

Excel Conditional Formatting for Project Managers

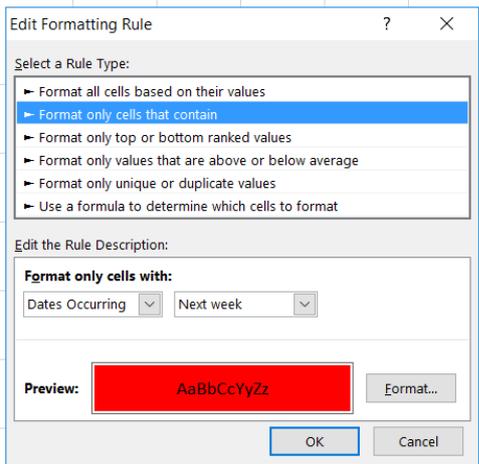
By Andreas Solomou PMP®

A large number of project managers uses Excel to store information about their projects. If you use Excel to store deadlines for project activities you might as well use Excel's analysis tools to help you quickly see your upcoming deadlines or delayed activities.

A really powerful tool to set up such automations in Excel is the Conditional Formatting tool. We will use the tool to quickly highlight upcoming deadlines with build in options and a formula. Keep in mind that since we are going to be using dates to automatically format cells, Excel relies on your system's date to perform calculations and provide you with the result.

Scenario 1: Highlight your upcoming deadlines (*if today is 20/2/2016*)

	A	B	C	D	E	F	G	H	I	J
	Activity Name	Activity Description	Start Date	Finish Date						
1										
2	Task 1	Lorem ipsum dolor sit amet, nec rebum corpora legendos te.	05/01/2016	25/01/2016						
3	Task 2	Cum velit inani id. Eu mea delicata dignissim, quot dolorum deseruisse at vel.	26/01/2016	23/02/2016						
4	Task 3	Duo appellantur consequuntur ad.	26/01/2016	02/03/2016						
5	Task 4	Percipit voluptatum ullamcorper usu ex, nec ne quem splendide.	09/01/2016	30/01/2016						
6	Task 5	Nonumy postea et duo, sea stet nemore at.	26/02/2016	05/03/2016						
7	Task 6	Cum velit inani id. Eu mea delicata dignissim, quot dolorum deseruisse at vel.								

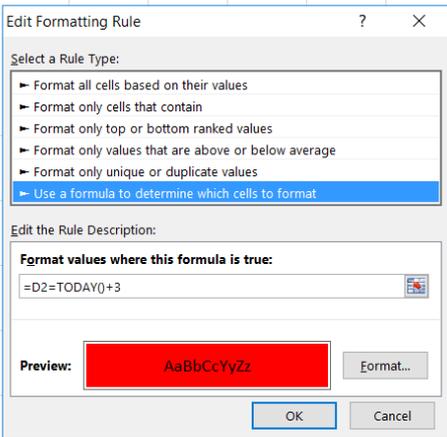


1. Select the range of in the column D named "Finish Date"
2. Hit the Conditional formatting command in the Home Tab of the Ribbon
3. Select New Rule to open the New Rule window
4. Select "Format only cells that contain"
5. In the "Cell Value" field select "Dates Occurring"
6. Select the option that fits your case (e.g. Next week)
7. Set your desired formatting using the Format... command
8. Done

(Please note that the command position changes depending on which version of Excel you are using)

Scenario 2: Highlight deadlines coming up in 3 days (*if the today is 20/2/2016*)

	A	B	C	D	E	F	G	H	I	J	K
	Activity Name	Activity Description	Start Date	Finish Date	Status						
1											
2	Task 1	Lorem ipsum dolor sit amet, nec rebum corpora legendos te.	05/01/2016	25/01/2016	Completed						
3	Task 2	Cum velit inani id. Eu mea delicata dignissim, quot dolorum deseruisse at vel.	26/01/2016	23/02/2016	Pending						
4	Task 3	Duo appellatur consequuntur ad.	26/01/2016	02/03/2016	Completed						
5	Task 4	Percipit voluptatum ullamcorper usu ex, nec ne quem splendide.	09/01/2016	30/01/2016							
6	Task 5	Nonumy postea et duo, sea stet nemore at.	26/02/2016	05/03/2016	Pending						
7	Task 6	Cum velit inani id. Eu mea delicata dignissim, quot dolorum deseruisse at vel.			Pending						
	Task 7	Duo appellatur consequuntur ad.									



1. Select the range of dates
2. Hit Conditional formatting on the Home Tab of the Ribbon
3. Select New Rule
4. Select "Use a formula....."
5. In formula field write a formula as shown in the screenshot
6. Set your desired formatting using the Format... command
7. Done

(Please note that the command position changes depending on which version of Excel you are using)

These are just two examples that can help automate the monitoring and controlling of your project schedule using Excel's build in features, however you can use these tools in combination with other Excel features to further simplify your everyday work.