

Column Formatting

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Overview

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The Column format tab contains a number of sections that you can use to format your report fields. For instance, you could use this feature to display flags in a column report that contains country names.

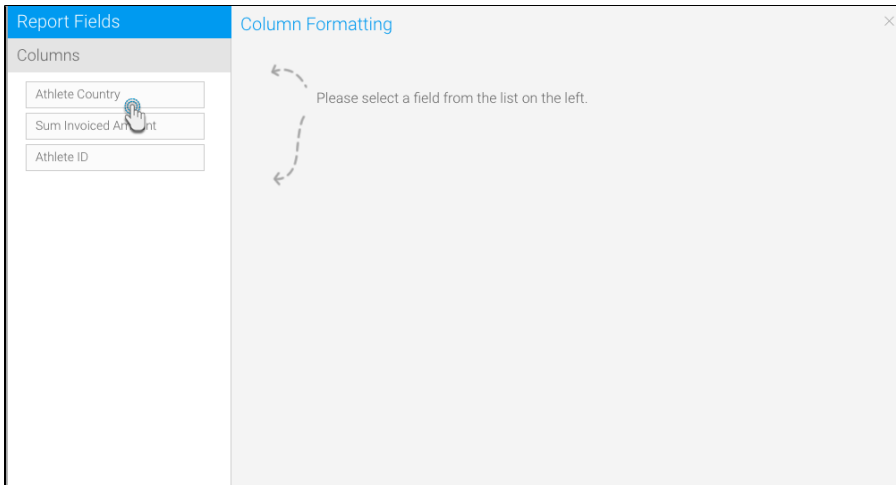
| Camp Country ▾ |
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How to Apply

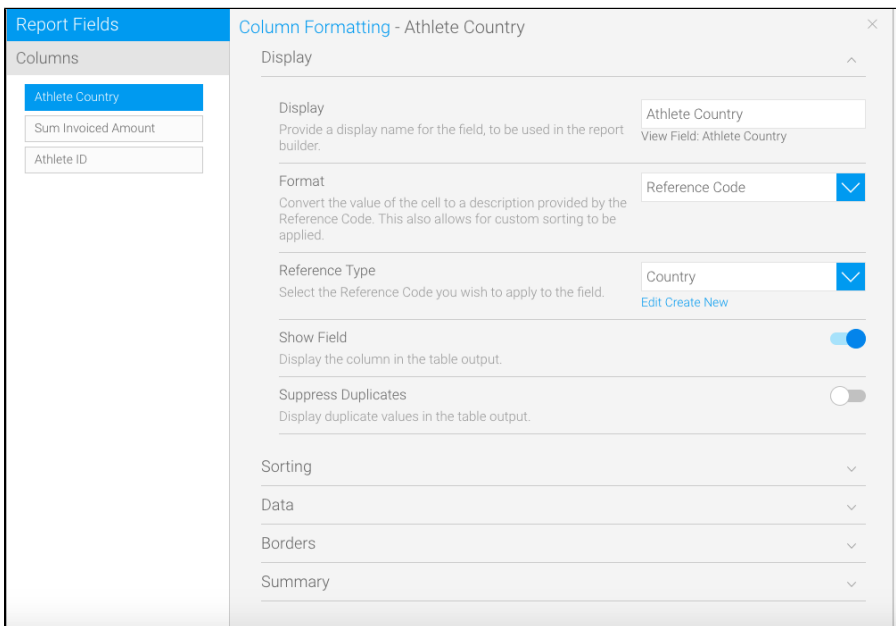
1. Create a report as you normally would.
2. While in the Data mode or the Design mode, click on the Column Formatting icon in the header.



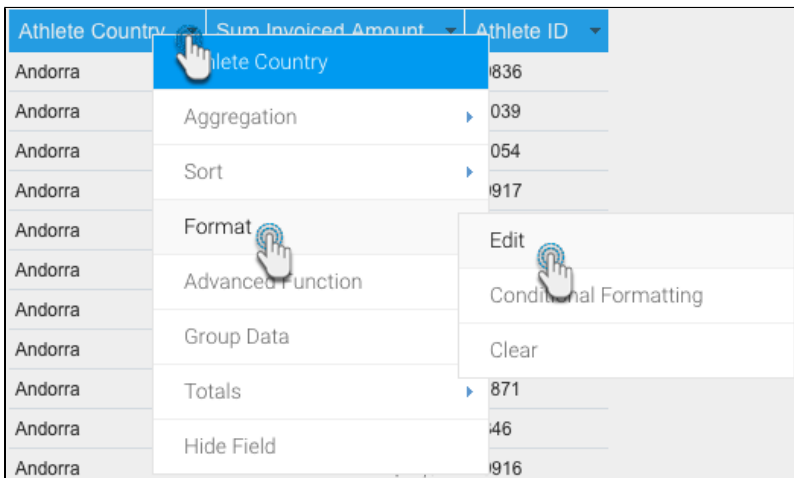
3. When the following popup appears, select a field from the left side.



4. Once a field is selected, the column formatting settings will appear in the popup.



5. Simultaneously, you could also bring up this popup by clicking on a column's menu, then selecting Format, and finally clicking on Edit.



6. See the below section to learn about the different types of formatting you could apply to a report column.

Column Formatting Settings

Each of column formatting setting options is described below.

| Option | Description |
|--------------------|---|
| Display | To change the display name of the column from the default value simply update this field. |
| Format | <p>Each data type will have a unique set of format options – eg Text, Date or Numeric.</p> <p>See Display Formats for details on each type.</p> |
| Sub Format | Depending on the format option you have chosen for the column above you will have a separate set of sub format options. Select the appropriate sub format option. |
| Date Other | <p>If you select 'Other' from the date sub format you will be able to build your own custom date format.</p> <p>For example to create a Japanese date format which includes characters, eg. 2003?4?2?would be created by adding in: yyyy?M?d ?</p> |
| Decimal Places | <p>If you have a defined a numeric format you can set the number of decimal places to be defined. This can be used to define cents in a decimal place for \$20.00 by adding in: 2</p> <p>Note: To convert numeric data by doing divide by 1,000 calculations etc you would use the data conversion options in advanced functions which are available on the Report Fields page.</p> <p>See Advanced Functions for more information.</p> |
| Prefix | The prefix is used to include additional characters before the value that is returned from the data base. This can be used to define currency for \$20.00 by adding in: \$ |
| Suffix | The suffix is used to include additional characters after the value that is returned from the data base. This can be used to define percentage for 30% by adding in: % |
| Rounding | <p>The rounding format allows you to choose how a decimal value should be rounded.</p> <ul style="list-style-type: none">• Round Up: Will round any decimal up eg. 1.1 to 2• Round Down: Will round any decimal down eg. 1.9 to 1• Round Half Up: Rounds 0.5 and above up• Round Half Down: Rounds 0.5 and below down |
| Thousand Separator | Turns the defaulted thousand separator for your instance on or off. For example: 1000 to 1,000 |
| Bracket Negatives | Displays negative values with or without brackets. |

Show Field

To hide the column from the report, select this item. By hiding a column the data presented on the page is not re-grouped which would occur if you removed the field from your report. For Example:

Original Report

| City | Country | Sum Revenue |
|------------|---------|-------------|
| London | UK | 500,000 |
| Manchester | UK | 300,000 |
| Hamburg | Germany | 400,000 |
| Munich | Germany | 450,000 |

City Column Hidden

| Country | Sum | Revenue |
|---------|---------|---------|
| UK | 500,000 | |
| UK | 300,000 | |
| Germany | 400,000 | |
| Germany | 450,000 | |

City Column Removed From Report

| Country | Sum Revenue |
|---------|-------------|
| UK | 800,000 |
| Germany | 850,000 |

Suppress Duplicates

The suppression of duplicate option will remove duplicate values from a column and group the values under a single value.

Display Formats

Based on the type of field that the column being formatted is there are various format options. The ones listed below come default with Yellowfin, however as this is customisable there may be additional ones that comes as part of your installation.

| Format Option | Description |
|-----------------------|--|
| Text | Displays as plain text |
| Case Formatter | Allows you to format text as Uppercase or Lowercase . |
| Email | Creates a hyperlink on the text that will open an email client and pre-populate the sent to address. |
| Flag Formatter | If your data contains ISO country codes you can display these as flags of the world instead of text. |
| HTML | Formats a field containing HTML tags, either by removing them, or using them, depending on user selection. For example, if you wanted to display an image using a URL the field may look something like this: . |
| HTML 5 Video | Displays a video from a path stored in the field, either a full URL, or a relative path if the video is stored in the Yellowfin ROOT directory. |

| | |
|----------------------------|--|
| Link To URL | <p>Allows you to pass the value of the returned data into a URL link. Use the hashes ## to indicate to Yellowfin where you want the column value to be placed in the url itself. For example: Formatting on a column of IP addresses and the url typed in is:</p> <p>http://www.google.com.au/search?hl=en&q=##</p> <p>This essentially means that every ip address will be placed into it into it i.e.:</p> <p>http://www.google.com.au/search?hl=en&q=10.100.32.44</p> |
| Org Ref Code | Converts the text in the cell to the value of an internal lookup table. E.g. AU to Australia. See Org Ref Codes for more information. |
| Raw Formatter | Displayed the data as it would have been returned from the database – no additional formatting applied. |
| URL Hyperlink | Creates a hyperlink on the text and will open web page on click. Assumes the text is a legitimate URL. |
| YouTube Formatter | This displays a YouTube video, based on the ID being stored in the field. |
| Date | |
| Date | Displays value as a date – multiple date options exist. |
| Time | Displays value as a time field – multiple date options exist. |
| Timestamp | Displayed full date and time value |
| Date Part Formatter | Takes a date field and formats the display to show part of that date. |
| Numeric | |
| Numeric | Displays value as a decimal – allows you to set the decimal places to be used. |
| Percentage Bar | Converts a percentage value less than or equal to 100 into a bar. |
| Option | Description |
| Direction | Apply sorting to an individual column. If you wish to use multiple fields to provide a sort order, see Table Sort . |

| Option | Description |
|-----------------------|---|
| Font Style | Define styling options for the text in this field. This covers the font face, font size, font colour, and font style. |
| Alignment | Define the alignment option for text in this field. |
| Background | Define a custom background colour for the column. |
| Column Width | Define the width of the column. |
| Maximum Length | Define the maximum number of characters to be displayed in the cell. |
| Wrap Text | Wrap long cell text across multiple rows. |

| Option | Description |
|-----------------|--|
| Position | Define where borders should be displayed around the edges of the cell. |
| Colour | Define the colour of the cell borders. |
| Width | Define the thickness of the cell borders. |

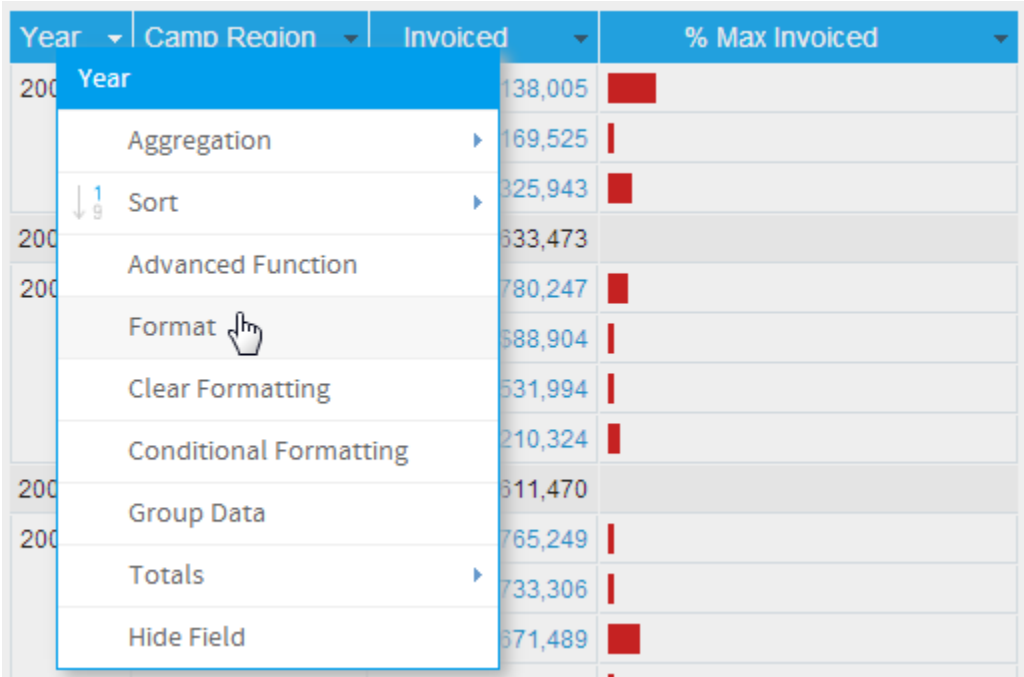
| Option | Description |
|--------------------------|--|
| Total Aggregation | <p>Define the aggregation to be applied to the column as a total.</p> <p>Note: the calculated total is only available for calculated fields and will create a total based on the same rules as were used for the calculation. For example if you have a ratio of Received / Invoiced the total will equal the Sum (Received) / Sum (Invoiced)</p> |
| Display Labels | Display a text label for the column summary. |
| Style | Define custom formatting for the summaries of this column. This covers the font face, font size, font colour, font style, and alignment. |

| | |
|-------------------|--|
| Background | Define the background colour for the column summary. |
| Sub Total | Display a sub total row for each unique value in the column. |

Column Drop Down Menu

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If you wish to select a column to format from the table you can do so by clicking the menu drop down in the column title.



| Option | Description |
|-------------------------------|--|
| Aggregation | Allows the user to apply Aggregations to the field. |
| Sort | Allows the user to apply sorting to the individual field. <ul style="list-style-type: none"> • None: removes any sorting applied to the field. • Ascending: sort the data in ascending order – A to Z or 1 to 9. • Descending: sort the data in ascending order – Z to A or 9 to 1. |
| Advanced Function | Allows the user to apply an Advanced Function to the field. |
| Format | Opens the Column Formatting menu with this field selected to allow the report writer to apply formatting options. |
| Clear Formatting | Allows the report writer to clear all formatting options applied to this field. |
| Conditional Formatting | Allows the user to open the Conditional Formatting menu for this field in order to apply alerts. |
| Group Data | Allows the user to create groups of values based on the data in the field. e.g. age (1-18 = Youth, 19-36 = Gen Y etc) |
| Totals | Allows the user to apply a summary aggregation to the field. |
| Hide Field | Allows the user to hide the field from display. |

Column Drag & Drop Options

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Most of the formatting options available to you are accessed through the format menus. However, once your report has been generated you can use some drag and drop formatting options to change the layout of your report.

Note: the drag and drop formatting are only available whilst a report is in DRAFT mode. If the report is ACTIVE you will not see these options.

Column Order

You can change the order of your columns directly on the screen. This option is only available for 'column' based reports.

- 1. To move a column, place your cursor over the column title and when the cursor changes into a cross icon click and hold.
- 2. Now drag your column into the desired location. You will see the outline of the column and a highlighted line which indicated where the left hand border of the column will be placed.
- 3. Drop your column and the page will be refreshed with your column in the new location.

| Year ▾ | Camp Region ▾ | Invoiced ▾ | % Max Invoiced ▾ |
|--------|---------------|-------------------|------------------|
| 2007 | Asia | \$11,138,005 | |
| | Europe | \$169,525 | |
| | North America | \$6,325,943 | |
| 2007 | | Sum: \$17,633,473 | |
| 2008 | Asia | \$4,780,247 | |
| | Australia | \$88,904 | |
| | Europe | \$531,994 | |
| | North America | \$3,210,324 | |

Column Width

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You can resize a column as seen on a report by placing you cursor over the right hand column border of the column you wish to resize.

- 1. Click and hold the cursor. The cursor will be represented as a horizontal line and the column outline will be highlighted.
- 2. Drag your column to the desired width and let the cursor go. The report will refresh and your column will be resized.

| Year ▾ | Camp Region ▾ | Invoiced ▾ | % Max Invoiced ▾ |
|--------|---------------|-------------------|------------------|
| 2007 | Asia | \$11,138,005 | |
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