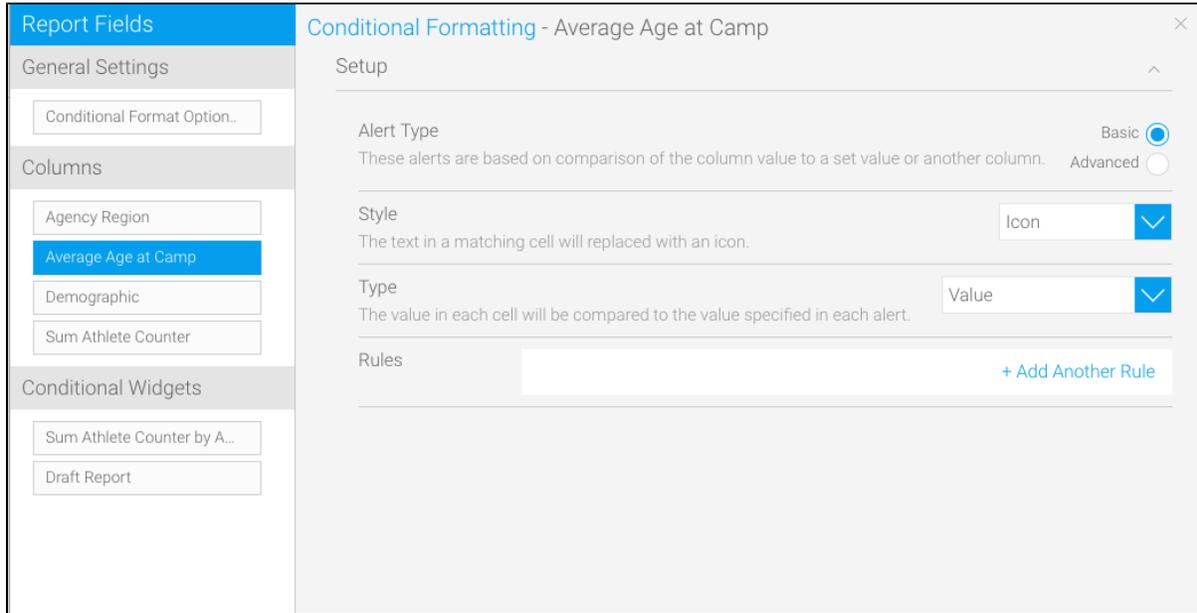


# Columns Conditional Formatting

- [Basic Formatting](#)
  - [Creating Basic Rules on Report Columns](#)
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- [Conditional Formatting on Totals](#)

## 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.



| Option     | Description   |
|------------|---|
| Alert Type | <p>Select the complexity of the alert rules.</p> <ul style="list-style-type: none"> <li>• Basic: these alerts are based on comparison of the column value to a set value or another column.</li> <li>• Advanced: these alerts can be based on multiple conditions, set up using logic similar to that of <a href="#">Filter Settings</a>.</li> </ul>  |
| Style      | <p>Select a display method for the alert. There are three options available:</p> <ul style="list-style-type: none"> <li>• 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.)</li> <li>• Cell: the background colour in a matching cell will be highlighted.</li> <li>• Icon: the text in a matching cell will be replaced with an icon.</li> </ul>   |
| Type       | <p>Select the comparison type from the following options:</p> <ul style="list-style-type: none"> <li>• Value: compares data to set values eg. Greater than 10.</li> <li>• 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.</li> <li>• 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'.</li> <li>• 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.</li> <li>• 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</li> </ul> |
| Target     | <p>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.</p>  |

## Creating Basic Rules on Report Columns

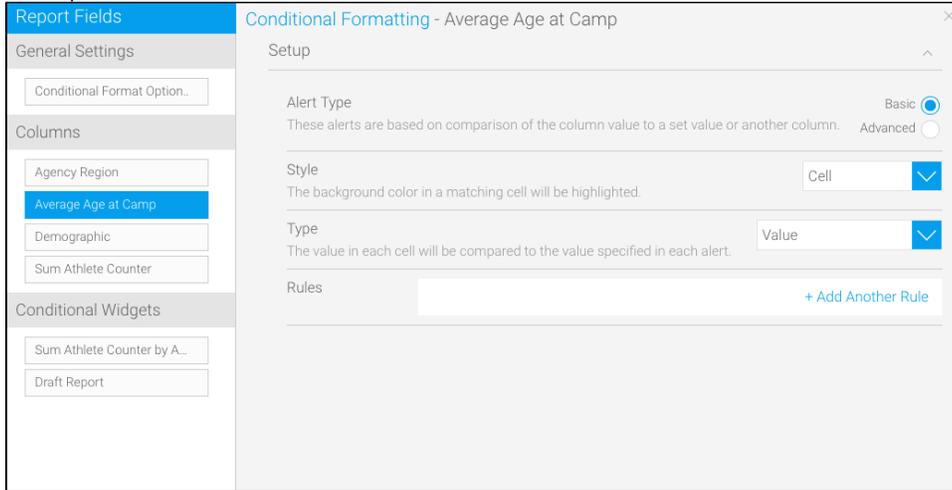
While on the Conditional Formatting popup window, you can create rules with different types of styling. Yellowfin allows users to add three types of styles when rules are matched, as explained below:

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.

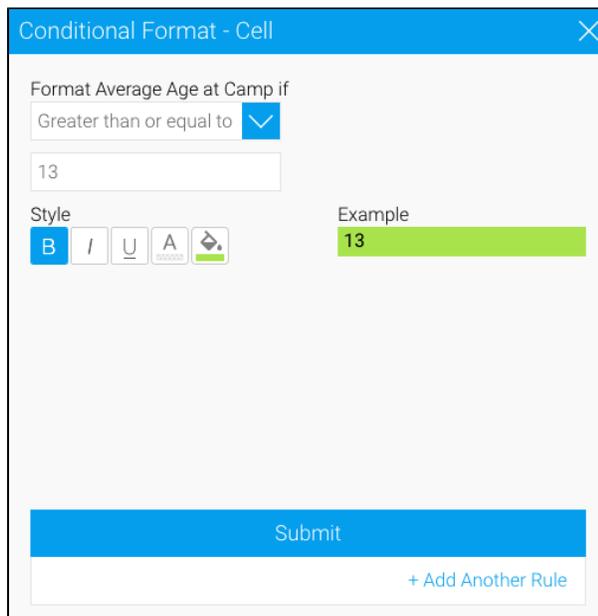
Follow these steps:

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



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. |

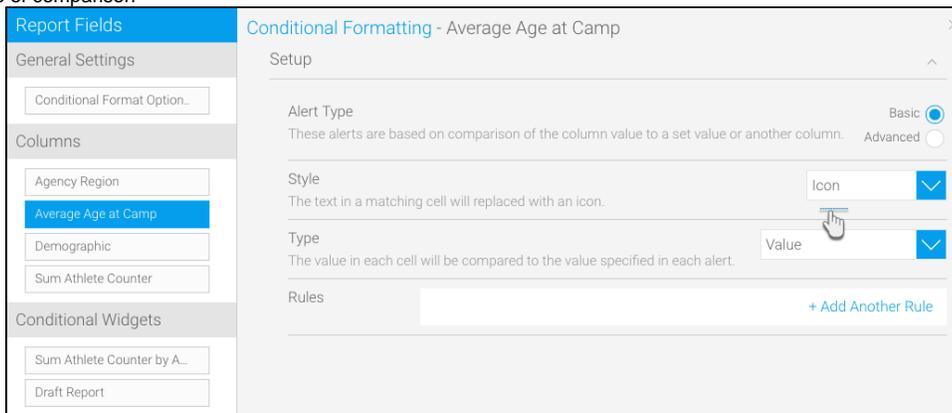


c. Click on the Submit button to save the rule

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



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 |
|------|------------|-------------|------------|
|------|------------|-------------|------------|

|   |                   |   |  |
|---|-------------------|---|--|
|  | 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





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

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

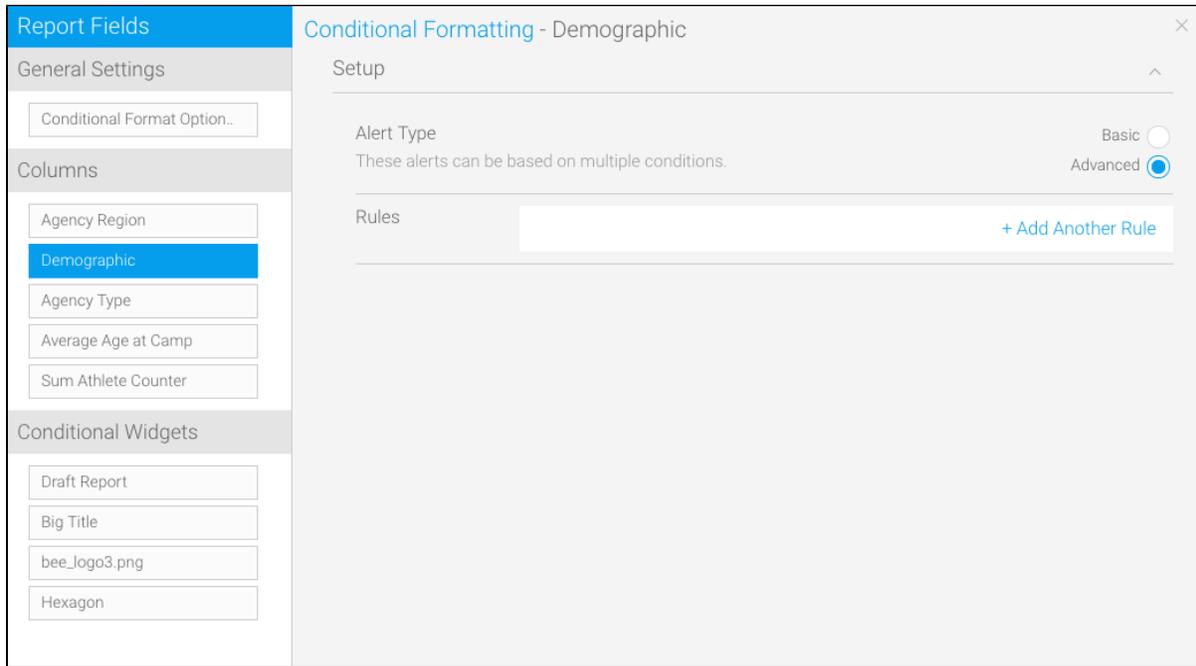
| Icon | Style type       | Description  |
|------|------------------|--|
|      | Bar colour       | Choose a colour for the bar.   |
|      | Left alignment   | To place the bar on the left part of the matching cells.   |
|      | Middle alignment | To place the bar in the middle of the matching cells.  |
|      | 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

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**.



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

/

U

A

■

Example

Example

Submit

[+ Add Another Rule](#)

- a. 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
- b. Choose a format
- c. 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. |

- d. Click on the Submit button to save the advanced rule

Conditional Format - Advanced
✕

Format Demographic if

5005

And

Demographic
 

Equal to

% Average ( Average Age at Ca...
 

Equal to

Average Age at Camp

Filter Logic

Demographic Equal to  
AND Average(Age at Camp) Equal to

Format as: Cell

Style

B
/
U
A
↺

Example

Example

[+ Add Another Rule](#)

## Conditional Formatting on Totals

Report Fields

Conditional Formatting - Sum Sum Invoiced Amount ✕

General Settings

Conditional Format Optio...

Columns

Year (Dim)

Quarter

Sum Invoiced Amount

Totals

Sum Invoiced Amount

Setup

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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 |
|--------|-------------|
|--------|-------------|

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

**Related links:**

[Conditional Formatting](#)

[Conditional Formatting on Canvas Widgets](#)

[Yellowfin Canvas](#)