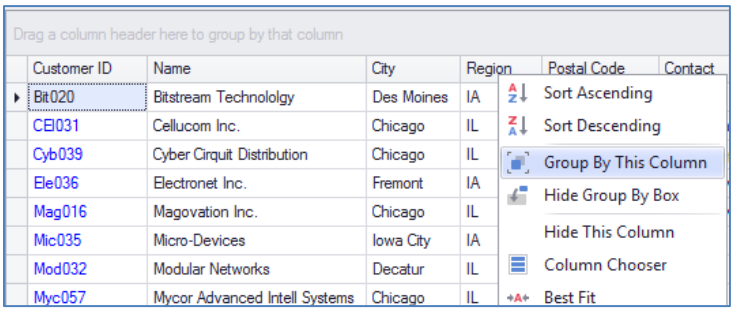
2. Once your **Column Header** is in place, you can click the **expand icon** (which will turn into a **collapse icon**) to expand details of the **grouped column**.



3. To **ungroup** the **Column Header**, click and drag the **Column Header** back into the desired location in the **Header Bar**. A **pair of arrows** will appear where the **Column Header** is going to appear in the **Header Bar**. Release it when the **pair of arrows** is in the desired location.

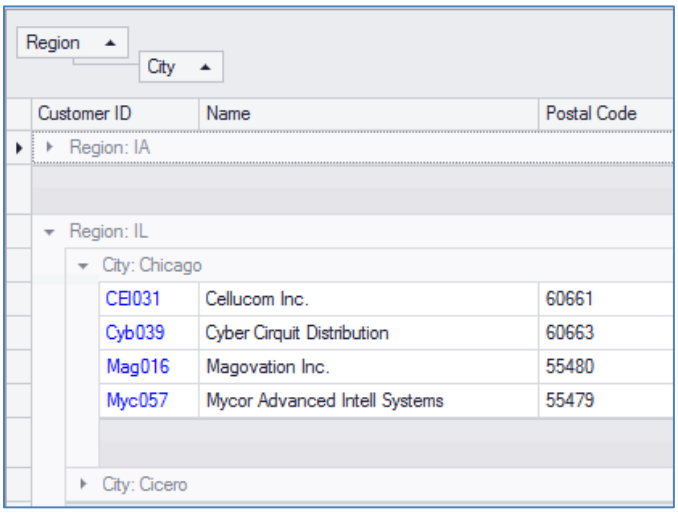


Alternately, you can **right click** on a **Column Header** to select **Group by This Column** and **Ungroup**, instead of dragging and dropping the headers.



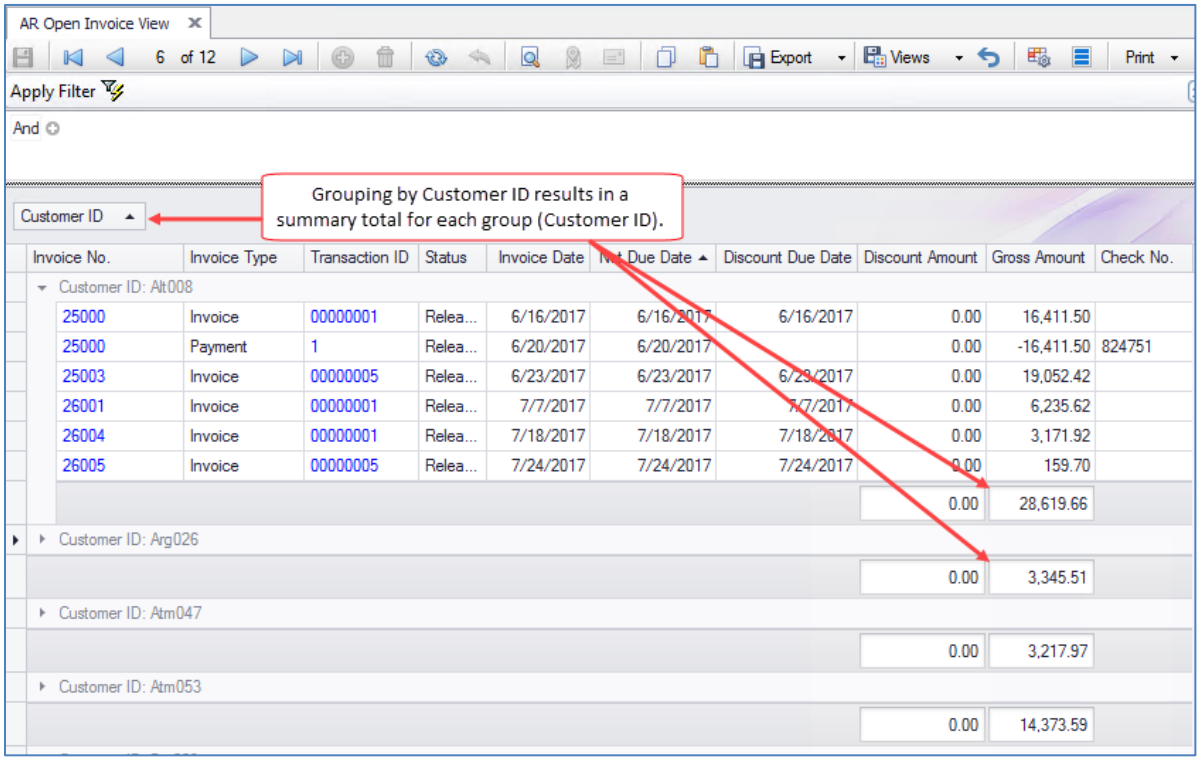
Group Data by Multiple Columns

To group data by multiple columns, simply drag and drop another **Column Header** to the **grouping area**, the same way you did for grouping by a single column.

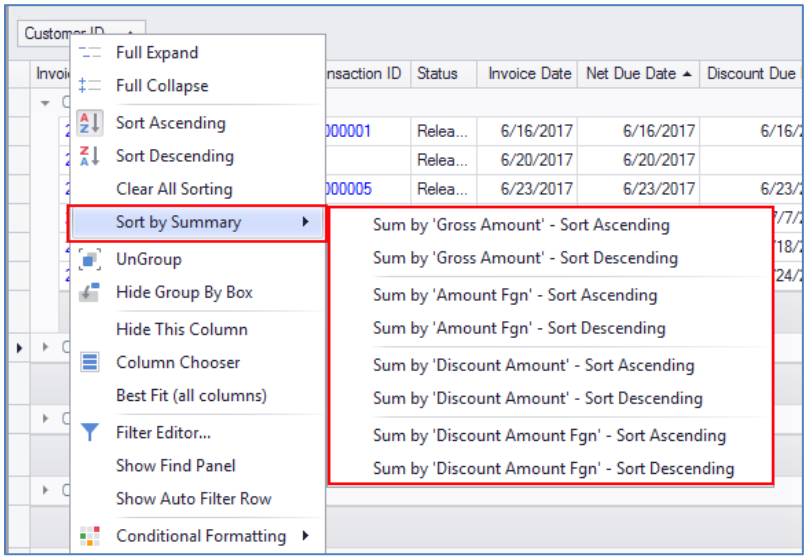


Sorting Grouped Data by Summary

If you have used one or more columns to group/summarize data in the view, you can sort the data by a group sum.

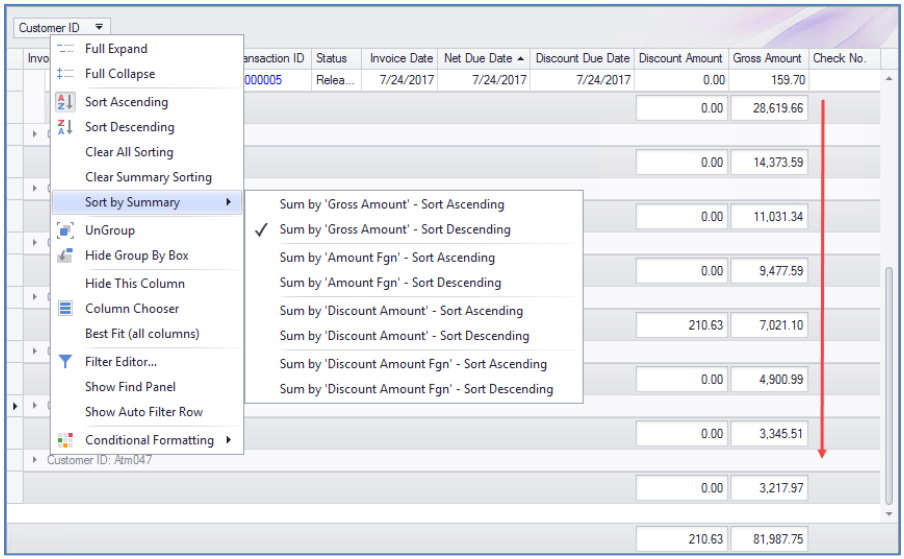


To sort the data by group sum, right-click on the group header and select **Sort by Summary**. All available options for sorting will be listed in a fly-out menu.



The fly-out may list some column options that are not visible in the view. You can add those columns to the view using the Column Chooser.

Select the sort option you want from the fly-out menu. The view will be sorted accordingly.

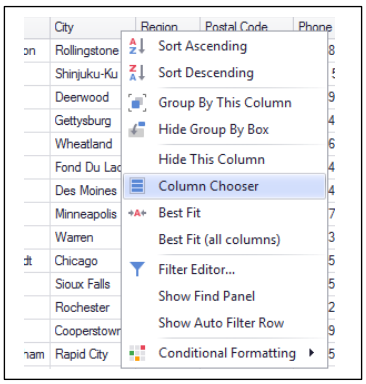


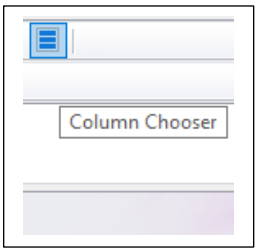
To clear the summary sorting, select **Clear Summary Sorting** from the right-click menu.

Customizing Column Display (Column Chooser)

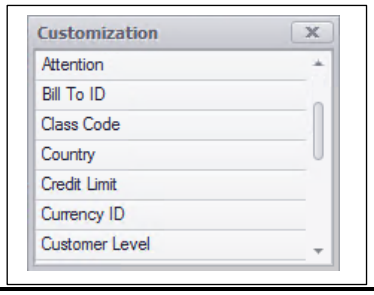
The columns displayed on the screen are not always all the columns available for an interactive view. You can add or subtract columns on the view to see the data you want.

1. **Right-click** on a **Column Header**, select **Column Chooser** *OR* use the **Column Chooser** button on the toolbar.

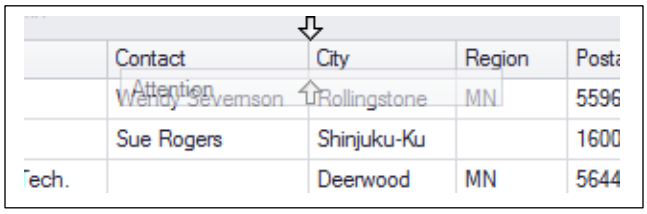




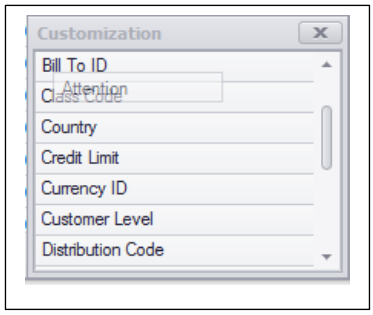
2. A **Customization Window** will appear.



3. **Drag and drop** a new column from the **Customization Window** into the **grid** next to the other column headers.



To remove a **Column**, drag and drop a column header into the body of the grid. Another method is to drag and drop the header into the **Customization Window**.



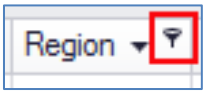
You can also rearrange columns by dragging the headers into different positions and dropping them into a new location in the view.

Filter Data by Selection

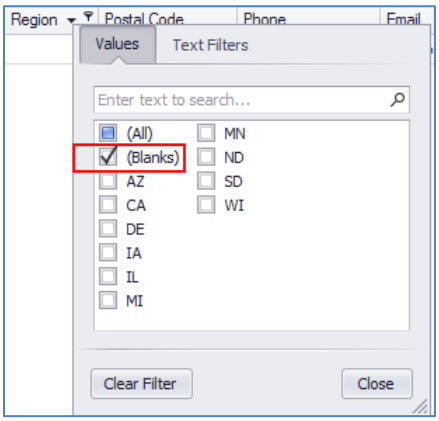
You might want to view only data for particular entries in the table, such as any record with a blank contact, or all records in Paoli, PA. You can do this by selecting the value to filter by from the column header.

Show All Entries with a Blank Value

1. Click on the **funnel icon**

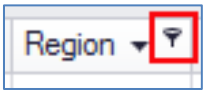


2. Select **Blanks**

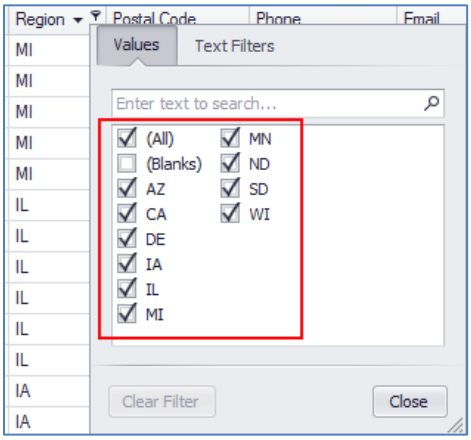


Show All Entries that are Not Blank

1. Click on the **funnel icon.**

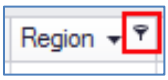


2. Select all check boxes using the **All** check box, then clear the **Blanks** check box.

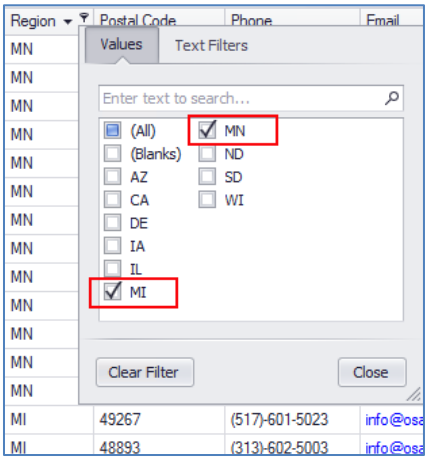


Show All Entries with a Selected Value

1. Click on the **funnel icon.**

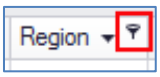


2. Select one or more **data values**.

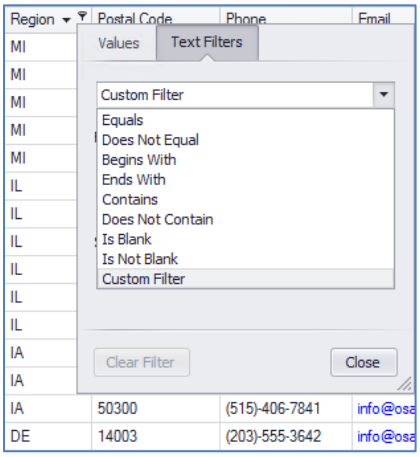


Create a Custom Selection Filter

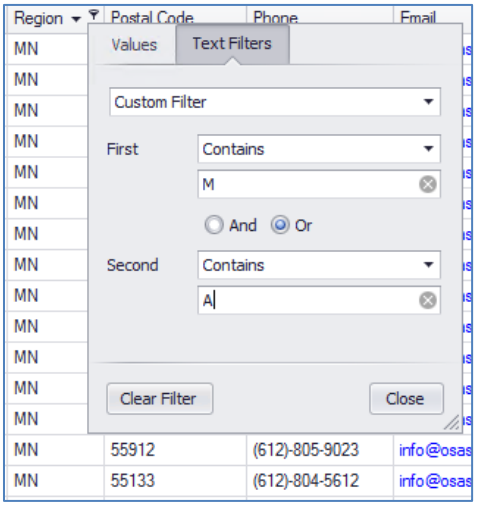
1. Click on the **funnel icon**.



2. Select the Text Filters tab, then **Custom Filter** in the drop-down list.



3. In the Custom Filter, you can create up to two criteria by which to filter the column.



   a. **OR** in this example will list all of the regions that match the first or the second conditions.
   b. **AND** in this example will list all of the regions that match both of the conditions.

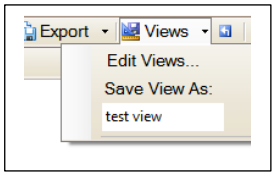
4. To clear the filter, click the **Clear Filter** button.

Named Views

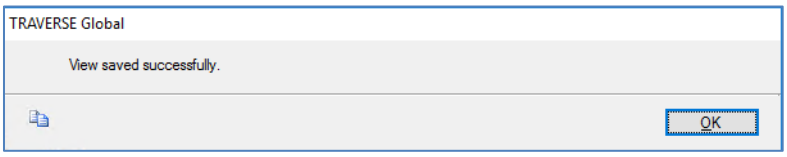
When you have an interactive view set up with the criteria you want, and would like to save that view for future use, you can create a named view.

Save Named View

1. Click on **Views** button on the **Toolbar.**
2. Under **Save View As**, enter a name and press the Enter key.



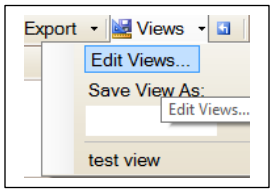
3. A notification will appear that says the view is saved, then click **OK**.



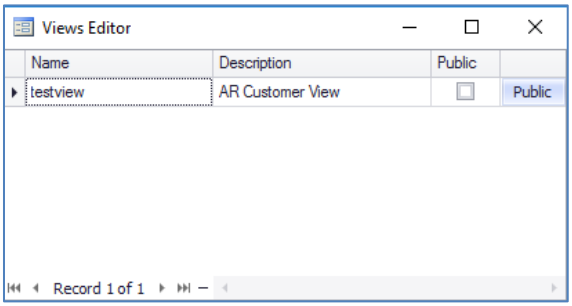
The new view you saved is displayed on the Views menu.

Edit Views

1. Click on the **Views button**.
2. Select **Edit Views**.

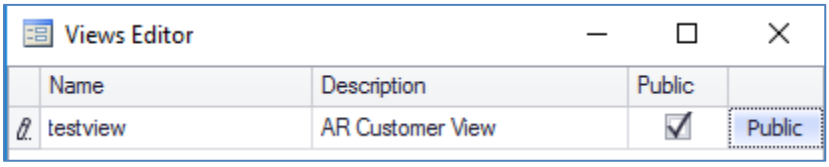


3. The **Views Editor** appears.



4. Make your changes to the interactive view. By default, the named view is private. You can only edit private views.

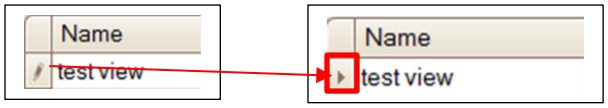
5. If necessary, change from **private** to **public** by clicking the **Public** button, which marks the check box. Making the view public allows all other TRAVERSE users to use the view, instead of just the user who created it. **NOTE:** Once a view is made public, it cannot be edited unless the SM Business Rule to allow editing public views is set to 'Yes'.



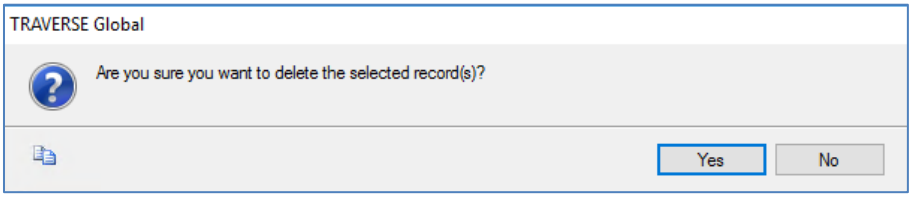
Delete Named Views

NOTE: A public view cannot be deleted unless the SM Business Rule to allow editing public views is set to 'Yes'.

1. To **delete Named Views,** select the **View** so there is an arrow in the left gray column, then click the **minus/delete record button.**



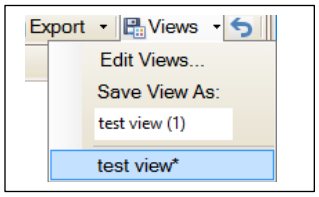
2. A **notification** will appear, select **Yes**.



3. Close the editor with the X in the top right corner.

Open a Named View

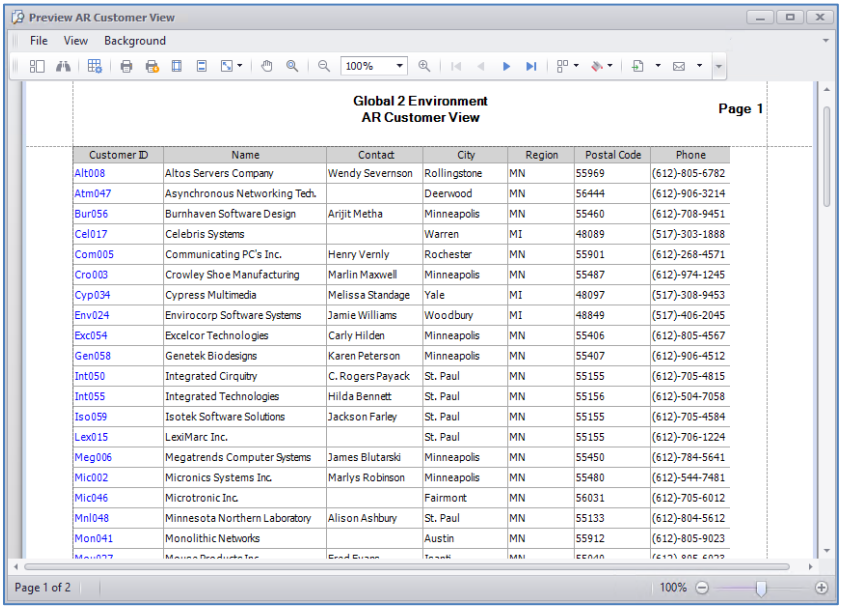
1. Click on the **Views button**
2. Select the **Named View**



Print or Export a Report

Print the Report Data

1. Set up your window how you want it to look as a printed document. This would include any grouping, sorting, filtering, or column changes you would like to include.
2. Click **Print Preview** button .

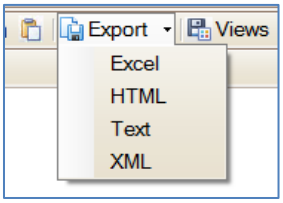


Customer ID	Name	Contact	City	Region	Postal Code	Phone
Alt008	Altos Servers Company	Wendy Severnson	Rollingstone	MN	55969	(612)-805-6782
Atm047	Asynchronous Networking Tech.		Deerwood	MN	56444	(612)-906-3214
Bur056	Burnhaven Software Design	Arijit Metha	Minneapolis	MN	55460	(612)-708-9451
Cel017	Celebris Systems		Warren	MI	48089	(517)-303-1888
Com005	Communicating PC's Inc.	Henry Vernly	Rochester	MN	55901	(612)-268-4571
Cro003	Crowley Shoe Manufacturing	Marlin Maxwell	Minneapolis	MN	55487	(612)-974-1245
Cyp034	Cypress Multimedia	Melissa Standage	Yale	MI	48097	(517)-308-9453
Env024	Envirocorp Software Systems	Jamie Williams	Woodbury	MI	48849	(517)-406-2045
Exc054	Excelcor Technologies	Carly Hilden	Minneapolis	MN	55406	(612)-805-4567
Gen058	Genetek Biodesigns	Karen Peterson	Minneapolis	MN	55407	(612)-906-4512
Int050	Integrated Cirquitry	C. Rogers Payack	St. Paul	MN	55155	(612)-705-4815
Int055	Integrated Technologies	Hilda Bennett	St. Paul	MN	55156	(612)-504-7058
Iso059	Isotek Software Solutions	Jackson Farley	St. Paul	MN	55155	(612)-705-4584
Lex015	LexiMarc Inc.		St. Paul	MN	55155	(612)-706-1224
Meg006	Megatrends Computer Systems	James Blutarski	Minneapolis	MN	55450	(612)-784-5641
Mic002	Micronics Systems Inc.	Marlys Robinson	Minneapolis	MN	55480	(612)-544-7481
Mic046	Microtronic Inc.		Fairmont	MN	56031	(612)-705-6012
Mnl048	Minnesota Northern Laboratory	Alison Ashbury	St. Paul	MN	55133	(612)-804-5612
Mon041	Monolithic Networks		Austin	MN	55912	(612)-805-9023

3. Use the print command buttons in the preview window to print or save the report data.
4. Use the other buttons on the preview toolbar to scale the output, change the background, change the page setup, etc. You can also use the Export Document option to export to different file formats such as PDF or XLSX.
5. Close preview window with the x in the corner.

Export the Report Data

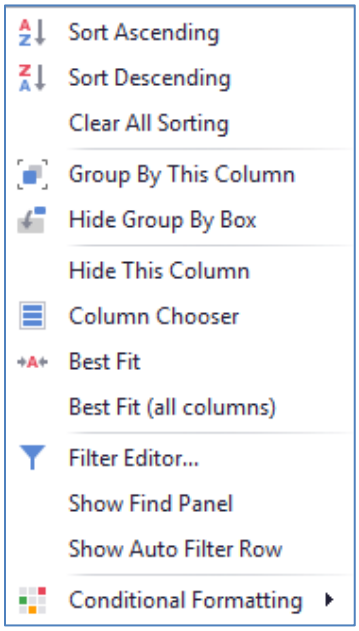
1. Click on the **Export button** on the toolbar.



2. Choose the format for the export and click.

Right-click Menu

You can access a number of options via the right-click menu available when you move the cursor to a column header and right-click.



Sort

Use the **Sort Ascending** or **Sort Descending** options to sort the column accordingly. Use the **Clear All Sorting** option to remove sorting.

Group

When you right-click on a column header, you can use the **Group By This Column** option to add the column to the grouping area (aka Group By box). Alternately, you can click and drag column headers into the grouping area.

To fully expand or fully collapse a grouped view, right-click on the grouping area and select **Full Expand** or **Full Collapse**.

If you want to hide the grouping area (aka Group By box), use the **Hide Group By Box** option. To show it, select **Show Group By Box** from the right-click menu.

If you grouped data in the view, you can right-click on the grouping area and select **Clear Grouping** from the menu.

Columns

Right-click on a column header and select **Hide This Column** to keep the column in the view, but hidden. To show the column, add the column again from the Column Chooser window. You can use the **Reset**

Layout button on the toolbar to show the column again, but this option will reset the view to the initial, or 'default', columns, so use caution if you have made a number of changes to the view.

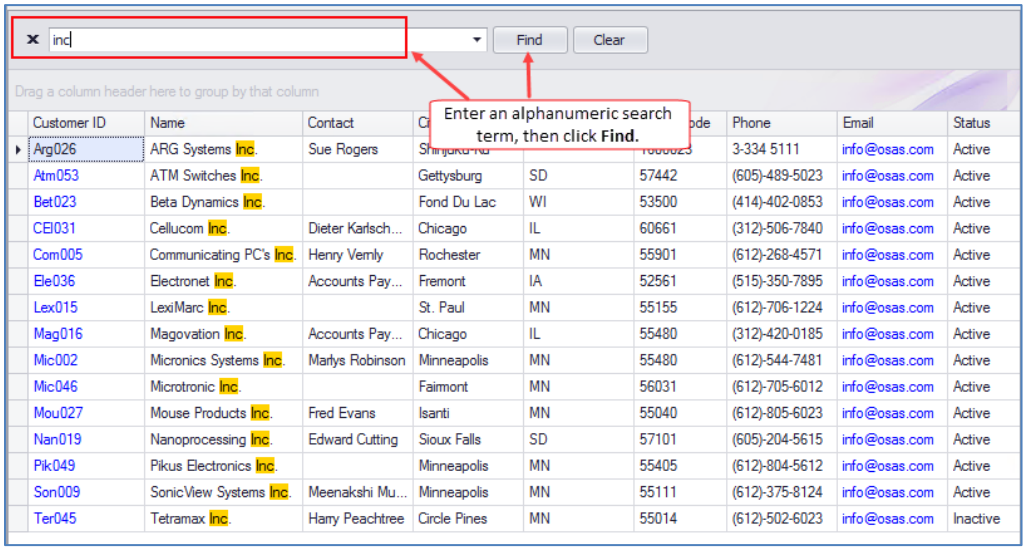
See page **13** for details about the **Column Chooser**.

Use the **Best Fit** option on a column to automatically size the column to view the entirety of the data in the cells of that column. Use the **Best Fit (all columns)** option to automatically size all columns.

Filters

You can create a column-specific filter by right-clicking on the column header and choosing the **Filter Editor…** option. This will open a Create Filter window where you can create a filter similar to a Data Filter for the column. When you finish creating the filter, click the **Apply** button.

Use the **Show Find Panel** to open a panel that allows you to search the entire view. Enter a search string and click the **Find** button. The view will display all rows containing the search term, as well as highlight that search string in the cells.

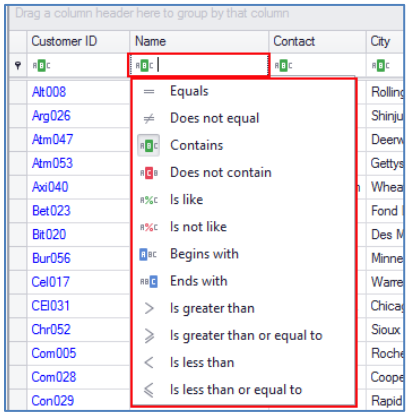


Customer ID	Name	Contact	Phone	Email	Status
Arg026	ARG Systems Inc.	Sue Rogers	3-334 5111	info@osas.com	Active
Atm053	ATM Switches Inc.		Gettysburg SD 57442 (605)-489-5023	info@osas.com	Active
Bet023	Beta Dynamics Inc.		Fond Du Lac WI 53500 (414)-402-0853	info@osas.com	Active
CEI031	Cellucom Inc.	Dieter Karlsch...	Chicago IL 60661 (312)-506-7840	info@osas.com	Active
Com005	Communicating PC's Inc.	Henry Vernly	Rochester MN 55901 (612)-268-4571	info@osas.com	Active
Ele036	Electronet Inc.	Accounts Pay...	Fremont IA 52561 (515)-350-7895	info@osas.com	Active
Lex015	LexiMarc Inc.		St. Paul MN 55155 (612)-706-1224	info@osas.com	Active
Mag016	Magovation Inc.	Accounts Pay...	Chicago IL 55480 (312)-420-0185	info@osas.com	Active
Mic002	Micronics Systems Inc.	Marlys Robinson	Minneapolis MN 55480 (612)-544-7481	info@osas.com	Active
Mic046	Microtronic Inc.		Fairmont MN 56031 (612)-705-6012	info@osas.com	Active
Mou027	Mouse Products Inc.	Fred Evans	Isanti MN 55040 (612)-805-6023	info@osas.com	Active
Nan019	Nanoprocessing Inc.	Edward Cutting	Sioux Falls SD 57101 (605)-204-5615	info@osas.com	Active
Pik049	Pikus Electronics Inc.		Minneapolis MN 55405 (612)-804-5612	info@osas.com	Active
Son009	SonicView Systems Inc.	Meenakshi Mu...	Minneapolis MN 55111 (612)-375-8124	info@osas.com	Active
Ter045	Tetramax Inc.	Harry Peachtree	Circle Pines MN 55014 (612)-502-6023	info@osas.com	Inactive

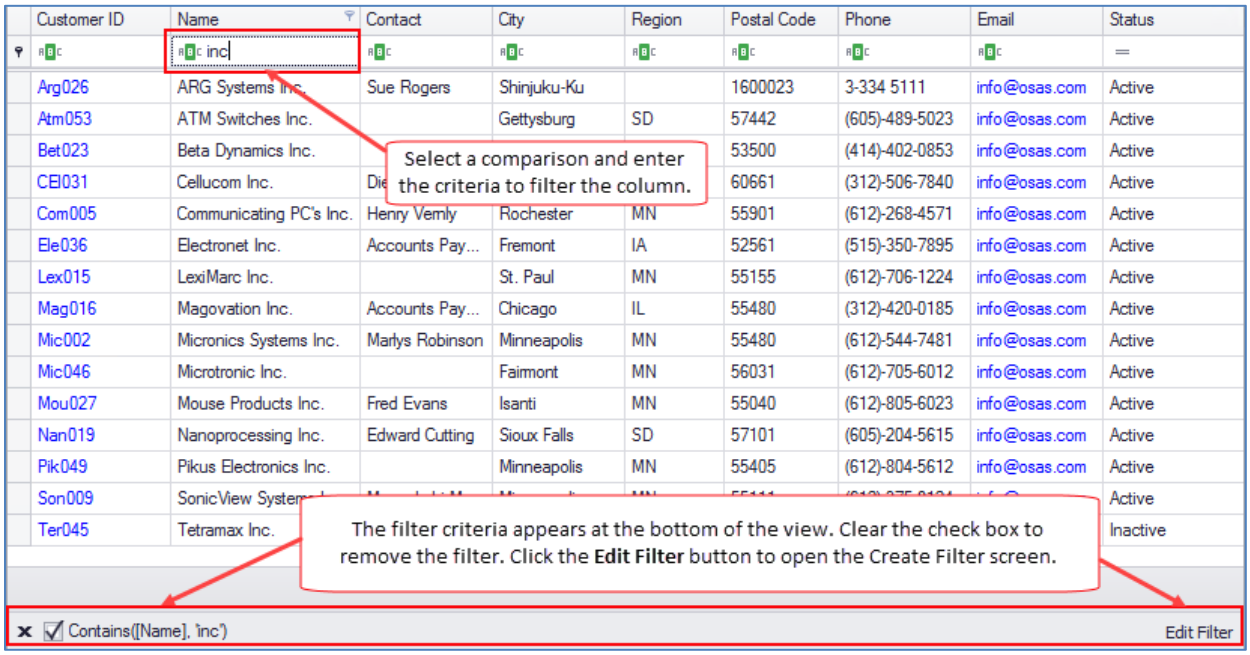
Use the **Hide Find Panel** option to close the panel.

Use the **Show Auto Filter Row option** to make the auto filter row available. The auto filter row allows you another way to filter the data in the view.

Click in the column filter row and enter the criteria with which to filter the view.



Select the conditional and enter the criteria to filter the view.



You can hide the auto filter row with that option on the right-click menu.

Conditional Formatting

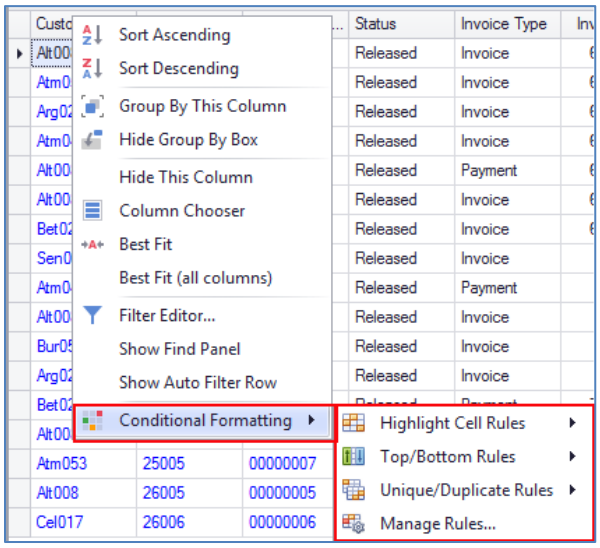
Conditional formatting will allow you to format records when they meet certain criteria, giving you a quick visual reference of the data. This criterion can be determined by:

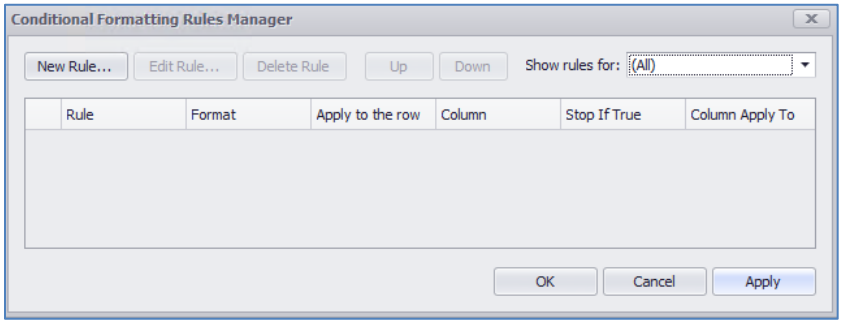
- All cells based on their values
- Only cells that contain a particular value
- Only top or bottom ranked values

- Only values that are above or below average
- Only unique or duplicate values
- Use a formula to determine which cells to format

The Conditional Formatting Rules are very similar to the conditional formatting used in MS Excel. If you are familiar with the Excel conditional formatting functionality, you will understand the conditional formatting used in the Interactive Views.

To access the conditional formatting rules, click on the Conditional Formatting Rules button ( ) on the toolbar OR right-click on a column header and select 'Conditional Formatting' from the menu. Additional fly-out menus allow you to select specific conditional formatting rules. Select the '**Manage Rules…**' option to open the Conditional Formatting Rules Manager window.





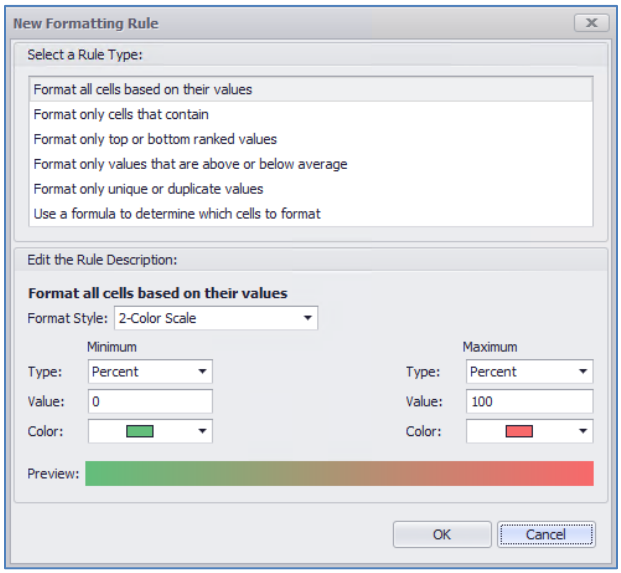
Rule Types and Formatting Options

Each rule type allows you to determine the conditions under which cells are formatted. Each rule type has one or more ways to format the cells that meet the conditions.

Use the **New Rule…** button on the Conditional Formatting Rules Manager screen to open the New Formatting Rule screen where you can select a rule type and establish conditions and formatting.

On the Conditional Formatting Rule Manager screen, you have options to define the limits of the formatting:

- If you want to format an entire row based on the conditions that exist in one or more columns, rather than just the column cells, select the **Apply to the row** option.
- Use the **Stop If True** property to determine how to evaluate overlapping conditional formatting rules on a cell. Select the **Stop if True** check box to indicate whether rules lower in precedence are applied. If the overlapping conditional formatting rules affect the same format attributes of the cell (for example, all of them specify the background color), only the format of the rule with the highest priority will be applied, despite the **Stop If True** value. By default, the last created rule has the highest priority. This option is not available for rules that format cells using data bars, color scale, or icon sets.



Format all cells based on their values

When you select to format all cells based on their values, you can then edit the rule description to set the conditions under which cells will be formatted. There are multiple styles available for formatting all cells based on their values:

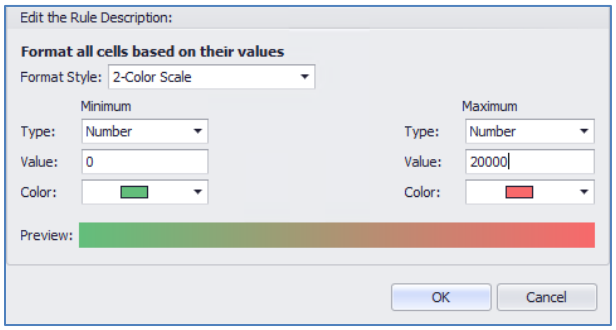
2-Color Scale

A two-color scale will format the cells depending on how close to the minimum or maximum value the cell falls. To set up the conditions for a 2-color scale:

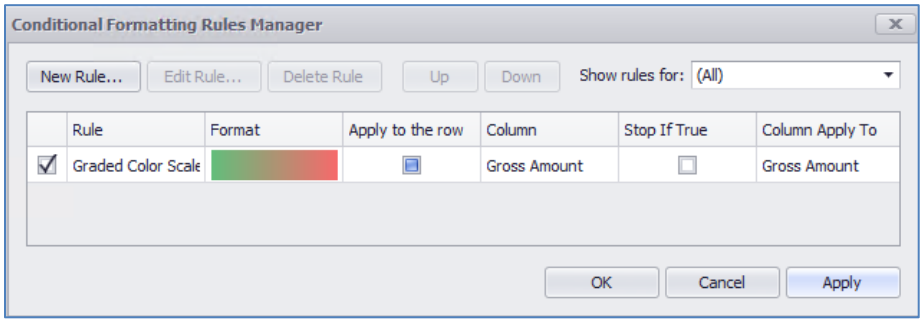
1. Select the **Type** of Minimum and Maximum value. Ideally, these should be the same for analysis purposes. Choose 'Number' to analyze the cells on the numeric value, or 'Percent' to analyze the cells by percentage of the value when compared to the Min/Max values.
2. Enter a Minimum and Maximum **Value** for the conditional scale. The closer a value is to the minimum, the closer it will match the minimum color. The closer it is to the maximum, the closer it will match the maximum color.

3. Select a Minimum and a Maximum **Color**. These will help you determine with a glance how close a cell value is to either end of the range.

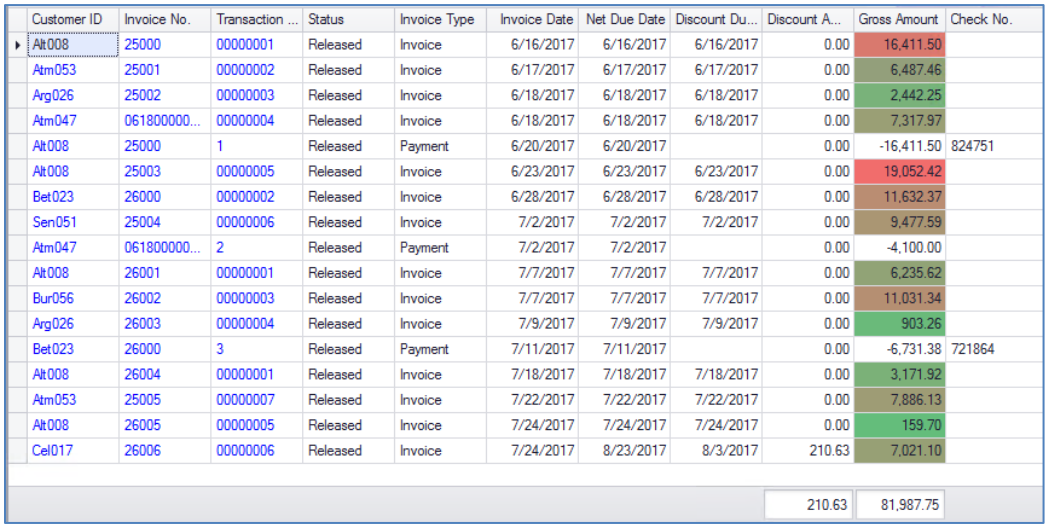
Sample:



When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.



Click the **Apply** button to see the results.



Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoice Date	Net Due Date	Discount Du...	Discount A...	Gross Amount	Check No.
Alt008	25000	00000001	Released	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Released	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Released	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Released	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Released	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Released	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Released	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,235.62	
Bur056	26002	00000003	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Released	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Released	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Released	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,171.92	
Atm053	25005	00000007	Released	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Released	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Released	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

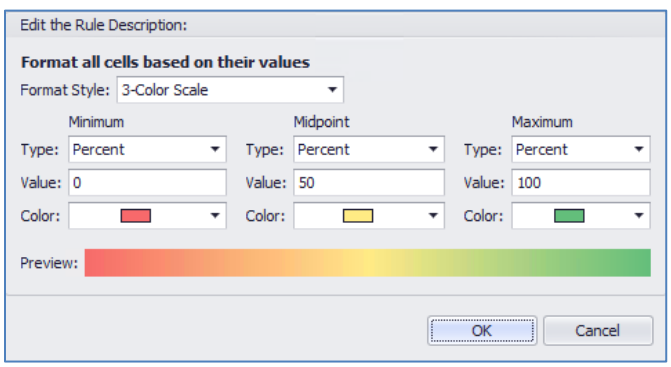
Notice the closer an amount is to minimum, the more green (minimum color) the cell becomes. Likewise with the maximum (red color). Negative cells are not formatted because they are outside the Min/Max range.

3-Color Scale

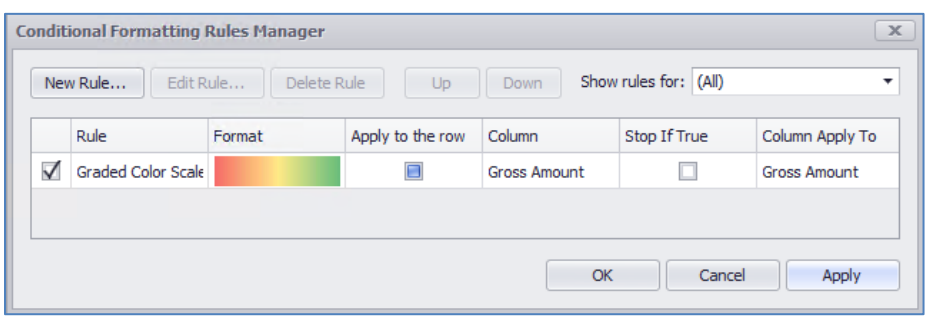
A three-color scale will format the cells depending on how close to the minimum, midpoint, or maximum value the cell falls. To set up the conditions for a 3-color scale:

1. Select the **Type** of Minimum, Midpoint, and Maximum value. Ideally, these should be the same for analysis purposes. Choose 'Number' to analyze the cells on the numeric value, or 'Percent' to analyze the cells by percentage of the value when compared to the Min/Mid/Max values.
2. Enter a Minimum, Midpoint, and Maximum **Value** for the conditional scale. The closer a value is to each setting, the closer it will match that color.
3. Select a Minimum, Midpoint, and Maximum **Color**. These will help you determine with a glance how close a cell value is to either end or the middle of the range.

Sample:



When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.



Click the **Apply** button to see the results.

Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoice Date	Net Due Date	Discount Du...	Discount A...	Gross Amount	Check No.
Alt008	25000	00000001	Released	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Released	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Released	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Released	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Released	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Released	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Released	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,235.62	
Bur056	26002	00000003	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Released	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Released	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Released	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,171.92	
Atm053	25005	00000007	Released	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Released	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Released	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

Notice that because the Min/Mid/Max range is based on percent rather than value, *all* cells in the selected column are analyzed. The negative numbers are toward/at the minimum (red) end of the range, while the largest positive numbers are toward/at the maximum (green) end of the range.

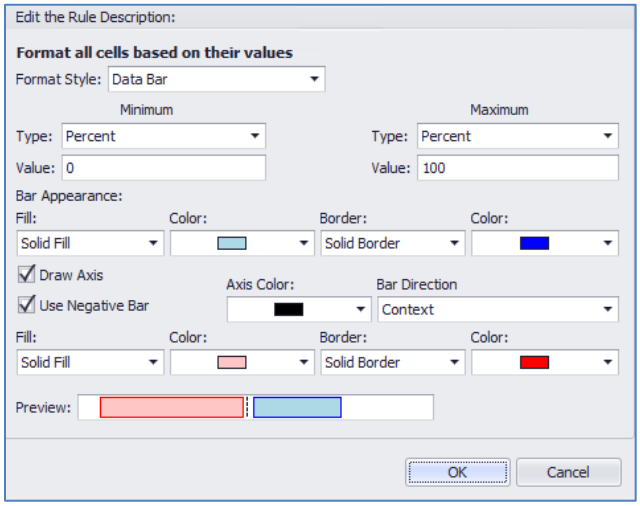
Data Bar

A data bar will format the cells with sized, colored bars depending on how close to the minimum or maximum value the cell falls. To set up the conditions for a data bar format:

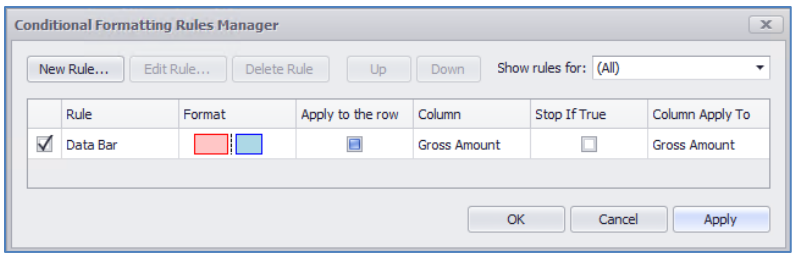
1. Select the **Type** of Minimum and Maximum value. Ideally, these should be the same for analysis purposes. Choose 'Number' to analyze the cells on the numeric value, or 'Percent' to analyze the cells by percentage of the value when compared to the Min/Max values.
2. Enter a Minimum and Maximum **Value** for the conditional scale. The closer a value is to each setting will determine the size of the Min/Max bars.
3. Select a **Fill** and fill **Color** for the values greater than the minimum value. A solid fill will display the data bar as a solid color, while the gradient fill will display the bar with varying degrees of darkness.
4. Select a **Border** for the minimum bar. You can choose to have a solid border around the bar, or no border. If you choose to have a border, select the **Color** of the border.
5. To show a vertical series of dots to separate the min/max colors, mark the **Draw Axis** check box; otherwise, leave it blank. If you choose to draw the axis, select an **Axis Color.**
6. Select a **Bar Direction** to define to which side of the axis the bar colors will be used: 'Context' to color the values based on the min/max values, 'Left-to-Right' to use the bar colors from the bottom half (max) of the format description on the left side of the axis, or 'Right-to-Left' to use those colors on the right of the axis.
7. Select the **Use Negative Bar** check box to activate the remaining fields and use them to determine the **Fill**, fill **Color**, **Border**, and border **Color** characteristics for values below the minimum value entered; otherwise, clear the check box.

8. The **Preview** bar shows how the data bars will appear on the view.

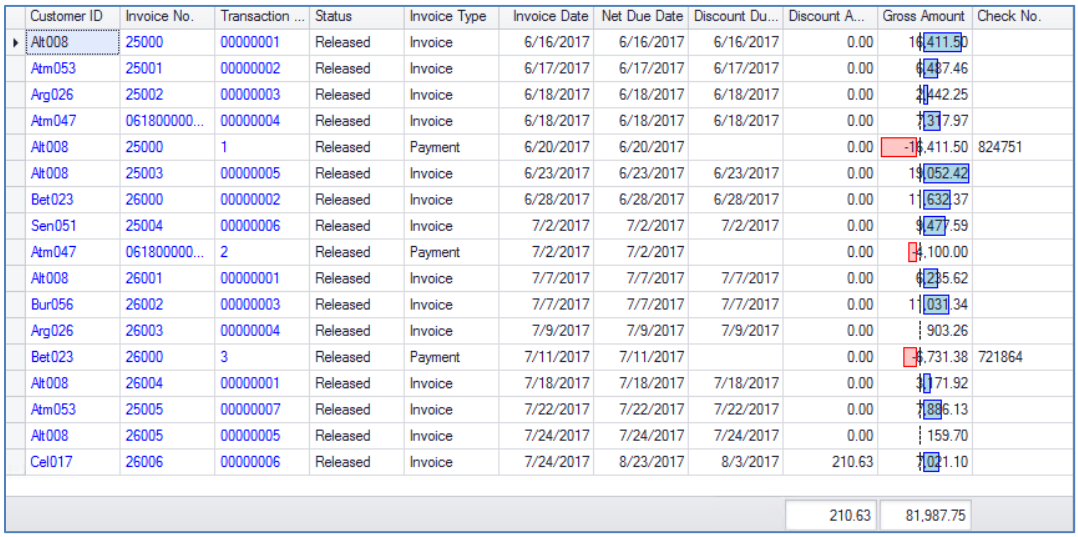
Sample:



When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.



Click the **Apply** button to see the results.



Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoice Date	Net Due Date	Discount Du...	Discount A...	Gross Amount	Check No.
Alt008	25000	00000001	Released	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Released	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Released	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Released	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Released	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Released	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Released	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,215.62	
Bur056	26002	00000003	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Released	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Released	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Released	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,071.92	
Atm053	25005	00000007	Released	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Released	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Released	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

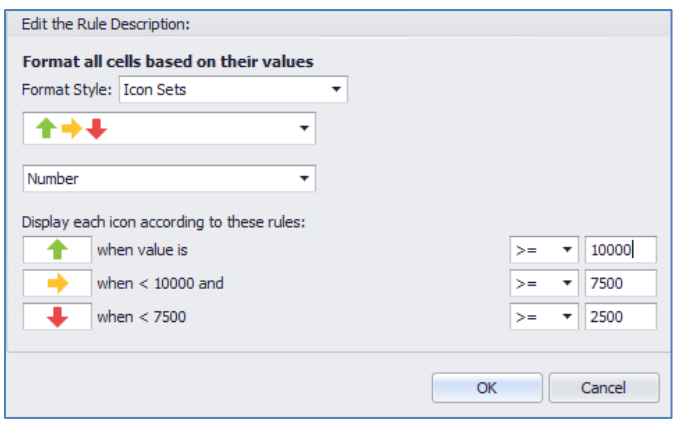
Notice that because the Min value (percent) is set to zero, all cells with values less than 0 percent have negative bars, and cells with values greater than zero have bars of varying lengths depending on how far the value is beyond zero. If the value in the cell is very close to the min value, the cell may appear to have no bar.

Icon Sets

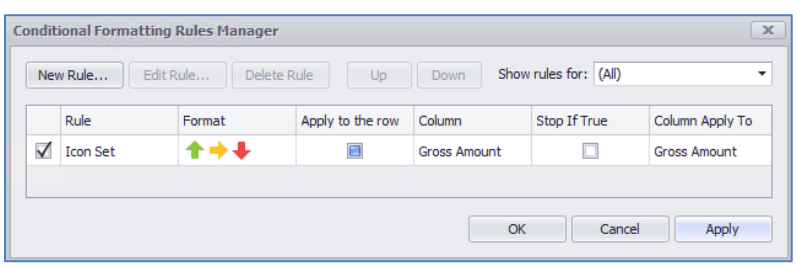
An Icon Set will format the cells with filled or colored icons depending on how close to the indicated values the cell falls. To set up the conditions for an icon set format:

1. Select the **Icon Set** to use for formatting.
2. Select the **Type** of value. Ideally, these should be the same for analysis purposes. Choose 'Number' to analyze the cells by the numeric value, or 'Percent' to analyze the cells by percentage of the value.
3. For each icon, determine the values at which the icon will be displayed. Each icon has an option to display when the cell value is either 'equal to or greater than' (>=) the entered value, or greater than (>) the entered value. Enter a minimum value for each icon on the conditional scale.

Sample:



When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.



Click the **Apply** button to see the results.

Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoice Date	Net Due Date	Discount Du...	Discount A...	Gross Amount	Check No.
Alt008	25000	00000001	Released	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Released	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Released	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Released	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Released	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Released	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Released	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,235.62	
Bur056	26002	00000003	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Released	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Released	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Released	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,171.92	
Atm053	25005	00000007	Released	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Released	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Released	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

Notice that cells with values that fall outside the parameters established in the condition format manager have no icon. All cells with values equal to or greater than 10,000 have green arrows, all cells with values of 7,500 up to 9,999 have yellow arrows, and cells with values less than 7,500 but greater than or equal to 2,500 have red arrows.

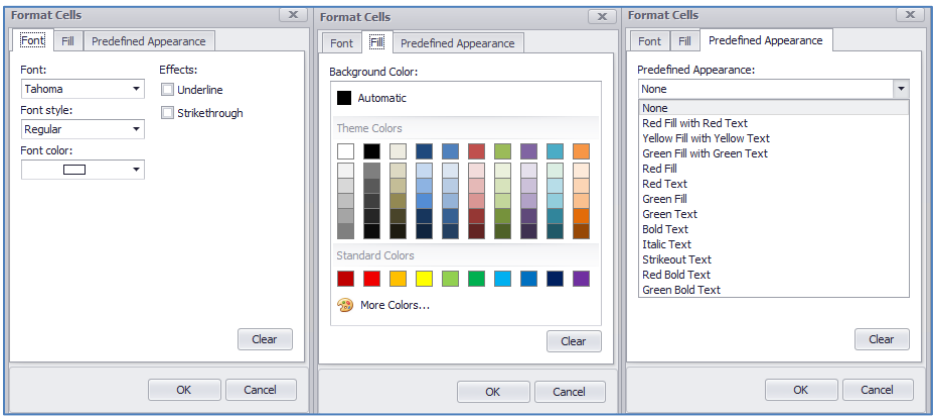
Only format cells that contain

You can select to format only cells that contain a value based on criteria you select. You have the option to set criteria based on whether the value is empty, equal to/not equal to, greater than/less than, between/not between, or greater than or equal to/less than or equal to a value or values you choose. If you want to format cells based on a date, you can select from a variety of timeframes.

Cell Value

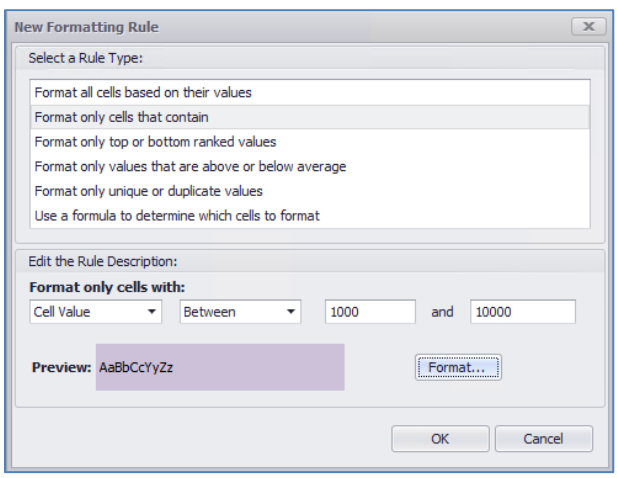
1. Select **Cell Value** for the basis of the format condition.
2. Select a criteria from the drop-down list. The available criteria is similar to the criteria available in the Data Filter.
3. Depending on the criteria, enter one or more values that determine the boundaries of the criteria. Cells with a value that makes the criteria true will be formatted. For instance, if you choose a criteria of 'between', enter the range of values within which cells will be formatted. If you enter a range of 10,000 to 15,000, any cell with a value that is between those two numbers will be formatted.

4. Click the **Format…** button to open the Format Cells window. There are three tabs in this window that allow you to format the Font and Fill of the cells, or you can select a Predefined Appearance for the cells. Select your cell format. Use the **Clear** button to clear your choices.

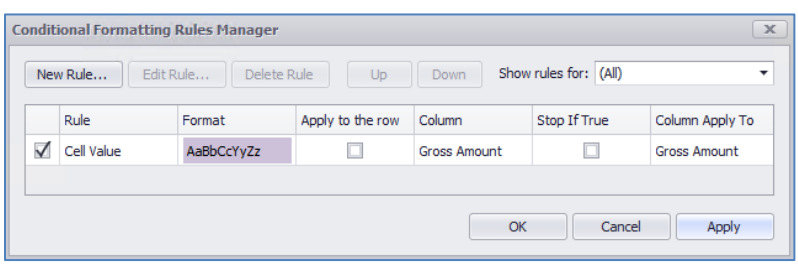


5. Click **OK** to close the Format Cells window and return to the Formatting Rule screen. The **Preview** bar shows how the formatting will appear on the view.

Sample:



When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.



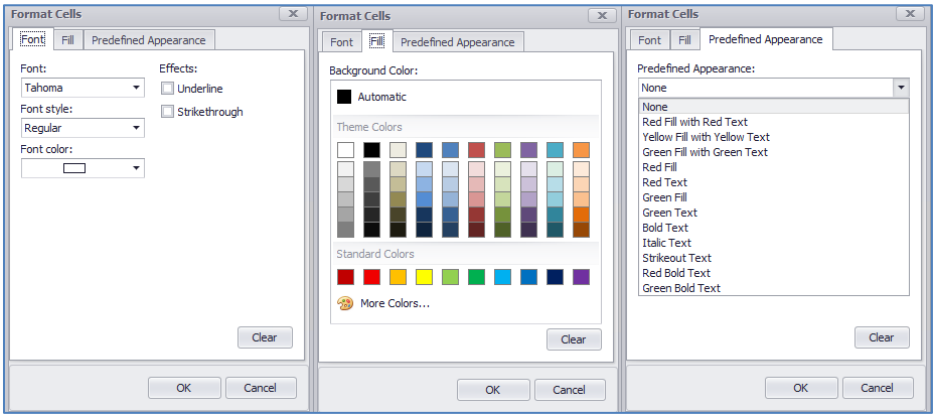
Click the **Apply** button to see the results.

Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoice Date	Net Due Date	Discount Du...	Discount A...	Gross Amount	Check No.
Alt008	25000	00000001	Released	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Released	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Released	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Released	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Released	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Released	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Released	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,235.62	
Bur056	26002	00000003	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Released	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Released	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Released	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,171.92	
Atm053	25005	00000007	Released	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Released	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Released	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

Cells with values that fall within the range of 1,000 and 10,000 are formatted.

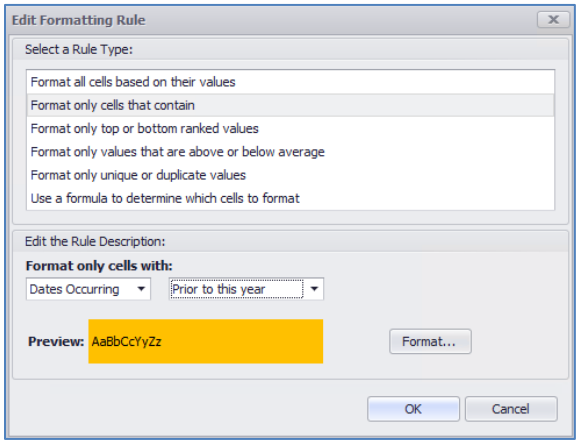
Dates Occurring

1. Select **Dates Occurring** for the basis of the format condition.
2. Select one or more timeframes from the drop-down list.
3. Click the **Format…** button to open the Format Cells window. There are three tabs in this window that allow you to format the Font and Fill of the cells, or you can select a Predefined Appearance for the cells. Select your cell format. Use the **Clear** button to clear your choices.

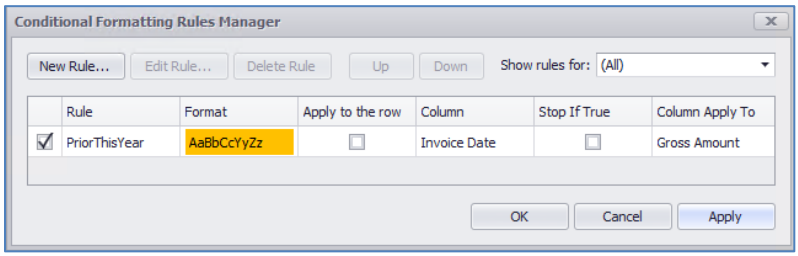


4. Click **OK** to close the Format Cells window and return to the Formatting Rule screen. The **Preview** bar shows how the formatting will appear on the view.

Sample:

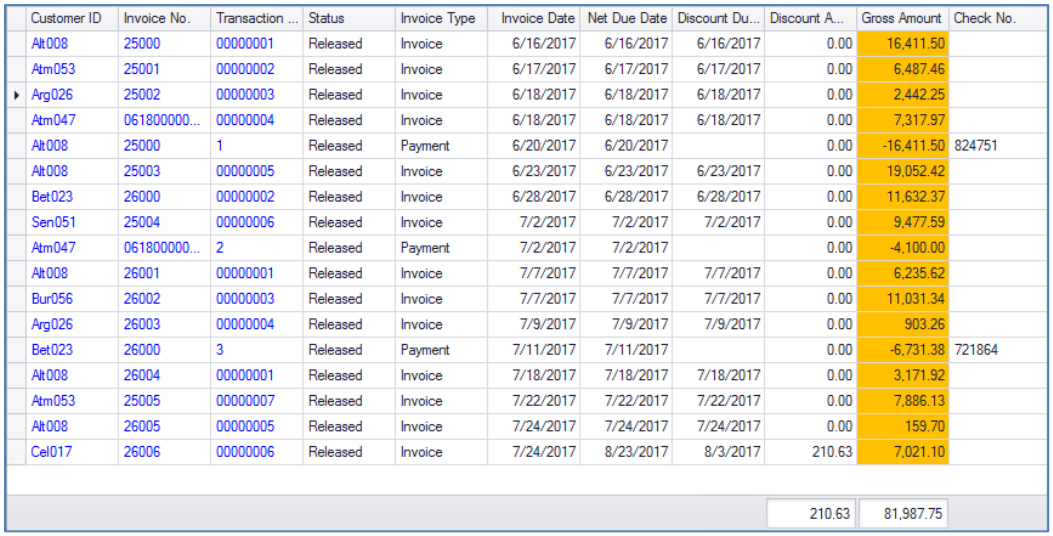


When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.



Notice that you can use one column to determine if cells meet the condition, and apply the formatting to a different column.

Click the **Apply** button to see the results.

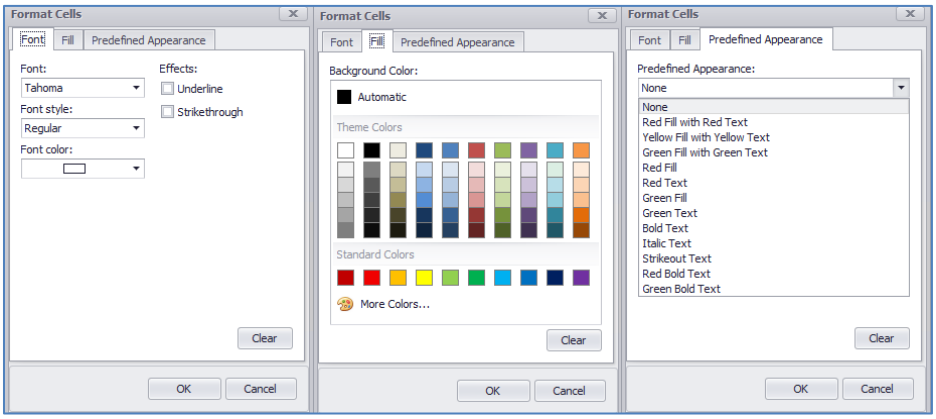


Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoice Date	Net Due Date	Discount Du...	Discount A...	Gross Amount	Check No.
Alt008	25000	00000001	Released	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Released	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Released	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Released	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Released	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Released	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Released	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,235.62	
Bur056	26002	00000003	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Released	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Released	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Released	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,171.92	
Atm053	25005	00000007	Released	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Released	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Released	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

Only format top or bottom ranked values

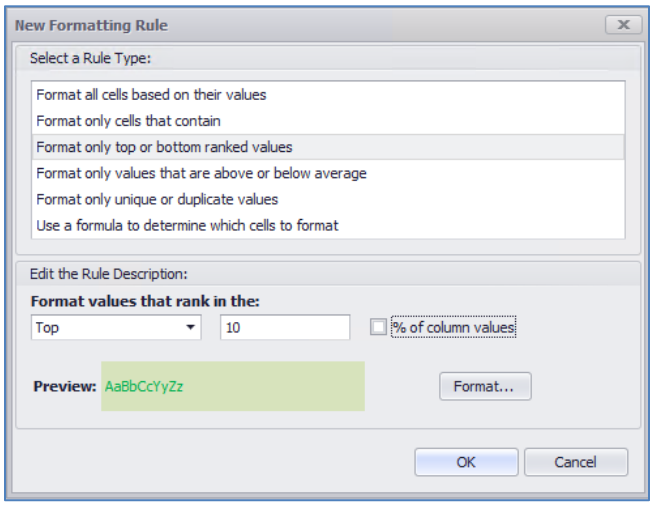
You can select to format only cells that contain values that rank in the top or the bottom by number or percent of a list of all cells.

1. Select to format either the 'Top' or the 'Bottom' values.
2. If you want to format based on a percentage of the column values rather than the numeric rank, mark the **% of column values** check box.
3. Depending on the criteria, enter a value for the boundary of the criteria, such as the top 10 values or the top 5% of all values in the column.
4. Click the **Format…** button to open the Format Cells window. There are three tabs in this window that allow you to format the Font and Fill of the cells, or you can select a Predefined Appearance for the cells. Select your cell format. Use the **Clear** button to clear your choices.



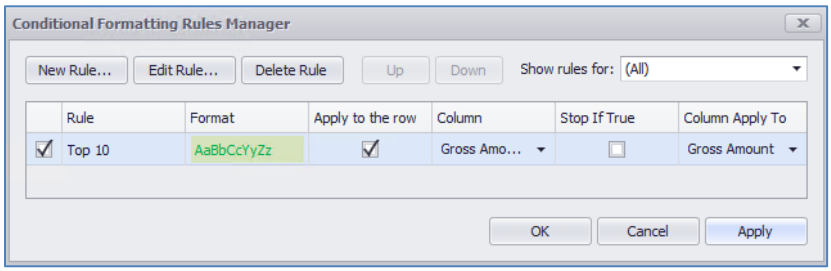
5. Click **OK** to close the Format Cells window and return to the Formatting Rule screen. The **Preview** bar shows how the formatting will appear on the view.

<u>Sample:</u>

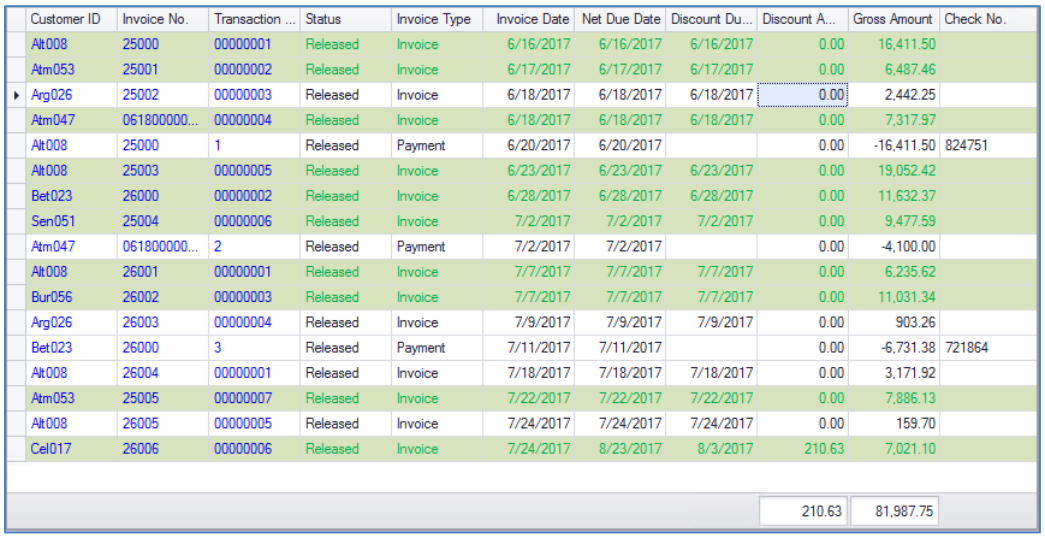


When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.

If you mark the **Apply to the row** check box, the entire row will be formatted, not the just column in the **Column Apply To** field.



Click the **Apply** button to see the results.



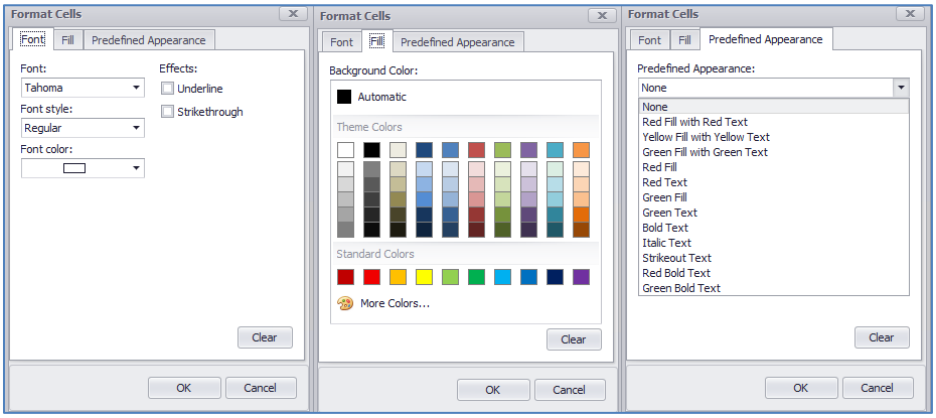
Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoice Date	Net Due Date	Discount Du...	Discount A...	Gross Amount	Check No.
Alt008	25000	00000001	Released	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Released	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Released	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Released	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Released	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Released	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Released	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,235.62	
Bur056	26002	00000003	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Released	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Released	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Released	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,171.92	
Atm053	25005	00000007	Released	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Released	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Released	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

Cells with values that fall within the top ten ranked cells are formatted.

Only format values that are above or below average

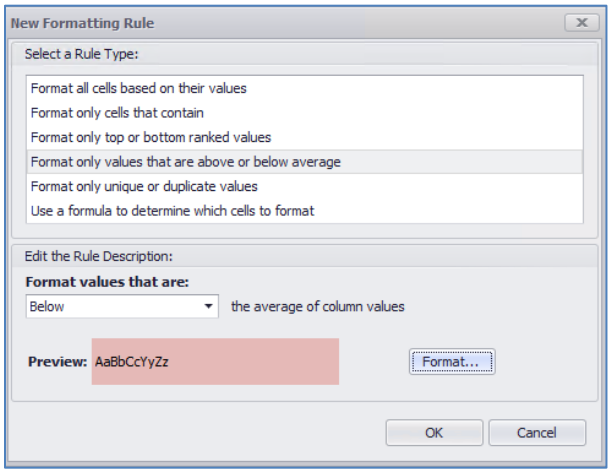
You can select to format only cells that contain values that fall above, below, equal to and above, or equal to and below the average value of the entire column.

1. Select to format the cells that fall above or equal to and above the average value of the column, or select to format the cells that fall below or equal to and below the average value.
2. Click the **Format…** button to open the Format Cells window. There are three tabs in this window that allow you to format the Font and Fill of the cells, or you can select a Predefined Appearance for the cells. Select your cell format. Use the **Clear** button to clear your choices.

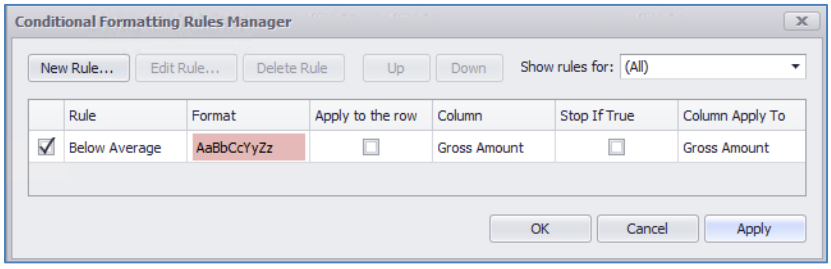


3. Click **OK** to close the Format Cells window and return to the Formatting Rule screen. The **Preview** bar shows how the formatting will appear on the view.

Sample:



When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.



Click the **Apply** button to see the results.

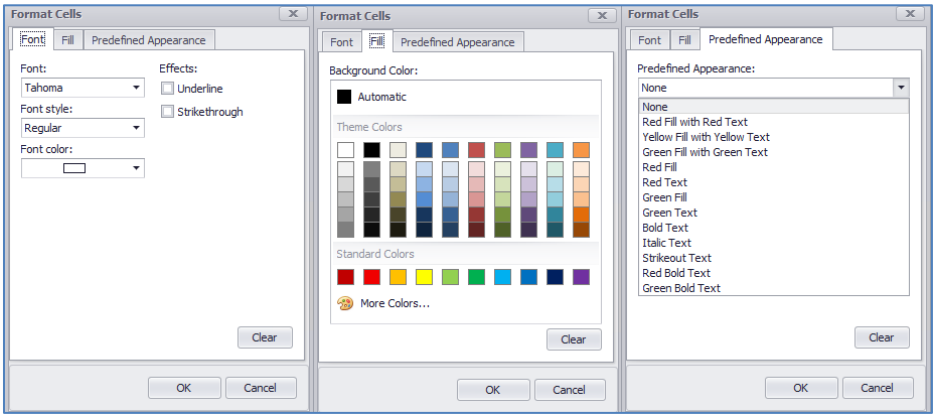
Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoice Date	Net Due Date	Discount Du...	Discount A...	Gross Amount	Check No.
Alt008	25000	00000001	Released	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Released	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Released	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Released	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Released	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Released	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Released	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,235.62	
Bur056	26002	00000003	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Released	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Released	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Released	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,171.92	
Atm053	25005	00000007	Released	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Released	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Released	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

Cells with a value that fall below the average value of the column are formatted.

Only format unique or duplicate values

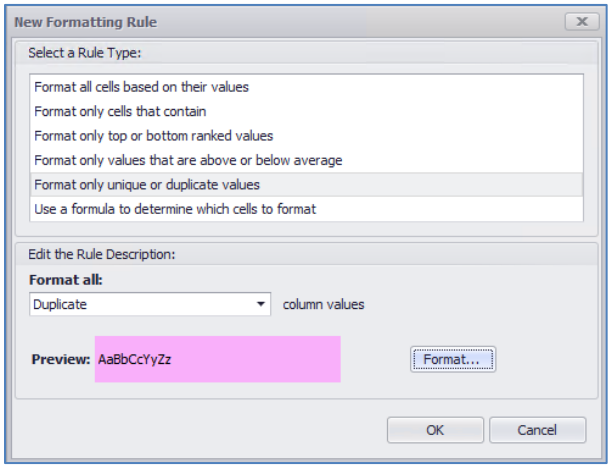
You can select to format only cells that contain values that exist in multiple cells (duplicate) or a value that exists in only one cell (unique).

1. Select to format the cells with a value that exists in multiple cells, or a cell with a value that exists in only one cell.
2. Click the **Format…** button to open the Format Cells window. There are three tabs in this window that allow you to format the Font and Fill of the cells, or you can select a Predefined Appearance for the cells. Select your cell format. Use the **Clear** button to clear your choices.

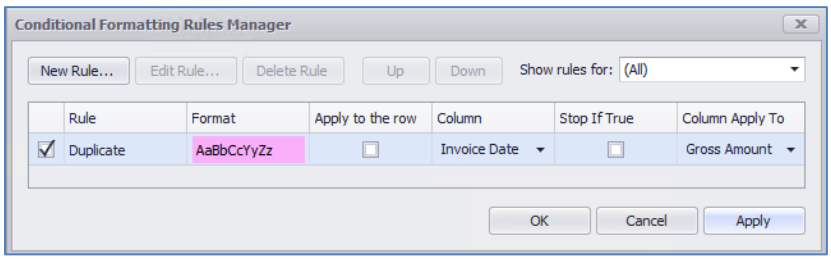


3. Click **OK** to close the Format Cells window and return to the Formatting Rule screen. The **Preview** bar shows how the formatting will appear on the view.

Sample:



When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.



Click the **Apply** button to see the results.

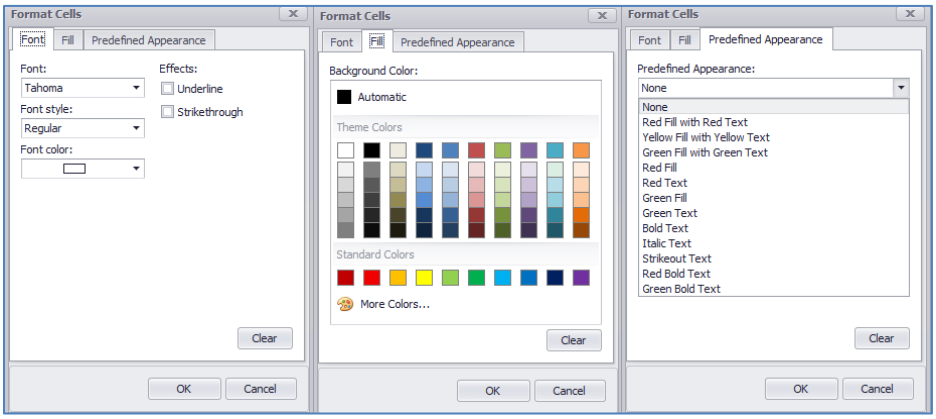
Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoice Date	Net Due Date	Discount Du...	Discount A...	Gross Amount	Check No.
Alt008	25000	00000001	Released	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Released	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Released	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Released	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Released	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Released	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Released	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Released	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,235.62	
Bur056	26002	00000003	Released	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Released	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Released	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Released	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,171.92	
Atm053	25005	00000007	Released	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Released	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Released	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

The Gross Amount cells are formatted in records with duplicate values in the Invoice Date column.

Use a formula to determine which cells to format

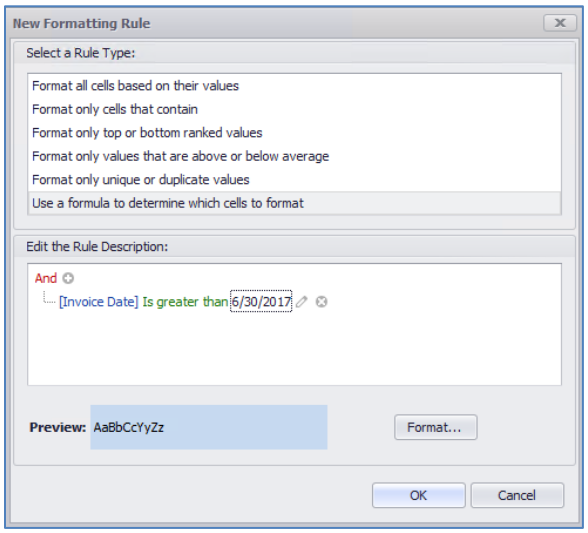
You can create a filtering formula for formatting cells. Just like with a data filter, you can use multiple criteria to determine which cells to format. You can use any of the available fields in the formula. Remember, not all fields are displayed in the view. You can use any field available in the Column Chooser in the formula.

1. Enter a formula in the **Edit the Rule Description** field. The formula follows the same process as the Data Filter.
2. You can add multiple criteria, as well as compare a field value to another field value.
3. Click the **Format…** button to open the Format Cells window. There are three tabs in this window that allow you to format the Font and Fill of the cells, or you can select a Predefined Appearance for the cells. Select your cell format. Use the **Clear** button to clear your choices.



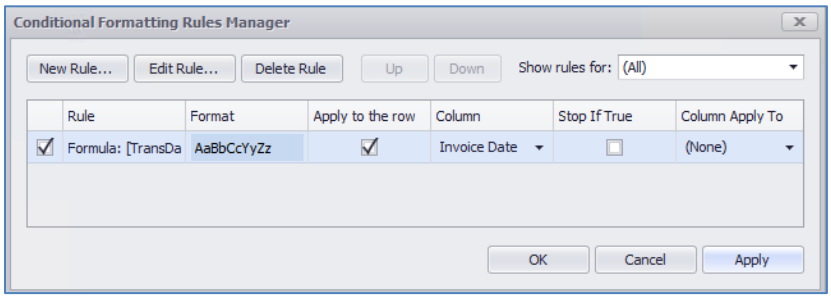
4. Click **OK** to close the Format Cells window and return to the Formatting Rule screen. The **Preview** bar shows how the formatting will appear on the view.

<u>Sample:</u>



When finished setting up the condition, click **OK**. The rule appears in the Conditional Formatting Rules Manager. Select the **Column** to analyze for the condition. Select a **Column Apply To** for the formatting.

If you mark the **Apply to the row** check box, the entire row will be formatted, not the just column in the **Column Apply To** field.



Click the **Apply** button to see the results.

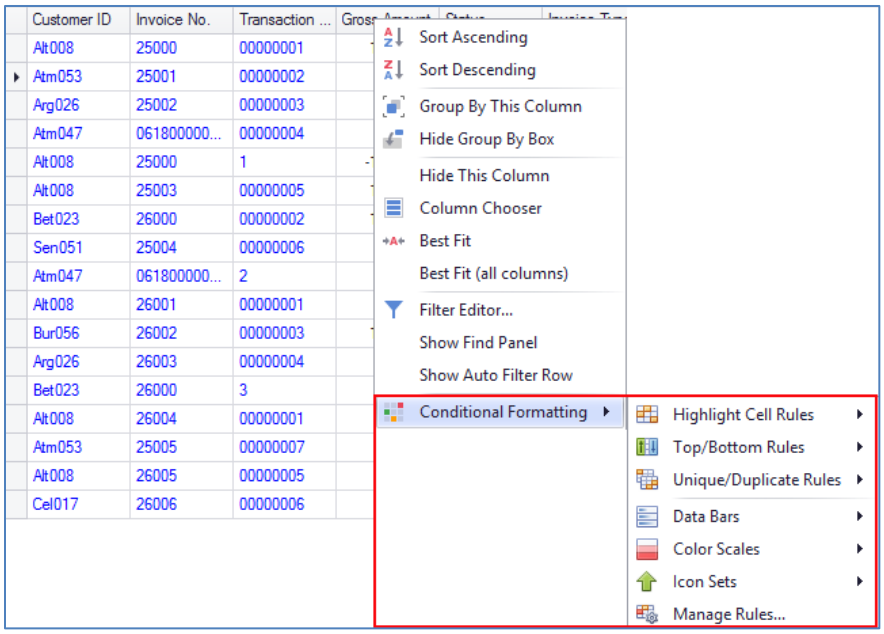
Customer ID	Invoice No.	Transaction ID	Status	Invoice Type	Invoice Date	Net Due Date	Discount Due Date	Discount Amount	Gross Amount	Check No.
Alt008	25000	00000001	Relea...	Invoice	6/16/2017	6/16/2017	6/16/2017	0.00	16,411.50	
Atm053	25001	00000002	Relea...	Invoice	6/17/2017	6/17/2017	6/17/2017	0.00	6,487.46	
Arg026	25002	00000003	Relea...	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	2,442.25	
Atm047	061800000...	00000004	Relea...	Invoice	6/18/2017	6/18/2017	6/18/2017	0.00	7,317.97	
Alt008	25000	1	Relea...	Payment	6/20/2017	6/20/2017		0.00	-16,411.50	824751
Alt008	25003	00000005	Relea...	Invoice	6/23/2017	6/23/2017	6/23/2017	0.00	19,052.42	
Bet023	26000	00000002	Relea...	Invoice	6/28/2017	6/28/2017	6/28/2017	0.00	11,632.37	
Sen051	25004	00000006	Relea...	Invoice	7/2/2017	7/2/2017	7/2/2017	0.00	9,477.59	
Atm047	061800000...	2	Relea...	Payment	7/2/2017	7/2/2017		0.00	-4,100.00	
Alt008	26001	00000001	Relea...	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	6,235.62	
Bur056	26002	00000003	Relea...	Invoice	7/7/2017	7/7/2017	7/7/2017	0.00	11,031.34	
Arg026	26003	00000004	Relea...	Invoice	7/9/2017	7/9/2017	7/9/2017	0.00	903.26	
Bet023	26000	3	Relea...	Payment	7/11/2017	7/11/2017		0.00	-6,731.38	721864
Alt008	26004	00000001	Relea...	Invoice	7/18/2017	7/18/2017	7/18/2017	0.00	3,171.92	
Atm053	25005	00000007	Relea...	Invoice	7/22/2017	7/22/2017	7/22/2017	0.00	7,886.13	
Alt008	26005	00000005	Relea...	Invoice	7/24/2017	7/24/2017	7/24/2017	0.00	159.70	
Cel017	26006	00000006	Relea...	Invoice	7/24/2017	8/23/2017	8/3/2017	210.63	7,021.10	
								210.63	81,987.75	

Rows holding cells with values that meet the formula criteria are formatted.

Using the Conditional Formatting Right-Click menu

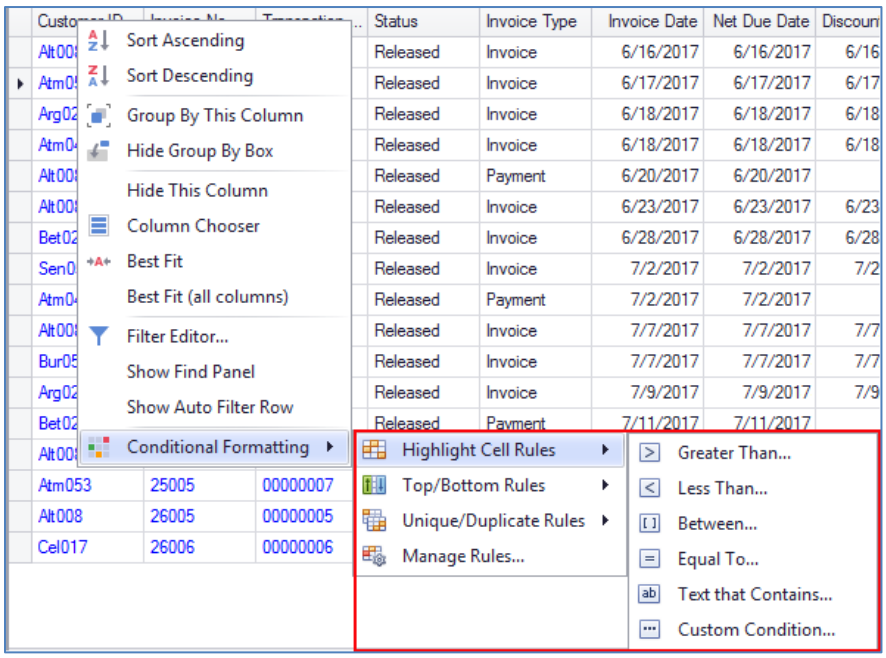
When you right-click on a column heading, the menu has a conditional formatting option. Move your mouse over the **Conditional Formatting** option to open the first fly-out menu for conditional formatting.

The first fly-out menu holds the same conditions that you will find on the Conditional Formatting Rules Manager screen (as applicable to the type of column data), with an option to open the Conditional Formatting Rules Manager screen. The conditions are set up so you can quickly select the conditions you may use the most often.

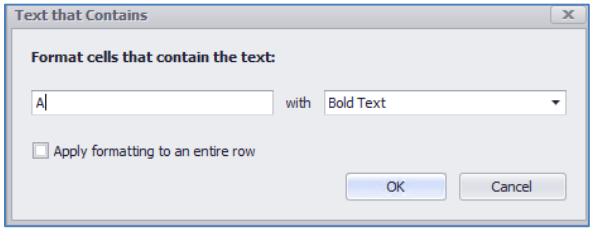


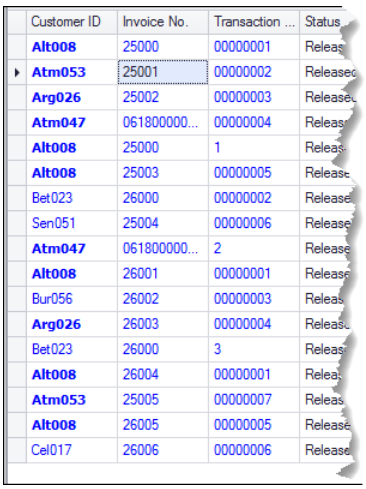
Highlight Cell Rules

The fly-out menu for the Highlight Cell Rules option shows the compare conditions available.



When you select one of the conditional options, a window opens to allow you to select a field and/or value for the condition. For example, selecting the condition for **Text that Contains…** will open a Text that Contains window. Enter the condition in the left field and select the preset format to use for the cells in the right field. To apply the formatting to the entire row, mark the check box. Click **OK** to apply the formatting.

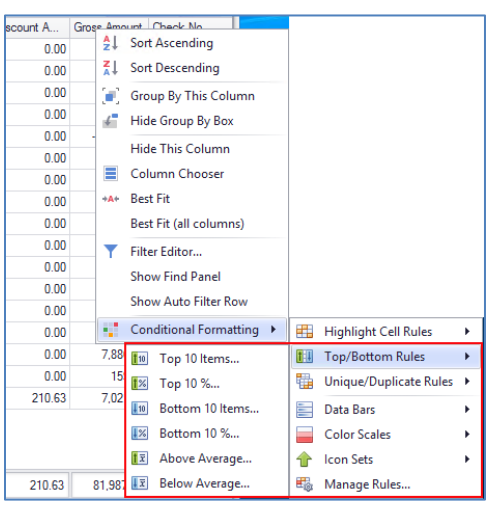




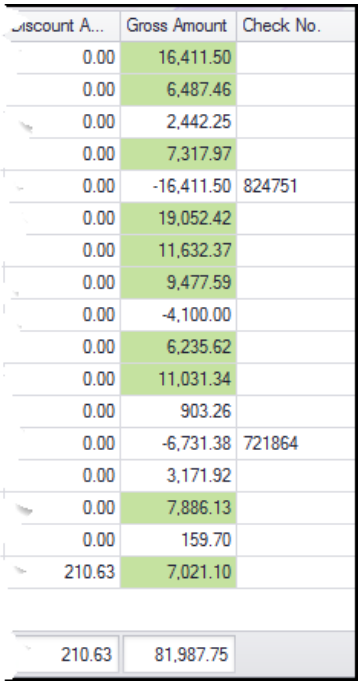
Customer ID	Invoice No.	Transaction ...	Status
Alt008	25000	00000001	Releas
Atm053	25001	00000002	Released
Arg026	25002	00000003	Release
Atm047	061800000...	00000004	Releas
Alt008	25000	1	Releas
Alt008	25003	00000005	Release
Bet023	26000	00000002	Release
Sen051	25004	00000006	Release
Atm047	061800000...	2	Release
Alt008	26001	00000001	Release
Bur056	26002	00000003	Releas
Arg026	26003	00000004	Releas
Bet023	26000	3	Releas
Alt008	26004	00000001	Releas
Atm053	25005	00000007	Releas
Alt008	26005	00000005	Release
Cel017	26006	00000006	Release

Top/Bottom Rules

The fly-out menu for the Top/Bottom Rules option shows the compare conditions available. The number of conditions available will depend on the type of data in the column. For example, columns holding numbers will have more top/bottom rule options than columns with text data.



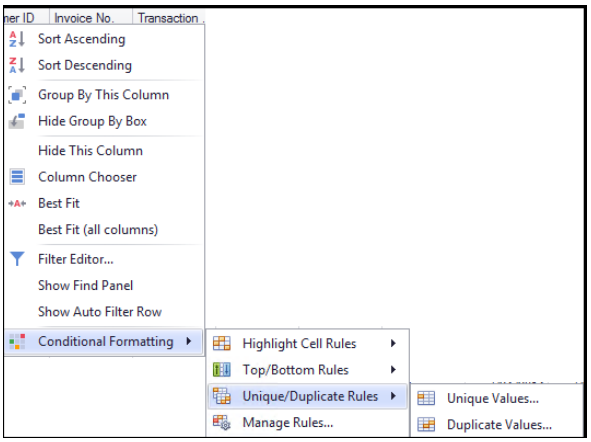
When you select one of the conditional options, a window opens to allow you to select a field and/or value for the condition. For example, selecting the condition for **Top 10 Items…** will open a Top 10 Items window. Accept or edit the number of top items in the left field and select the preset format to use for the cells in the right field. To apply the formatting to the entire row, mark the check box. Click **OK** to apply the formatting.



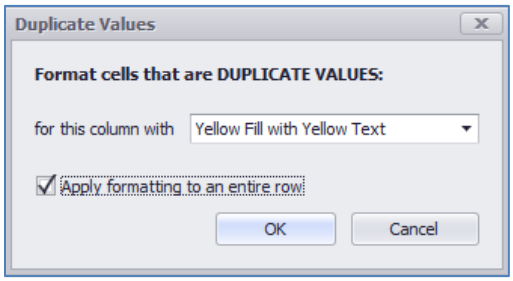
Discount A...	Gross Amount	Check No.
0.00	16,411.50	
0.00	6,487.46	
0.00	2,442.25	
0.00	7,317.97	
0.00	-16,411.50	824751
0.00	19,052.42	
0.00	11,632.37	
0.00	9,477.59	
0.00	-4,100.00	
0.00	6,235.62	
0.00	11,031.34	
0.00	903.26	
0.00	-6,731.38	721864
0.00	3,171.92	
0.00	7,886.13	
0.00	159.70	
210.63	7,021.10	
210.63	81,987.75	

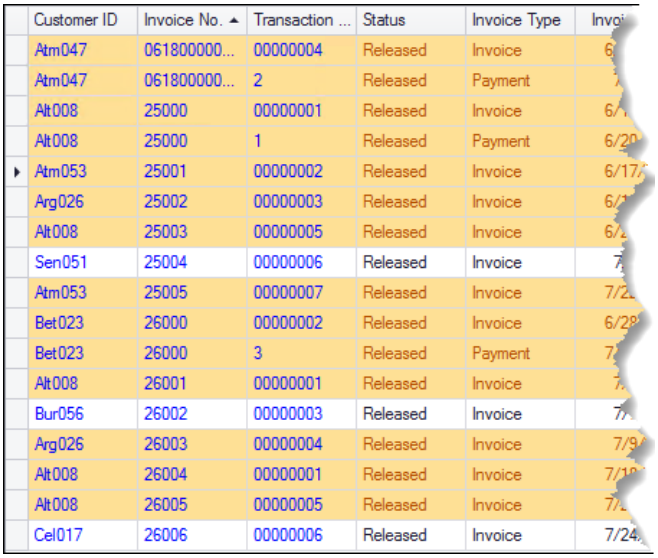
Unique/Duplicate Rules

The fly-out menu for the Unique/Duplicate Rules allows you to format unique or duplicate values in the column.



When you select one of the conditional options, a window opens to allow you to select a preset format to the column. To apply the formatting to the entire row, mark the check box. Click **OK** to apply the formatting.

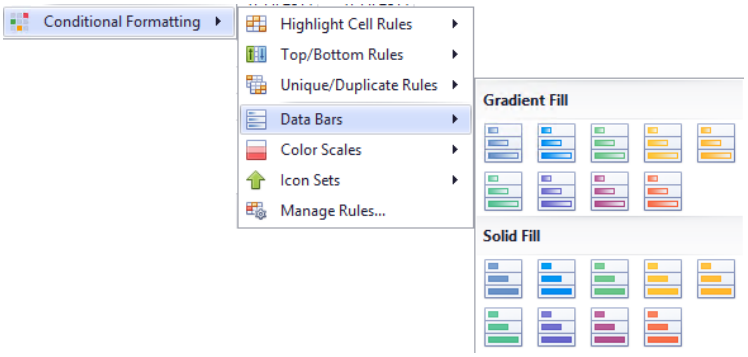




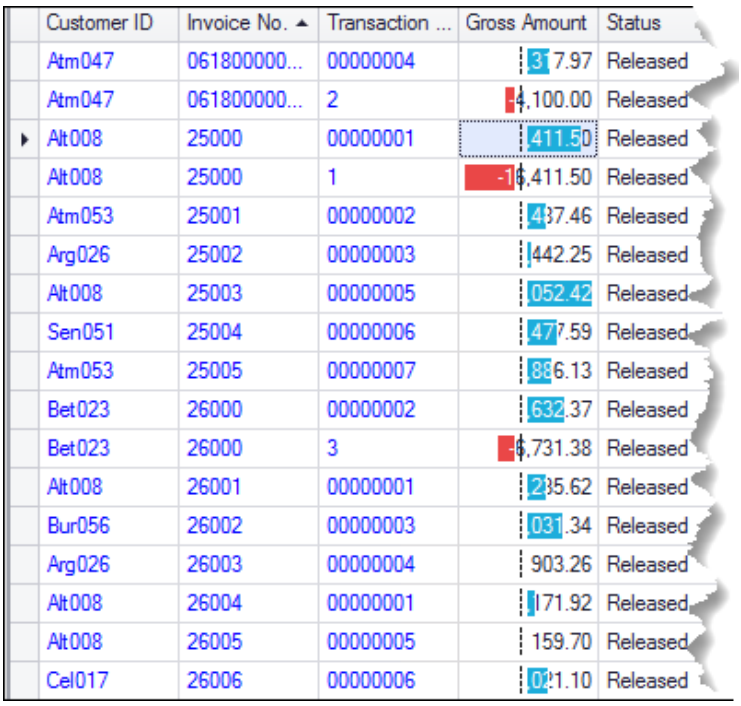
Customer ID	Invoice No.	Transaction ...	Status	Invoice Type	Invoi
Atm047	061800000...	00000004	Released	Invoice	6
Atm047	061800000...	2	Released	Payment	
Alt008	25000	00000001	Released	Invoice	6/
Alt008	25000	1	Released	Payment	6/20
Atm053	25001	00000002	Released	Invoice	6/17
Arg026	25002	00000003	Released	Invoice	6/
Alt008	25003	00000005	Released	Invoice	6/
Sen051	25004	00000006	Released	Invoice	7
Atm053	25005	00000007	Released	Invoice	7/2
Bet023	26000	00000002	Released	Invoice	6/28
Bet023	26000	3	Released	Payment	7
Alt008	26001	00000001	Released	Invoice	7
Bur056	26002	00000003	Released	Invoice	7/
Arg026	26003	00000004	Released	Invoice	7/9
Alt008	26004	00000001	Released	Invoice	7/1
Alt008	26005	00000005	Released	Invoice	7/
Cel017	26006	00000006	Released	Invoice	7/24

Data Bars

The fly-out menu for Data Bars allows you to format cells in the column based on the value in the cell.



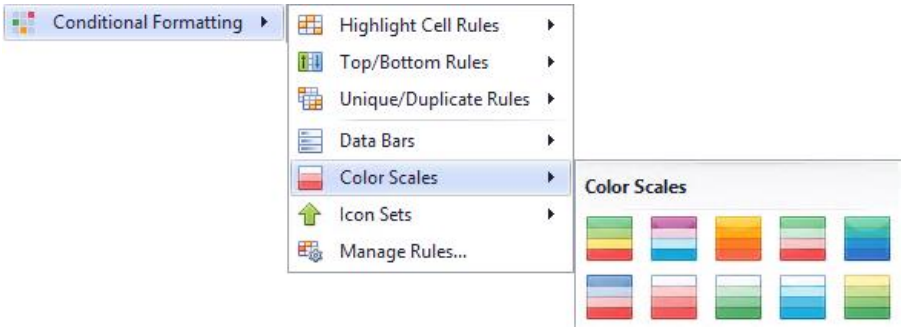
When you select one of the data bar fill options, a colored bar will be added to represent the value in the cell. The higher the value, the longer the bar. If the column holds negative values along with positive values, each cell will automatically be split, and the negative values will be represented by a red bar.



Customer ID	Invoice No.	Transaction ...	Gross Amount	Status
Atm047	061800000...	00000004	317.97	Released
Atm047	061800000...	2	-4,100.00	Released
Alt008	25000	00000001	411.50	Released
Alt008	25000	1	-16,411.50	Released
Atm053	25001	00000002	437.46	Released
Arg026	25002	00000003	442.25	Released
Alt008	25003	00000005	1,052.42	Released
Sen051	25004	00000006	477.59	Released
Atm053	25005	00000007	886.13	Released
Bet023	26000	00000002	632.37	Released
Bet023	26000	3	-6,731.38	Released
Alt008	26001	00000001	235.62	Released
Bur056	26002	00000003	1,031.34	Released
Arg026	26003	00000004	903.26	Released
Alt008	26004	00000001	171.92	Released
Alt008	26005	00000005	159.70	Released
Cel017	26006	00000006	021.10	Released

Color Scales

The fly-out menu for Color Scales allows you to format cells in the column based on the value in the cell.



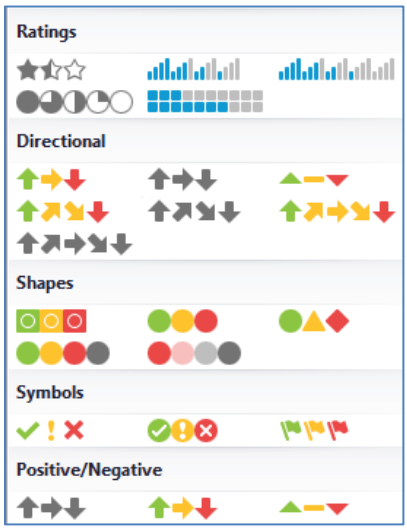
When you select one of the color scale fill options, a color gradient will be applied to a range of cells in the column. The color indicates where each cell falls within that range.

Customer ID	Invoice No.	Transaction ...	Gross Amount	Status	Invoic
Atm047	061800000...	00000004	7,317.97	Released	Invoic
Atm047	061800000...	2	-4,100.00	Released	Paym
Alt008	25000	00000001	16,411.50	Released	Invoi
Alt008	25000	1	-16,411.50	Released	Payme
Atm053	25001	00000002	6,487.46	Released	Invoi
Arg026	25002	00000003	2,442.25	Released	Invoi
Alt008	25003	00000005	19,052.42	Released	Invoic
Sen051	25004	00000006	9,477.59	Released	Invoi
Atm053	25005	00000007	7,886.13	Released	Invoi
Bet023	26000	00000002	11,632.37	Released	Invoice
Bet023	26000	3	-6,731.38	Released	Paym
Alt008	26001	00000001	6,235.62	Released	Invoice
Bur056	26002	00000003	11,031.34	Released	Invoi
Arg026	26003	00000004	903.26	Released	Invo
Alt008	26004	00000001	3,171.92	Released	Invoic
Alt008	26005	00000005	159.70	Released	Invoi
Cel017	26006	00000006	7,021.10	Released	Invoi

Icon Sets

The fly-out menu for Icon Sets allows you to format cells in the column based on the value in the cell.

When you select one of the icon sets as a fill option, icons will be added a range of cells in the column. The icon indicates where each cell falls within that range.



A set of 3 icons will classify column values into these ranges: ≥ 67%, ≥ 33%, ≥ 0%

A set of 4 icons will classify column values into these ranges: ≥ 75%, ≥ 50%, ≥ 25%, ≥ 0%

A set of 5 icons will classify column values into these ranges: ≥ 80%, ≥ 60%, ≥ 40%, ≥ 20%, ≥ 0%

The Positive/Negative icons will classify column values into these ranges: > 0, 0, < 0

Customer ID	Invoice No.	Transaction ...	Gross Amount	Status	Invoice
Alt008	25000	00000001	16,411.50	Released	Invoice
Atm053	25001	00000002	6,487.46	Released	Invoice
Arg026	25002	00000003	2,442.25	Released	Invoice
Atm047	061800000...	00000004	7,317.97	Released	Invoice
Alt008	25000	1	-16,411....	Released	Payment
Alt008	25003	00000005	19,052.42	Released	Invoice
Bet023	26000	00000002	11,632.37	Released	Invoice
Sen051	25004	00000006	9,477.59	Released	Invoice
Atm047	061800000...	2	-4,100.00	Released	Payment
Alt008	26001	00000001	6,235.62	Released	Invoice
Bur056	26002	00000003	11,031.34	Released	Invoice
Arg026	26003	00000004	903.26	Released	Invoice
Bet023	26000	3	-6,731.38	Released	Payment
Alt008	26004	00000001	3,171.92	Released	Invoice
Atm053	25005	00000007	7,886.13	Released	Invoice
Alt008	26005	00000005	159.70	Released	Invoice
Cel017	26006	00000006	7,021.10	Released	Invoice

Clear Rules

Use this option to clear the conditional formatting rules from the selected column or from all columns.

Manage Rules…

Use this option to open the Conditional Formatting Rules Manager.