

# Styles and Conditional Features

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Intellicus Enterprise Reporting and BI Platform



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## **Acknowledgements**

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For details, visit: <http://www.intellicus.com/acknowledgements.htm> .

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
## Formula fields

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Create and use formula fields in your report when value of a report field is calculated based on other fields (database fields and or other calculated fields) of the record. For example, price = rate \* quantity.

Formula fields are managed from **Formula Fields** dialog box. Once a calculated field is created, it is placed on **Fields List** window. Drag and drop it on the report – like any other field.

To get **Formula Fields** Dialog box,

- Click  button from the toolbar.
- On **Tools** menu, click **Formula Field** option.

### The Formula Fields dialog box

**Formula Fields** dialog box lists all the calculated fields (formula fields) designed for the report. It has a set of buttons for management of formula fields.

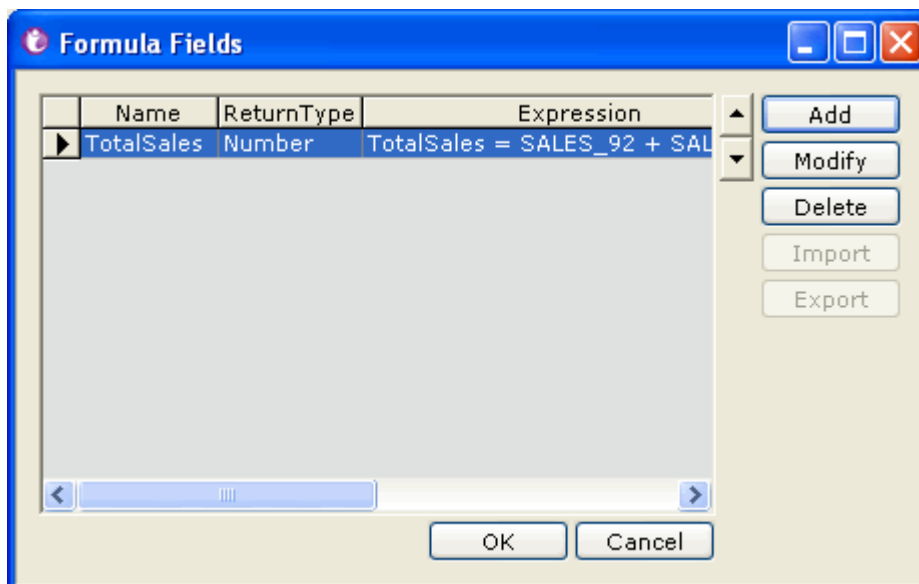


Figure 1: Formula Fields Dialog box

### Buttons on the Formula Fields Dialog box

- **Add:** To add a formula field on the report.
- **Modify:** To modify the selected formula field.
- **Delete:** To delete the selected formula field.
- **Ok:** To save the work and close the dialog box.
- **Cancel:** To abandon the changes and close the dialog box.

## Formula Fields

**Up and down arrow buttons:** Select a formula field row and click **up** button or **down** button to move the selected field up or down. When you want to use a formula within another field, you may prefer to move the "field being used" up to indicate its dependency on the field being created and the one in which it is used.

### To design a new formula field

Formula fields are designed on **Formula Field Expression** dialog box.

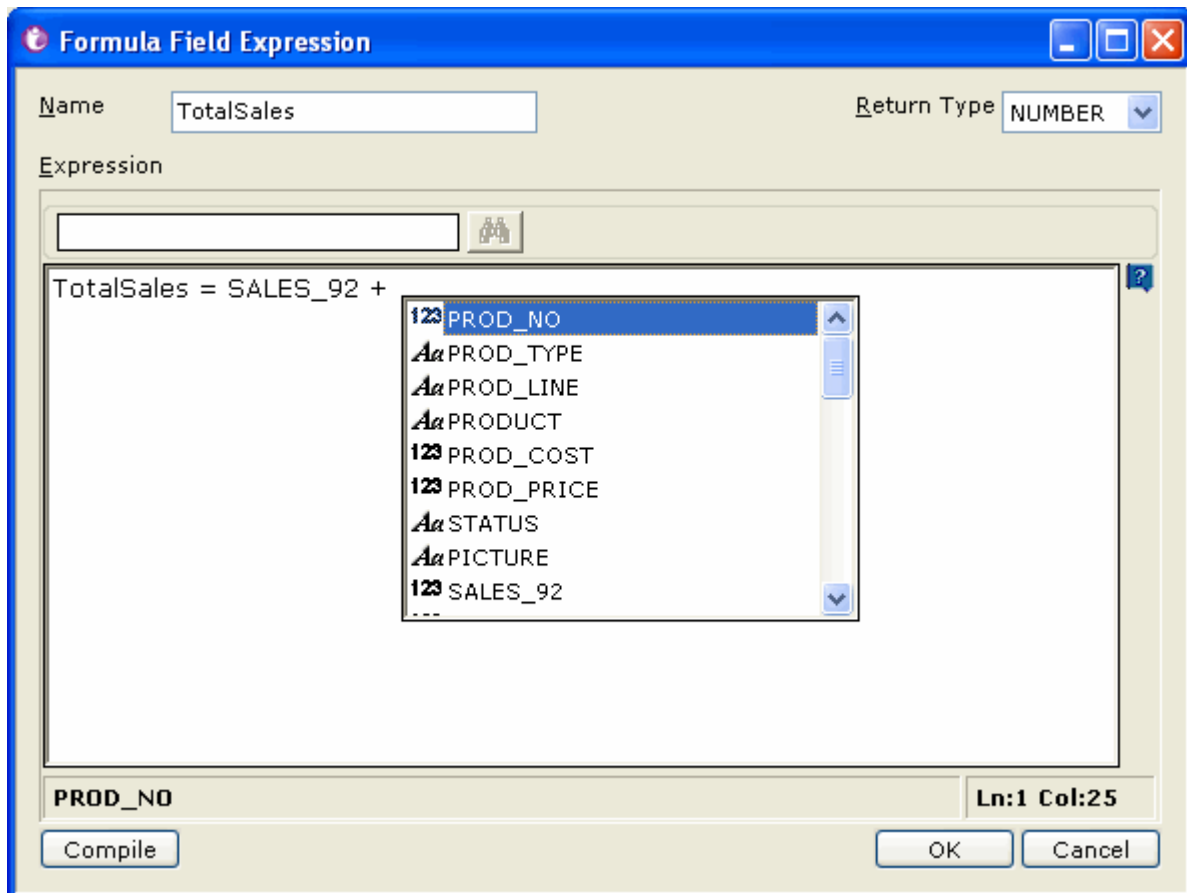


Figure 2: Formula Field Expression dialog box

1. Click **Add** button from **Formula Fields** dialog box. **Formula Fields Expression** dialog box appears.
2. In **Name**, Specify a unique name for the formula field being designed.
3. In **Return Type** drop down box, select a return type.
4. In **Details**, specify the formula followed by an '=' sign and specify expression for the field.
5. Click **OK** to save the work and close the dialog box.

The field appears in the list under **Formula fields** dialog box.



**Note:** Report will not run if there is any syntax error in the formula. Click **Compile** button to check the formula for syntax errors.

### To Edit (modify) a Formula field

1. On **Formula fields** dialog box, select the formula field that you want to edit and click **Modify** button. The field opens in **Formula Field Expression** dialog box.
2. Change the required details.
3. Click **OK** to save the work and close the dialog box.

The changes are saved.

### To Delete a Formula field

1. On **Formula fields** dialog box, select the formula field that you want to delete.
2. Click **Delete** button.
3. Click **OK** to save the work and close the dialog box.

### General syntax

You can make simple to complex formula for a formula field. General syntax for a formula field is:

FormulaName = formula

Follow JavaScript syntax to create a formula. To create formula, you can use field names and define variables. A formula may have if construct as well as nested if construct. You can use logical operators too. If want to add more than one statements in formula, use semicolon ';' as separator between two statements.

Example:

- `NewForm1 = var a = 5 ; b = 3 ; if (a!=b) { f = a } {NewForm1=f}`
- `TotalAmount = var total ; if (unitprice < 10 ) {total = unitprice*quantity} else {total = unitprice} {TotalAmount = total}`

## Styles (Formats)

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You need to create a format before it can be used. All the activities regarding setting up different formats are carried out from **Styles** dialog box.

### To get Styles dialog box


- Click  button on the toolbar.
- On **Format** menu, click **Styles** option.



Figure 3: Styles dialog box

### Buttons on Styles dialog box

- **Add:** To open **New Style** dialog box to create a new format.
- **Modify:** To Change selected Format.
- **Delete:** To delete selected format.
- **OK:** Save the changes and close the dialog box.
- **Cancel:** Abandon the changes and close the dialog box.

### To create a new format

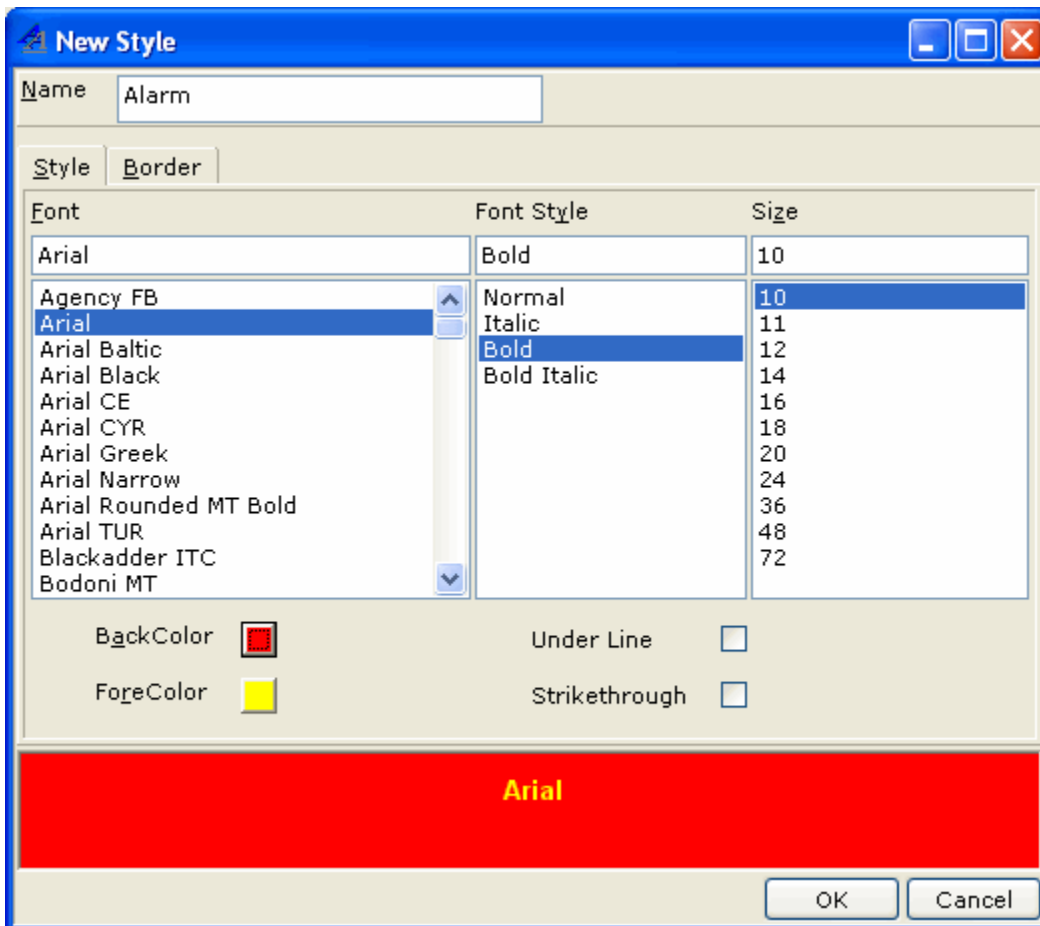


Figure 4: Selecting styles and border for a format

1. On **Styles** dialog box, click **Add** button. **New Style** dialog box opens.
2. In **Name** entry box, specify a unique name for the format being created.
3. Select styles settings on **Styles** tab. Select Borders settings on **Borders** tab.
4. Click **OK** to save the format.

**New Style** dialog box is closed and the newly created format is added in **Styles** dialog box.

### To change an existing format

1. On **Styles** dialog box, click the format that you want to change.
2. Click **Modify** button. **Modify Style** dialog box opens.
3. Make changes where required.
4. Click **OK** to save the changes.

Changes are saved.



### To delete an existing format

1. On **Styles** dialog box, click the format that you want to delete.
2. Click **Delete** button. A Confirm delete dialog box appears. Click **OK** to go ahead with the deletion.

## Global Styles

Styles setup here can be imported in any of the reports. Once it is imported, it will be available in respective open report through **Styles** dropdown box.

### To get Global Styles dialog box

1. From **Tools** menu, click **Options** to get **Options** dialog box.
2. On **Options** dialog box, under **Global Styles** area, click **Manage Styles** button.

### To create a global style

1. On **Global Styles** dialog box, click **Add** button.
2. On **Add New Global Style** dialog, specify style settings and click **OK** to save the style.

### To modify a global style

1. On **Global Styles** dialog box, select the style that needs to be modified.
2. Click **Modify** button.
3. On **Modify Global Style** dialog, specify modified style settings and click **OK** to save the style.

**Important:** To get effect of modified styles if they are used (imported) in any of the reports, click **Auto update where used** checkbox before clicking **Manage Styles** button.

### To delete a global style

1. On **Global Styles** dialog box, select the style that needs to be deleted.
2. Click **Delete** button.
3. Click **Yes** on the confirmation message.

### To import a global style in an open report

List of the global styles becomes visible when you click down-arrow located on right of the **Style** button.

1. From toolbar, click the down arrow button on the right of **Styles** button.
2. From the list that drops down, select the global style that you want to import.
3. Conform import dialog box appears. Click **Yes** to go ahead with the import.

After import, the style appears in styles dropdown box on report's format toolbar.

## Conditions

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Conditions are used in Conditional Formatting and Notifications. You need to create a condition before it can be used. All the activities regarding setting up different conditions are carried out from **Conditions** dialog box.

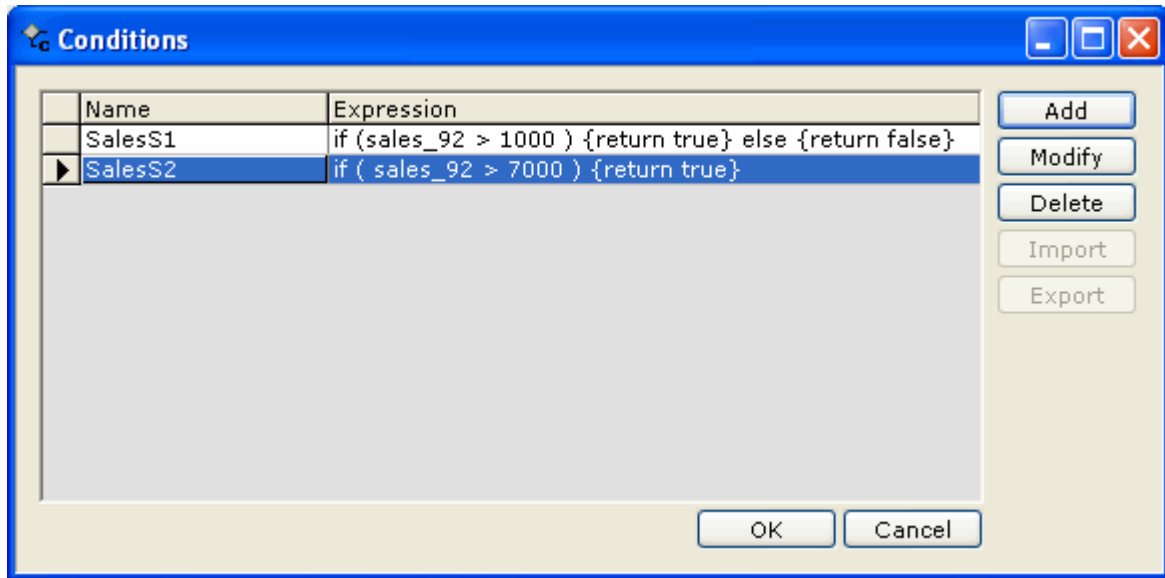



Figure 5: Conditions dialog box

To get **Conditions** dialog box,

- Click  button on the toolbar.
- On **Insert** menu, click **Conditions** option.

### Buttons on Conditions dialog box

- **Add:** To open Conditions dialog box to create a new condition.
- **Modify:** To edit an existing condition.
- **Delete:** To delete selected condition.

## To create a new condition

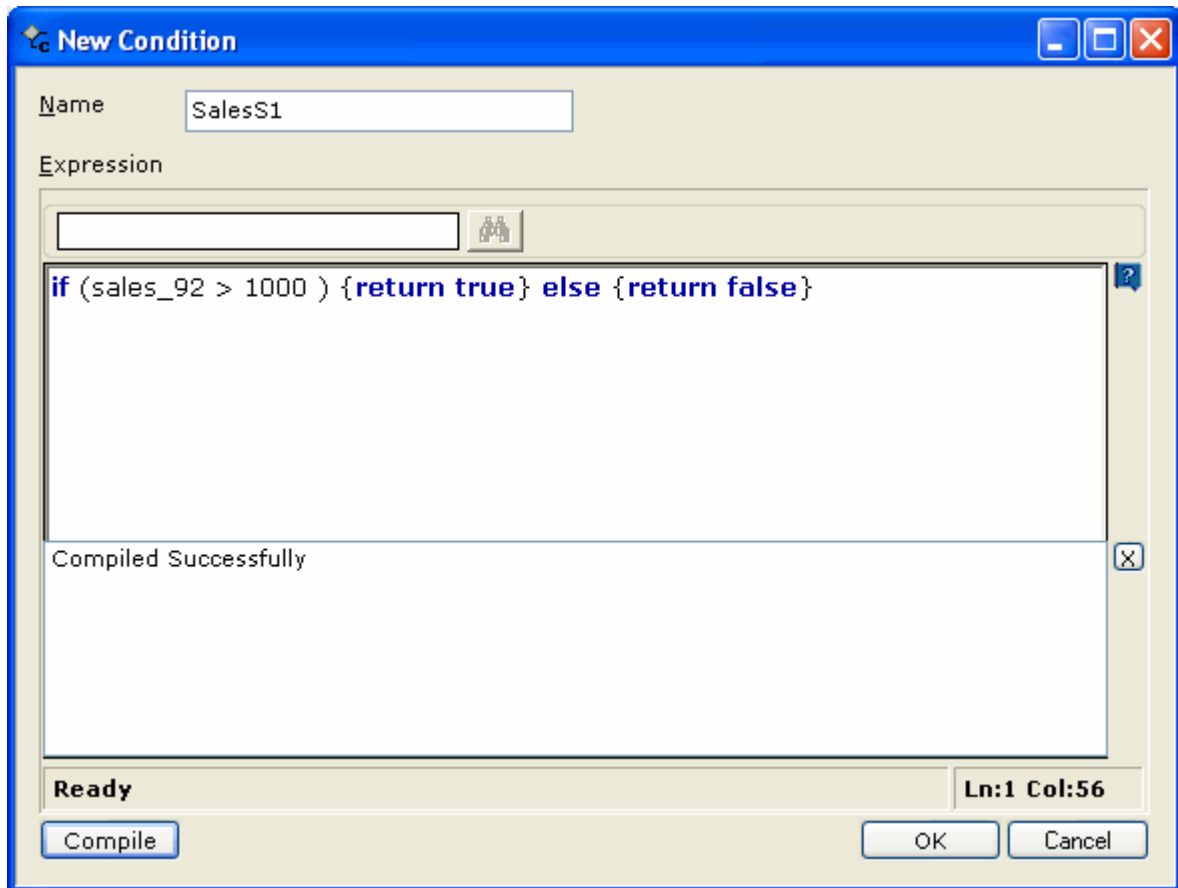


Figure 6: Specifying Conditions

1. On **Conditions** dialog box, click **Add** button. **New Condition** dialog box opens.
2. In **Name** entry box, specify a unique name for the condition being created.
3. In **Details** box, specify condition.
4. Click **Ok** to save the condition.

**New Condition** dialog box is closed and the newly created condition is added in **Conditions** dialog box.

### Specifying a condition

The condition structure is:

```
if (condition) {return true} else {return false}
```

You can nest a condition:

```
if (if (condition1) {return true} else {return false}) && (if (condition2) {return true} else {return false}) {return true} else {return false}
```

Following logical and mathematical operators can be used with a condition:

Use this operator	to indicate this
&&	And
	Or
!	Not
==	Equal to
!=	Not equal to
<	Less than
>	Greater than
<=	Less than equal to
>=	Greater than equal to

- To use a text for checking, enclose the text within single quotes, for example: `E_Name=='Pinto'` .
- To use a date for checking, specify the date in yyyy-mm-dd format and enclose it within single quotes, for example: `JoiningDate=='2004-05-30'` .
- Numbers can be used as it is, for example, `Sales>5000` .

If a field of one type is checked with that of another type, then the conditional format will not be applied.

Examples:

```
if ( empno > 7500) {return true} else {return false}  
if ( Sal > 7500) {return true} else {return false}
```

```
if (CustNo == 'Elsa'){return true}  
if (ename == 'Elsa'){return true}
```

```
if (empno > 7500 || ename != 'SMITH' ) {return true}  
if ((sal > 1400 || empno >7500) && (comm > 2)) return true
```

### To change an existing condition

1. On **Conditions** dialog box, click the condition that you want to change.
2. Click **Modify** button. **Modify Condition Expression** dialog box opens.
3. Make changes in the condition.

## Conditions

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4. Click **Ok** to save the changes.

Changes are saved and the dialog box is closed.

### To delete an existing condition

A condition can be deleted only when it is not used in the report. If a condition is used, you need to remove its use before deleting the condition.

1. On **Conditions** dialog box, click the condition that you want to delete.
2. Click **Delete** button. A Confirm delete dialog box appears. Click **OK** to go ahead with the deletion.

# Conditional Formatting

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With conditional formatting, you can apply formatting based on the outcome of pre-set conditions (set at design time) and checked at run time.

Conditional formatting is applied at runtime on a field or a label control. For example,

- Display the record in Bold if result of a student is FAIL.
- Display the figure in red and in braces if the profit figure is negative.
- Display the sales figure with light blue background if the sales target is met, yellow if the target is missed by up to 25 % and red if it is missed by more than 25%.


Before applying a conditional formatting you need to,

- Set the required conditions.
- Set the required formats.

### Applying formats to controls

Conditional formats are applied to a control or a label using **Conditional Formatting** Dialog box. Before opening the **Conditional Formatting** dialog box, select the control on which the format is to be applied.

To get **Conditional Formatting** dialog box,

- Click  button from the toolbar.
- On **Format** menu, click **Conditional Formatting** option.

### To apply conditional formats to the selected control

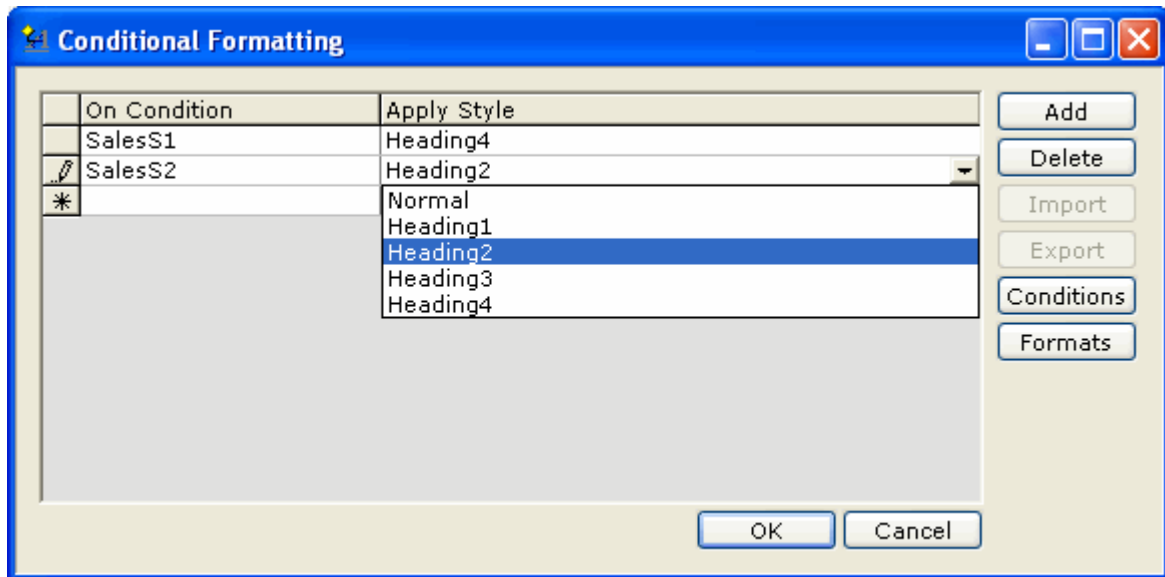


Figure 7: Conditional Formatting Dialog box

1. Click **Add** button on **Conditional Formatting** dialog box.
2. From **On Condition** drop down box, select a condition for which you want to apply a format.
3. In the same row, from **Apply Style** drop down box, select the format that you want to apply for selected condition of the control.

If you want to add more conditions for the selected control, repeat steps 1 through 3.

4. After applying formatting preferences for all the conditions, click **OK** button to save the work and close the dialog box.

### Buttons on Conditional Formatting dialog box

- **Add:** To create a new conditional format.
- **Delete:** To remove selected conditional format.
- **Conditions:** To open **Conditions** dialog box to create a new condition.
- **Formats:** To open **Formats** dialog box to create a new format.



**Note:** When you apply styles to a control from style drop down box, respective properties of the control will not automatically change (in property pane).



# Notifications

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Notify feature provides report users proactive information when a pre-set condition satisfies on report data. For example, Intellicus can notify users by sending an alert when during report generation it finds that total sale has gone over a set amount.

Notifications for a report are created during report design. When a report having notifications is uploaded to portal, all the notifications set for that report along with that set for other reports are listed on **Notification List** page of Portal.

Users need to subscribe to a notification and set alerts that they wishes to receive.

Alerts sent to users are viewed on **Alert Viewer** page of portal.

## Notification List

Notifications dialog box is used to

- View list of notifications set for a report
- Open dialog to add a notification
- Open dialog to modify a notification
- Delete a notification
- Open dialog to edit conditions

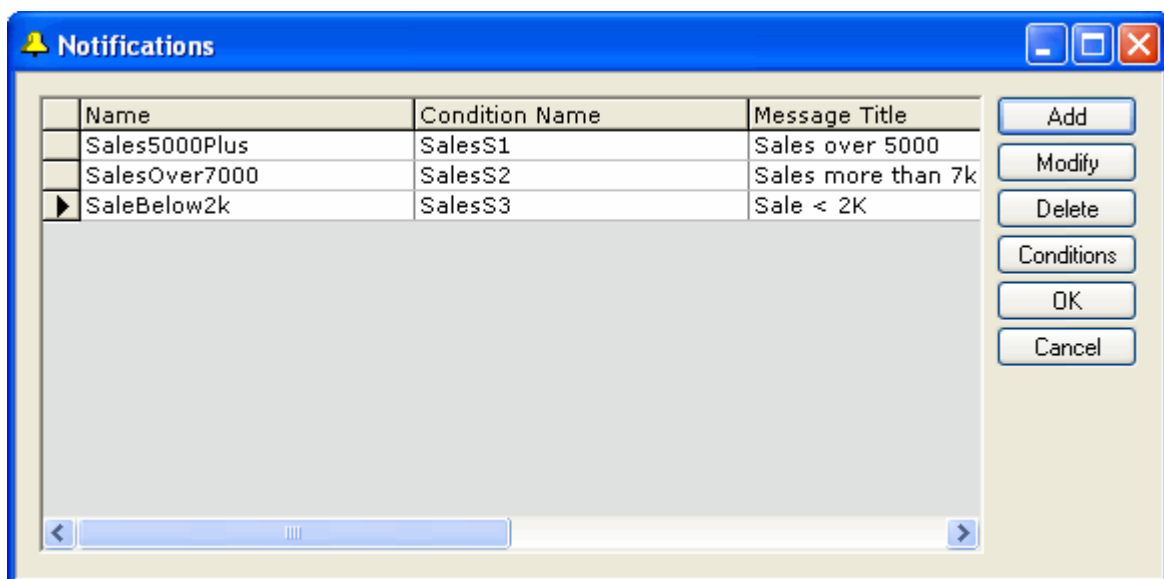



Figure 8: Notifications dialog box

## Notifications

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To get this dialog box,

- Click  button on toolbar or
- From menu click **Tools > Notifications**.

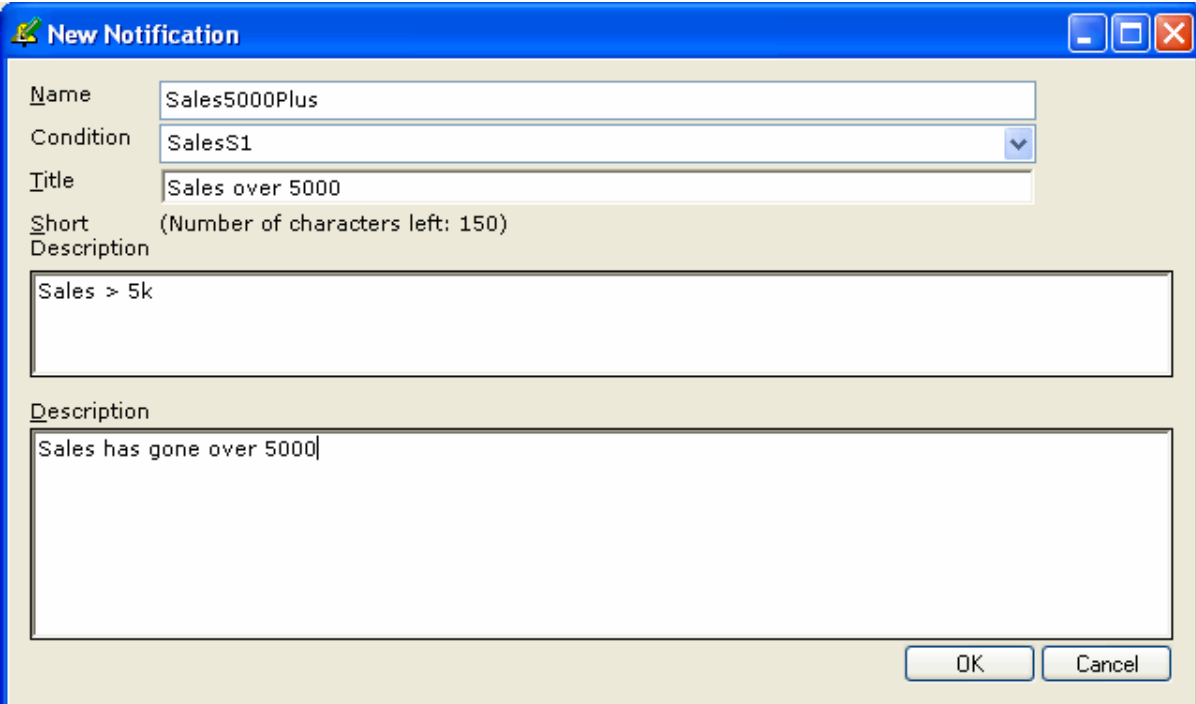
### Buttons

- **Add:** To open dialog box to add a new notification.
- **Modify:** To get dialog box to modify selected notification.
- **Delete:** To delete selected notification.
- **Conditions:** To get **Conditions** dialog box. This dialog box is used for working with conditions.
- **OK:** To save changes and close the dialog box.
- **Cancel:** To abandon changes and close the dialog box.

## Notification Detail

**Notification Details** (New Notification and Modify Notification) dialog box is used to add or modify details of a notification.

Notification details set on this page will appear on portal's Notification page as standard notification message.



The screenshot shows a 'New Notification' dialog box with the following fields and values:

- Name:** Sales5000Plus
- Condition:** SalesS1
- Title:** Sales over 5000
- Short Description:** Sales > 5k (Number of characters left: 150)
- Description:** Sales has gone over 5000

Buttons: OK, Cancel

Figure 9: Notification Details (New Notification) dialog box

## Notifications

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### Details on the dialog box

- **Name:** Unique name to identify this notification.
- **Condition:** Select the condition that would be evaluated. If the condition set here evaluates to true at the time of report generation an alert would be generated.
- **Title:** Specify a text that will appear as subject on email.
- **Short Description:** Specify a text that will appear as a message on email (first line in message) and as message on IM.
- **Description:** Specify a text that will appear as message on email. This text will not appear on IM.



**Note:** To include values as a part of message, add them in the message enclosed in <% and %>. For example, Profit increased by <%ProPer%>. Where, ProPer is a field.

### To add a Notification

1. On the **Notifications** dialog box, click **Add** button.
2. On the **New Notification** dialog box, specify details of the notification.
3. Click **OK** to save the notification.

Context-Help is available on **Title**, **Short Description** and **Description**. Use context help to auto-populate field names, parameter names in these fields.

### To modify a Notification

1. On the **Notifications** dialog box, select the notification that you want to modify.
2. On the **Modify Notification** dialog box, make changes in the notification details.
3. Click **OK** to save the modified notification.

### To delete a Notification

1. On the **Notifications** dialog box, select the notification that you want to delete.
2. Click **OK** to save the changes and close **Notifications** dialog box.

