

Columns Conditional Formatting

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Basic Formatting

Basic rules allow you to set the format of a column using comparisons to either its own values or another field's values. This is the most common form of Conditional Format that are applied.

Report Fields

General Settings

Conditional Format Option...

Columns

Agency Region

Average Age at Camp

Demographic

Sum Athlete Counter

Conditional Widgets

Sum Athlete Counter by A...

Draft Report

Conditional Formatting - Average Age at Camp

Setup

Alert Type

These alerts are based on comparison of the column value to a set value or another column.

Basic

Advanced

Style

The text in a matching cell will replaced with an icon.

Icon

Type

The value in each cell will be compared to the value specified in each alert.

Value


Rules

+ Add Another Rule

Option	Description
Alert Type	Select the complexity of the alert rules. <ul style="list-style-type: none">• Basic: these alerts are based on comparison of the column value to a set value or another column.• Advanced: these alerts can be based on multiple conditions, set up using logic similar to that of Filter Settings.
Style	Select a display method for the alert. There are three options available: <ul style="list-style-type: none">• Bar: the value in a matching cell will be displayed as an inline bar. (Note: This type of styling can only be applied to certain types of content.)• Cell: the background colour in a matching cell will be highlighted.• Icon: the text in a matching cell will be replaced with an icon.
Type	Select the comparison type from the following options: <ul style="list-style-type: none">• Value: compares data to set values eg. Greater than 10.• Compare Column: compares data to set values stored in another column. E.g. Compare the received amount with amount invoiced to highlight those that are not equal.• Percentage of Column: compares the value to a percentage threshold of a comparison column. Use this to highlight revenue that is 10% less than 'planned revenue'.• Percentage of Total: compares the value to a percentage of the total of the column. Use this to highlight values that represent less than 5% of revenue.• Percentage of Max: compares the value to a percentage of the maximum value. Use this to highlight values relative to the maximum value eg. values that are in the lowest 20% bracket of results
Target	If you select a column comparison type you will have to choose the column that you want to compare your data to. Choose the appropriate column.

Creating Basic Rules on Report Columns

While on the Conditional Formatting popup window, you can create rules with different types of styling. Yellowfin allows users to add three types of styles when rules are matched, as explained below:

 Based on the data type of the column, the styling options will differ.

This can be used to highlight the background colour in a matching cell. For example, you can make it so that if the profits on your monthly report hit a number greater than 500,000, that data will be highlighted with a blue colour.

Follow these steps:

- 1. Choose a column from the left side, on which the formatting will be applied
- 2. Choose the *Basic* option from the Alert Type
- 3. Select *Cell* from the Style dropdown
- 4. Choose the type of comparison

Report Fields

General Settings

Columns

Conditional Widgets

Conditional Format Option...

Agency Region

Average Age at Camp

Demographic

Sum Athlete Counter

Sum Athlete Counter by A...

Draft Report

Conditional Formatting - Average Age at Camp

Setup

Alert Type

These alerts are based on comparison of the column value to a set value or another column.

Basic

Advanced

Style

The background color in a matching cell will be highlighted.

Cell

Type






The value in each cell will be compared to the value specified in each alert.

Value

Rules

+ Add Another Rule

- 5. Click on the +Add Another Rule link; a new pop to format matching cells in the report will appear
 - a. Start creating a rule by choosing an operator and then adding a value
 - b. Set a style to highlight the matching cells

Icon	Style type	Description
	Bold	To make the matching values appear bold.
	Italic	Make your values italic with this option.
	Underline	Add an underline to the matching values.
	Font colour	Change the colour of the font.
	Background colour	Change the background colour of the matching cell.

Conditional Format - Cell

Format Average Age at Camp if

Greater than or equal to ▼

13

Style

B I U A 🔍

Example

13

Submit

[+ Add Another Rule](#)

c. Click on the Submit button to save the rule

This can be used to replace the text in a matching cell with an icon.

Follow these steps:

1. Choose a column from the left side, on which the formatting will be applied
2. Choose the *Basic* option from the Alert Type
3. Select *Icon* from the Style dropdown
4. Choose the type of comparison

Report Fields

General Settings

Conditional Format Option...

Columns

Agency Region

Average Age at Camp

Demographic

Sum Athlete Counter

Conditional Widgets

Sum Athlete Counter by A...

Draft Report

Conditional Formatting - Average Age at Camp

Setup

Alert Type

These alerts are based on comparison of the column value to a set value or another column.

Basic ☒ Advanced ☐

Style

The text in a matching cell will be replaced with an icon.

Icon ▼

Type

The value in each cell will be compared to the value specified in each alert.





Value ▼

Rules

[+ Add Another Rule](#)

5. Click on the +Add Another Rule link; a new popup to format matching cells in the report will appear
 - a. Start creating a rule by choosing an operator and then adding a value
 - b. Choose an icon; you can also alter its colours

Icon	Style type	Description	Screenshot
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	Select icon	Choose from a range of icons	
	Forefront colour	Change the forefront colour of the icon.	
	Background colour	Update the background colour of the icon.	




c. Click on the Submit button to save the rule

Conditional Format - Icon


Format Average Age at Camp if

Equal to

Style

Example



Submit

+ Add Another Rule

d. This icon will now appear wherever matched data is found in your report

This is used to make the value in a matching cell display as an inline bar. (Note: This type of styling can only be applied to certain types of content.)

Follow these steps:

1. Choose a numeric column from the left side, on which the formatting will be applied.
2. Choose the *Basic* option from the Alert Type
3. Select *Bar* from the Style dropdown
4. Choose the type of comparison
5. Select a target value

Report Fields

General Settings

Conditional Format Option...

Columns

Agency Region

Demographic

Average Age at Camp

Agency Type

Sum Invoiced Amount

Sum Invoice Estimate

Conditional Widgets

Draft Report

Conditional Formatting - Average Age at Camp

Setup

Alert Type

These alerts are based on comparison of the column value to a set value or another column.

Basic ☒ Advanced ☐

Style

The value in a matching cell will be displayed as an inline bar.

Bar

Type

The value in each cell will be compared to a value in a specified column, as a percentage.

Percentage of Column

Target







Select the column you wish to use in the comparison.

Sum Invoiced Amount

Rules

+ Add Another Rule

6. Click on the +Add Another Rule link; a new popup to format matching cells in the report will appear
 - a. Start creating a rule by choosing an operator and then adding a value
 - b. Style the bar you want to make appear on the matching cells

Icon	Style type	Description
	Bar colour	Choose a colour for the bar.
	Left alignment	To place the bar on the left part of the matching cells.
	Middle alignment	To place the bar in the middle of the matching cells.
	Right alignment	To place the bar on the right side of the matching cells. <i>Note: The selected alignment's icon changes to blue</i>
	Hide/Show text	Hide or show text/value of the matching data on the bar.
	Text colour	If you opt to show text on the bar, you can also change its colour.

- c. Click on the Submit button to save the rule







Conditional Format - Bar

Format Average Age at Camp if

Equal to

30

Style

Example

123456

Submit

+ Add Another Rule

- d. This bar will now appear wherever matched data is found in your report

Advanced Formatting

Advanced rules allow you to create complex rules for determining the format of the column. For example, if you wanted to create a rule such as: If Region = Europe and Revenue > \$200,000 then highlight Profitability as **RED**.

The screenshot shows a software interface for configuring conditional formatting. On the left, a sidebar titled 'Report Fields' contains three sections: 'General Settings' with a 'Conditional Format Option...' button, 'Columns' with a list of fields (Agency Region, Demographic, Agency Type, Average Age at Camp, Sum Athlete Counter) where 'Demographic' is highlighted, and 'Conditional Widgets' with buttons for Draft Report, Big Title, bee_logo3.png, and Hexagon. The main window is titled 'Conditional Formatting - Demographic' and has a 'Setup' section. Under 'Alert Type', there are two radio buttons: 'Basic' (unselected) and 'Advanced' (selected). Below this, the 'Rules' section is empty, with a '+ Add Another Rule' link on the right.

Follow these steps:

1. Choose a column from the left side, on which the formatting will be applied.
2. Choose the *Advanced* option from the Alert Type
3. Click on the +Add Another Rule link; a new popup to format matching cells in the report will appear

Conditional Format - Advanced

Format Demographic if

Provide a description for this rule.

No conditional format rules.

Agency Region
+ Add Condition

Format as: Cell

Style






B I U A

Example
Example

Submit

+ Add Another Rule

- Enter the logic of your rule. You can select a column the operator and the value. By clicking add you can add additional rules with bracketing etc. See [Filter Settings](#) for more information
- Choose a format
- Style the values the matched conditions will display, the way you want

Icon	Style type	Description
	Bold	To make the matching values appear bold.
	Italic	Make your values italic with this option.
	Underline	Add an underline to the matching values.
	Font colour	Change the colour of the font.
	Background colour	Change the background colour of the matching cell.

- Click on the Submit button to save the advanced rule

Conditional Format - Advanced

Format Demographic if

5005

And

Demographic

Equal to

Define Value

% Average (Average Age at Ca...

Equal to

Define Value

Average Age at Camp

+ Add Condition

Filter Logic

Demographic Equal to

AND Average(Age at Camp) Equal to

Format as: Cell

Style

B

I

U

A

Example

Example

Submit

+ Add Another Rule

Conditional Formatting on Totals

Report Fields

General Settings

Conditional Format Optio...

Columns

Year (Dim)

Quarter

Sum Invoiced Amount

Totals

Sum Invoiced Amount

Conditional Formatting - Sum Sum Invoiced Amount

Setup

Style

The background color in a matching cell will be highlighted.

Cell

Type

The value in each cell will be compared to the value specified in each alert.

Value

Format Sub Totals

Total conditional formats will be applied to sub total values for this column.

Rules

+ Add Another Rule

Totals

If you have a total value displayed on any of the columns, you can apply formatting rules to those values. The setup configurations for these include:

Option	Description
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Style	<p>Select a display method for the formatting rule. There are two options available:</p> <ul style="list-style-type: none"> • Cell: the background colour in a matching Total cell will be highlighted. • Icon: the text in a matching total cell will be replaced with an icon.
Type	<p>Select the comparison type from the following options:</p> <ul style="list-style-type: none"> • Value: compares data to set values eg. Greater than 10.
Format Sub Totals	Enable this toggle to apply conditional formatting rules to subtotal cells.
Rule	Create a basic conditional formatting rules, as you would for a Column.
<p>Related links:</p> <p>Conditional Formatting</p> <p>Conditional Formatting on Canvas Widgets</p> <p>Yellowfin Canvas</p>	