

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.

Field Settings

Search

Athlete

Athlete Location

Athlete Payment

Invoiced Amount

Cancellation Fee

Cost of Camp

Camp

Booking

Parameters

Time

Field Settings - Invoiced Amount

Details

Table Name

ATHLETEFACT

This is the name of the source table that the view field comes from.

Column Name

INVOICEDAMOUNT

This is the name of the source column that the view field is based on.

Display Name

Invoiced Amount

Provide a display name for the field, to be used in the report builder.

Description

Invoiced amount (in the travel agency's local currency).

Provide a description for the column to aid report writers understanding of its purpose and contents.

Data Type

Numeric

This is the type of data contained within the source column.

Field Type

Dimension

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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Field Settings

Search

Q

Dimensions

FIRSTNAME

GENDER

FIRSTNAME

REGION

PERSONTYPE

ISOCODE

LASTNAME

REGION

PERSONTYPE

ISOCODE

LASTNAME

GENDER

Field Settings - FIRSTNAME

Details

Display Name

Provide a display name for the field, to be used in the report builder.

FIRSTNAME

Table Name

This is the name of the source table that the view field comes from.

PERSON

Table Display Name

This is the display name of the source table that the view field comes from.

PERSON INFO

Column Name

This is the name of the source column that the view field is based on.

FIRSTNAME

Description

Provide a description for the column to aid report writers understanding of its purpose and contents.

FIRSTNAME

Data Type

Varchar

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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Field Settings - Invoiced Amount

Details

Format

Format
Display the value as a decimal.
Numeric

Decimal Places
Define the number of decimal places to be displayed.
2

Prefix
Define text to display before the field value.

Suffix
Define text to display after the field value.

Rounding
Define the rounding you wish to apply to the field.
Round Half Up

Thousand Separator
Display thousand separators in the numeric value.
☒

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. <table border="1"> <thead> <tr> <th>Option</th><th>Description</th></tr> </thead> <tbody> <tr> <td>URL</td><td>Define the URL to use, including ## to be replaced by the value of the field.</td></tr> <tr> <td>URL Type</td><td>Define if the URL is local or remote.</td></tr> <tr> <td>New Window</td><td>Define if the URL opens in the current or new window.</td></tr> <tr> <td>Display Text</td><td>Define text to display instead of the full URL. (optional)</td></tr> </tbody> </table> 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	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)
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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)										
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. <table border="1"> <thead> <tr> <th>Option</th><th>Description</th></tr> </thead> <tbody> <tr> <td>Reference Type</td><td>Select the Reference Code set to be applied to the field.</td></tr> </tbody> </table> See Reference Codes for more information.	Option	Description	Reference Type	Select the Reference Code set to be applied to the field.						
Option	Description										
Reference Type	Select the Reference Code set to be applied to the field.										
Raw Formatter	Displayed the data as it would have been returned from the database – no additional formatting applied.										
Text											
Text	Displays as plain text.										

Case Formatter	Define if the value of the field should be converted to display as a specific case.	
	Option	Description
	Case	Define if the value should be converted to display in Capital Case , 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 Formatter	This allows you to format a field that contains HTML tags.	
	Option	Description
	Remove HTML tags	Specify if Yellowfin should be removing HTML tags from the displayed text, or including them.
HTML 5 Video Formatter	This allows you to display video from a path stored in the field.	
	Option	Description
	Video Width	Define the width, in pixels, of the video display.
	Show Video Controls	Specify if the controls for the video should be displayed or hidden.
	Auto Play Video	Specify if the video should automatically play when the report loads.
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 allows you to display a YouTube video by using the value in the field as the video ID.	
Date		
Date	Displays value as a date – multiple date options exist.	
	Option	Description
	Date Format	Specify the format to be applied to the date values. This will not convert the value, just format it.
	Date Other	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
Time	Displays value as a time field – multiple date options exist.	
Timestamp	Displayed full date and time value	
Date Part Formatter	Allows you display part of the date, e.g. Month Name, rather than the full date.	
	Option	Description
	Format	Select the part of the date value to be displayed in the table.
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.	
Geometry		
Default Geometry	This uses the default settings for the geometry, as defined by the source database.	
Geometry	Option	Description
	Decimal Places	This allows you to define the precision of the geometry data, down to the number of decimal places.

Access

Field Settings#top

Field Settings

Search

Agency

Agency Type

Agency Name

Agency Region

Agency Country

Agency Demographic

Agency Geo Polygon

Agency Geo ISOCode

Athlete

Athlete Location

Athlete Payment

Booking

Access

Access Filter

Select an access filter to apply to this field.

None

Create new access filter.

Access Filter Logic

Report data will be filtered to only show the user records that match their access filter record values.

Access Level

Specify if this use and display of this field should be restricted to select users.

Global

Restricted

Field Permissions

Specify which specialty functions this field can use with.

Display Column

Grouping

Drill Anywhere

Sort Column

Calculations

Restrict by Access Filter

Filter text suggestions

Mandatory Field

Specify if this field is required or should be suggested for use as a field in

--- N/A ---

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 <i>not</i> 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.

Field Permissions	Field permissions dictate how the field can be used in reports. For example can the field be displayed, grouped or sorted.	
	Option	Description
	Display Column	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.
	Grouping	Allow the field values to be grouped using the report builder Group Values function.
	Drill Anywhere	Allow the field to be displayed in the Drill Anywhere drill fields popup.
	Sort Column	Allow the field to have sorting applied directly to it.
	Calculations	Allow this field to be used within calculations. This also allows calculated fields to be used within other calculated fields if enabled.
	Restrict by Access Filter	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.
	Filter Text Suggestions	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.
Mandatory Field	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.	
Mandatory Filter	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.	

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