Adding a Data Transformation to a Dashboard Data Set

Last Modified on 01/29/2025 4:49 pm EST

Overview

Data Transformations generate new fields for a Dashboard by performing basic calculations between two or more Fields, Formulas, or Properties in the Dashboard Data Set. Users can only leverage Fields, Formulas, or Properties within the Data Set when adding Data Transformations.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission or Data Management advanced permissions to add a Data Transformation to a Dashboard Data Set.

Related Information/Setup

After creating a Dashboard Data Set, the user must publish it before it can be used with the Dashboard Data Set Builder. Please follow the link below for more information on Publishing a Dashboard Data Set.
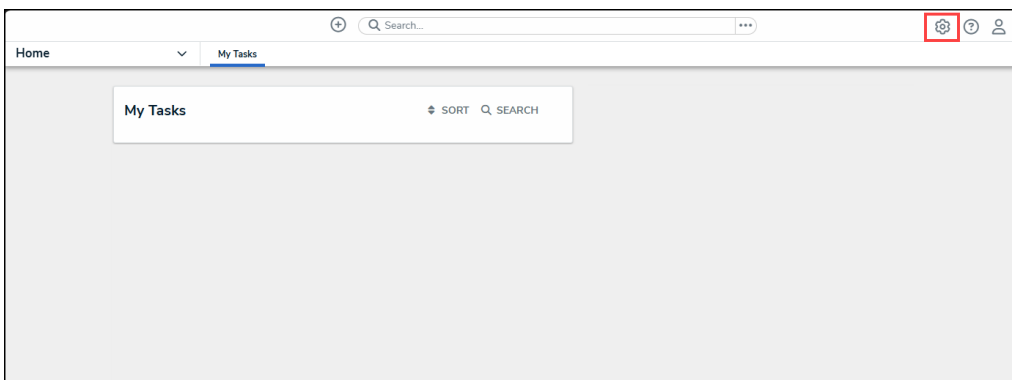
- Publishing/Unpublishing a Dashboard Data Set

For more information on how to delete a Dashboard Data Set, please follow the link below.
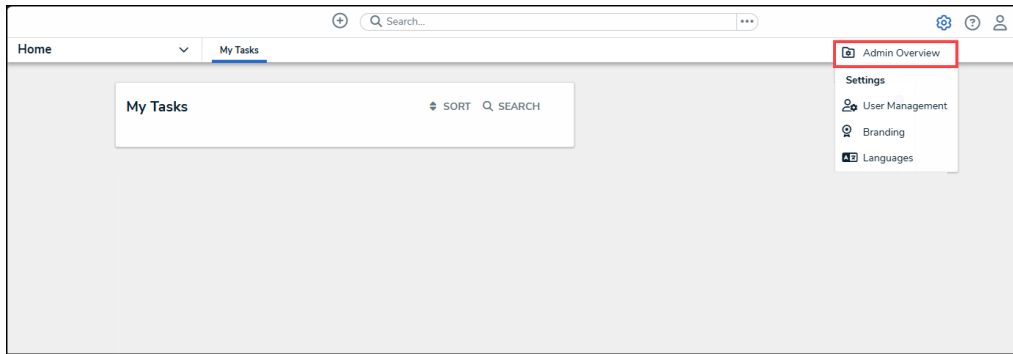
- Deleting a Data Dashboard Set

Navigation

1. From the *Home* screen, click the **Administration** icon.
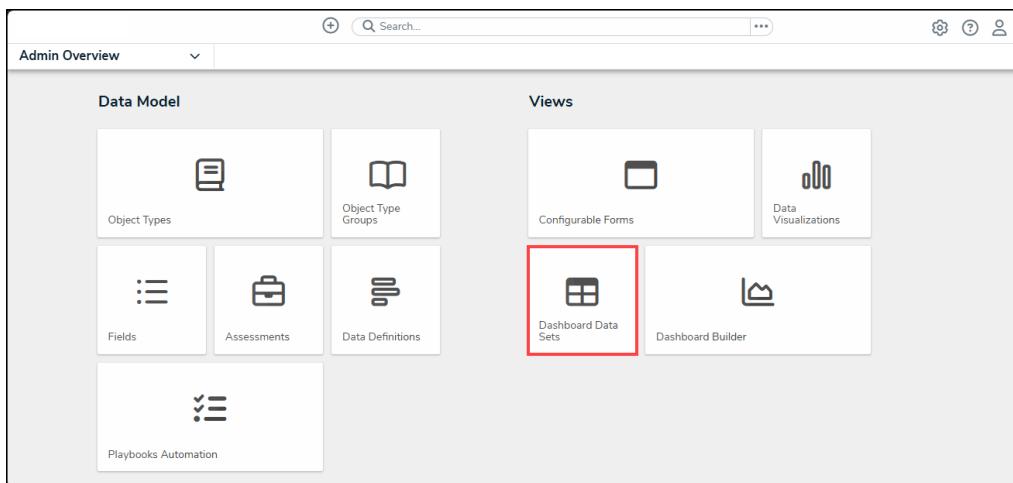

Administration Icon

2. From the **Administrator Settings** menu, click the **Admin Overview** link.

Administrator Settings Menu

3. From the **Admin Overview** screen, click on the **Dashboard Data Sets** tile under the **Views** section.
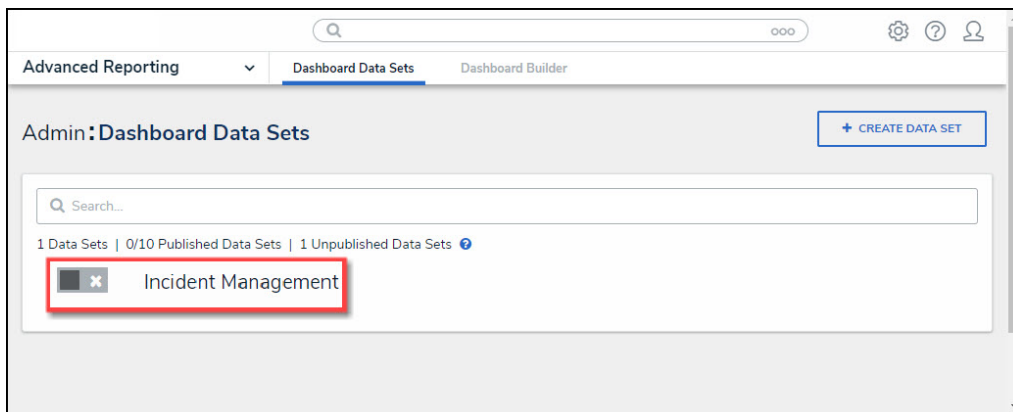

Dashboard Data Sets Tile

4. The **Dashboard Data Sets** screen lists the following information below the **Search** field:

- **Number of Data Sets (Data Sets):** The total number of Dashboard Data Sets.
- **Published Data Sets:** The total number of published Dashboard Data Sets that can be used within the Dashboard Builder. Published Dashboard Data Sets will be out of 10. You can only have 10 Published Dashboard Data Sets within the system.
- **Unpublished Data Sets:** The total number of unpublished Dashboard Data Sets. Unpublished Dashboard Data Sets cannot be used within the Dashboard Builder.
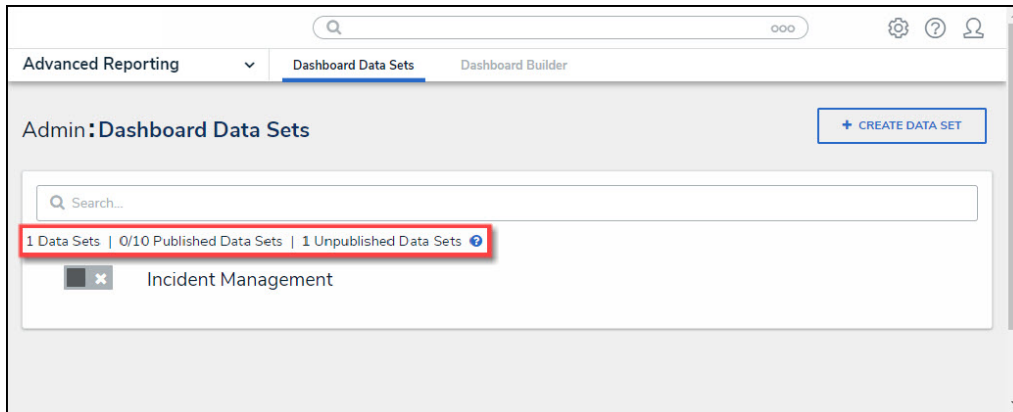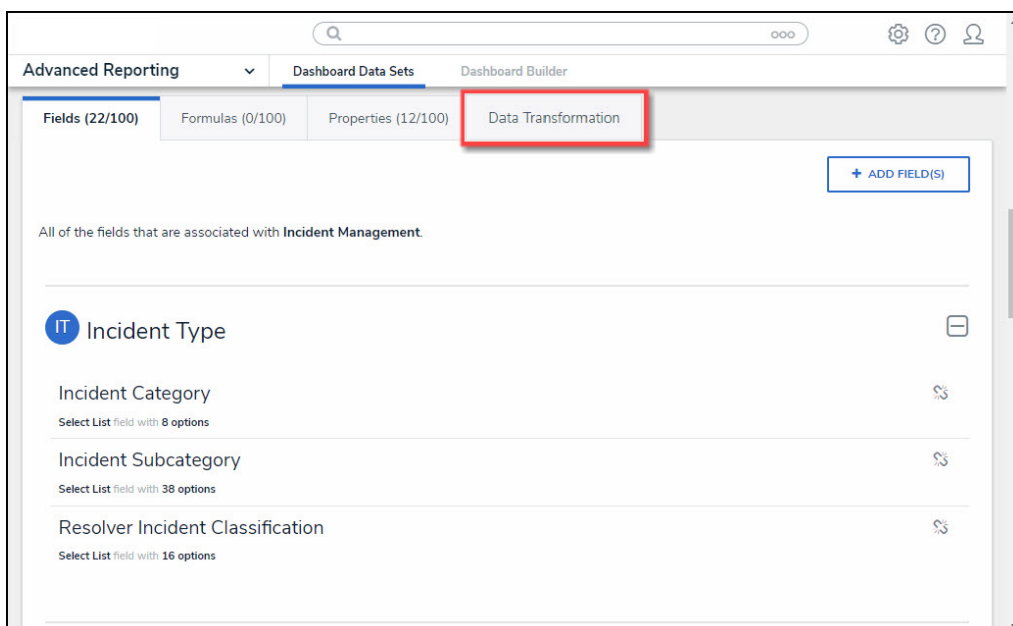
Total Data Set Fields

5. Click the **Dashboard Date Set Name** to select a **Dashboard Data Set** from the list.
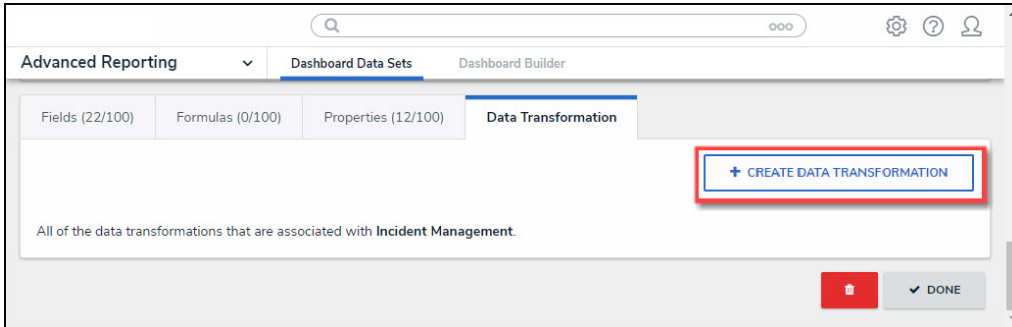

Dashboard Data Set

6. From the ***Edit Data Set*** screen, scroll to the ***Tabs*** section and select the ***Data Transformation*** tab.
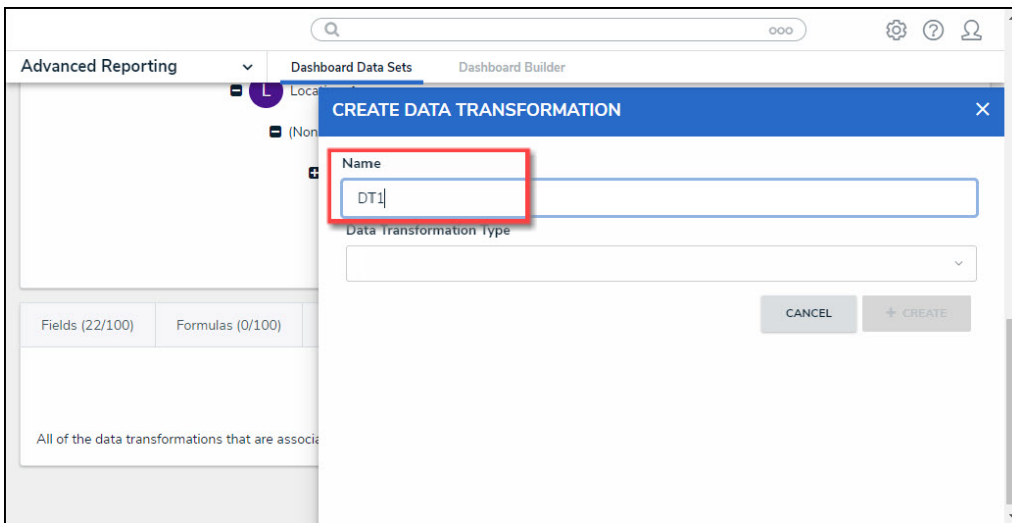
Adding a Data Transformation to a Dashboard Data Set

1. From the ***Data Transformation*** tab, click the **+ Create Data Transformation** button.

+ Create Data Transformation Button

2. From the ***Create Data Transformation*** pop-up, enter the **Name** of the new field in the **Name** field.

Name Field

3. Select a **Data Transformation Type** from the **Data Transformation Type** dropdown menu:

   - **Date Difference:** The **Date Difference** type calculates the difference between two date/time fields.
     - **Start Date:** Select the **Date/Time Field** for the Start Date in the Date Difference calculation from the **Start Date** dropdown menu.
     - **End Date:** Select the **Date/Time Field** for the End Date in the Date Difference calculation from the **End Date** dropdown menu.

- **Date Unit:** Select the unit of measurement used within the Date Difference calculation.
- **Format:** Select a **Format** type from the dropdown menu.
    - **Numeric:** The **Numeric** format type displays the Data Transformation value in numerical format.
    - **Abbreviated:** The **Abbreviated** format type abbreviates the thousand, millions, etc. placeholders with thousand = k, millions = m (e.g. 1500 would be 1.5k).
    - **Currency:** The **Currency** format type displays the Data Transformation value in currency format (e.g., $1500.00).
    - **Percentage:** The **Percentage** format type displays the Data Transformation value using a Percentage (e.g., 25%).
    - **Scientific:** The Scientific format type displays the Data Transformation value using scientific notation (e.g., $450,000 = 4.5 \times 10^6$).
- **Decimals:** The **Decimals** field allow a user to select the number of decimal place used to display the Data Transformation value from the dropdown menu.

Date Difference Type

- **Add Date:** The **Add Date** type increases a **Date/Time** field by the number entered in the **Value** field.
    - **Date Reference:** Select the **Date/Time Field** increased by the numeric value entered in the **Value** field is added to from the **Date Reference** dropdown menu (e.g., Observed Date/Time + 2 Months).
    - **Value:** Enter a numeric value added to the date/time field selected in the **Date**

Reference field.

- **Date Unit:** Select the unit of measurement used within the Add Date calculation.
- **Format:** Select a date **Format** type from the dropdown menu to apply to the Data Transformation value.
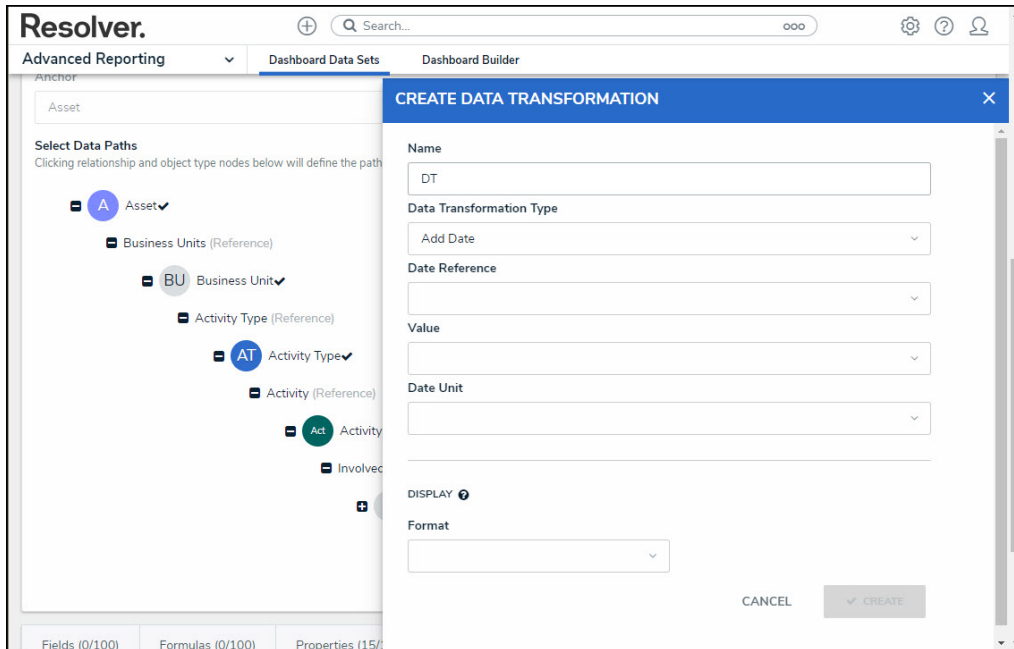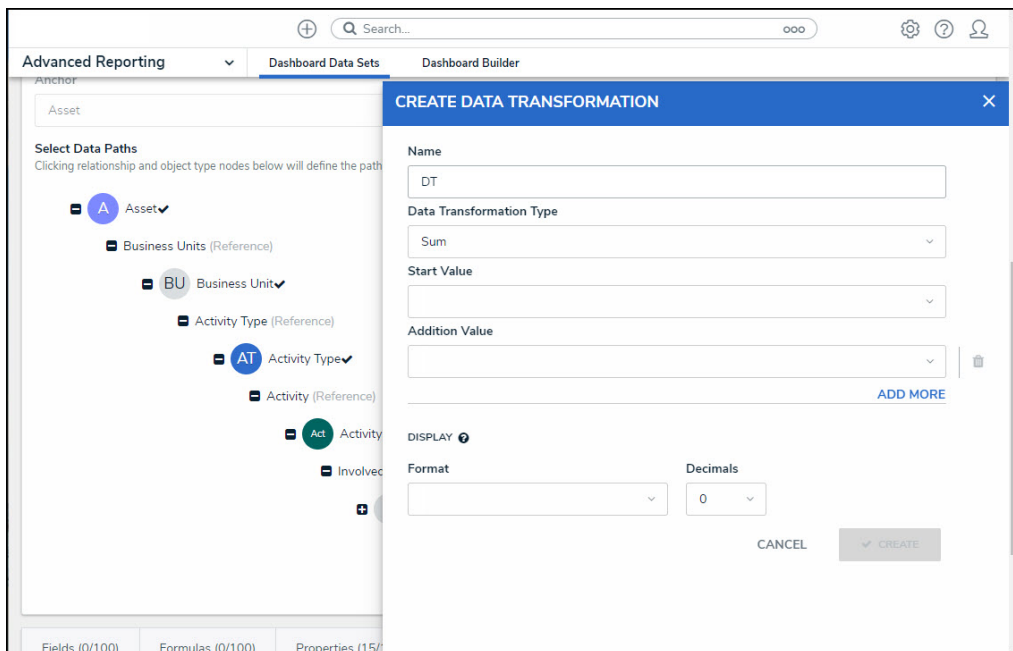

Add Date Type

> **Note:**
> The **Date Difference** and **Add Date** Data Transformation Types create a new Date/Time field. They use numeric fields, date/time fields or System-Generated Tokens to perform their calculations.
>
> System-Generated Tokens are dynamic date values that cannot be edited and allow a Data Transformation to account for the flow of time.

- **Sum:** The **Sum** type adds the values of two or more fields.
  - **Start Value:** Select a **Field** for the first value in the Sum calculation from the **Start Value** dropdown menu.
  - **Additional Value:** Select a **Field** for the second value in the Sum calculation from the **Additional Value** dropdown menu.
  - **+ Add Value Button:** Click the **+ Add Value** button to add an additional field value, adding another **Additional Value** field. Users can add up to 12 **Additional Value** fields to the Data Transformation.
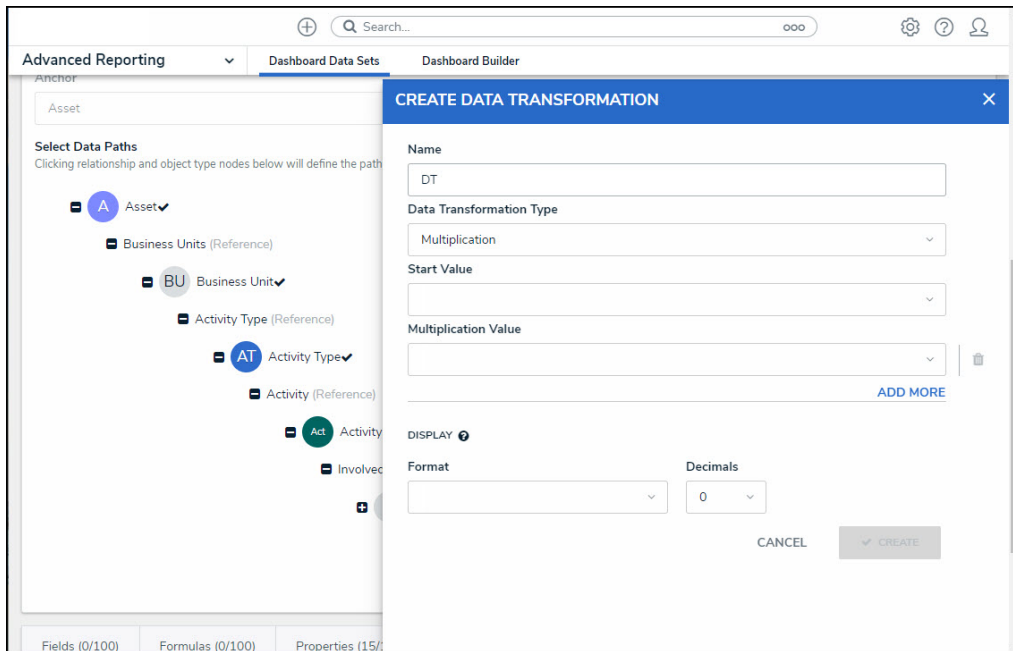 - **Format:** Select a **Format** type from the dropdown menu.

- **Numeric:** The **Numeric** format type displays the Data Transformation value in numerical format.
- **Abbreviated:** The **Abbreviated** format type abbreviates the thousand, millions, etc. placeholders with thousand = k, millions = m (e.g. 1500 would be 1.5k).
- **Currency:** The **Currency** format type displays the Data Transformation value in currency format (e.g., $1500.00).
- **Percentage:** The **Percentage** format type displays the Data Transformation value using a Percentage (e.g., 25%).
- **Scientific:** The Scientific format type displays the Data Transformation value using scientific notation (e.g., $450,000 = 4.5 \times 10^6$).
  - **Decimals:** The **Decimals** field allow a user to select the number of decimal place used to display the Data Transformation value from the dropdown menu.

Sum Type

- **Multiplication:** The **Multiplication** type multiplies the values of two or more fields.
  - **Start Value:** Select a **Field** for the first value in the Multiplication calculation from the **Start Value** dropdown menu.
  - **Multiplication Value:** Select a **Field** for the second value in the Multiplication calculation from the **Multiplication Value** dropdown menu.
  - **+ Add Value Button:** Click the **+ Add Value** button to add an additional **Multiplication Value** field. Users can add up to 12 additional **Multiplication Value** fields to the Data Transformation.
  - **Format:** Select a **Format** type from the dropdown menu.

- **Numeric:** The **Numeric** format type displays the Data Transformation value in numerical format.
- **Abbreviated:** The **Abbreviated** format type abbreviates the thousand, millions, etc. placeholders with thousand = k, millions = m (e.g. 1500 would be 1.5k).
- **Currency:** The **Currency** format type displays the Data Transformation value in currency format (e.g., $1500.00).
- **Percentage:** The **Percentage** format type displays the Data Transformation value using a Percentage (e.g., 25%).
- **Scientific:** The Scientific format type displays the Data Transformation value using scientific notation (e.g., $450,000 = 4.5 \times 10^6$).

- **Decimals:** The **Decimals** field allow a user to select the number of decimal place used to display the Data Transformation value from the dropdown menu.
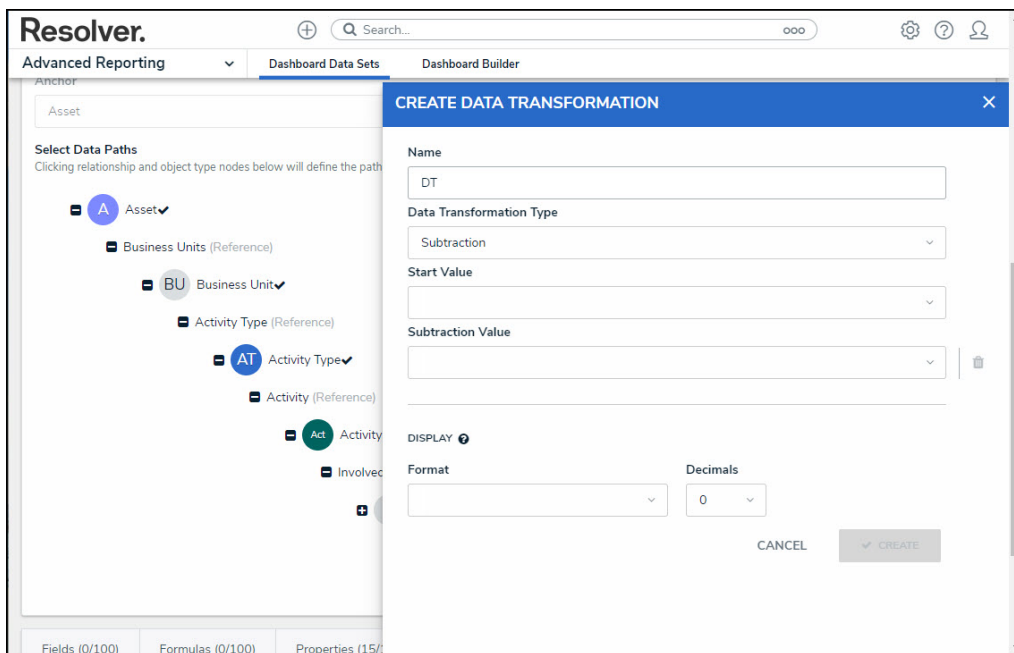

Multiplication Type

- **Subtraction:** The **Subtraction** type subtracts the values of two or more fields.
    - **Start Value:** Select a **Field** for the first value in the Subtraction calculation from the **Start Value** dropdown menu.
    - **Subtraction Value:** Select a **Field** for the first value in the Sum calculation from the **Subtraction Value** dropdown menu.
    - **Format:** Select a **Format** type from the dropdown menu.
        - **Numeric:** The **Numeric** format type displays the Data Transformation value in numerical format.
        - **Abbreviated:** The **Abbreviated** format type abbreviates the thousand,

millions, etc. placeholders with thousand = k, millions = m (e.g. 1500 would be 1.5k).

- **Currency:** The **Currency** format type displays the Data Transformation value in currency format (e.g., $1500.00).

- **Percentage:** The **Percentage** format type displays the Data Transformation value using a Percentage (e.g., 25%).

- **Scientific:** The Scientific format type displays the Data Transformation value using scientific notation (e.g., 450,000 = 4.5×10^6).

○ **Decimals:** The **Decimals** field allow a user to select the number of decimal place used to display the Data Transformation value from the dropdown menu.

Subtraction Type

4. Click the **Create** button to add the Data Transformation to the Dashboard Data Set.

The **Data Transformation Typ**e field is locked down and cannot be modified when a Data Transformation is created. The user must delete the Data Transformation and create a new one to change the **Data Transformation Type** field.