

# Conditional Formatting

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Conditional formatting is performed in Report Builder on any column.

If applying conditional formatting for a column that is displaying a choice field, additional considerations apply. See the section "Conditional Formatting on Choice Fields"

## Performing conditional formatting

To perform conditional formatting:

1. Go to Report Builder.
2. Hover on the column where you want to perform the conditional formatting.
3. Select the down arrow. The column context menu appears.
4. Select **Format Column**. The Format dialogue appears.
5. In the **Format** field, select the down arrow and select the option you want.

For a text column, there are two types of formats available: Highlight and Icon

For a number column, there are three types of formats available: Highlight, Icon and Progress Bar

## Highlight Conditional Formatting

To use highlight conditional formatting:

1. Follow the steps in **Performing conditional formatting** above and select the format as **Highlight**.
2. Select the checkbox for **Display text**. The text displays in the highlighted colour. If the checkbox is unchecked then the text does not display.
3. In the **Scheme** field select the down arrow and select the option you want. Once a format is selected, the corresponding schemes are listed in the scheme drop down. At the maximum, you can select up to a four step scheme and a minimum of a two step scheme.

If you select a four step scheme, four rows of rules are provided. If you select a three step scheme, three rows of rules are provided and so on

Rules have three columns: Operation, Value and Colour

4. Select an Operation, type a Value and select a Colour for each rule.
5. Select + icon to add a row for the rule, see item 1 in the screen shot.
6. Select X icon to remove any row in the rule, see item 2 in the screen shot.
7. When complete, select **OK**. The rules apply on the report.
8. Select **SAVE** to save the report. The conditional formatting displays in view mode of the report.

## Icon Conditional Formatting

To use Icon Conditional Formatting:

1. Follow the steps in **Performing conditional formatting** above and select the format as **Icon**.
2. Select the checkbox for **Display text**. The text displays in the highlighted colour. If the checkbox is unchecked then the text does not display.
3. Select the **Scheme** you want.
4. Once a scheme is selected, create the rules for the column.
5. Select an operation, value and icon to make a rule.
6. When complete, select **OK**. The rules apply on the report.
7. Select **SAVE** to save the report. The icon formatting displays in view mode of the report.

## Progress Bar Formatting

Progress Bar Formatting is available only for a number column.

To use Progress Bar Formatting:

1. Follow the steps in **Performing conditional formatting** above and select the format as **Progress Bar**.
2. Select the checkbox for **Display text**. The text displays in the highlighted colour. If the checkbox is unchecked then the text does not display.
3. Select **Scheme**.
4. Type a **Minimum** value.
5. Type a **Maximum** value.
6. The **Colour** field shows the value selected in the scheme. You can select any other colour.
7. Select **OK**. The rules apply on the report.
8. Select **SAVE** to save the report. The applied Progress Bar formatting displays in view mode of the report.

Note: The progress Bar begins at the minimum value and it keeps increasing till it reaches the maximum value. Once the maximum value is reached, the full progress bar is displayed for the rest of the values above maximum value.



## Conditional Formatting on Choice Fields

Conditional Formatting can be set directly on the choice field itself. This allows the same conditional format scheme to be used on all reports where this choice field is displayed.

If a conditional format scheme is applied to a choice field, then this will be on by default when the choice field is added to a report.

To configure this:

1. Follow the steps in **Performing conditional formatting** above for the column that contains the choice field
2. Select or Deselect the checkbox for **Use default format for choice field**