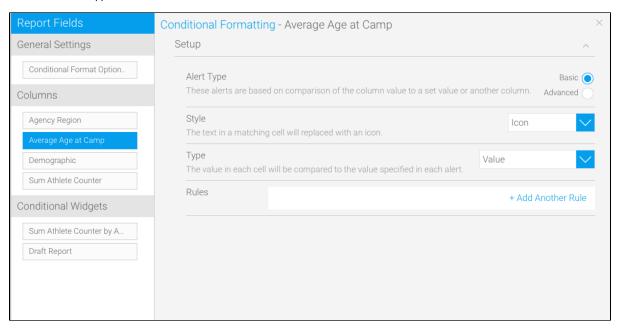
# **Columns Conditional Formatting**

## **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	Select the complexity of the alert rules.  • 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:  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.
Туре	<ul> <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	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**

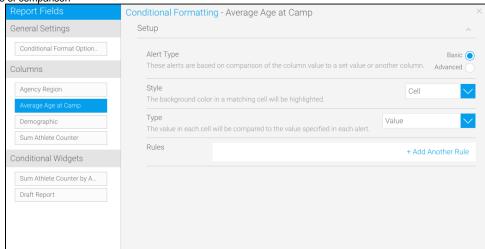
While on the Conditional Formatting popup window, you can create rules with different types of styling. Yellowfin allows users to add three types of styles when rules are matched, as explained below:



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.

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

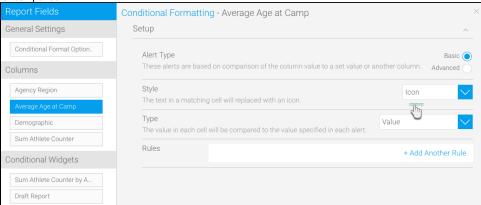
Icon	Style type	Description
В	Bold	To make the matching values appear bold.
	Italic	Make your values italic with this option.
Ū	Underline	Add an underline to the matching values.
A	Font colour	Change the colour of the font.
<b>\$</b>	Background colour	Change the background colour of the matching cell.



c. Click on the Submit button to save the rule

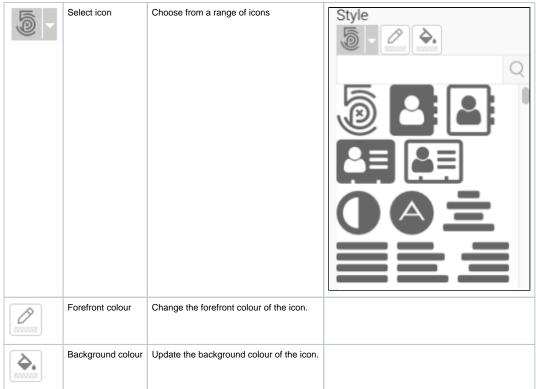
This can be used to replace the text in a matching cell with an icon.

- 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

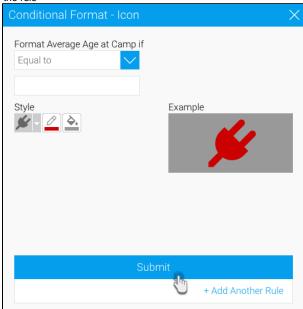


- 5. Click on the +Add Another Rule link; a new popup to format matching cells in the report will appear
  - a. Start creating a rule by choosing an operator and then adding a value
  - b. Choose an icon; you can also alter its colours

Icon	Style type	Description	Screenshot
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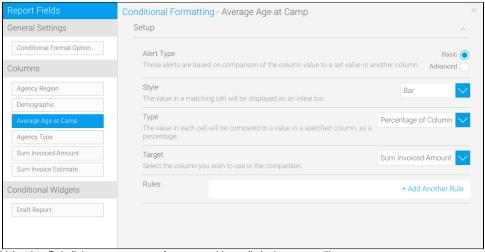
c. Click on the Submit button to save the rule



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.)

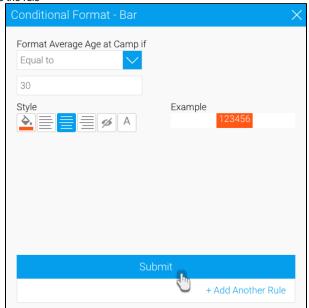
- 1. Choose a numeric column from the left side, on which the formatting will be applied.
- 2. Choose the Basic option from the Alert Type
- 3. Select Bar from the Style dropdown
- 4. Choose the type of comparison
- 5. Select a target value



- 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
<b>\_</b>	Bar colour	Choose a colour for the bar.
	Left alignment	To place the bar on the left part of the matching cells.
$\equiv$	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. Note: The selected alignment's icon changes to blue
55	Hide/Show text	Hide or show text/value of the matching data on the bar.
A	Text colour	If you opt to show text on the bar, you can also change its colour.

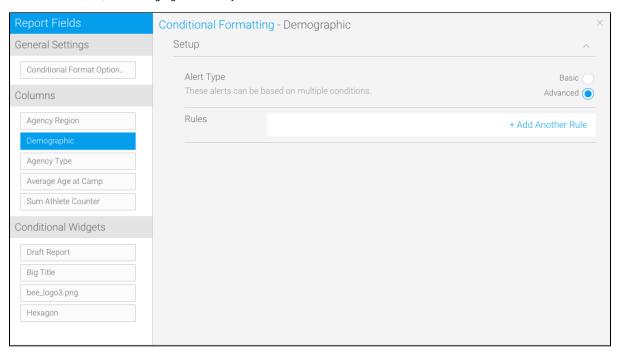
c. Click on the Submit button to save the rule



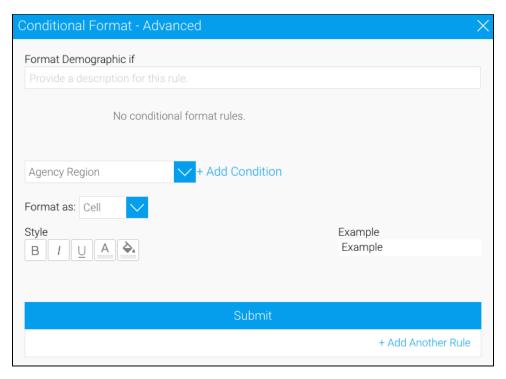
d. This bar will now appear wherever matched data is found in your report

## **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.



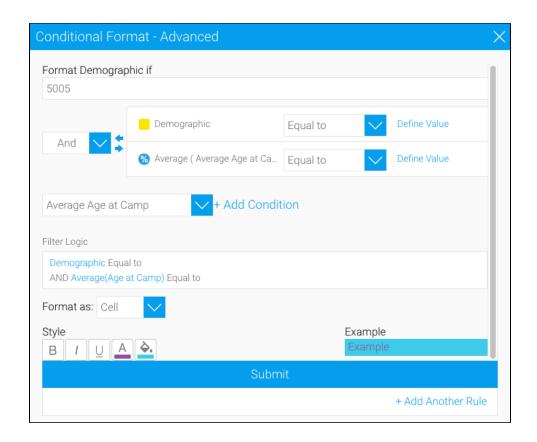
- 1. Choose a column from the left side, on which the formatting will be applied.
- 2. Choose the Advanced option from the Alert Type
- 3. Click on the +Add Another Rule link; a new popup to format matching cells in the report will appear



- 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
В	Bold	To make the matching values appear bold.
	Italic	Make your values italic with this option.
Ū	Underline	Add an underline to the matching values.
A	Font colour	Change the colour of the font.
<b>\$</b>	Background colour	Change the background colour of the matching cell.

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



Related links:

**Conditional Formatting** 

Conditional Formatting on Canvas Widgets

Yellowfin Canvas