Add basic conditional formatting to a view activities

Summary

To create conditional formatting:

1. Choose the column where you want the formatting to appear

2. Decide on what conditions you want the formatting to change

3. Decide what kind of formatting change will work best

   - background color

   - text color

   - replacement text

   - show an icon
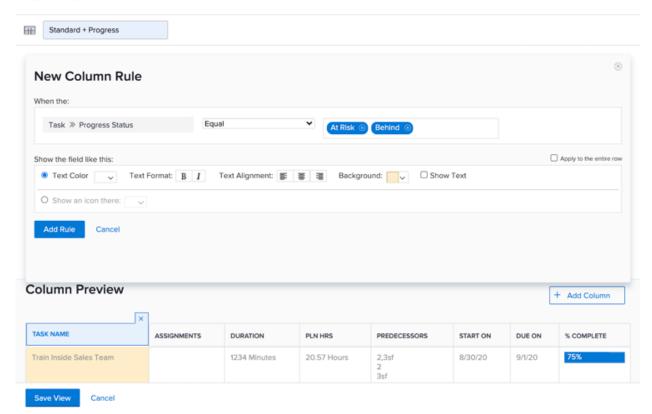
Activity 1: Add conditional formatting to a view

Create a task view named "Standard + Progress" by using the existing Standard view and adding this conditional formatting on the Name column.

1. Add a column rule that will turn the field background red when the progress status of the task is Late.

2. Add a column rule that will turn the field background yellow when the progress status is Behind or At Risk.

This will help you spot troubled tasks without including the column for progress status as part of your view.

Answer 1

New View

Standard + Progress

New Column Rule

When the:

| Task » Progress Status | Equal ⌄ | At Risk ⊗ Behind ⊗ |

Show the field like this: ☐ Apply to the entire row

● Text Color ⌄   Text Format: **B** *I*   Text Alignment: ≣ ≣ ≣   Background: ⌄   ☐ Show Text

○ Show an icon there: ⌄

Add Rule   Cancel

Column Preview

+ Add Column

TASK NAME	ASSIGNMENTS	DURATION	PLN HRS	PREDECESSORS	START ON	DUE ON	% COMPLETE
Train Inside Sales Team		1234 Minutes	20.57 Hours	2,3sf 2 3sf	8/30/20	9/1/20	75%

Save View   Cancel

1. In a task list report, go to the **View** drop-down menu and select **New View**.

2. Name your view "Standard + Progress."

3. Use the default columns provided.

4. Select the Task Name column. This is the column you want to apply the conditional formatting to, so it appears red or yellow if the progress status of the task is not On Time.

5. Click **Advanced Options** at the top-right corner of the report builder window.

6. Click **Add a Rule for this Column**.

7. Start the column rule by changing Task > Name at the top of the window to Task > Progress Status. Just click the **X** icon next to Task > Name to delete it from the field.

8. Type "progress" in the field, then select Progress Status under the Task field source.

9. Select **Late** in the field to the right of the Equal qualifier.

10. Choose a background of red in the Text Color row.

11. Click **Add Rule** to save the column rule.

12. Now click **Add Column Rule** again to add another rule.

13. Just like before, delete Task > Name from the criteria field. Replace it with Progress Status under the Task field source.

14. Select both At Risk and Behind in the field to the right of the Equal qualifier.

15. Choose a background of yellow in the Text Color row.

16. Click **Add Rule** to save the column rule.

17. Click **Save View** to save the view.