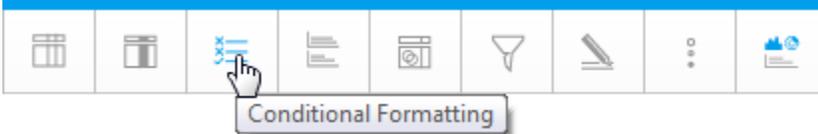


# Conditional Formatting

- Overview
- General Settings
- Field Settings - Basic Rules
- Field Settings - Advanced Rules
- Conditional Format Data Validation
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## Overview

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The most important reason for creating a Conditional Format is to assist an end user to interpret the data presented to them. The example below illustrates how Conditional Formats can help the user. The average salary column has had red and green Conditional Formats applied to it. This makes it easy for the user to quickly interpret the report and act on the information provided.

Camp Region	KPI	Invoiced
Asia	✓	\$120,474,325
Australia	!	\$97,832,651
Europe	✓	\$191,560,001
Latin America	✗	\$1,602,199
North America	✗	\$59,474,670
		\$470,943,846

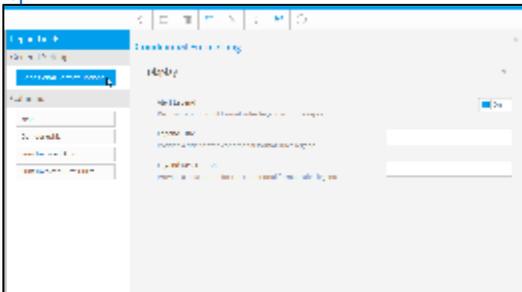
## Conditional Format List

- ! KPI Between 40% And 60% of max
- ✗ KPI Less than 40% of max
- ✓ KPI Greater than 60% of max

It is recommended that Conditional Formats are used whenever the reader of a report needs to be drawn to act or interpret data based on a pre-determined set of rules.

## General Settings

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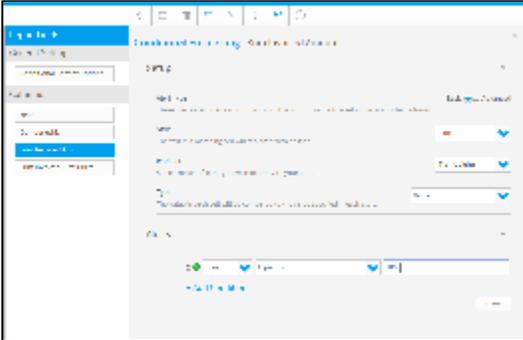


Option	Description
<b>Alert Legend</b>	Display a conditional format rules legend with the report.
<b>Legend Title</b>	Provide a title for the conditional format rules legend.
<b>Legend Description</b>	Provide a description for the conditional format rules legend.

## Field Settings - Basic Rules

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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 forms of Conditional Format that is applied.



Option	Description																									
<b>Alert Type</b>	Select the complexity of the alert rules. <ul style="list-style-type: none"> <li>• <b>Basic:</b> these alerts are based on comparison of the column value to a set value or another column.</li> <li>• <b>Advanced:</b> these alerts can be based on multiple conditions, set up using logic similar to that of <a href="#">Filter Settings</a>.</li> </ul>																									
<b>Style</b>	Select a display method for the alert. There are four options available: <ul style="list-style-type: none"> <li>• <b>Bar:</b> the value in a matching cell will be displayed as an inline bar.</li> <li>• <b>Cell:</b> the background colour in a matching cell will be highlighted.</li> <li>• <b>Icon:</b> the text in a matching cell will be replaced with an icon.</li> <li>• <b>Text:</b> the text in a matching cell will be highlighted.</li> </ul>																									
<b>Icon Set</b>	If the Style is set to Icon then select the set of icons to apply to the alert. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <table border="1"> <tbody> <tr> <td><b>Traffic Lights</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Arrows Up</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Arrows Down</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Ticks</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Shapes</b></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div>	<b>Traffic Lights</b>					<b>Arrows Up</b>					<b>Arrows Down</b>					<b>Ticks</b>					<b>Shapes</b>				
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<b>Type</b>	<p>Select the comparison type from the following options:</p> <ul style="list-style-type: none"> <li>• <b>Value:</b> compares data to set values eg. Greater than 10.</li> <li>• <b>Compare Column:</b> 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>• <b>Percentage of Column:</b> 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>• <b>Percentage of Total:</b> 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>• <b>Percentage of Max:</b> 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>
<b>Target</b>	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.

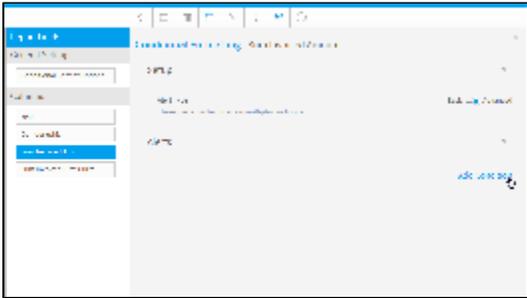
Once you have selected how you want to highlight your data you must set the alert rule. The rule input section will differ based on earlier selections however, generally you will need to choose the colour the operator (greater than etc) and input the values.

Option	Description
<b>Colour/Icon</b>	Define the colour or icon to be used for each rule.
<b>Operator</b>	Define the operator to be used for each rule.
<b>Value</b>	Define the value to be used (if required) for each rule.

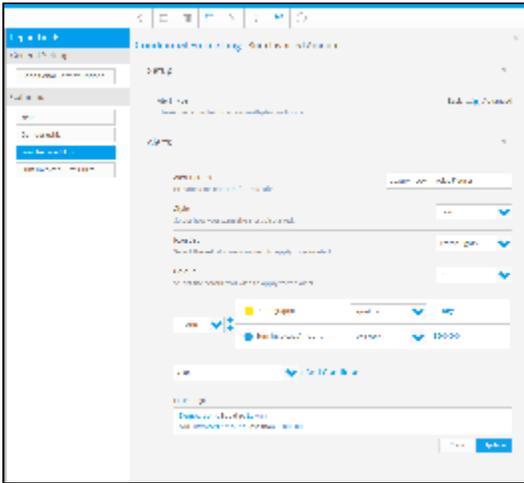
## Field Settings - Advanced Rules

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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**.



Option	Description
<b>Alert Type</b>	<p>Select the complexity of the alert rules.</p> <ul style="list-style-type: none"> <li>• <b>Basic:</b> these alerts are based on comparison of the column value to a set value or another column.</li> <li>• <b>Advanced:</b> these alerts can be based on multiple conditions, set up using logic similar to that of <a href="#">Filter Settings</a>.</li> </ul>



Option	Description																									
<b>Alert Details</b>	Provide a description for this rule.																									
<b>Style</b>	Select a display method for the alert. There are four options available: <ul style="list-style-type: none"> <li>• <b>Bar</b>: the value in a matching cell will be displayed as an inline bar.</li> <li>• <b>Cell</b>: the background colour in a matching cell will be highlighted.</li> <li>• <b>Icon</b>: the text in a matching cell will be replaced with an icon.</li> <li>• <b>Text</b>: the text in a matching cell will be highlighted.</li> </ul>																									
<b>Icon Set</b>	If the Style is set to Icon then select the set of icons to apply to the alert. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <table border="1"> <tr> <td><b>Traffic Lights</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Arrows Up</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Arrows Down</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Ticks</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Shapes</b></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> </div>	<b>Traffic Lights</b>					<b>Arrows Up</b>					<b>Arrows Down</b>					<b>Ticks</b>					<b>Shapes</b>				
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<b>Colour</b>	This option requires you to define either the colour, or the icon from a set, to be applied to the rule.																									
<b>Rules</b>	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. <p style="text-align: center;"><i>See <a href="#">Filter Settings</a> for more information.</i></p>																									

## Conditional Format Data Validation

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When inserting values into the Conditional Format type a number of rules need to be followed. These include:

### Value Overlaps

If you are creating a number of Conditional Formats, as in the example above, care will have to be taken to ensure that the Conditional Format values do not overlap. For instance you cannot set one record that is 50 to 60 and another 55 to 65. This will cause a clash in processing and may result in your report failing.

### Value Sequence

When creating a range of values – such as for a **BETWEEN** operator the lower end variable must be inserted as the first value of the Conditional Format followed by the higher. Example – 30 then 40 not 40 then 30. If this is not followed you report Conditional Format will fail since no data will meet the criteria.

### Value Applicability

You do not have to create a Conditional Format for every possible value that will be returned. If there is a measure that does not meet a Conditional Format criterion it will be returned in a normal font. Conditional Formats should only be put on values that you want to draw attention to.

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