

Column Formatting

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Overview

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The Column format tab contains a number of sections that you can use to format your report fields. For instance, you could use this feature to display flags in a column report that contains country names.

Camp Country ▾



















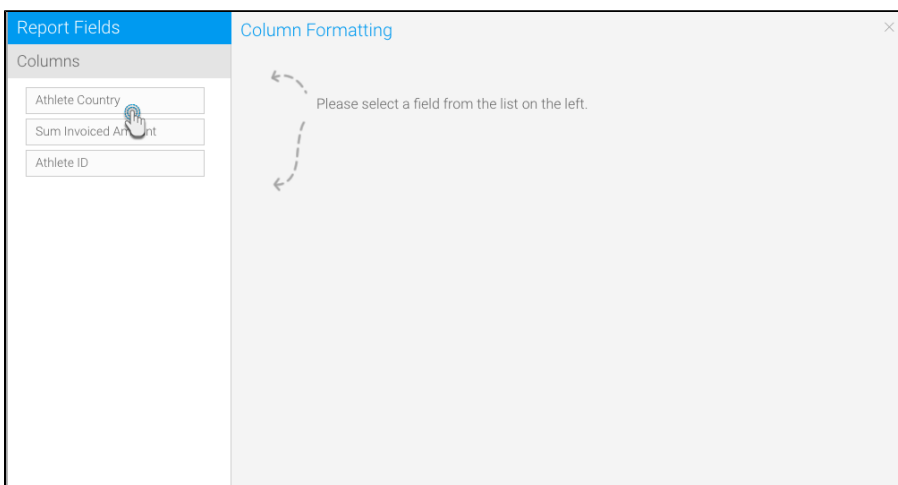


How to Apply

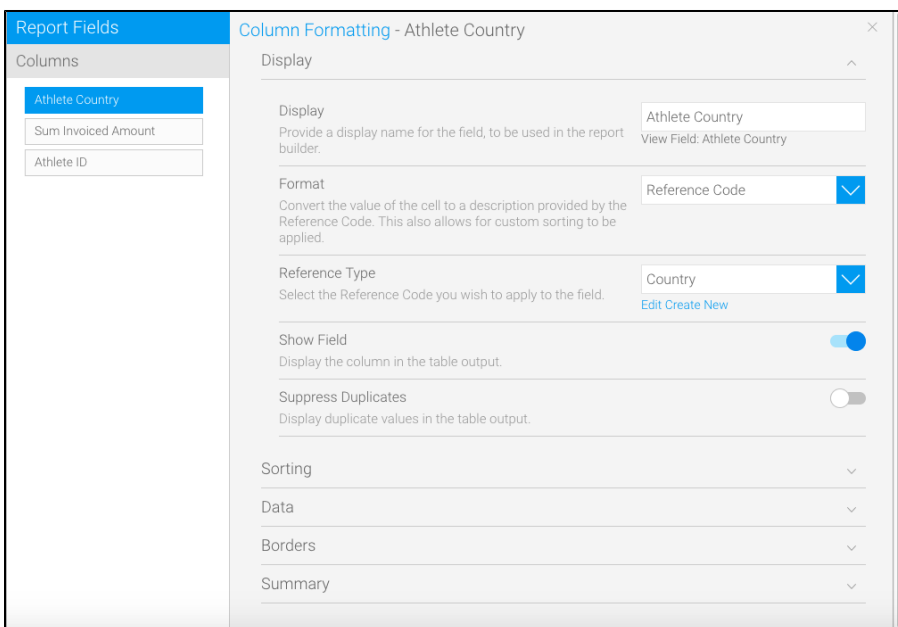
1. Create a report as you normally would.
2. While in the Data mode or the Design mode, click on the Column Formatting icon in the header.



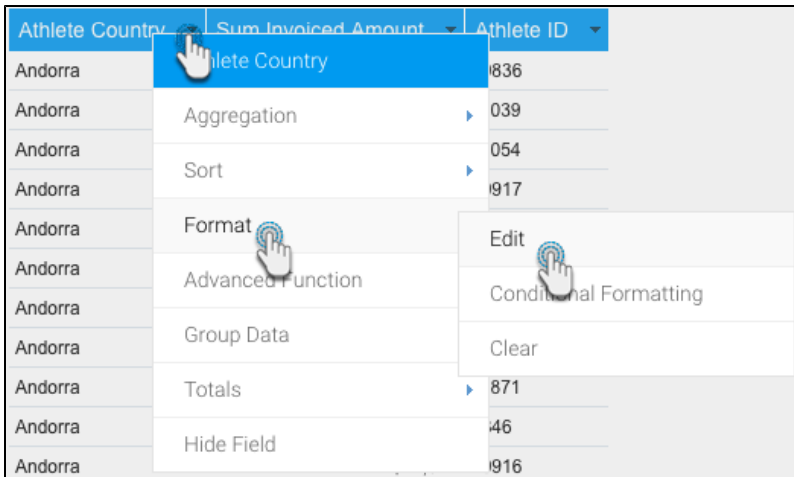
3. When the following popup appears, select a field from the left side.



4. Once a field is selected, the column formatting settings will appear in the popup.



5. Simultaneously, you could also bring up this popup by clicking on a column's menu, then selecting Format, and finally clicking on Edit.



6. See the below section to learn about the different types of formatting you could apply to a report column.

Column Formatting Settings

Each of column formatting setting options is described below.

Option	Description
Display	To change the display name of the column from the default value simply update this field.
Format	Each data type will have a unique set of format options – eg Text, Date or Numeric. See Display Format Types for details on each type.
Description	Enter or update the description of a calculated field to allow report writers to understand its purpose. This description will appear in a tooltip when hovered over calculated field columns.
Sub Format	Depending on the format option you have chosen for the column above you will have a separate set of sub format options. Select the appropriate sub format option.
Date Other	If you select 'Other' from the date sub format you will be able to build your own custom date format. For example to create a Japanese date format which includes characters, eg. 2003?4?2?would be created by adding in: yyyy?M?d ?
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	The rounding format allows you to choose how a decimal value should be rounded. Round Up: Will round any decimal up eg. 1.1 to 2 Round Down: Will round any decimal down eg. 1.9 to 1 Round Half Up: Rounds 0.5 and above up Round Half Down: Rounds 0.5 and below down

Thousand Separator	Turns the defaulted thousand separator for your instance on or off. For example: 1000 to 1,000																															
Bracket Negatives	Displays negative values with or without brackets.																															
Show Field	To hide the column from the report, select this item. By hiding a column the data presented on the page is not re-grouped which would occur if you removed the field from your report. For Example: Original Report <table><tr><th>City</th><th>Country</th><th>Sum Revenue</th></tr><tr><td>London</td><td>UK</td><td>500,000</td></tr><tr><td>Manchester</td><td>UK</td><td>300,000</td></tr><tr><td>Hamburg</td><td>Germany</td><td>400,000</td></tr><tr><td>Munich</td><td>Germany</td><td>450,000</td></tr></table> City Column Hidden <table><tr><th>Country</th><th>Sum Revenue</th></tr><tr><td>UK</td><td>500,000</td></tr><tr><td>UK</td><td>300,000</td></tr><tr><td>Germany</td><td>400,000</td></tr><tr><td>Germany</td><td>450,000</td></tr></table> City Column Removed From Report <table><tr><th>Country</th><th>Sum Revenue</th></tr><tr><td>UK</td><td>800,000</td></tr><tr><td>Germany</td><td>850,000</td></tr></table>	City	Country	Sum Revenue	London	UK	500,000	Manchester	UK	300,000	Hamburg	Germany	400,000	Munich	Germany	450,000	Country	Sum Revenue	UK	500,000	UK	300,000	Germany	400,000	Germany	450,000	Country	Sum Revenue	UK	800,000	Germany	850,000
City	Country	Sum Revenue																														
London	UK	500,000																														
Manchester	UK	300,000																														
Hamburg	Germany	400,000																														
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UK	800,000																															
Germany	850,000																															
Suppress Duplicates	The suppression of duplicate option will remove duplicate values from a column and group the values under a single value.																															

Option	Description
Direction	Apply sorting to an individual column. If you wish to use multiple fields to provide a sort order, see Table Sort .

Option	Description
Font Style	Define styling options for the text in this field. This covers the font face, font size, font colour, and font style.
Alignment	Define the alignment option for text in this field.
Background	Define a custom background colour for the column.
Column Width	Define the width of the column.
Maximum Length	Define the maximum number of characters to be displayed in the cell.
Wrap Text	Wrap long cell text across multiple rows.
Vertical Alignment	Define the vertical alignment for text in this field - top, middle or bottom.
Option	Description

Position	Define where borders should be displayed around the edges of the cell.
Colour	Define the colour of the cell borders.
Width	Define the thickness of the cell borders.
Option	Description
Total Aggregation	Define the aggregation to be applied to the column as a total. Note: the calculated total is only available for calculated fields and will create a total based on the same rules as were used for the calculation. For example if you have a ratio of Received / Invoiced the total will equal the Sum (Received) / Sum (Invoiced)
Display Total Value	Show or hide the total aggregated value of a column. Note that this does not affect subtotals, i.e. if you've chosen to hide the total, the subtotals will still be displayed. Works for regular and cross-tab reports.
Move Total Value Location	When Display Total Value is activated, choose whether to display the table totals at their default location of the end of the table, or activate this option to move the totals to the start of the table.
Display Labels	Display a text label for the column summary.
Style	Define custom formatting for the summaries of this column. This covers the typeface, font size, colour and emphasis, and text alignment.
Background	Define the background colour for the column summary.
Sub Total	Display a sub total row for each unique value in the column.
Move Sub Total Value Location	When Sub Total is activated, choose whether to display the table subtotals at their default location of the end of each section, or activate this option to move the subtotals to the start of each section.
Hide Sub Total on Columns	Select column fields from this list to hide their subtotal. Works for regular and cross-tab reports. Tip: Remember to disable conditional formatting on subtotal cells if you're opting to hide the subtotal values.

Display Format Types

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.

Format Option	Description
Text	Displays as plain text.
Action button	Allows you to create an action button linked to a URL. You can pass the value of the returned data into a URL link. Use double hashes ## to indicate where you want the column value to be placed in the url itself. Click here for additional settings related to this formatter. For example, the system will replace the ## in the following link with the column value, and initiate a Google search on it. http://www.google.com.au/search?hl=en&q=## Note: This formatter is similar to the 'Link to URL' formatter.
Case Formatter	Allows you to format text as 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	Formats a field containing HTML tags, either by removing them, or using them, depending on user selection. For example, if you wanted to display an image using a URL the field may look something like this: .
HTML 5 Video	Displays a video from a path stored in the field, either a full URL, or a relative path if the video is stored in the Yellowfin ROOT directory.
Image Link Formatter	When a field contains a URL to an image file, choosing this option displays the image rather than the URL, effectively providing images within reports.

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. For example: Formatting on a column of IP addresses and the url typed in is: <code>http://www.google.com.au/search?hl=en&q=##</code> This essentially means that every ip address will be placed into it into it i.e.: <code>http://www.google.com.au/search?hl=en&q=10.100.32.44</code>
Reference Code	Converts the text in the cell to the value of an internal lookup table. E.g. AU to Australia. See Reference Codes for more information.
Sparkline Formatter	Allows you to create a single sparkline column or column chart within the report table. Click here for additional settings related to this formatter. Tip: You may use this in conjunction with the Sparkline Array advanced function, or any text field that contains comma separated numeric values. For example, you may create a calculated field with multiple values gathered from different metrics or dimensions to create a sparkline chart, as long as they are comma separated.
Raw Formatter	Displayed the data as it would have been returned from the database – no additional formatting applied.
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 displays a YouTube video, based on the ID being stored in the field.
Date	
Date	Displays value as a date – multiple date options exist.
Time	Displays value as a time field – multiple date options exist.
Timestamp	Displayed full date and time value
Date Part Formatter	Takes a date field and formats the display to show part of that date.
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.

Action button formatter settings

Below are descriptions of all settings used to configure action buttons in reports.

Option	Description
URL	Define the URL to use, including ## to be replaced by the field value. You can also reference other columns of data in the table by using the <code>{{1}}</code> syntax, where '1' is the position of the column appearing in the report table. Note that the position numbering starts from '1' rather than '0'.
URL type	Specify whether the URL points to something external (Remote) or internal (Local) in the system.
Apply URL Encoding	Enable this option to apply URL encoding used for special characters (such as %20 for a space) to the field values. Note that this applies to the entire URL, so this may break URLs if they contain symbols because symbols would inadvertently be replaced with encoded values too. Disable this option if you wish to leave field values in their original format. This is recommended for URLs that contain symbols so that they remain as symbols instead.
New window	Allows you to open the URL in a new browser window when enabled.
Button display text	Enter the text to be displayed on the action button.
Disable button on click	Specify whether the button should be disabled or not when clicked.

Use data values to disable button	The button will become disabled by specified data values in a given column.
Status field	Enter the column number from disabled values will be sourced.
Disabled values	No action button will be displayed for these values, a completed status button will be displayed instead.
Inactive display	Choose how the button should be displayed for inactive status. You can choose to display a blank cell, a success icon, or an inactive button.

Sparkline formatter settings

Below are descriptions of all settings for the Sparkline formatter. Only one Sparkline chart per table is currently supported.

Option	Description
Width	Specify the maximum width of the sparkline chart.
Height	Specify the maximum height of the sparkline chart.
Sparkline type	Select whether the chart should be displayed as a sparkline or a column.
Includes scaling value	Enables scaling on the chart. Scaling enables the chart to scale lines by observing values of all rows. If left unscaled, a sparkline with smaller values, such as 10, 21, 35, and so on, might look similar to a sparkline with drastically different values that have similar value differences, such as 100, 210, 350, and so on. If enabled, the first data-point will be treated as a scaling value, and will not be rendered.

Column Drop Down Menu

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If you wish to select a column to format from the table you can do so by clicking the menu drop down in the column title.

Year	Camp Region	Invoiced	% Max Invoiced
200	Year	138,005	
	Aggregation	169,525	
	Sort	325,943	
200		633,473	
200	Advanced Function	780,247	
	Format	688,904	
	Clear Formatting	531,994	
	Conditional Formatting	210,324	
200		611,470	
200	Group Data	765,249	
	Totals	733,306	
	Hide Field	671,489	

Option	Description
Aggregation	Allows the user to apply Aggregations to the field.
Sort	Allows the user to apply sorting to the individual field. • None: removes any sorting applied to the field. • Ascending: sort the data in ascending order – A to Z or 1 to 9. • Descending: sort the data in ascending order – Z to A or 9 to 1.
Advanced Function	Allows the user to apply an Advanced Function to the field.
Format	Opens the Column Formatting menu with this field selected to allow the report writer to apply formatting options.
Clear Formatting	Allows the report writer to clear all formatting options applied to this field.
Conditional Formatting	Allows the user to open the Conditional Formatting menu for this field in order to apply alerts.
Group Data	Allows the user to create groups of values based on the data in the field. e.g. age (1-18 = Youth, 19-36 = Gen Y etc)
Totals	Allows the user to apply a summary aggregation to the field.
Hide Field	Allows the user to hide the field from display.

Column Drag & Drop Options

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Most of the formatting options available to you are accessed through the format menus. However, once your report has been generated you can use some drag and drop formatting options to change the layout of your report.

Note: the drag and drop formatting are only available whilst a report is in DRAFT mode. If the report is ACTIVE you will not see these options.

Column Order

You can change the order of your columns directly on the screen. This option is only available for 'column' based reports.

1. To move a column, place your cursor over the column title and when the cursor changes into a cross icon click and hold.
2. Now drag your column into the desired location. You will see the outline of the column and a highlighted line which indicated where the left hand border of the column will be placed.
3. Drop your column and the page will be refreshed with your column in the new location.

Year ▾	Camp Region ▾	Invoiced ▾	% Max Invoiced ▾
2007	Asia	\$11,138,005	■
	Europe	\$169,525	
	North America	\$6,325,943	■
2007		Sum: \$17,633,473	
2008	Asia	\$4,780,247	■
	Australia	\$88,904	
	Europe	\$531,994	
	North America	\$3,210,324	■

Column Width

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You can resize a column as seen on a report by placing you cursor over the right hand column border of the column you wish to resize.

- 1. Click and hold the cursor. The cursor will be represented as a horizontal line and the column outline will be highlighted.
- 2. Drag your column to the desired width and let the cursor go. The report will refresh and your column will be resized.

Year ▾	Camp Region ▾	Invoiced ▾	% Max Invoiced ▾
2007	Asia	\$11,138,005	
	Europe	\$169,525	
	North America	\$6,325,943	
2007		Sum: \$17,633,473	
2008	Asia	\$4,780,247	
	Australia	\$88,904	
	Europe	\$531,994	
	North America	\$3,210,324	

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