

Chart Formatting

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Overview

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The Chart step formatting menu bar provides you with all the formatting options for your chart. You can use these options to change settings such as the legend, background, axis and label.



Note: the menus and items contained within them will change based on the type of chart you are using.

Reset

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The Reset menu allows you to reset your chart or formatting options:

- **Formatting:** this will reset your formatting selections, but keep the chart type and field selections defined.
- **Chart:** this will reset your chart, including all formatting, field, and chart type selections, returning it to an empty state.

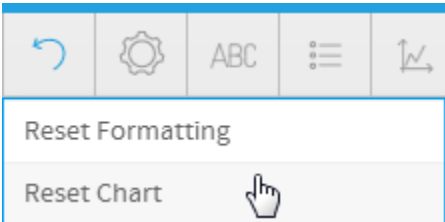


Chart Settings

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The chart format options are the most dynamic options and are based on the type of chart selected. For example for a pie chart you will be able to set the shadow colour and exploding slice options. The common options found in the chart format drop down include interactivity options such as visible series selection.



Chart Settings

Size & Position

Width

Specify the width (pixels) of the chart as it should display on the report preview page.

Height

Specify the height (pixels) of the chart as it should display on the report preview page.

Chart Position

Specify the position of the chart in relation to the table.

Top

Horizontal Alignment

Specify which edge of the table the chart should be aligned to.

Left

Style

Option	Description
Width	Define the width of the chart in pixels. This option is used instead of resizing the chart using the dragging method.
Height	Define the height of the chart in pixels. This option is used instead of resizing the chart using the dragging method.
Chart Position	Specify the position of the chart in relation to the table.
Horizontal Alignment	Specify which edge of the table the chart should be aligned to.

See [Chart Size & Position](#) for more information.

Option	Description
Yearly Comparison	Display multiple years on the x axis of the chart, with one line per series.
Units	Select the granularity of the dates to be displayed. Selecting a unit of finer granularity than your data will result in using the level of your data.

See [Time Series](#) for more information.

Option	Description
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Shading	Define whether the area has shading or is a solid colour.
Curved	Define whether the corners to the bars/columns will be curved or squared.
Glow	Define whether the bars/columns will have a glow applied.
Shadows	Define whether the bars/columns have a shadow applied.
Colour Set	The colour applied to this chart will be based the selection made. Possible options are; Metric, Monochrome, Configuration Defaults. • Metric: The colour applied to this chart will be based the default colours applied to metrics in the view. If no colour was defined for a metric, configuration defaults will be used. • Monochrome: The colour applied to this chart will be based on different shades of a single selected colour. • Configuration Defaults: The colour applied to this chart will be based on the defaults defined in configuration. • Reference Code: The colour applied to this chart will be based on the defaults applied to the Org Reference Code.
Colour	This is only available if Monochrome is selected above. Define the colour to be used for monochromatic colouring of the chart.
Opacity	Select the opacity percentage of the chart. The lower the percentage, the more transparent it is.
Other Segment	Select the % of total a segment must be smaller than in order to be grouped into an 'Other' segment. If 0 there is no grouping.
Shadow Colour	Define the colour of the shadow effect applied to the pie.
Outline Colour	Define the colour of the outline of the pie and segments.
Outline Width	Define the width of the outline of the pie and segments.
Pie Shading Style	Define the shading style to apply to the pie.
Start Position	Select the position relative to an analogue clock face that the first segment in the pie should start.
Explode Slice	Define which segment(s) of the pie should be split from the main pie.
Depth Factor	Select the percentage of the chart display to be used for the 3D height of the pie.
Keep Circular	Display the pie to fill the full chart area. This means the pie may be stretched so there is no empty space.
Hollow Shapes	Display the line shapes with a solid colour centre at each data point, or hollow, depending on the selection.
Curved Lines	Display straight or curved lines between each data point, depending on the selection.
Total Value	Define the total value contained in the proportional infographic image. If left blank the series total will be used. If the series total is less, there will be 'empty colour' for the rest of the image. If it is more, everything after the specified value will be ignored.
Empty Colour	Define the colour to be displayed if the specified Total Value is not met by the selected series.
Orientation	The image used by the proportional infographic will be filled from the top down.
Scale	Display a scale above the comparative infographic that shows the min and max values, and the central point.
Scale Font	Define the formatting for text displayed above the comparative infographic images.
Label Font	Define the formatting for the label text displayed below the comparative infographic images.
Text Font	Define the formatting for text displayed above the comparative infographic images.
Maintain Aspect Ratio	Display the raster map using the same aspect ratio as the original image. This means that it will not be stretched and as such may leave some empty space.
Border Colour	Define a colour to be used as an outline for each region on the map.
Option	Description

Visible Series Selection	Define whether the user can select which series to display when viewing the report.
Series Selection Style	Only available on Time Series charts, select from different display options for the series selection.
Link Field	Select a field formatted to contain a URL in order to use it as a link on the chart.
Visible Unit Selection	Allow users to change the granularity of the dates to be displayed. Selecting a unit of finer granularity than your data will result in using the level of your data.
Date Slider	Display a date slider on the chart to allow users to adjust the date range of the chart.
Slider Position	Define where the date slider will be displayed on the chart.
Slider Initial Range	Specify the percentage of the available date range the slider is set to when the chart loads.
Bottom Navigation	Display navigation buttons in a bar directly below the map.
Hover Navigation	Display navigation hovered over the top left of the map.
Hover Navigation Colour	Select the colour of the navigation hovered over the top left of the map.

See [Time Series](#) & [Visible Series Selection](#) for more information.

Option	Description
Latitude	Define the latitude boundaries of the map. This allows you to reduce the area displayed on the map.
Longitude	Define the longitude boundaries of the map. This allows you to reduce the area displayed on the map.

Option	Description
Sunday	Define the colour to be applied to the Sunday value row.
Monday	Define the colour to be applied to the Monday value row.
Tuesday	Define the colour to be applied to the Tuesday value row.
Wednesday	Define the colour to be applied to the Wednesday value row.
Thursday	Define the colour to be applied to the Thursday value row.
Friday	Define the colour to be applied to the Friday value row.
Saturday	Define the colour to be applied to the Saturday value row.

Option	Description
Show Median	Enable/disable the display of the median value for each label row.
Show Mean	Enable/disable the display of the mean value for each label row.

Option	Description
Bin Count	Specify the number of bins, or intervals, is based on the number of unique values in the dataset. There are three options available here: ▪ Auto - the number of bins, or intervals, is automatically calculated by Yellowfin. ▪ Values - the number of bins, or intervals, is based on the number of unique values in the data set. ▪ Manual - the number of bins, or intervals, is manually defined by the chart creator.
Count	Define the number of bins, or intervals, to be used for the histogram. Note: only available when Bin Count is set to Manual .
Show Outliers	Toggle if bins to contain distant outlier values should be included.

Option	Description
Up Colour	Define the colour to fill the candlestick when displaying an upwards trend value.

Down Colour	Define the colour to fill the candlestick when displaying a downwards trend value.
Line Colour	Define the colour to be used for the line or border.
Colour	Define the colour to be used for the volume columns.
Axis Position	Display the vertical axis of the volume columns on the left or right of the chart.
Option	Description
Summarise Value	Specify if the number should be summarised - shortened to the nearest unit, followed by a unit label.
Decimal Places	Define the number of decimal places to be displayed for the summarised value.
Rounding	Define the rounding you wish to apply to the summarised value.

Title

[top](#)

The title option allows you to change the title of the chart as well as the style – such as the font settings.



Title

Text

Title Contents

Hide the chart title.

None

Option	Description
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Title Contents	Define what should be shown in the Chart Title area. • Auto Title: Display a title that is automatically generated based on the fields used in the chart. <i>Note: only available for Auto Charts.</i> • Report Name: Display the report name as the title of the chart. • Animation Field: Display the value of the animation field for each frame as the chart title. • Metric: Display the name of the currently selected series as the chart title. <i>Note: the chart has to be a single metric series selection. This means that it can only display one metric at a time. To do this just add one metric to the chart and then enable series selection, rather than adding all metrics and allowing users to toggle multiple at a time.</i> • Custom: Display a custom defined chart title. • None: Hide the chart title.
Custom Title	Display a custom defined chart title.
Style	Use the system default formatting for the chart title text.

Legend

[top](#)

The Legend is a box that identifies the patterns or colours that are assigned to the data series or categories in a chart. This section of the menu lets you set the following options.

ABC

Legend

Position

Legend Position

Specify the location of the legend on the chart. Selecting None will hide the legend.

Bottom

Font

Style

Option	Description
Legend Position	Specify the location of the legend on the chart. Selecting None will hide the legend.

Option	Description
Style	Define the formatting for chart legend text.
Option	Description
Background Colour	Define the background colour for the legend area of the chart.
Border	Specify the border type for the legend area of the chart.
Conditional	Limit the number of values displayed in the legend area of the chart.
Limit	Specify a limit for the number of values displayed in the legend area of the chart.

Axis

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A line bordering the chart plot area used as a frame of reference for measurement. The y axis is usually the vertical axis and contains data. The x-axis is usually the horizontal axis and contains categories.

Chart Axis

Horizontal

Vertical

Secondary Vertical

Chart Settings - Vertical

Title

Display Name

Define the title text to be displayed on this axis.

Style

Define custom font formatting for axis title text.

42

▼

6pt

▼

B

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Style

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Scale

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Option	Description
Display Name	Define the title text to be displayed on this axis.
Style	Define the formatting for axis title text.

The Axis style drop down lets you determine the formats to be applied to axis.

Option	Description
Visible	Display the axis on the chart.
Show Arrow	Display an arrow on the end of the axis bar.
Colour	Define the colour of the axis bar.

Thickness	Define the thickness of the axis bar.
Margin	Define the spacing between the edges of the axis and the first and last categories.
Abbreviate Label	Label text will be abbreviated to display partial values.
Rotate Axis Label	Specify which angle the axis labels are displayed in relation to the axis bar. This allows you to rotate long labels to display more text.
Category Spacing	Define the size of the spacing between each category grouping on the axis.
Series Spacing	Define the size of the spacing between each series within a category grouping on the axis.
Prefix	Define a prefix to be applied to the values displayed on the axis. This is a character to display before the value, such as \$.
Suffix	Define a suffix to be applied to the values displayed on the axis. This is a character to display after the value, such as %.
Decimal Places	Define the number of decimal places to display on the axis label text.
Desired Trend	Display an arrow in the corner of the chart to demonstrate the desired trend.
Axis Location	Specify which side of the chart the axis is displayed on.
Label Font	Define the font formatting for axis label text.
Secondary Prefix	Define a prefix to be applied to the values displayed on the axis. This is a character to display before the value, such as \$.
Secondary Suffix	Define a suffix to be applied to the values displayed on the axis. This is a character to display after the value, such as %.
Secondary Dec. Places	Define the number of decimal places to display on the axis label text.

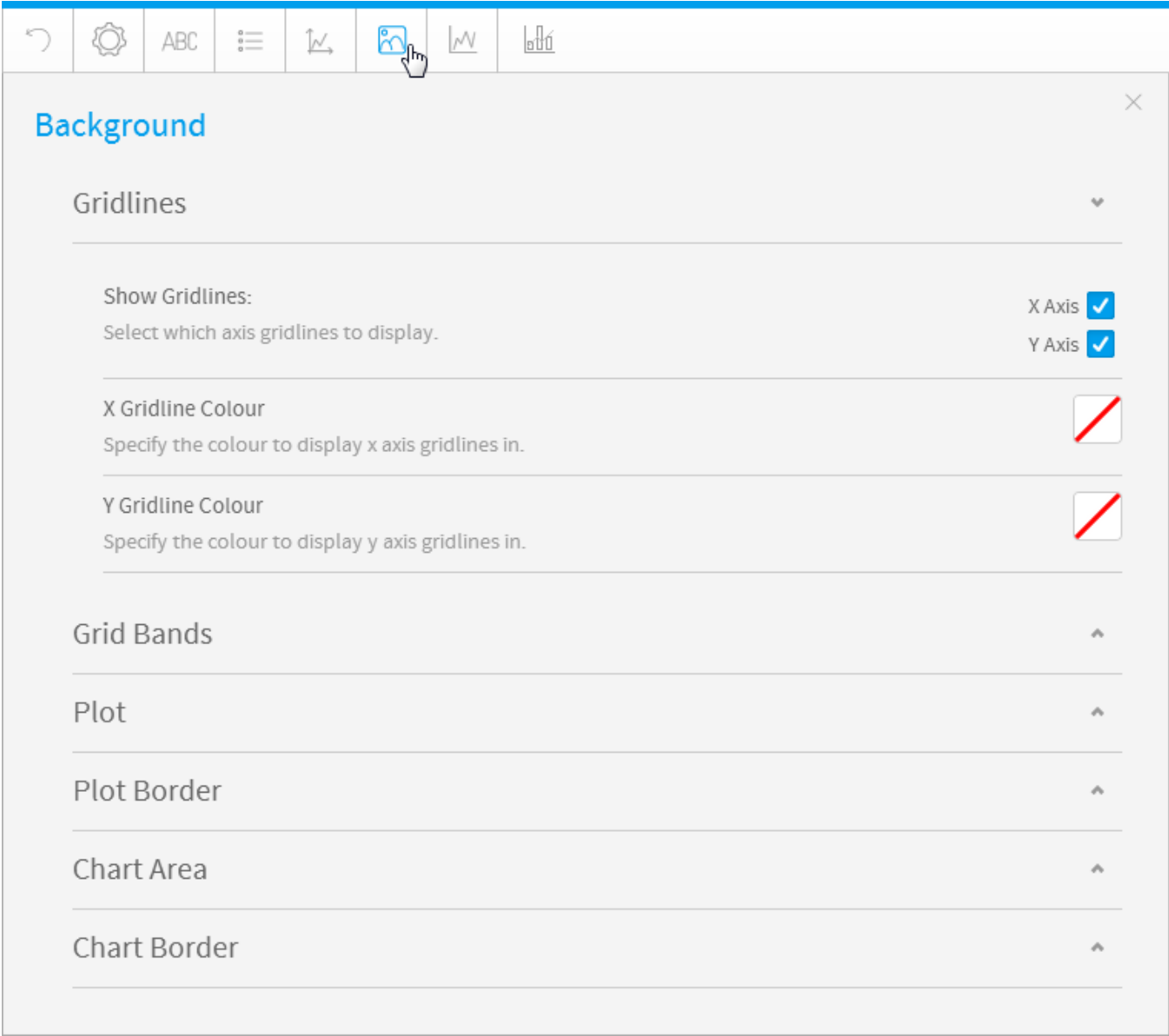
The Axis scale drop down lets you determine the scale dimensions. Generally you will only be able to set the Y Axis attributes – unless you are using XY charts in which case you can set both X & Y attributes.

Option	Description
Scale	Define the boundaries of the axis.
Lower Bound	Define a custom starting point for the axis.
Upper Bound	Define a custom cut-off point for the axis.
Scale Unit	Define the scale unit for the axis. Labels will be displayed at these increments, or multiples of the unit.
Ref Line	Define the position (value), colour, and label for this reference line.

Background

[top](#)

The Background options let you set the style and colour of the main chart elements such as the plot and chart areas. You can apply elements such as background images and or gridlines.



Gridline options are available for all category charts, bubble and scatter charts.

Option	Description
Show Gridlines	Select which axis gridlines to display.
X Gridline Colour	Specify the colour to display x axis gridlines in.
Y Gridline Colour	Specify the colour to display y axis gridlines in.

Gridline options are available for all category charts, bubble and scatter charts.

Option	Description
Band Colour	Define the colour to be used for grid band shading on the chart.
Band Opacity	Select the opacity percentage of the grid band shading on the chart. The lower the percentage, the more transparent it is.

The plot area is the area bounded by the axes, including all data series. The drop down options let you set the background colours applied to the plot area.

Option	Description
Style	Specify the background shading style for the plot.

Direction	Specify the gradient shading style for the plot background colour.
Colour	Specify the colour(s) to be used in the plot background.
Image	Select an image to use for the plot background.
Image Opacity	Select the opacity percentage of the plot background image. The lower the percentage, the more transparent it is.

The plot area is the area bounded by the axes, including all data series. The drop down options let you set the background colours applied to the plot area.

Option	Description
Style	Define the border style for the plot.
Colour	Define the colour of the border for the plot.
Width	Define the width of the border for the plot.

The entire chart and all its elements are described as the chart area. The drop down options let you set the background colours applied to the chart area.

Option	Description
Style	Specify the background shading style for the chart.
Direction	Specify the gradient shading style for the chart background colour.
Colour	Specify the colour(s) to be used in the chart background.
Image	Select an image to use for the chart background.
Image Opacity	Select the opacity percentage of the chart background image. The lower the percentage, the more transparent it is.

The entire chart and all its elements are described as the chart area. The drop down options let you set the background colours applied to the chart area.

Option	Description
Style	Define the border style for the chart.
Colour	Define the colour of the border for the chart.
Width	Define the width of the border for the chart.

Labels

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Labels can be added to charts to print out the values of the data point onto the chart in text format. Generally the formatting of label options are only available for pie charts.

ABC

Labels

Display

Labels

On

Display the labels for each value on the chart.

Label Contents

Category ☒
Value ☐
Percentage ☐

Style

Default ☐ Custom ☒

Define custom styling settings for chart labels.

Label Font

426pt

Define custom font formatting for the label contents.

B

/

Hide Label Lines

Off

Hide the lines connecting the chart to each label.

Background

Option	Description
Labels	Display the labels for each value on the chart.
Label Contents	Specify the contents of the label, if applicable. - Category: this is the dimension value. - Value: this is the metric value. - Percentage: this is the % of total for the metric value.
Style	Define the formatting for chart labels.
Label Font	Define the custom font formatting for the label contents.
Hide Label Lines	Display or hide the lines connecting the chart to each label.
Option	Description
Style	Specify the background shading style for the label.
Direction	Specify the gradient shading style for the label background colour.
Colour	Specify the colour(s) to be used in the label background.

Shadow Colour	Select the colour to be used as the shadow effect on the chart labels.
Border	Define the border style for the label.
Border Colour	Define the colour of the border for the labels of the chart.
Border Width	Define the width of the border for the labels of the chart.

Series

[top](#)

Chart Series

Series

Sum Invoiced Amount

Category

Demographic

Series Settings - Sum Invoiced Amount

Series

Style

Use the system default colour for the series.

Default

Aggregation Label

Display the aggregation type in front of the field name in labels when an aggregation has been applied in the chart. This includes use in chart labels, tooltips, and legends.

☒

Border

Series

Option		Description
Aggregation Label		This allows you to toggle the display of a label in front of the field name, based on the chart level aggregation applied.
Style		Specify the shading style for the series.
Direction		Select the direction of the gradient shading to be applied to the series.
Colour		Define the colour(s) to be applied to the series.
Combination Sub Chart		Specify which sub chart this series belongs to. This will define the type of chart, and which vertical axis it will use.
Shapes		Define whether line shapes are on, off, or system default.
Thickness		Define the width of the line in pixels.
Option	Description	
Colour	Define a colour for the outline of the series.	
Width	Define the width of the outline of the series.	
Option	Description	

Style	Define the colour set and bounds to be applied to the series.
Bounds	This is where you can define the bounds of the colour when using a gradient or colour set. Options include: • Auto - this automatically works out the min and max values of the chart. • Range - this allows you to provide the min and max values for the bounds of the chart colour range. • Centre - this allows you to provide the mid point value for the chart colour range.  Auto  Auto  Range  Centre

Colour Set	This allows you to select from a list of pre-defined colour sets for your chart, or alternatively define your own. Pre-defined Colour Sets                Custom Set Custom Colour Set Custom Set  Min     Max  + Add Item
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Option	Description
Speed	Define how long each frame is displayed for.
Option	Description
Display	Enable/Disable the display of conditional formatting alerts on the chart.
Style	Select how to display the alerts on the chart from three styles: • Area: display the conditional formatting alert as a range on the chart. This will create a block of colour for the whole range of the alert. • Bar: display the conditional formatting alert by highlighting bars that fall into the alert range. • Line: display the conditional formatting alert as a line on the chart. This will create a line positioned at the lowest value in the alert range.

Position	Define whether the alert should be displayed in the foreground (in front) of the chart, or in the background (behind) the chart.
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Category

Option	Description
Sort By	Specify how the data in the chart is ordered, from one of these options; ▪ Data Order - order this data based on the order the values appear in the report table. ▪ Alphanumeric - order this data based on the values in the chart, alphabetically. ▪ Reference Code - order this data based on the values in the chart, by Reference Code custom sort order. ▪ Series - order this data based on the values in the Sort Series field.
Sort Series	Specify which series should be used to order the data in the chart.
Sort Direction	Specify if the data should be sorted in ascending or descending order.
Option	Description
Category Highlight	Specify if certain category values should be highlighted in the chart, changing the colour specified by the series.
Highlighted Value	Select the value(s) to be highlighted in the chart, from the list provided.
Highlight Colour	Select a colour to use as the category highlight.

GIS Settings

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GIS Layers

GIS World Background

+ Add Layer

Layer - GIS World Background

Settings

Selectable

The layer will always be enabled when viewing the map.

Off

Default

The layer will be enabled when the map is initially loaded.

Selected

Colour

Define the colour to be applied to the layer.

Foreground

The layer will be displayed behind the map.

Off

Zoom Levels

Define the number of zooms it takes for the layer to show and then hide on the map display.

0 to 0

Labels

Hide the labels for each value on the layer.

Off

Point Size

Define the diameter (pixels) of each point.

0

Option	Description
Selectable	Allow the user to enable and disable the layer when viewing the map.
Default	The layer will be enabled when the map is initially loaded.
Colour	Define the colour to be applied to the layer.
Foreground	The layer will be displayed in front of the map.
Zoom Levels	Define the number of zooms it takes for the layer to show and then hide on the map display.
Labels	Display the labels for each value in the layer.
Point Size	Define the diameter (pixels) of each point.
Bubble Fill Type	Define the shading effect to be applied to the bubbles.

Combination Charts

[top](#)

Chart 1 (Bar)

Chart 2 (Line)

+ Add Sub chart

Combination Charts - Chart 2

Combination Charts

Chart Type

This sub chart will display as a line in the combination chart.

Line

Secondary Y Axis

This sub chart will use the secondary vertical axis (right) for its scale.

☒ On

Option	Description
Chart Type	Define the type of display this chart will use.
Secondary Y Axis	Define which vertical axis this chart will use.

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