

Oracle BI 11g Reports and Dashboards

# Conditional Formatting

**PEAK**  
indicators

# Conditional Formatting

## *Agenda*

- Conditional Formatting
- Implementing on Tables
- Implementing on Graphs
- Using Custom Images




# Interactive Reports Conditional Formatting

# Conditional Formatting

## Overview

- Conditional Formatting is a useful feature enabling you to highlight trends, exceptions and problems in your data
- Conditional Formatting can be applied to:
  - Tables
  - Pivot Tables
  - Graphs

Deal Size	Order Amount 	Return Amount
☆☆☆☆☆ 0K - 10K	64,128,029	1,260,296
☆☆☆☆☆ 10K - 25K	106,140,562	1,998,369
☆☆☆☆☆ 25K - 50K	297,736,078	5,634,983
☆☆☆☆☆ 50K - 75K	452,048,223	8,220,082
☆☆☆☆☆ 75K - 100K	485,629,838	8,977,168
☆☆☆☆☆ 100K+	4,295,393,421	87,419,641
<b>Grand Total</b>	<b>5,701,076,150</b>	<b>113,510,539</b>



Organization	% Forecast Achieved			
	2007 Q 1	2007 Q 2	2007 Q 3	2007 Q 4
▽ Total	90.72	90.77	93.31	94.75
▷ Vision Benelux	90.55	88.04	89.93	93.63
▷ Vision East Europe	91.55	103.07	96.21	101.45
▽ Vision Nordics	89.81	90.70	97.42	91.69
Vision Finland	90.83	95.52	102.68	91.24
Vision Sweden	84.76	76.57	82.77	92.92
▷ Vision UK and Ireland	95.15	88.49	91.21	92.46
▷ Vision West Europe	93.24	93.64	97.00	118.15

# Conditional Formatting

## Overview

- Conditional formatting is like a series of “If Then” statements:
  - If [Condition 1] THEN [apply formatting 1]
  - If [Condition 2] THEN [apply formatting 2]
  - If [Condition 3] THEN [apply formatting 3]

**Column Properties**

Style | Column Format | Data Format | **Conditional Format** | Interaction | Write Back

1.	Deal Size is equal to / is in 0K - 10K	☆☆☆☆☆ Value 123	[X] [v] [u]
2.	Deal Size is equal to / is in 10K - 25K	☆☆☆☆☆ Value 123	[X] [v] [u]
3.	Deal Size is equal to / is in 25K - 50K	☆☆☆☆☆ Value 123	[X] [v] [u]
4.	Deal Size is equal to / is in 50K - 75K	☆☆☆☆☆ Value 123	[X] [v] [u]
5.	Deal Size is equal to / is in 75K - 100K	☆☆☆☆☆ Value 123	[X] [v] [u]
6.	Deal Size is equal to / is in 100K+	☆☆☆☆☆ Value 123	[X] [v] [u]

Add Condition ▸ | Clear All

Here a “5 star” rating is being implemented using Conditional Formatting, based upon the “Deal Size” of each Order

# Conditional Formatting

## *Conditional Styles*

- There is a whole range of formatting that can be applied conditionally:
  - Font size, colour, style
  - Cell alignment, background colour, image
  - Border position, style, colour

Style	Column Format	Data Format	Conditional Format	Interaction
1.	Deal Size is equal to / is in 0K - 10K	☆☆☆☆☆ Value 123		
2.	Deal Size is equal to / is in 10K - 25K	☆☆☆☆☆ Value 123		
3.	Deal Size is equal to / is in 25K - 50K	☆☆☆☆☆ Value 123		
4.	Deal Size is equal to / is in 50K - 75K	☆☆☆☆☆ Value 123		
5.	Deal Size is equal to / is in 75K - 100K	☆☆☆☆☆ Value 123		
6.	Deal Size is equal to / is in 100K+	☆☆☆☆☆ Value 123		

Edit Format

Style Data Format

Font

Family Default (System) Size

Color Style Default (System) Effects Default (System)

Cell

Horizontal Alignment Default (System) Background Color

Vertical Alignment Default (System) Image

☒ Wrap Text

Border

Position Default (System) Border Style Default (System)

Border Color

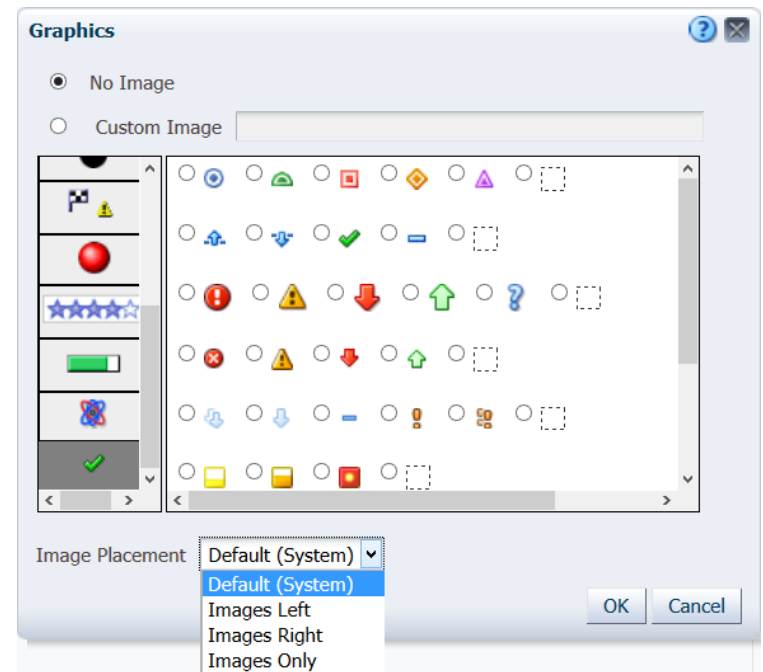
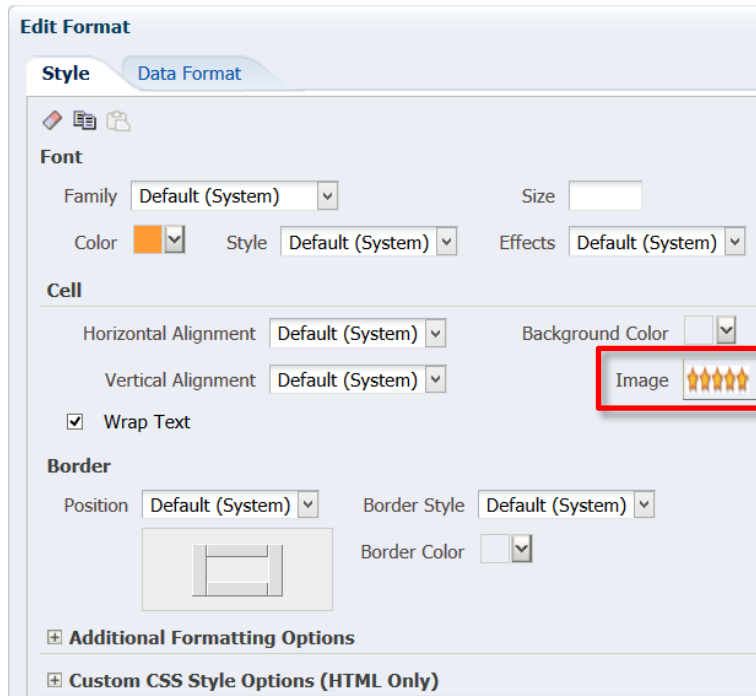
Additional Formatting Options

Custom CSS Style Options (HTML Only)

# Conditional Formatting

## *Conditional Images*

- There is a large library of images to choose from
  - You can even specify your own custom images



# Conditional Formatting

## *Conditional Data Format*

- You can even apply conditional “Data Formats”:

The image shows two screenshots from the Salesforce interface. The left screenshot, titled 'Column Properties', displays a table with six rows of deal size ranges and their corresponding star ratings. The right screenshot, titled 'Edit Format', shows the 'Data Format' tab selected, with a dropdown menu open showing options like 'Plain text', 'HTML', 'HyperText link', etc. A red box highlights the 'Data Format' tab in both screenshots, and a red arrow points from the 'Edit Format' dialog to the 'Conditional Format' tab in the 'Column Properties' window.

**Column Properties**

Style	Column Format	Data Format	Conditional Format
1. Deal Size is equal to / is in 0K - 10K	☆☆☆☆☆	Value 123	
2. Deal Size is equal to / is in 10K - 25K	☆☆☆☆☆	Value 123	
3. Deal Size is equal to / is in 25K - 50K	☆☆☆☆☆	Value 123	
4. Deal Size is equal to / is in 50K - 75K	☆☆☆☆☆	Value 123	
5. Deal Size is equal to / is in 75K - 100K	☆☆☆☆☆	Value 123	
6. Deal Size is equal to / is in 100K+	☆☆☆☆☆	Value 123	

**Edit Format**

**Data Format**

☒ Override Default Data Format

Treat Text As: Plain text

Custom Text Format: Plain text, Plain text (don't break spaces), **HTML**, HyperText link, HyperText link (prepend http://), Mail-To address, Image URL, Custom Text Format





## Interactive Reports Implementing on Tables

# Implementing on Tables

## *Example*

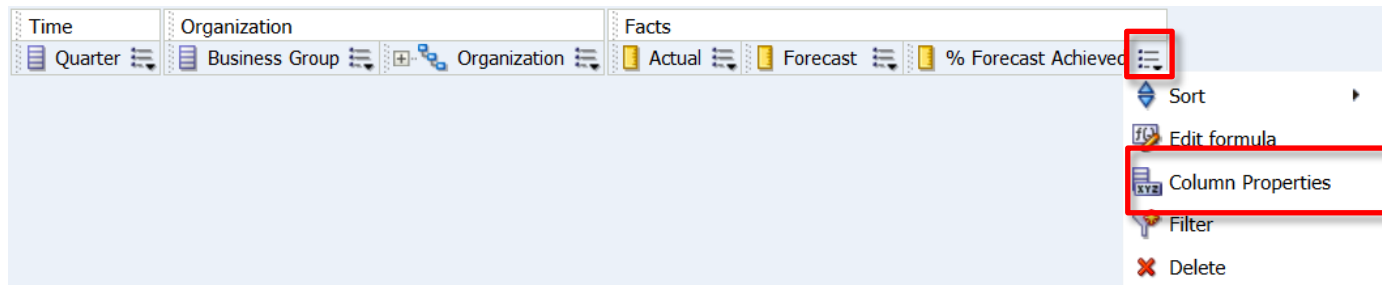
- In this example we will show how to implement Conditional Formatting on a Table or Pivot Table
- In this case, we want to highlight in red any “% Forecast Achieved” values which are below 90%.

Organization	% Forecast Achieved			
	2007 Q 1	2007 Q 2	2007 Q 3	2007 Q 4
▽ Total	90.72	90.77	93.31	94.75
▷ Vision Benelux	90.55	88.04	89.93	93.63
▷ Vision East Europe	91.55	103.07	96.21	101.45
▷ Vision Nordics	89.81	90.70	97.42	91.69
▷ Vision UK and Ireland	95.15	88.49	91.21	92.46
▷ Vision West Europe	93.24	93.64	97.00	118.15

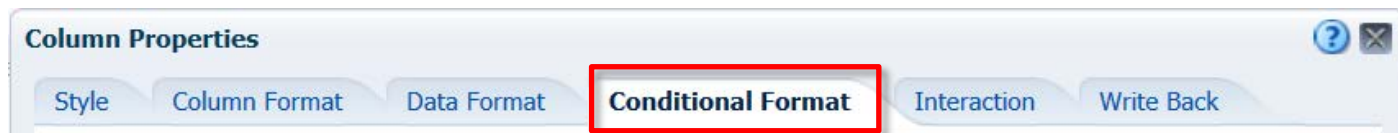
# Implementing on Tables

## *Step 1: Open Column Properties*

- On the “Criteria” tab, open up the “Column Properties” for the column which is to have Conditional Formatting applied



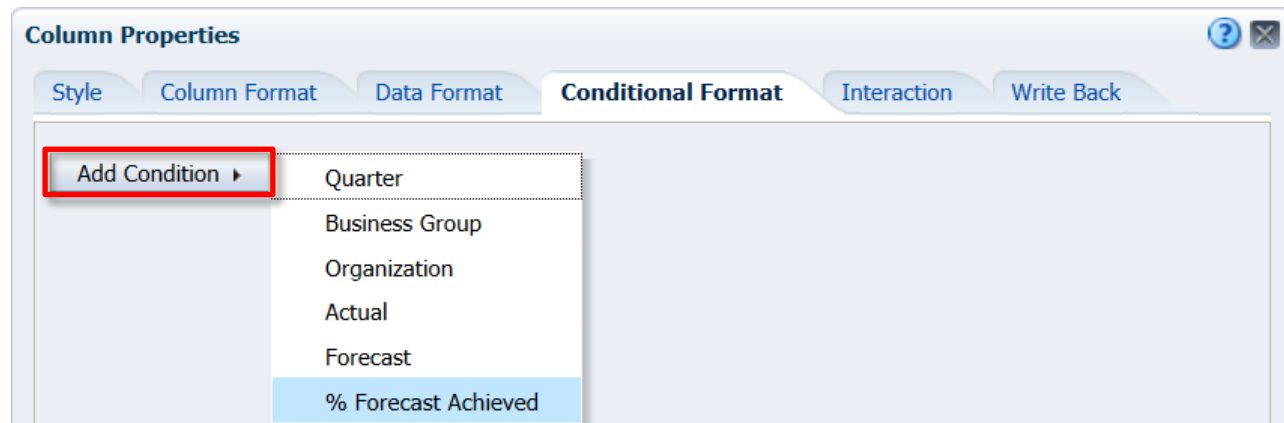
- Go to the “Conditional Format” tab



# Implementing on Tables

## *Step 2: Add Condition*

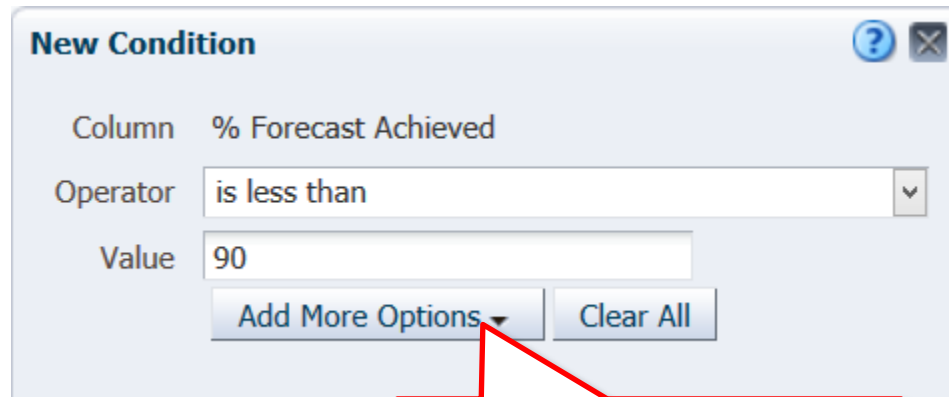
- Click on the “Add Condition” button
- Select the column on which the condition will be based
  - NOTE: The condition can be based on any column that is on the Analysis



# Implementing on Tables

## *Step 3: Define Condition Criteria*

- Now define the criteria for the condition, in our case we are looking for:
  - Values less than 90



**New Condition**

Column % Forecast Achieved

Operator is less than

Value 90

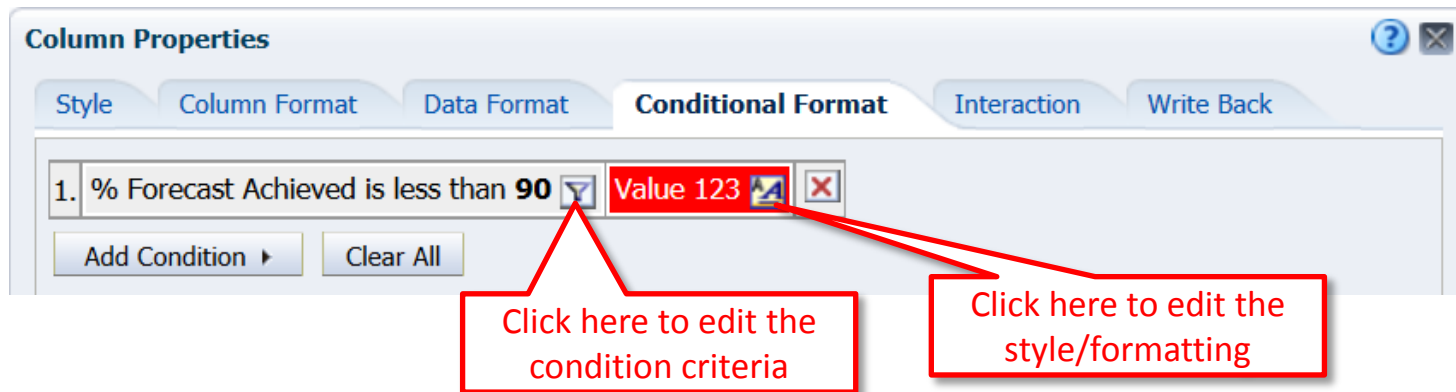
Add More Options Clear All

NOTE: you can refer to a  
Presentation Variable instead  
of a hard-coded value

# Implementing on Tables

## *Step 4: Add Another Condition*

- That's It!
- If you want you can now add another condition



# Implementing on Tables

## *Step 5: Define Format*

- Define the column format for the condition:
  - Column Style/Formatting (including an image)
  - Column Data Format

The screenshot shows the 'Edit Format' dialog box with the 'Style' tab selected. The 'Font' section includes dropdowns for Family (Default (System)), Size, Color, Style (Default (System)), and Effects (Default (System)). The 'Cell' section includes dropdowns for Horizontal Alignment (Default (System)), Vertical Alignment (Default (System)), and Background Color (a red color swatch). There is a checked 'Wrap Text' checkbox and an 'Image' field. The 'Border' section includes dropdowns for Position (Default (System)), Border Style (Default (System)), and Border Color. At the bottom, there are expandable sections for 'Additional Formatting Options' and 'Custom CSS Style Options (HTML Only)'.

In our case we have specified a white font on a red background

# Implementing on Tables

## *Step 6: View Results*

- You can now go to the Results tab and preview the results!



### **Sales vs Forecast for the Year 2007**

Click on the Dial to see a breakdown of Forecast vs Actual for the particular Quarter

Organization	% Forecast Achieved			
	2007 Q 1	2007 Q 2	2007 Q 3	2007 Q 4
▽ Total	90.72	90.77	93.31	94.75
▷ Vision Benelux	90.55	88.04	89.93	93.63
▷ Vision East Europe	91.55	103.07	96.21	101.45
▽ Vision Nordics	89.81	90.70	97.42	91.69
Vision Finland	90.83	95.52	102.68	91.24
Vision Sweden	84.76	76.57	82.77	92.92
▷ Vision UK and Ireland	95.15	88.49	91.21	92.46
▷ Vision West Europe	93.24	93.64	100.00	118.15

Note that it works even  
with Hierarchical Columns





## Interactive Reports Implementing on Graphs

# Implementing on Graphs

## *Example*

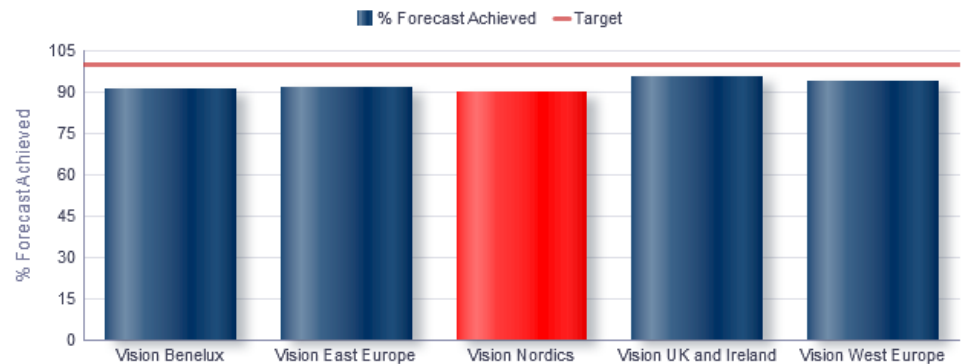
- We will now look at enhancing the Analysis so that the graph underneath will display in red whenever the “% Forecast Achieved” measure is below 90%



### Sales vs Forecast for the Year 2007

Click on the Dial to see a breakdown of Forecast vs Actual for the particular Quarter

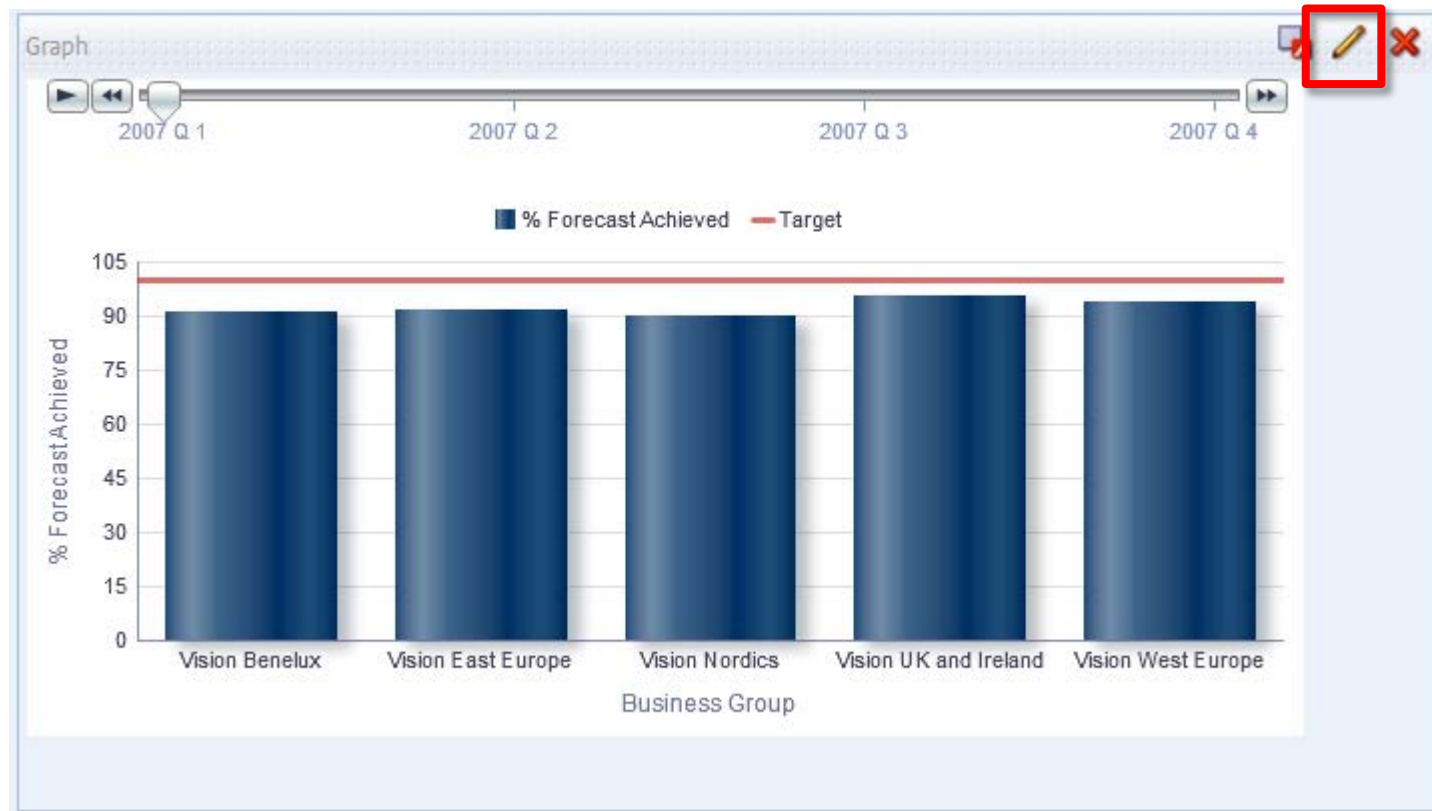
Organization	% Forecast Achieved			
	2007 Q 1	2007 Q 2	2007 Q 3	2007 Q 4
▽ Total	90.72	90.77	93.31	94.75
▷ Vision Benelux	90.55	88.04	89.93	93.63
▷ Vision East Europe	91.55	103.07	96.21	101.45
▷ Vision Nordics	89.81	90.70	97.42	91.69
▷ Vision UK and Ireland	95.15	88.49	91.21	92.46
▷ Vision West Europe	93.24	93.64	97.00	118.15



# Implementing on Graphs

## *Step 1: Edit Graph*

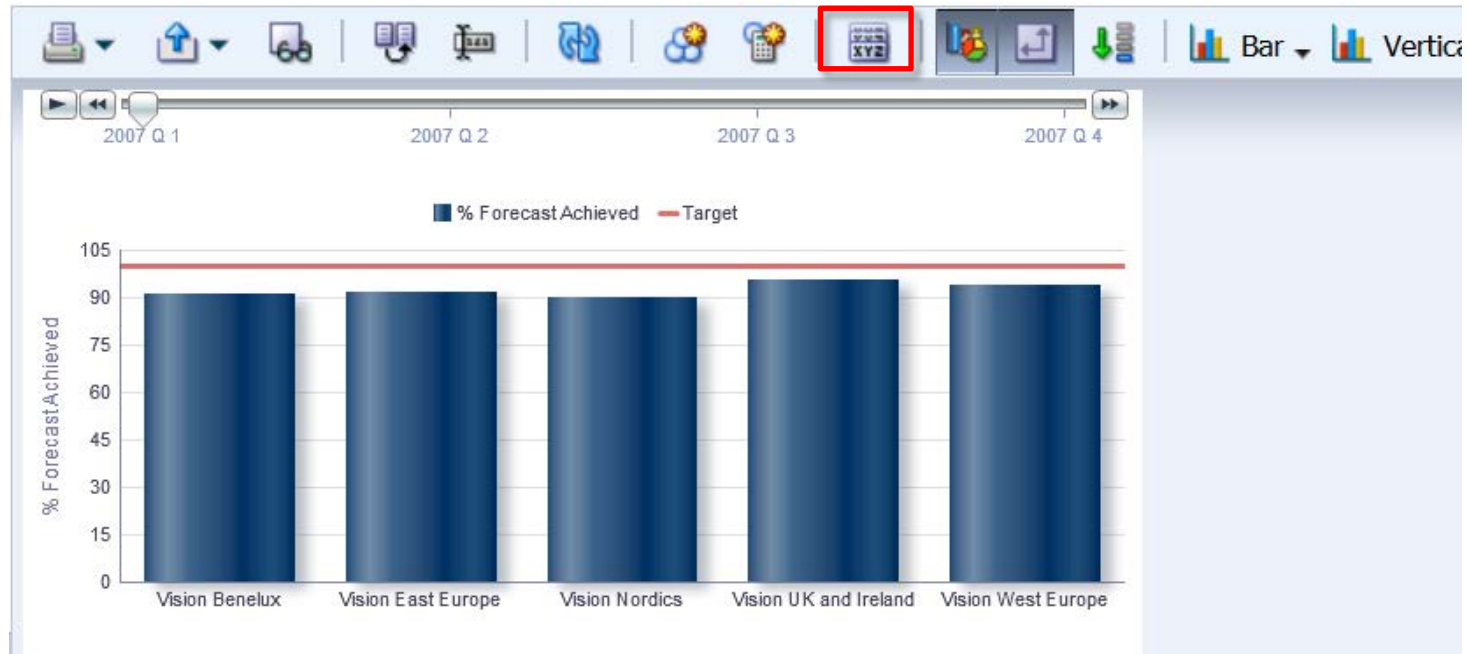
- On the Compound Layout, open up the graph for editing:



# Implementing on Graphs

## *Step 2: Open Graph Properties*

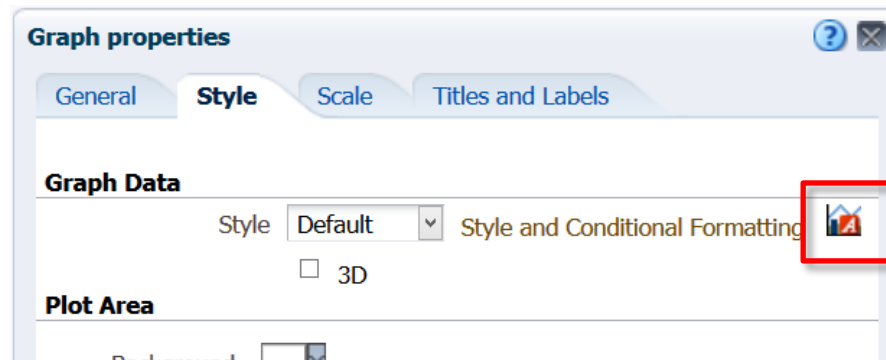
- Open up the “Graph Properties” and go to the “Style” tab:



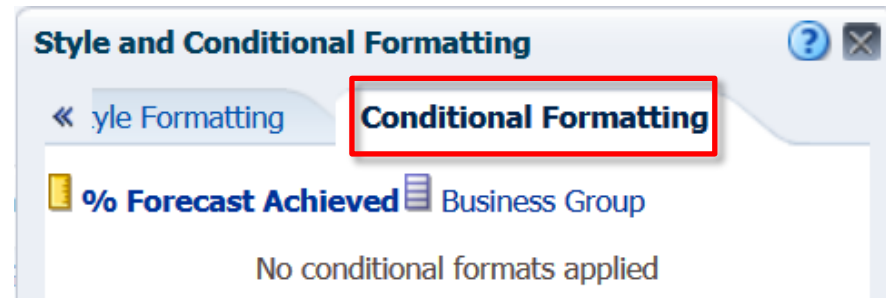
# Implementing on Graphs

## *Step 3: Open Conditional Formatting Settings*

- Open up the “Style and Conditional Formatting” settings:



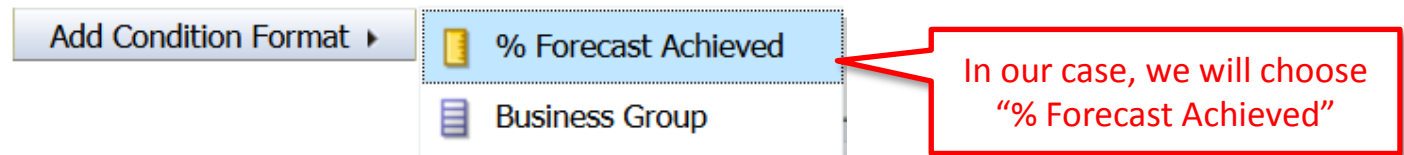
- Go to the “Conditional Formatting” tab:



# Implementing on Graphs

## *Step 4: Add/Define Condition*

- Click on the “Add Condition Format” button and select the column which is to have the conditional formatting applied:



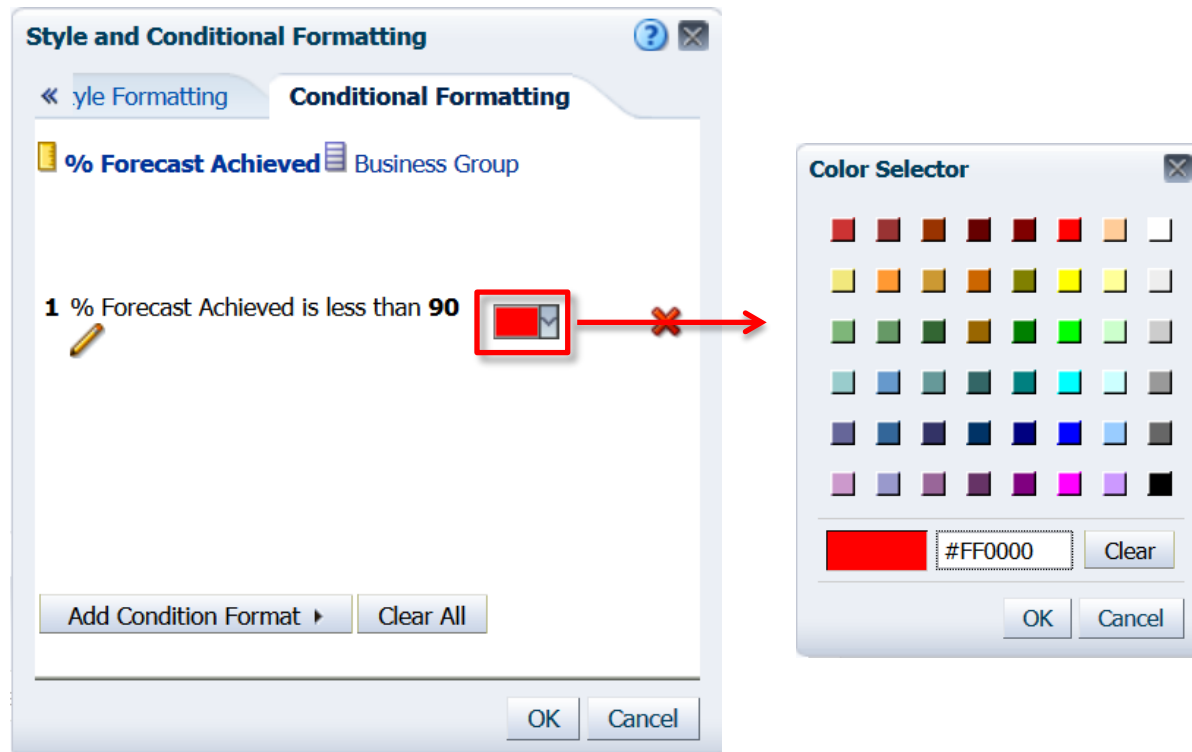
- Define the condition criteria:

The image shows a dialog box titled 'New Condition'. It has a 'Column' field set to '% Forecast Achieved', an 'Operator' dropdown menu set to 'is less than', and a 'Value' text box containing '90'. At the bottom, there are two buttons: 'Add More Options' and 'Clear All'.

# Implementing on Graphs

## *Step 5: Choose Colouring*

- Choose the colour for the graph when the condition is true:



# Implementing on Graphs

## Step 6: Test

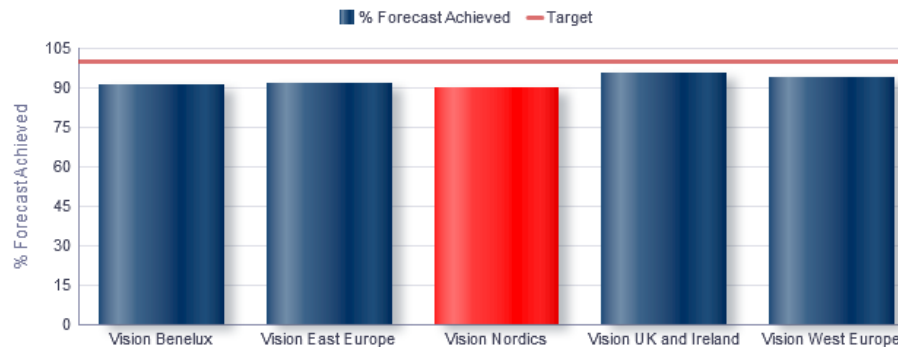
- That's it! You can now preview your graph with its Conditional Formatting applied:



### Sales vs Forecast for the Year 2007

Click on the Dial to see a breakdown of Forecast vs Actual for the particular Quarter

Organization	% Forecast Achieved			
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▽ Total	90.72	90.77	93.31	94.75
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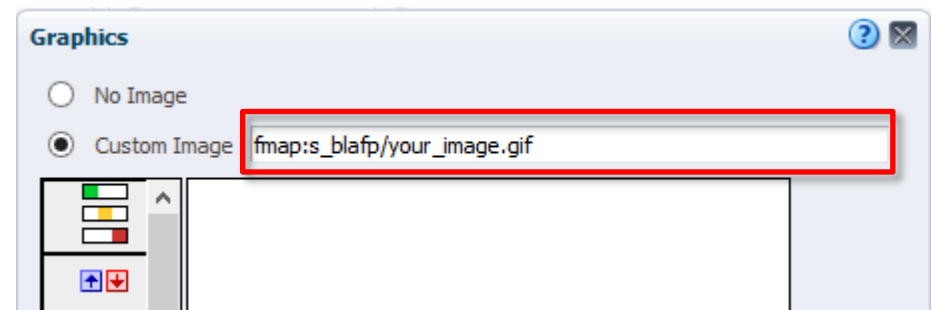




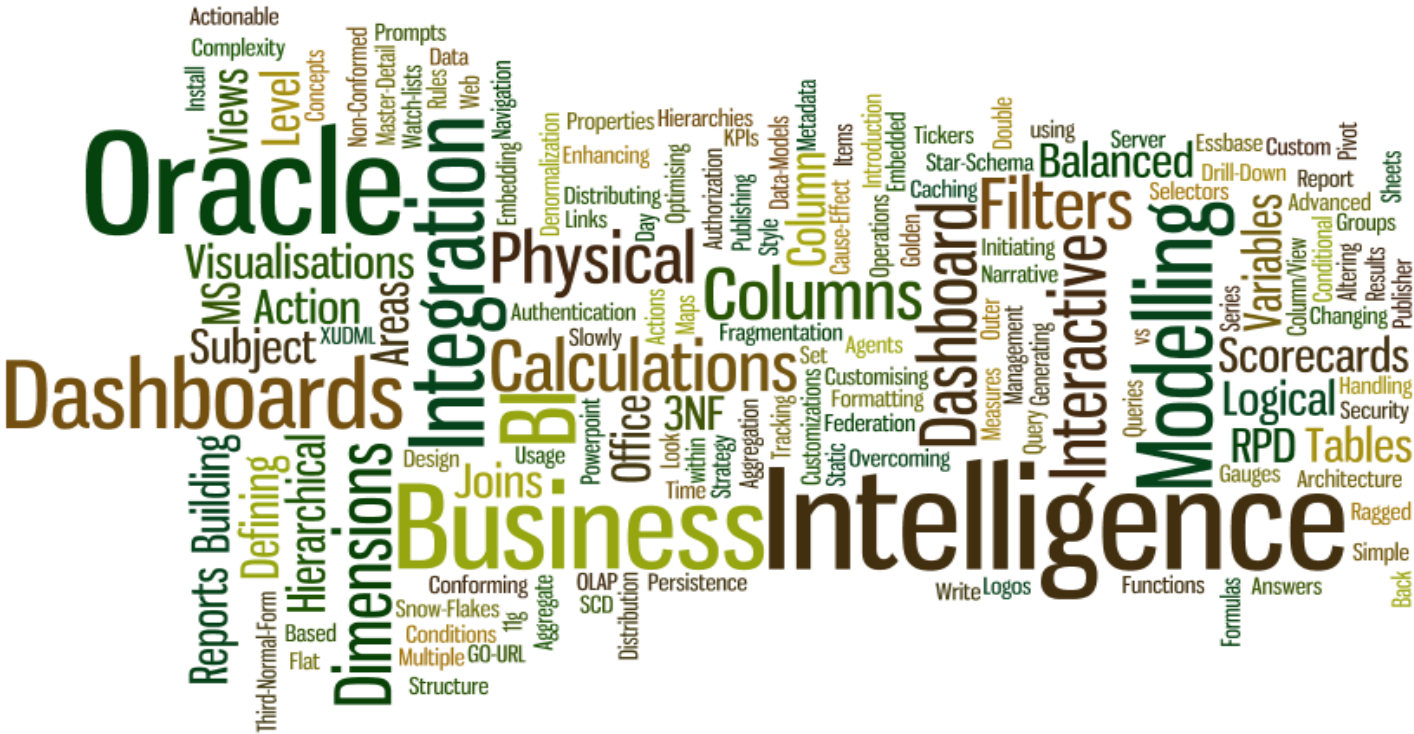
# Interactive Reports Using Custom Images

# Using Custom Images

- It is possible to use your own custom images with Conditional Formatting, but you will first need to upload your images to the OBIEE server
- The images need to be stored in the relevant “style” folder for your dashboard. For example, by default it will be:
  - *[Middleware\_Home]\user\_projects\domains\bifoundation\_domain\servers\bi\_server1\tmp\\_WL\_user\analytics\_11.1.1\7dezl\war\res\s\_blafp*
- You can then reference your image using the “fmap” syntax. For example:
  - `fmap:s_blafp/your_image.gif`



# Questions?



# PEAK

## indicators

**PEAK**  
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