

Adding an Aggregated Formula to a Group Table

Last Modified on 11/24/2023 2:25 pm EST

Our new Dashboard feature is available upon request for the initial launch phase. Please contact your Customer Success Manager if you'd like to schedule implementation with our Services team.

Overview

Aggregated Formulas allow users to create new columns of data based on predefined aggregate functions (e.g., Running Average, Running Sum, Running Min, etc.) using Column Data from the Columns loaded in the Columns field.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to use the Dashboard Data Set Builder.

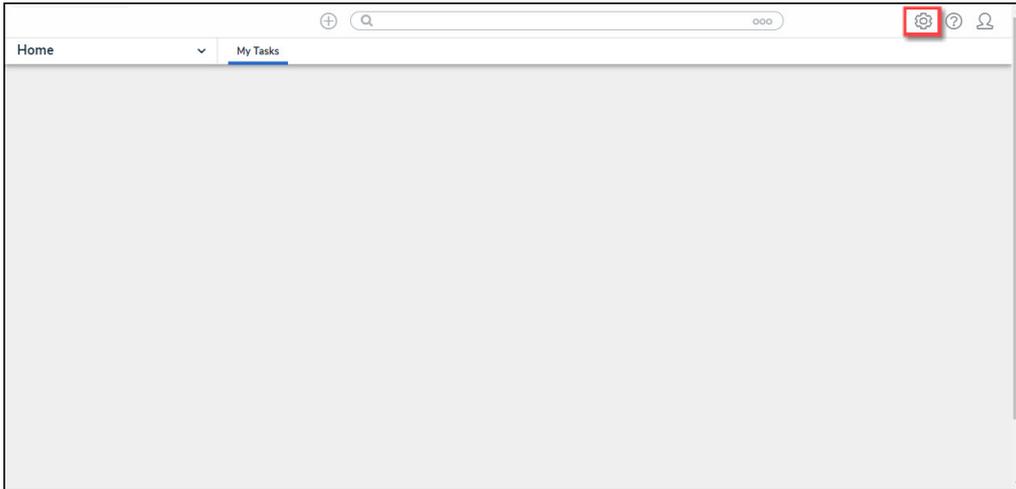
Related Information/Setup

Please see the corresponding article below for Information on Adding a Table/Group Table to a Dashboard.

- [Adding a Table/Group Table to a Dashboard](#)

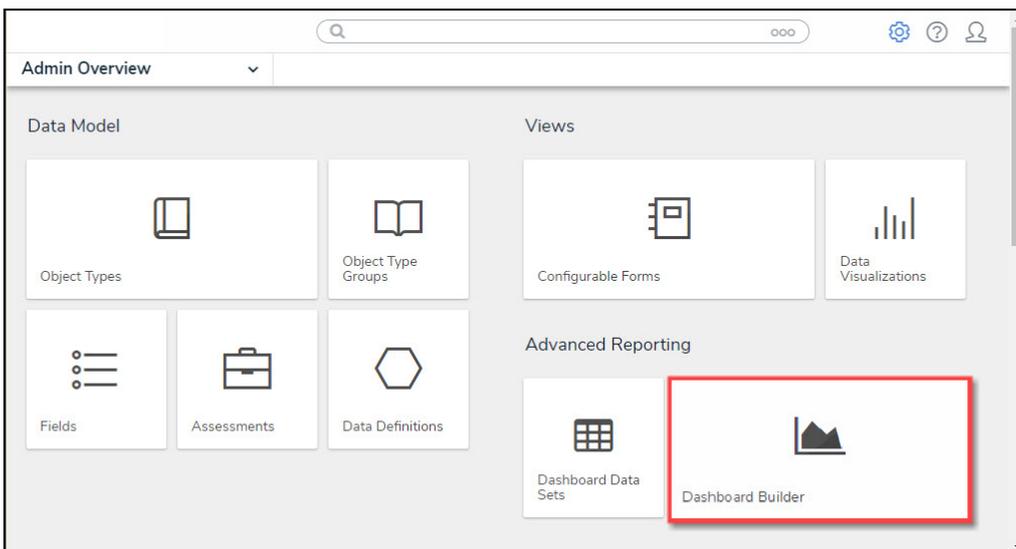
Navigation

1. From the **Home** screen, click on the **System** icon.



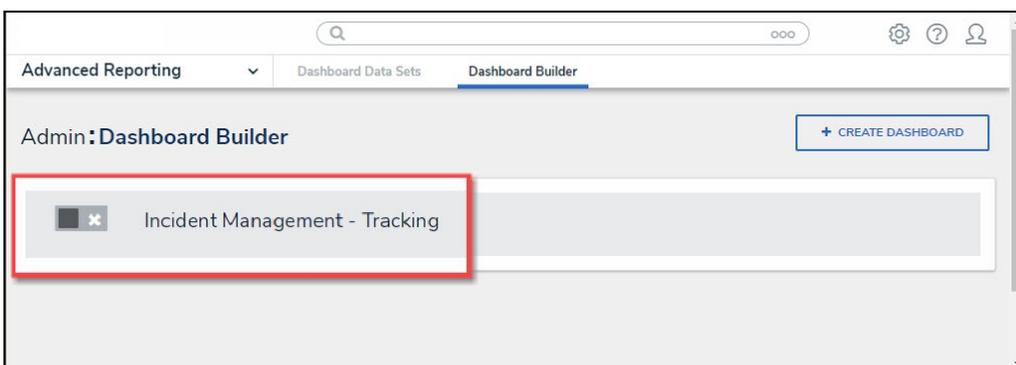
System Icon

- From the **Admin Overview** screen, click on the **Dashboard Builder** tile under the **Advanced Reporting** section.



Dashboard Data Sets Tile

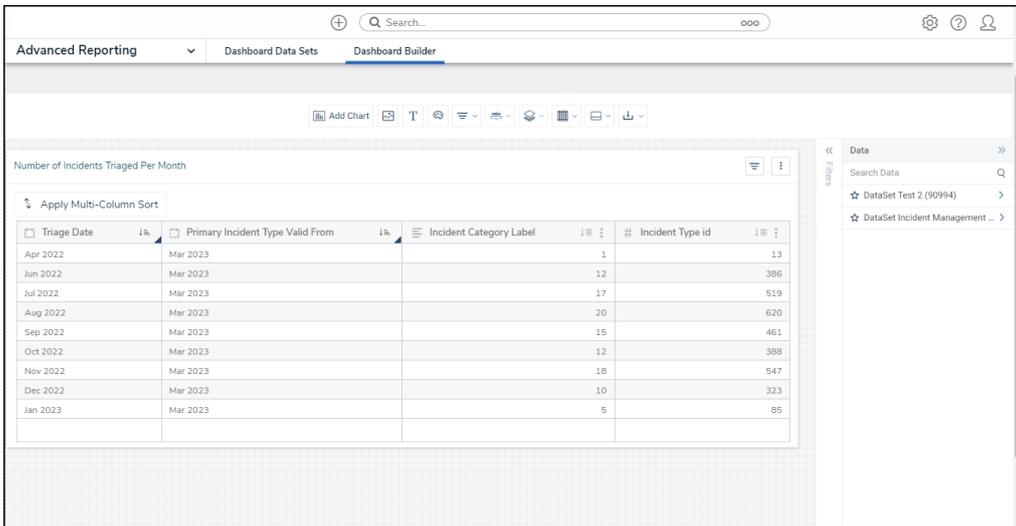
- From the **Dashboard Builder** screen, click on a **Dashboard Name**.



Dashboard Name

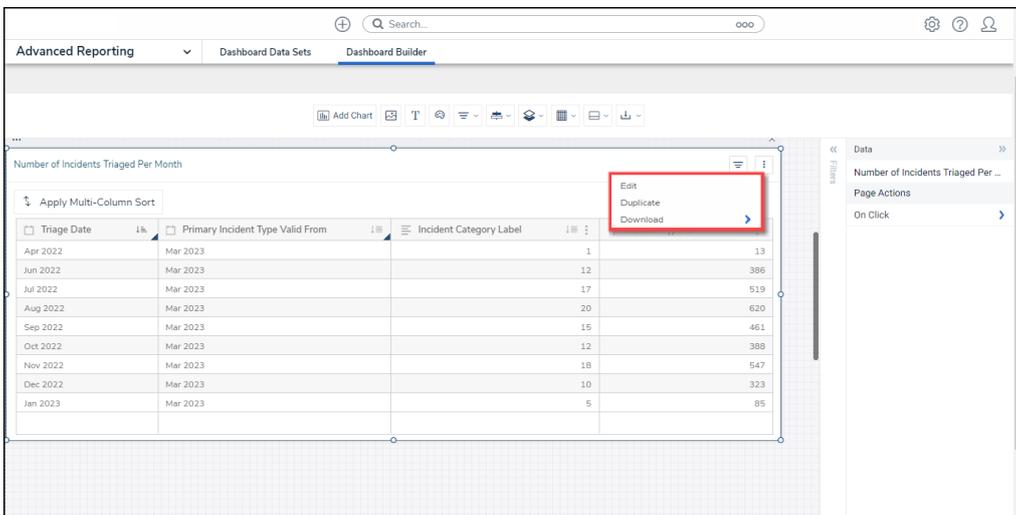
Adding Multi-Column Sort to a Table

1. From the **Dashboard** screen, find an existing Group Table on the Dashboard.



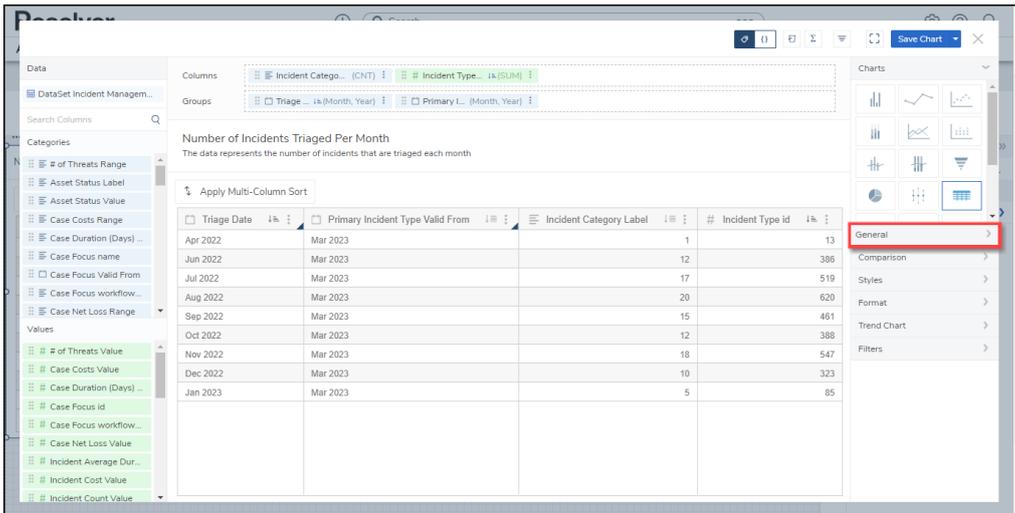
Group Table View

2. Click the **More Options** icon on the Group Table View and select **Edit** from the dropdown menu.



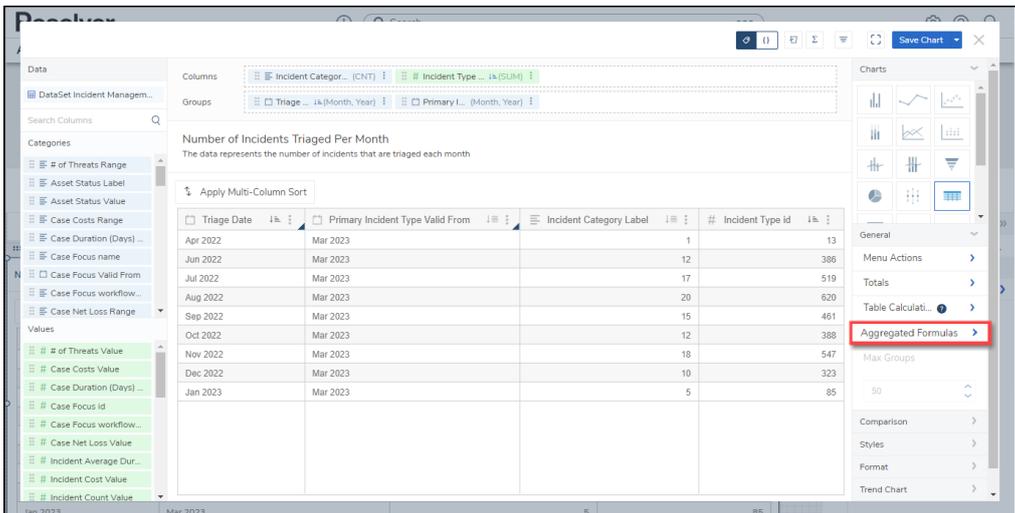
Edit

3. From the **Chart** screen, select the **General** panel from the **Configuration** panel.



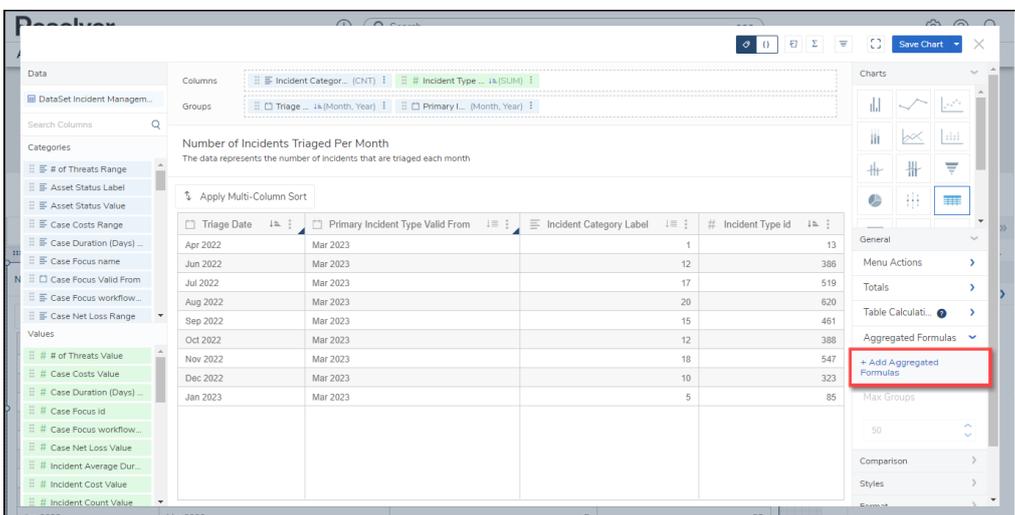
General Panel

4. Click the **Aggregated Formula** panel.



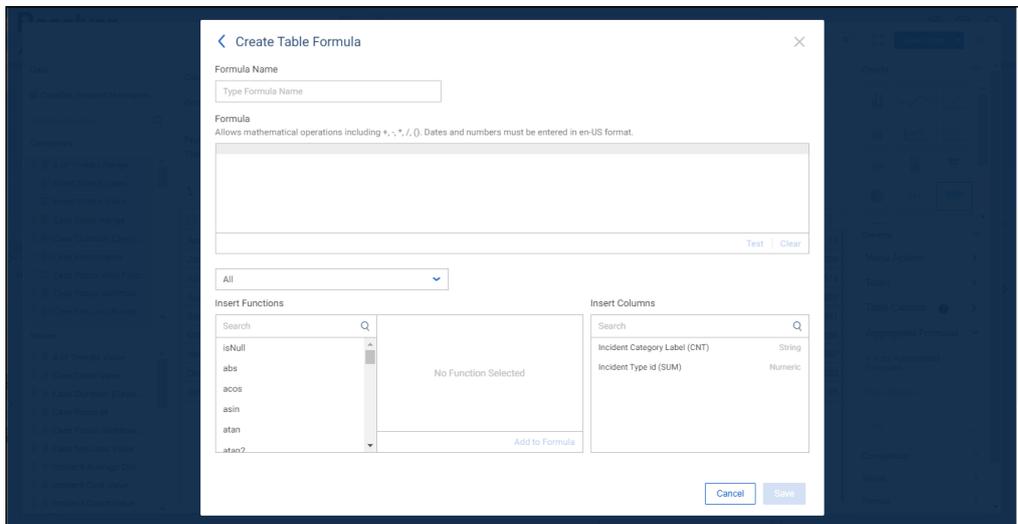
Aggregated Formula Panel

5. Click the **+Add Aggregated Formulas** link.



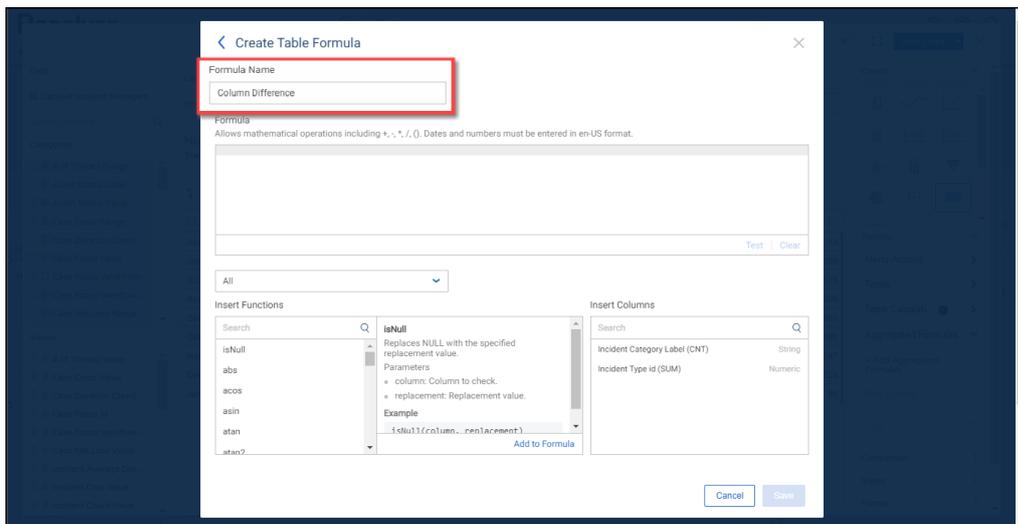
+Add Aggregated Formulas Link

6. The **Create Table Formula** screen will appear.



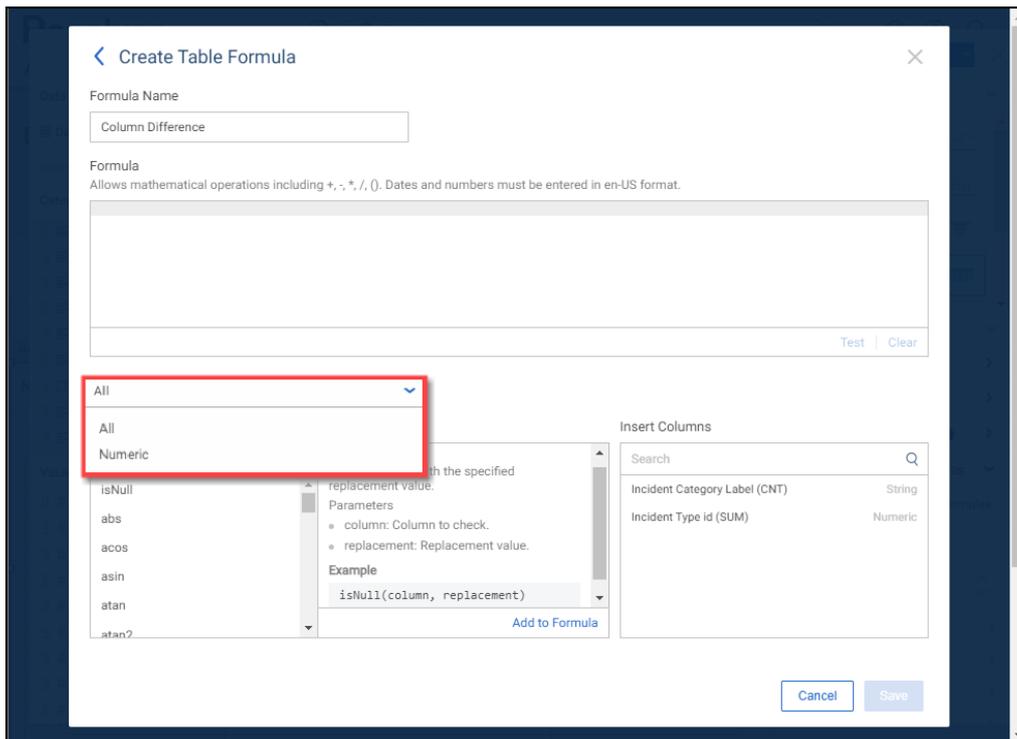
Create Table Formula Screen

7. Enter a name in the **Formula Name** field.



Formula Name

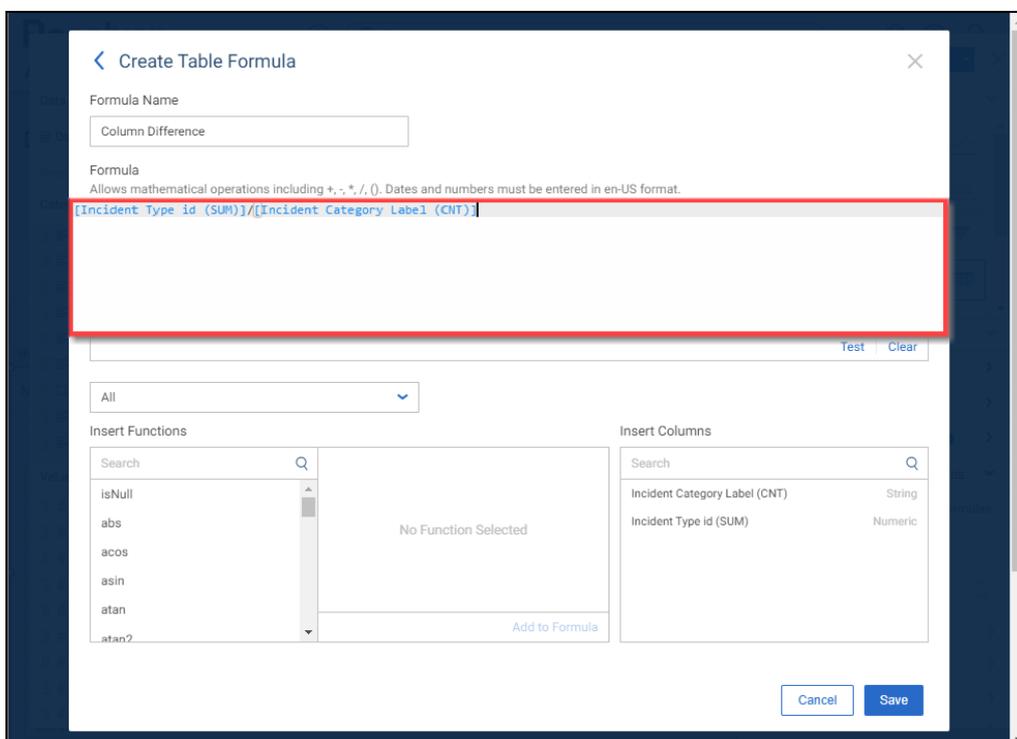
8. Select **Numeric** from the **Included Functions** dropdown menu to include only numeric functions within the Insert Function field.



Included Functions Dropdown

9. Create a Formula by either:

- Manually entering a formula in the **Formula** field.

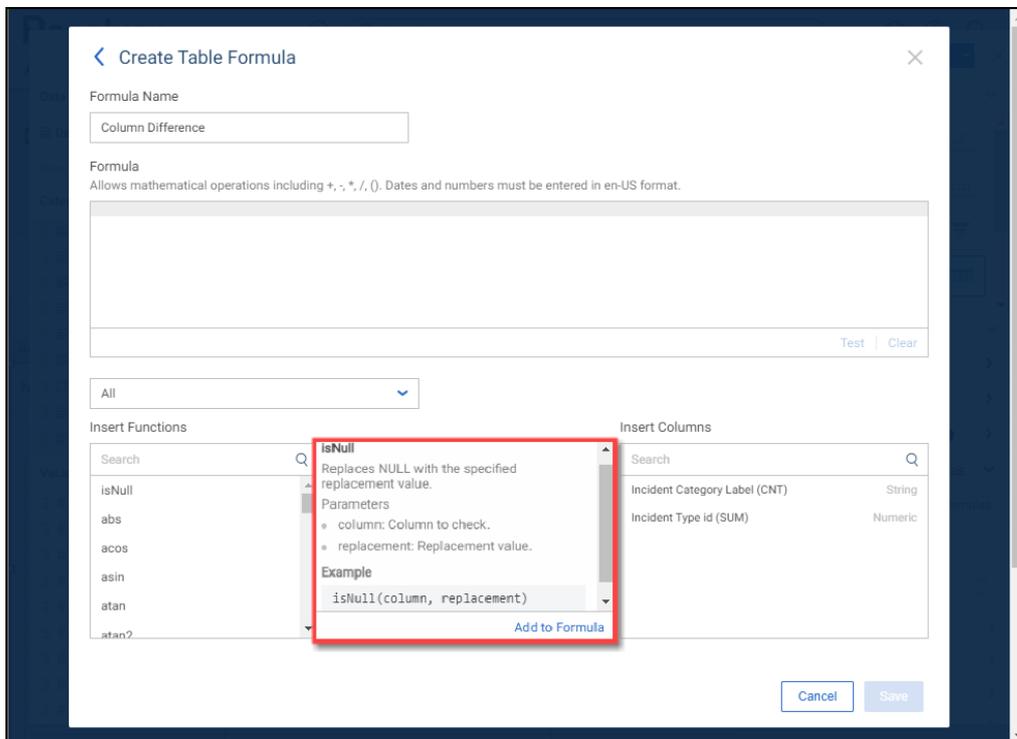


Manually Entering a Formula

- Select a function in the **Insert Function** menu by clicking on a function and viewing

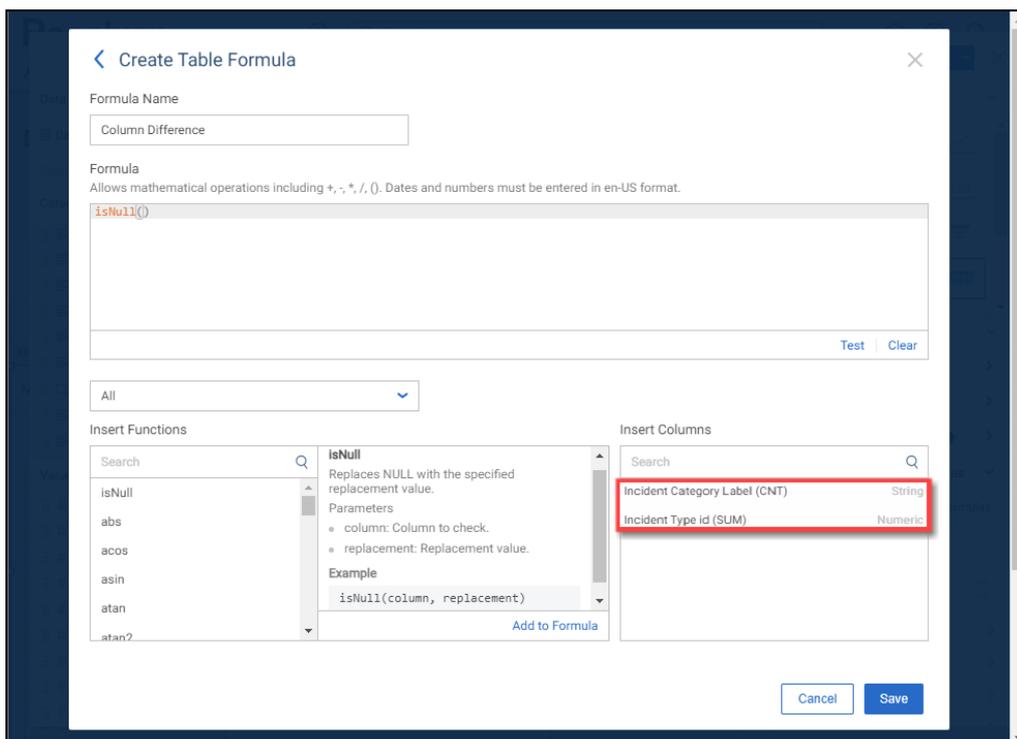
the Functions definition and required parameters in the **Review** field.

- Click the **Add to Formula** link in the **Review** field to add the function to the **Formula** field.



Add to Formula Link

- You can insert a Table Column into your Formula by clicking a Column on the Insert Columns field.



Insert Column Field

10. When you have entered a Formula in the **Formula** field, click the **Test** link to make sure that the Formula is Valid. A system-generated message will appear, indicating whether the Formula is valid.

Create Table Formula

Formula Name
Column Difference

Formula
Allows mathematical operations including +, -, *, /, (). Dates and numbers must be entered in en-US format.
[Incident Type id (SUM)]/[Incident Category Label (CNT)]

✓ Formula syntax is correct. **Test** Clear

All

Insert Functions

Search	Q
isNull	Replaces NULL with the specified replacement value. Parameters • column: Column to check. • replacement: Replacement value. Example isNull(column, replacement) Add to Formula
abs	
acos	
asin	
atan	
atan2	

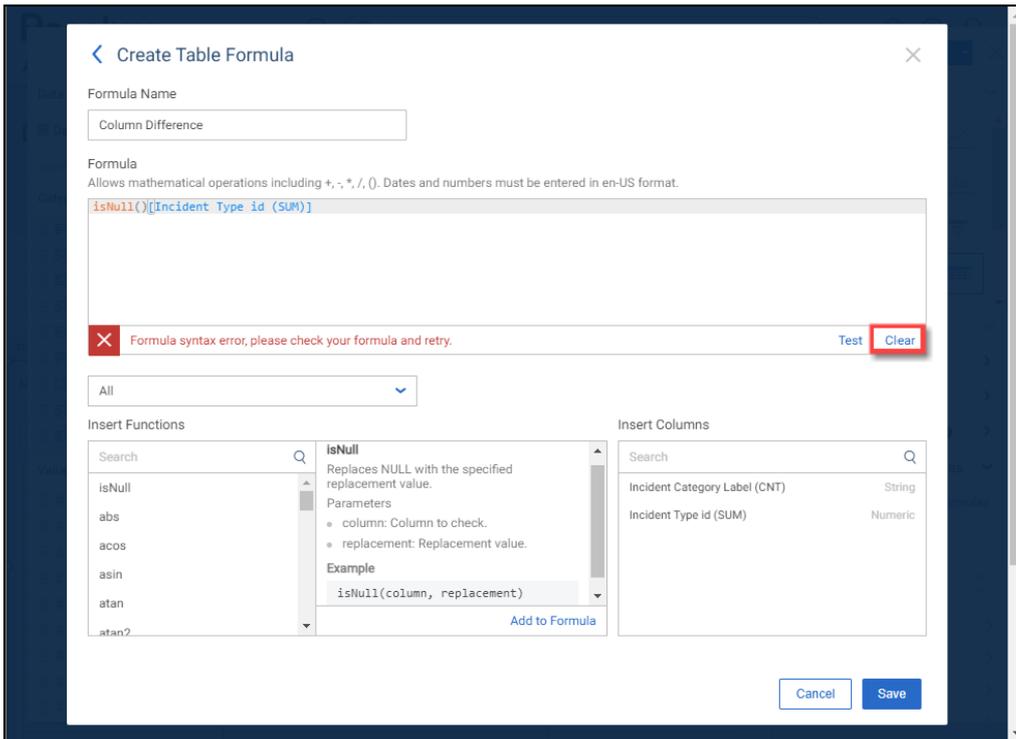
Insert Columns

Search	Q
Incident Category Label (CNT)	String
Incident Type id (SUM)	Numeric

Cancel Save

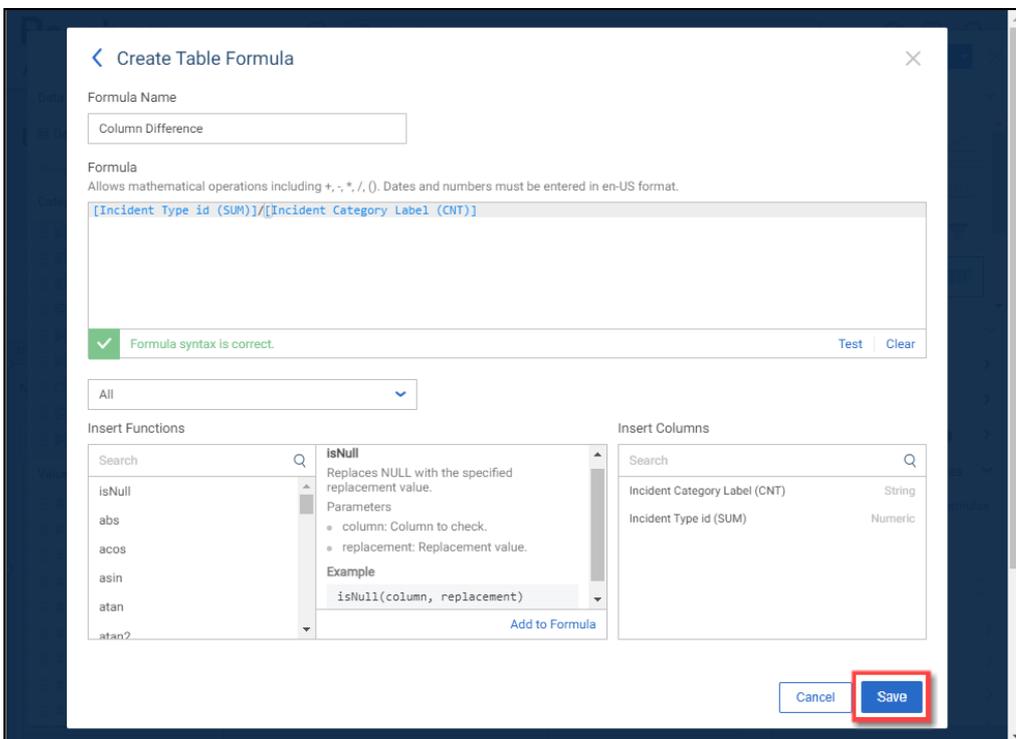
Test Link

11. If the Formula is not valid, adjust the Formula and click the **Test** link until you receive the valid Formula message.
12. Click the **Clear** link to delete the entire Formula from the **Formula** field.



Clear Link

13. Click the **Save** button to add the Formula to the Table.



Save Button