### Conditional Formatting using Rules

This session demonstrates how rules can be created and used to format displayed values (i.e. highlight results that fail or meet specific values).

Rules for conditional formatting contain 6 elements:

- **A name for the Formatting Rule**
  - More than one Formatting Rule can be created and naming them makes it easier to distinguish them.

- **Description**
  - An optional description for the Formatting Rule. This is very useful for future maintenance of the report as it enables you to explain the usage of the rule.

- **An object or cell contents**
  - The value of an object or cell to check when applying the Formatting Rule.

- **An operator**
  - How the value is to be compared (such as Equal to, Less than, Greater than, etc).

- **Operand value(s) or another object**
  - The value(s) to compare using the cell contents or another object’s value.

- **Conditional Formatting**
  - The formatting to apply to the cell if the Formatting Rule is satisfied.

When you apply a Formatting Rule to a column, row or cell on a report, Web Intelligence evaluates the Formatting Rule and the cell value(s) are Conditionally Formatted based on the result of the evaluation.

Formatting Rules can be applied to tables, sections, cells, and freestanding cells but they cannot be applied to charts.

Multiple conditions can be inserted within a Formatting Rule, and advanced Formatting Rule(s) can be created using formulas.

1. Create a new Web Intelligence document and use the following query (on ‘eFashion universe’):

   ![Result Objects](image)

2. Run the query and save the document.

3. We will now use this document to look at a few examples of Conditional Formatting.
21.1 Creating a Formatting Rule to act on Object Values

Formatting Rules can be created to act on the value of an object.

1. Change the default table to appear as shown below, i.e. in this example, the [Sales revenue] object has been used twice.

<table>
<thead>
<tr>
<th>Year</th>
<th>Quarter</th>
<th>Sales revenue</th>
<th>Sales revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>Q1</td>
<td>$2,660,700</td>
<td>$2,660,700</td>
</tr>
<tr>
<td>2004</td>
<td>Q2</td>
<td>$2,278,693</td>
<td>$2,278,693</td>
</tr>
<tr>
<td>2004</td>
<td>Q3</td>
<td>$1,367,841</td>
<td>$1,367,841</td>
</tr>
<tr>
<td>2004</td>
<td>Q4</td>
<td>$1,788,580</td>
<td>$1,788,580</td>
</tr>
<tr>
<td>2005</td>
<td>Q1</td>
<td>$3,326,172</td>
<td>$3,326,172</td>
</tr>
<tr>
<td>2005</td>
<td>Q2</td>
<td>$2,040,651</td>
<td>$2,040,651</td>
</tr>
<tr>
<td>2005</td>
<td>Q3</td>
<td>$2,879,303</td>
<td>$2,879,303</td>
</tr>
<tr>
<td>2005</td>
<td>Q4</td>
<td>$4,186,120</td>
<td>$4,186,120</td>
</tr>
</tbody>
</table>

The last column will be used to demonstrate conditional formatting based on the results of [Sales revenue]. Repeating the values like this in a second column makes it easier to demonstrate how Conditional Formatting Rules operate.

2. Click away from the table (in the blank part of the report) and then from the ‘Analysis’ toolbox, click on ‘Conditional – New Rule…”

3. This will initiate the ‘Formula Rule Editor’.
4. Type a name/description for the Formatting Rule, and set up the condition as shown below:

This has now set up the condition as when [Sales revenue] is less than 2,000,000.

NOTE – Do not type in the commas when specifying number values.
5. We now need to click on ‘Format …’ in order to specify what will be displayed when this condition is met (in terms of value and formatting).

This will initiate the Formatting Rules Display editor.

6. You can specify a formula to use, or value to display as shown below.
Conditional Formatting using Rules

7. From the 'Text' options select the ‘Red’ color and then click ‘OK’.

We now have a Formatting Rule that will display LOW in red font color, i.e. when the [Sales revenue] is less than 2,000,000.

8. Click on the button and set up a sub-rule as shown below:

Use the following settings for the sub-rule:

Filtered object or cell = [Sales revenue]

Operator = Between

Operands = 2000000;4000000

Then click ‘Format…’ and set:

Formula = MEDIUM

Text (Font color) = ‘Light Orange’

9. Click on the button again and set up a sub-rule as shown below: