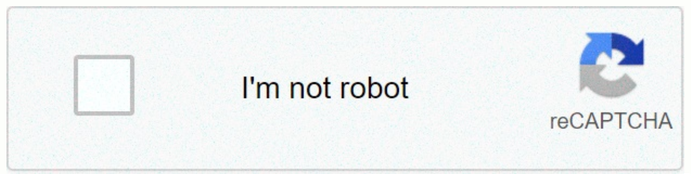

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Add checklist to excel spreadsheet

Open the sample worksheet to make sure you are viewing the first worksheet, Sections. As you can see, we've put together a pretty good-looking spreadsheet. You can use something like this for a presentation or tool that you can share with your colleagues. In the current state of the spreadsheet, we use the following formula to calculate the sum of a single order: =SUM(IF(ISTEXT(C2),B2),IF(ISTEXT(C3),B3),IF(ISTEXT(C4)),B4),IF(ISTEXT(C5),B5),IF(ISTEXT(C6),B6),IF(ISTEXT(C7),B7)) formula This checks, whether there is text in the cell in column C, and if so, add the corresponding value from column B to the order. So if someone writes x in column C, we get value added in total. Unfortunately, this formula also adds value to the whole if someone writes nothing or NO, which can throw away the accuracy of our formula. Check boxes are used to make it clearer. First, we remove the values from column C. Then click the Developer tab on the ribbon, and then click Add. Under Form Controls, select the check box in the resulting drop-down menu: You must click and pull to create a box that displays the check box. Drag around the cell where you want the check box to get it close to where it wants it. (In our case, it's cell C2.) You can see that there is text in the check box (this is labeled Check box 1). You can delete it, so you'll be left with a simple check box: Now, if you click this check box, the box will appear. It's pretty cool, isn't it? But not particularly useful because it does nothing. We need to connect that checkbox to another cell. Right-click the check box, and then click Format Control... The resulting window shows that the Cell Link box is empty. Let's fix it. Click the box, and then click the cell on the worksheet. We use E2 to see what's going on: If you're trying to make a professional-looking form, you might want to link the check box to a cell on another worksheet. You can also hide a column that contains TRUE/UNRE values. When you select the check box in C2, A TRUE value is displayed in E2. Note that after you right-click the check box to change the settings, you must click out of the cell before you can select or clear the check box again. If we repeat this process five times, there are six check boxes and six TRUE/FALSE cells next to each section. We have now added some check boxes to our worksheet . . . But what can we do with them? Let's go check it out. First, rewrite the original totaling formula to work with the check boxes. Here's how we do it: =SUM(IF(E2,B2),IF(E3,B3),IF(E4,B4),IF(E5,B5),IF(E6,B6),IF(E7,B7)) Doesn't it look more comfortable than the formula we used before? Try entering this formula in cell D9 and What's going on. Just like anywhere. Any. type of true or unreal cells, you can count the number of responses. Calculate the number of items we ordered. First, click in cell B10, and then type the number of items organized: Then enter the following formula in E10: =COUNTIF(E2:E7, TRUE) Now we will see how many items we have ordered: The formula counts the number of F TRUE entries in column F that corresponds to the number of check boxes selected. You've seen how check boxes can control other cells. We use conditional formatting to make it easy to see exactly which items in the list have been ordered. First, select cell A2, go to the Home tab on the ribbon, and then click Conditional Formatting: Hover over cell highlighting rules, and then click More Rules... One of the options available is to use Formula to define the cells that you want to format. Click this: In the Format values with this formula in the True box, click the up arrow, and then click cell E2: In this example, make sure that you remove dollar signs from the Format values where this formula is true. Alternatively, you can save some time by typing =E2 in the box. Now we choose the shape. Click the Format... button, then change the highlight to light green color, text color to dark green, and text style to bold: Finally, click OK. Now any cell in column A that matches the check box in column C will get a green highlight: Adding a check box is a simple matter, but it can improve the presentation of the worksheet. And if you're creative, you can find great uses for linked cells! Could you tell me how to do that? Thank you! Very useful. Just keep going! Thanks for releasing this. Big help! Just keep going! You sum it up very useful when you need to show information over 2-3 years with its easy and cosmetic too. Thank you. sumit these tutorials are v useful..... tell me to either work with the developer is easy or use formulas .... I also want to learn a dynamic filter with formulas if an easy checkbox is very useful if you are working with some standard data formats. You can use the check boxes to manage your actions. Very nice message. Thank you Comments are closed. This tutorial guides you through creating a check box in Excel, and the result is using formulas to create an interactive checklist, task list, report, or chart. I think everyone knows what the checkbox is, you've certainly seen a lot of them on different forms online. For the sake of clarity, however, I would like to start with a short definition. A check box, also called a checkbox, check box, or check box, is a small square box where you can select or clear the given option. Check box It sounds like a trivial thing to Excel, but it opens new opportunities for your spreadsheets that keep you on track for goals, schedule, assignments, etc. Add a check box to Excel Like all other form controls, the Check Box control is located on the Developer tab, which does not appear on the Excel ribbon by default. So you have to turn it on first. 1. Display the Developer tab on the ribbon To add the Developer tab to the Excel ribbon, do the following: Right-click anywhere on the ribbon, and then click Customize Ribbon... You can also > customize the ribbon > using file settings. Under Customize the Ribbon, click Main Tabs (usually selected by default), select the Developer check box, and then click OK. Now that the Developer tab is enabled, you can use multiple interactive controls, such as the check box. 2. Arranging data If you are creating an Excel checklist or Task List, the first step is to make a list of tasks or other items to which the check boxes are added. In this example, I have created the following party planning checklist: 3. Add the checkbox The preparatory steps have been completed, and now we will get to the main part - add the check boxes to our party planning list. To add a check box to Excel, do the following: On the Developer tab, in the Controls group, click Add, and under Form Controls, click Check Box. Click the cell where you want to add the first check box (B2 in this example). The check box control appears near that location, even though it's not actually in the cell: To place the check box correctly, move the mouse over it, and as soon as the cursor changes to a four-point arrow, drag the check box to where I want it. To remove Check box 1, right-click the check box, select and delete the text. You can also right-click the check box, click Edit Text on the shortcut menu, and then delete the text. The first Excel check box is complete, and you just need to copy it to other cells. 4. Use the arrow keys on your keyboard to copy the check box to other cells, and then place the insertion point over the lower-right corner of the cell. When the mouse pointer changes to a thin black cross, drag it to the last cell where you want to copy the check box. Done! Check boxes are added to all items in the checklist: As shown in the screenshot above, our Excel checklist is almost complete. Why almost? Although check boxes are added and you can now check or clear them by clicking the check box, Microsoft Excel cannot respond to these changes because no cell is yet linked Check box. The next section of the Excel Check Box Guide teaches you how to intercept the user who selects or clears the check box, and how to use this information in your formulas. Examples of using check boxes in Excel Below are some examples of how excel check boxes are used to create an interactive checklist report and chart. But first we learned to link the check boxes to the cells. The technique is very simple, but it is the cornerstone of the use of the checkbox, which leads to formulas. As already mentioned, to catch the status of a check box (selected or unselected), you must paste the check box into a specific cell. To do this, right-click the check box, and then click Format Control. In the Format Control dialog box, go to the Control tab, click the Cell Link box, and then select an empty cell in the table where you want to link the check box, or type the cell reference manually: Repeat the above step for the other check boxes. Tip. You can easily identify linked cells by selecting them in an adjacent column that contains no other data. This allows you to safely hide linked cells later so they don't mess with the worksheet. Finally, click each linked check box. Linked cells TRUE appear in the selected check boxes and ATT for cleared check boxes: At this point, the link cells probably don't make much sense, but just take a little longer with me and you'll see how many new opportunities they offer you. Add a checklist in Excel using a data summary In fact, we've already done a lot of the work by adding check boxes and linking them to cells. Now, we're just writing a few formulas to create a data summary for the Excel checklist. Formula for calculating the total number of tasks It is easiest - use the COUNTTS. Formula To get the number of completed tasks, a completed task is a check box with a check mark, which indicates the TRUE value of the linked cell. So you get the total TRUE value with this COUNTIF formula: =COUNTIF(C2:C12,TRUE) Where C2:C12 are linked cells. To make a formula a little smarter, use the COUNTIFS function instead of countif to check for empty cells in the list (column A): =COUNTIFS(A2:A12, <>, C2:C12, TRUE) In this case, if you remove some irrelevant items from the Excel checklist, but forget to remove the selection symbol from the corresponding box, such check marks will not count. Formula to get the percentage of completed tasks You can calculate the number of completed tasks using a regular percentage formula: Part/Total = Percentage Share the total number of completed tasks by the total number of tasks: =COUNTIF(C2:C12,TRUE)/COUNTA(A2:A12) The following screenshot shows all of the above formulas in action: As shown in the screenshot above, we have added one more formula to B18. The formula is based on the IF function, which returns Yes if the total number of tasks performed is equal to the total number of tasks, Not otherwise: =IF(B14=B15, Yep!, Nope :() checklist a little bit You can create a couple of conditional formatting rules that change the color of cell B18 based on its value. When this is complete, hide the column with linked cells and the Excel checklist will be complete! If you like the checklist we created for this example, you can download it now: Download this Excel checklist More Excel checklist templates If you want a quick selection of Excel checklist templates, click File > New, type a checklist in the search box, and then press Enter. If none of the Excel checklist templates are well suited to your needs, the following resources can be useful: Create a task list with conditional formatting Basically, you can add task list check boxes and formulas exactly as you would in an Excel checklist. What's the point of writing this section? You can ask me. Well, in a typical To-Do list, complete tasks have a strikethred format as follows: This effect can be easily achieved by creating a conditional formatting rule. Detailed steps will follow below. To begin with, you can write down the task list, add check boxes, and link them to cells: And now use conditional formatting that gives you a strikethred format and optionally a different background or font color for the checked items. Select a task list (in this example, A2:A11). On the Home tab, go to the > group, and then click Conditional Formatting > Rule... In the New Formatting Rule dialog box, click Apply Formula to specify the cell you want to format. In the Format values where this formula is true box, type the following formula: =$C 2=TRUE, where C2 is the most linked cell. Click the Format button, specify the formatting style that you want, and then click OK. Here's one more idea to format your Excel task list. Instead of crossing competing tasks, you can add an additional column with the following IF formula: =IF(E2=TRUE, Finished, Finished), where E2 is the most linked cell. As shown in the screenshot below, the formula returns Finish if the linked cell contains TRUE, Task if FAKE: Then apply the desired conditional formatting to the Status column based on this formula: =$C 2=FinishEd Result shows something similar: Finally, add a couple of formulas to calculate the completed tasks (as we did in the checklist), hide the linked cells, and excel's Task list is a good thing to do! The bar chart at the top of the task list is based on the percentage formula for B2. If you want to know the details, I encourage you to download the template, use columns D and E, and explore formulas. Download task list template Create an interactive report by using check boxes Another useful check box application in Excel is to create interactive reports. For example, assume you have a sales report that contains information about 4 regions: North, South, East, and West. Your goal is to get the total number of selected ranges. Of course, this can be done by using the Slicers feature in an Excel table or PivotTable, or by adding substrings. But why not make the report more user-friendly by adding 4 check boxes to the top? Looks good, doesn't it? To create a similar report in a table, do the following: Add 4 check boxes to the top of the table for the north, south, east, and west regions. Create a criteria range somewhere in an unused part of the table and link the check boxes to empty cells: In the screenshot above, I2:I5 has linked cells and H2:H5 are range names exactly as they appear in the report. Add one more column with an IF formula in the criteria area that returns the range name if the linked cell is set to TRUE, the line (-) by the way: =IF(I2=TRUE, H2, -) Type the title of the formula column that exactly corresponds to the label of the corresponding column in the report (in this example, Range). The exact match is very important and in the next step you will understand why. Next, enter a formula to calculate the total for the selected ranges. To do this, we use the DSUM function, which sums up database values that match the specified criteria: DSUM(database, field, criteria) Where: The database is a table or range, including column headings (A5:F48 in this example). A field is the column you want to sum up. It can be given either as a column heading attached to quotation marks or as a number representing the position of a column in a database. In this example, we sum the numbers in the Subtotal column, so our second argument is sub-total. Criteria are a range of cells that contain criteria, including a column heading (J1:J5). Therefore, the formula column label in the criteria range must match the column heading in the report. Add up the above argument, and your DSUM formula reads as follows: =DSUM(A5:F48, sub-total, J1:J5) ... and works perfectly! To hide #DIV/0! error that appears when no range is selected, line DSUM to IFERROR: =IFERROR(DSUM(A5:F48, sub-total, J1:J5), 0) If the report calculates the average for each row in addition to the amount, you can use the DAVERAGE(database, field, criteria) function to get the sales average for the selected ranges. Finally, hide and probably lock the criteria range to prevent intentional changes, and your interactive report is complete! Download interactive report Make dynamic chart based on check box status This example teaches you how to create a dynamic Excel chart that can respond to changing check boxes (selected or not selected): The source data in this example is this simple: To change it to a dynamic Excel chart, follow these steps: Create check boxes and link them to empty cells. In particular, two check boxes are added for 2013 and 2014 and attached to cells G2 and G3, respectively: Create a dataset for the chart by source data and linked cells (see figure below): If the 2013 check box is selected (J4:J7), use the following formula: =IF(G2=TRUE, B4, NA()) If the 2013 check box is selected (G2 is TRUE), the formula drags the original value from B4, otherwise returns an #N/A error. For 2014 (K4:K7), type a similar formula that drags values from column C if the 2014 check box is selected: =IF(G2=TRUE, C4, NA()) In cell L4, type the formula =$D 4 and copy it to cell L7. Because the 2015 data should always appear in the chart, you don't need an IF formula in this column. Create a combo chart in a dependent dataset (I3:L7). Because we have linked all cells in a dependent table to the original data, the chart updates automatically as soon as changes have been made to the original dataset. Download a dynamic chart To create and use check boxes in Excel. You can view all the examples discussed in this tutorial by downloading below our template manual. Thank you for reading and hoping to see you on our blog next week. Practice workbook for Excel check box examples (.xlsx file)

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