Field Settings

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Overview

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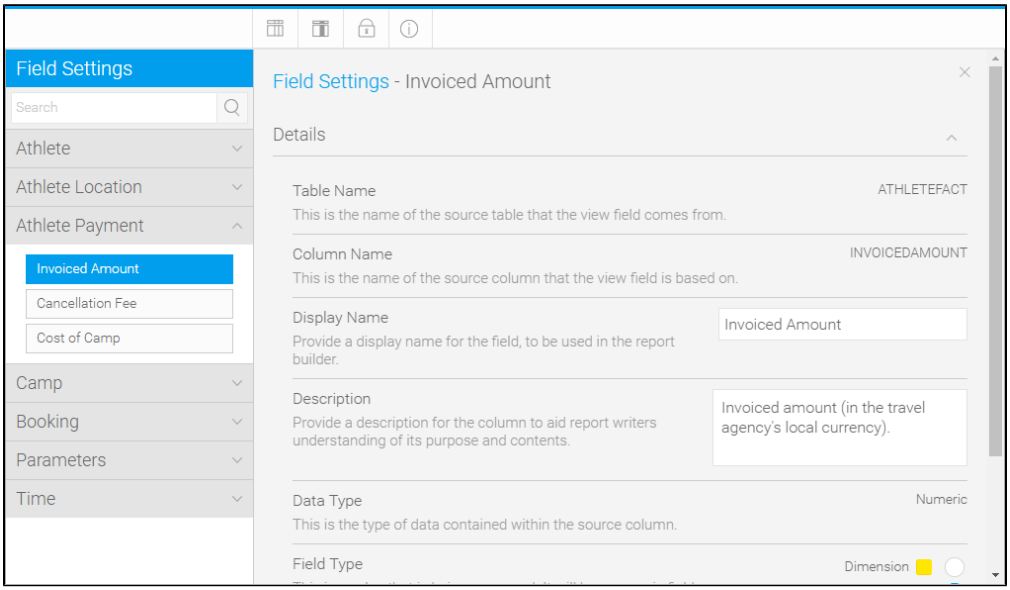
You can set the default format for a field on the format tab. This will then be the display type when a user adds the column to a report. The report writer may choose to change the format through the report formatting options if they wish.



The formats are limited to the data type – For example the data type below is integer so only number based formats are permitted – such as currency, decimal, percentage or time stamp.

Details

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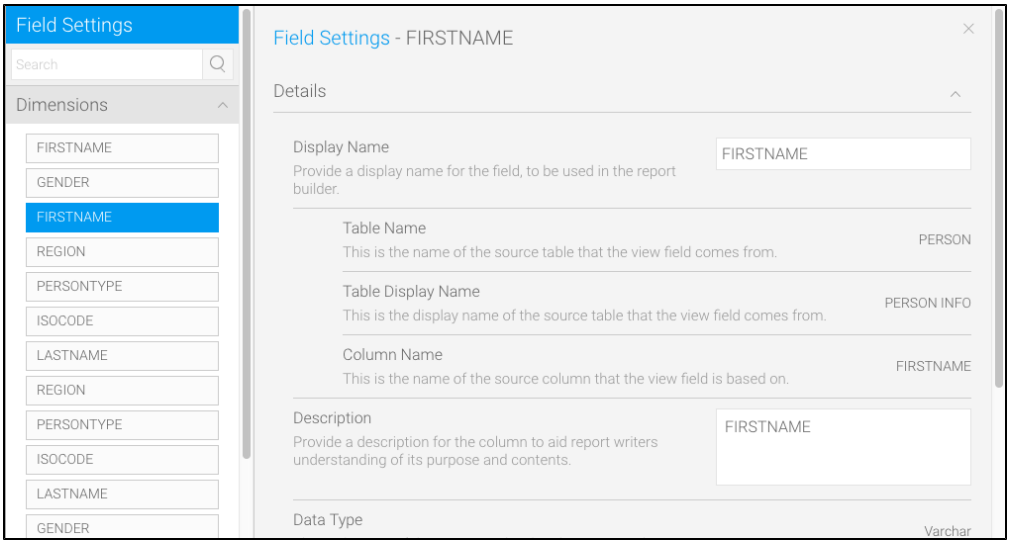

Option	Description
Display Name	This allows you to define the display name of the field, to be used in the report builder process. This can be overridden at the report level.
Table Name	This displays the name of the source table that the selected view field comes from. This is a **read-only** value.
Table Display Name	This shows the display name of the table if it is different from the actual table name (the display name is used to differentiate a table name, if another table of the same name exists in the view). This read-only value will only appear if the display table name differs from the table name.
Column Name	This displays the name of the source column that the view field is based on. This is a **read-only** value.
Description	This allows you to provide a description for the column, to aid report writers' understanding of its purpose and contents. This will be displayed as a tooltip when a writer hovers over the field in the data step of the report builder, and will also be listed in the report information.
Data Type	This displays the type of data contained within the source column. This is a **read-only** value.
Converted Data Type	This displays the type of data contained within the field, after converters have been applied. This is a **read-only** value.
Default Value	This displays the default value provided for a parameter field. This is a **read-only** value.
Field Type	This displays the type of field, defined by Yellowfin, which specifies how the field can be used. This type can be changed on some fields, but is read-only on others.
Date Field	This allows you to change the field the date function has been based on. This is only available on date function fields.

Format

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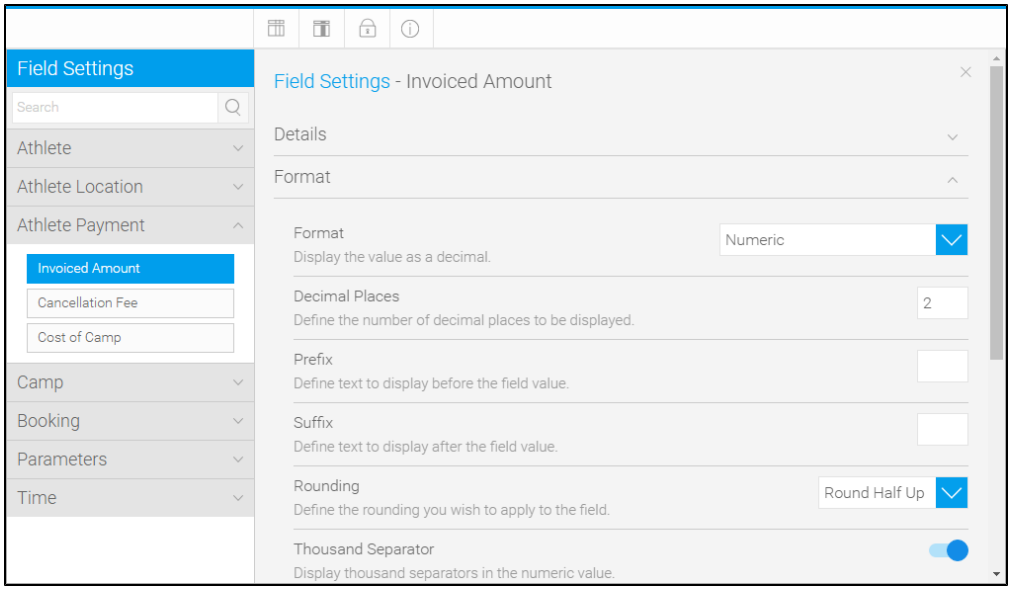

Option	Description
Geometry Format	This allows you to specify the format of your native geometry field, define the order of lat and lon values in each point.
Cache Field	This allows you to select which field to cache the geometry data against.
Format	Each data type will have a unique set of format options – eg Text, Date or Numeric. *See Field Settings#Format Options below for details on each type.*
Decimal Places	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 **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. *See Advanced Functions for more information.*
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	This allows you to define how the value of the field should be rounded. The following options are available: ▪ **Round Up** - Will round any decimal up e.g. 1.1 to 2 ▪ **Round Down** - Will round any decimal down e.g. 1.9 to 1 ▪ **Round Half Up** - Rounds 0.5 and above up ▪ **Round Half Down** - Rounds 0.5 and below down
Thousand Separator	This toggles the visibility of the thousand separator. For example, '1,000' or '1000'. Note that it's possible to display different separators for users of different languages within your instance. See Configuration for more information.
Bracket Negatives	This allows you to wrap negative values in brackets.

Default Aggregation	When the field type is a metric you will be able to set the default aggregation (e.g. Sum, Average etc). This is used when adding the metric to a report it will automatically set the aggregation based on this default value. The options in the dropdown when the field type is a date are count, max and min. For all other field types the dropdown options are sum, average, count, max and min. > *See Aggregation for more information.*
Colour	When the field type is a metric you will be able to define a default colour to be applied in charts. > *See Chart Formatting for more information on how to use Colour Sets.*
Chart Granularity	Defines the default unit applied to this field when used in a time series chart.
Filter Value Case	This allows you to specify if user prompt filter values entered by a user are converted automatically to upper or lowercase before being applied.

Format Options

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.

Common Format Options	
Link To URL	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. **Option** / **Description** **URL** – Define the URL to use, including ## to be replaced by the value of the field. **URL Type** – Define if the URL is **local** or **remote**. **New Window** – Define if the URL opens in the **current** or **new** window. **Display Text** – Define text to display instead of the full URL. (optional) **For example:** Formatting on a column of IP addresses and the URL typed in is: http://www.google.com.au/search?hl=en&q=## This essentially means that every IP address will be placed into it i.e.: http://www.google.com.au/search?hl=en&q=10.100.32.44
Reference Code	Converts the text in the cell to the value of an internal lookup table. E.g. AU to Australia. This also allows for custom sorting, colours, and images to be applied. **Option** / **Description** **Reference Type** – Select the Reference Code set to be applied to the field. > *See Reference Codes for more information.*
Raw Formatter	Displayed the data as it would have been returned from the database – no additional formatting applied.
Text	
Text	Displays as plain text.

<table>
<tr><td>Case Formatter</td><td>Define if the value of the field should be converted to display as a specific case.<table><tr><th>Option</th><th>Description</th></tr><tr><td>Case</td><td>Define if the value should be converted to display in Capital Case, UPPERCASE, or lowercase.</td></tr></table></td></tr>
<tr><td>Email</td><td>Creates a hyperlink on the text that will open an email client and pre-populate the sent to address.</td></tr>
<tr><td>Flag Formatter</td><td>If your data contains ISO country codes you can display these as flags of the world instead of text.</td></tr>
<tr><td>HTML Formatter</td><td>This allows you to format a field that contains HTML tags.<table><tr><th>Option</th><th>Description</th></tr><tr><td>Remove HTML tags</td><td>Specify if Yellowfin should be removing HTML tags from the displayed text, or including them.</td></tr></table></td></tr>
<tr><td>HTML 5 Video Formatter</td><td>This allows you to display video from a path stored in the field.<table><tr><th>Option</th><th>Description</th></tr><tr><td>Video Width</td><td>Define the width, in pixels, of the video display.</td></tr><tr><td>Show Video Controls</td><td>Specify if the controls for the video should be displayed or hidden.</td></tr><tr><td>Auto Play Video</td><td>Specify if the video should automatically play when the report loads.</td></tr></table></td></tr>
<tr><td>URL Hyperlink</td><td>Creates a hyperlink on the text and will open web page on click. Assumes the text is a legitimate URL.</td></tr>
<tr><td>YouTube Formatter</td><td>This allows you to display a YouTube video by using the value in the field as the video ID.</td></tr>
<tr><td colspan="2">Date</td></tr>
<tr><td>Date</td><td>Displays value as a date – multiple date options exist.<table><tr><th>Option</th><th>Description</th></tr><tr><td>Date Format</td><td>Specify the format to be applied to the date values. This will not convert the value, just format it.</td></tr><tr><td>Date Other</td><td>If you select ‘Other’ from the date format you will be able to build your own custom date format.
For example to create a Japanese date format which includes characters, eg. 200342 would be created by adding in:
yyyyMd</td></tr></table></td></tr>
<tr><td>Time</td><td>Displays value as a time field – multiple date options exist.</td></tr>
<tr><td>Timestamp</td><td>Displayed full date and time value</td></tr>
<tr><td>Date Part Formatter</td><td>Allows you display part of the date, e.g. Month Name, rather than the full date.<table><tr><th>Option</th><th>Description</th></tr><tr><td>Format</td><td>Select the part of the date value to be displayed in the table.</td></tr></table></td></tr>
<tr><td colspan="2">Numeric</td></tr>
<tr><td>Numeric</td><td>Displays value as a decimal – allows you to set the decimal places to be used.</td></tr>
<tr><td>Percentage Bar</td><td>Converts a percentage value less than or equal to 100 into a bar.</td></tr>
<tr><td colspan="2">Geometry</td></tr>
<tr><td>Default Geometry</td><td>This uses the default settings for the geometry, as defined by the source database.</td></tr>
<tr><td>Geometry</td><td><table><tr><th>Option</th><th>Description</th></tr><tr><td>Decimal Places</td><td>This allows you to define the precision of the geometry data, down to the number of decimal places.</td></tr></table></td></tr>
</table>

Access

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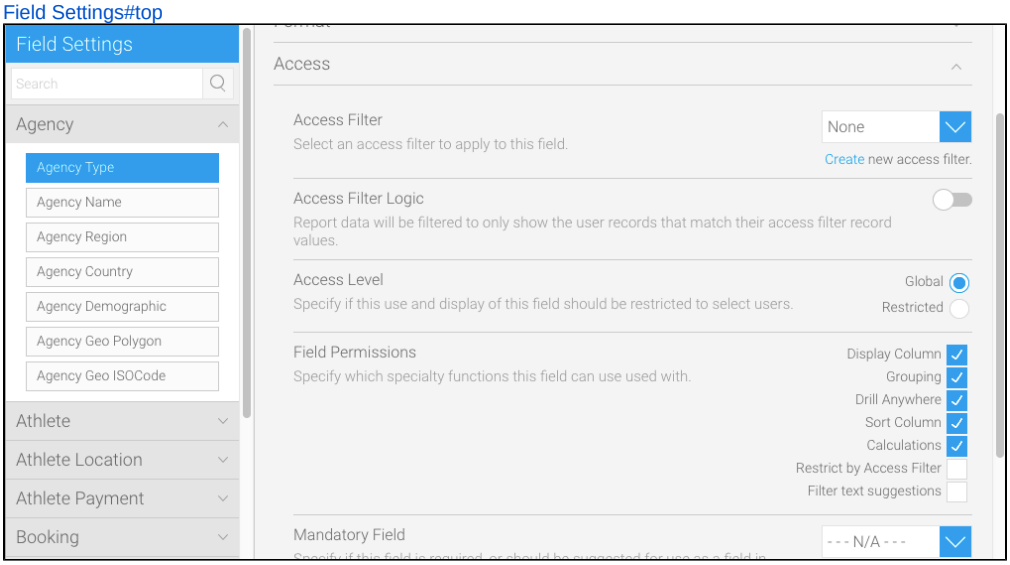

Option	Description
Access Filter	This allows you to associate a field with access filter records for use within reports. See Restricting Data with Access Filters for more information.
Access Filter Logic	If this button is switched on: Report data will be filtered to only show the user records that do *not* match their access filter record values. If this button is switched off: Report data will be filtered to only show the user records that match their access filter record values.
Access Level	This allows you to define if all users with access to use the view can see the field, or if it should be hidden and restricted to only a sub set of users, and finally if it's secure. Fields can be restricted to an individual user and/or groups of users. This will allow only those nominated permission to write reports with these fields. Users will need to be nominated through the View Security menu.

<table>
<tr><td>Field Permissions</td><td>Field permissions dictate how the field can be used in reports. For example can the field be displayed, grouped or sorted.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Display Column</td><td>Allow this field to be displayed in a report. If not checked, the column may be used, but will be hidden in the report output.</td></tr>
<tr><td>Grouping</td><td>Allow the field values to be grouped using the report builder Group Values function.</td></tr>
<tr><td>Drill Anywhere</td><td>Allow the field to be displayed in the Drill Anywhere drill fields popup.</td></tr>
<tr><td>Sort Column</td><td>Allow the field to have sorting applied directly to it.</td></tr>
<tr><td>Calculations</td><td>Allow this field to be used within calculations. This also allows calculated fields to be used within other calculated fields if enabled.</td></tr>
<tr><td>Restrict by Access Filter</td><td>If the field is used as a filter, the available values (cached or prompt) will be restricted by any access filters applied to the report.</td></tr>
<tr><td>Filter Text Suggestions</td><td>If the text field is used as a filter set to User Prompt - User Entry (not Cached) then Yellowfin will suggest values as the user types.

In order for this option to work, the Filter Text Suggestions option must be enabled on the first step of the View Builder.

Note: using this will mean that Yellowfin queries the source database as the user types, each time they type. This option should only be used if performance has been considered and tested to be found acceptable.</td></tr>
</table></td></tr>
<tr><td>Mandatory Field</td><td>Displayed when the access level is set to ‘Global’. It is used when creating a report to determine if the field selected is a mandatory or suggested field.</td></tr>
<tr><td>Mandatory Filter</td><td>Displayed when the access level is set to ‘Global’. It is used when creating a report to determine if the field selected is a mandatory or suggested filter.</td></tr>
</table>

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