

Adding a Data Transformation to a Dashboard Data Set

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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.

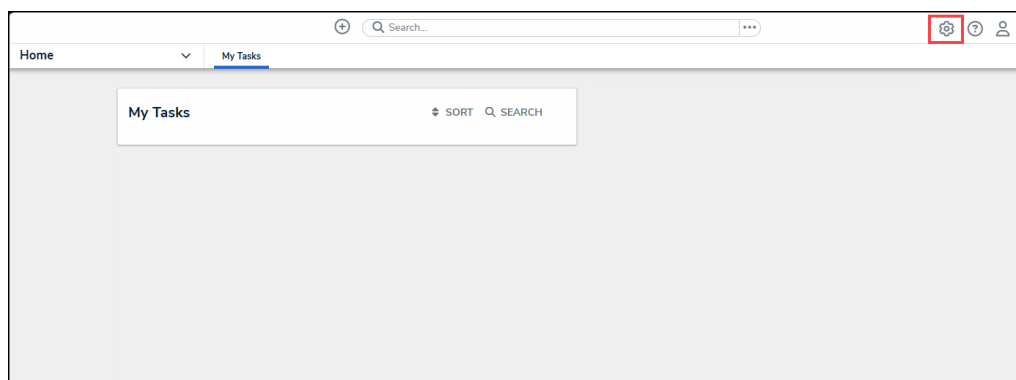
- [Publishing/Unpublishing a Dashboard Data Set](#)

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

- [Deleting a Data Dashboard Set](#)

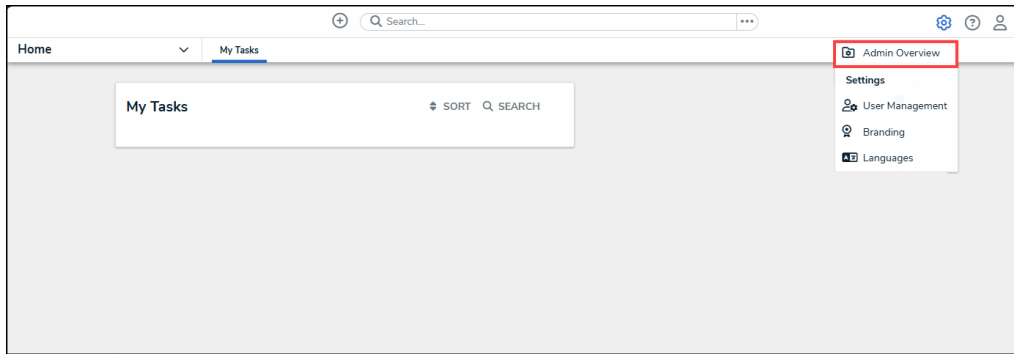
Navigation

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



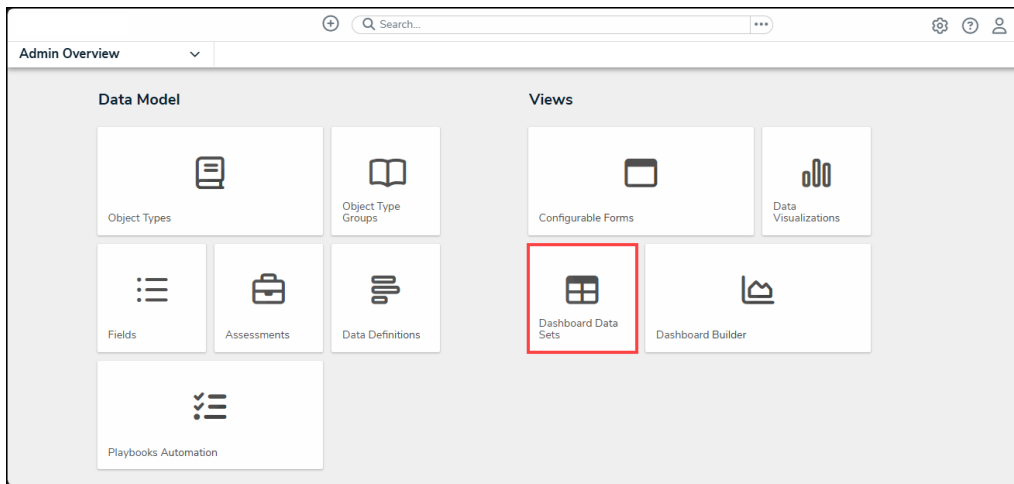
Administration Icon

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



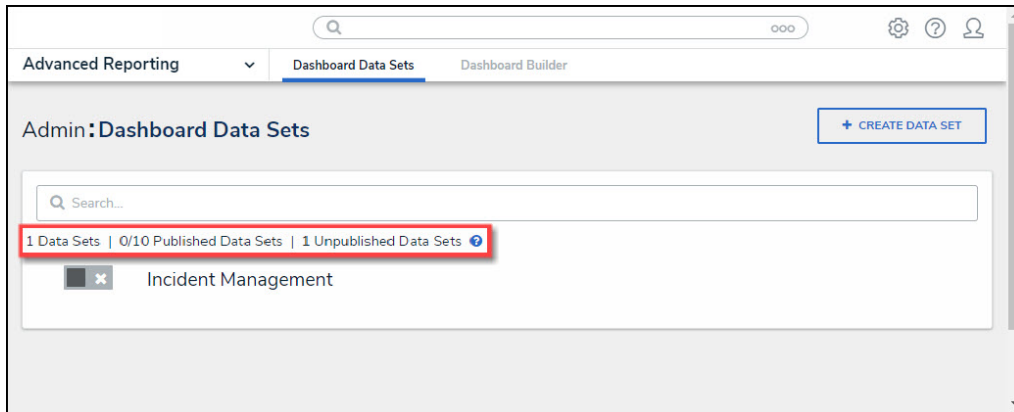
Administrator Settings Menu

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



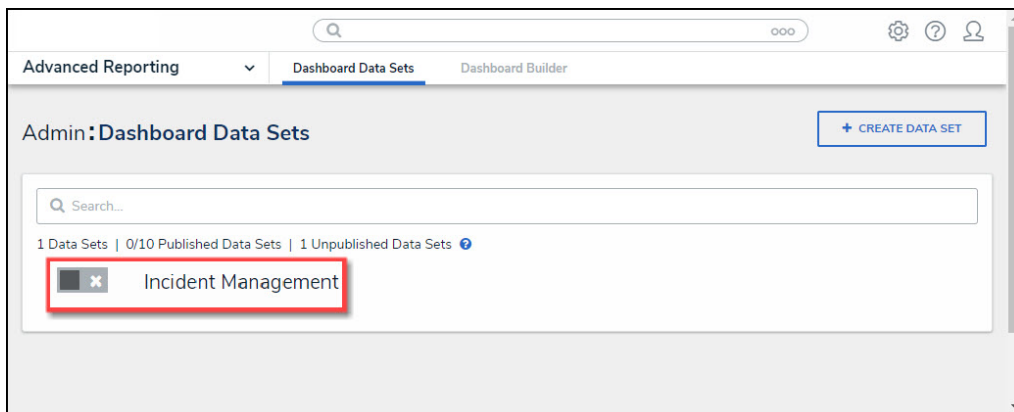
Dashboard Data Sets Tile

- 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.



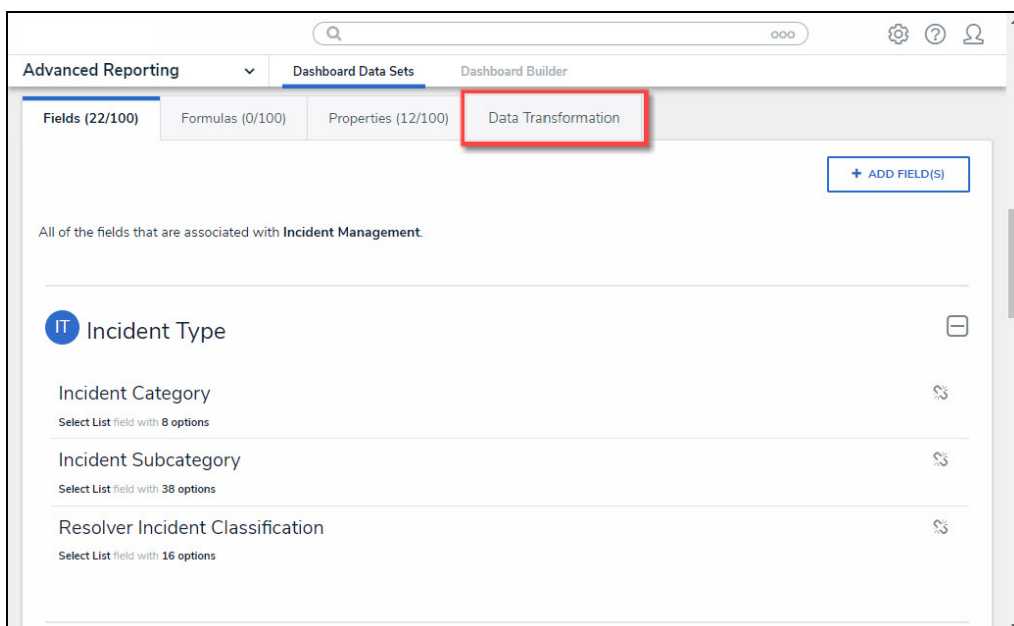
Total Data Set Fields

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



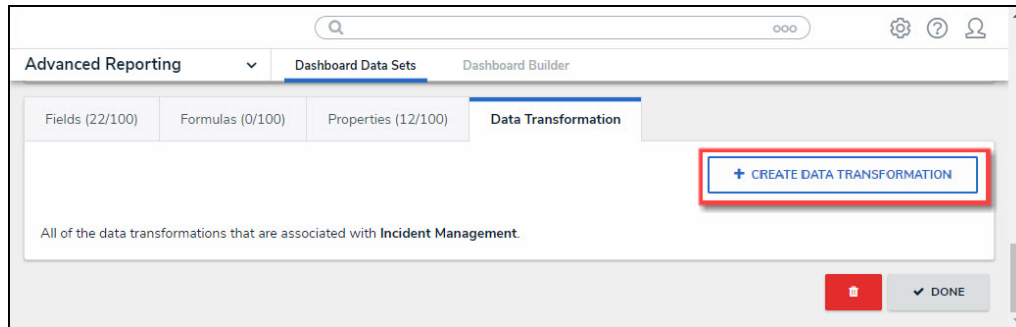
Dashboard Data Set

- From the **Edit Data Set** screen, scroll to the **Tabs** section and select the **Data Transformation** tab.



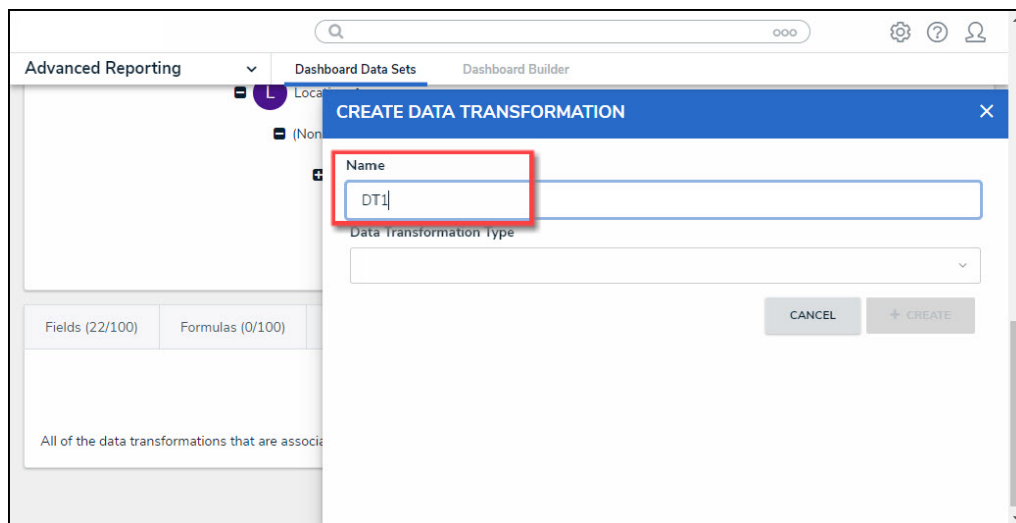
Adding a Data Transformation to a Dashboard Data Set

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 = 4.5×10^6).
- **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.

The screenshot shows the 'CREATE DATA TRANSFORMATION' dialog box in the Resolver Advanced Reporting interface. The dialog is overlaid on a dashboard builder view. The dialog has a blue header with the title 'CREATE DATA TRANSFORMATION' and a close button. The main content area contains several fields: 'Name' (text input with value 'DT1'), 'Data Transformation Type' (dropdown menu with 'Date Difference' selected), 'Start Date' (text input), 'End Date' (text input), and 'Date Unit' (dropdown menu). Below these is a 'DISPLAY' section with a 'Format' dropdown menu and a 'Decimals' dropdown menu (set to '0'). At the bottom right of the dialog are 'CANCEL' and 'CREATE' buttons. The background shows a dashboard builder with a tree view of data paths: Asset (A) -> Business Units (Reference) -> Business Unit (BU) -> Activity Type (Reference) -> Activity Type (AT) -> Activity (Reference) -> Activity (Act) -> Involved.

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 x 10⁶).
- **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.

The screenshot shows the 'CREATE DATA TRANSFORMATION' dialog box in the Resolver application. The dialog has a blue header with the title 'CREATE DATA TRANSFORMATION' and a close button. The main content area includes the following fields and options:

- Name:** A text input field containing 'DT'.
- Data Transformation Type:** A dropdown menu set to 'Sum'.
- Start Value:** A dropdown menu.
- Addition Value:** A text input field with an 'ADD MORE' link to its right.
- DISPLAY:** A section with a question mark icon, containing:
 - Format:** A dropdown menu.
 - Decimals:** A dropdown menu set to '0'.
- Buttons:** 'CANCEL' and 'CREATE' (with a checkmark icon) at the bottom right.

The background of the screenshot shows the 'Dashboard Data Sets' tab in the 'Dashboard Builder'. It features a tree view under 'Select Data Paths' with the following structure:

- Asset (selected with a blue circle and checkmark)
 - Business Units (Reference)
 - Business Unit (selected with a blue circle and checkmark)
 - Activity Type (Reference)
 - Activity Type (selected with a blue circle and checkmark)
 - Activity (Reference)
 - Activity (selected with a green circle and checkmark)
 - Involved

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 x 10⁶).
- **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.

The screenshot shows the 'CREATE DATA TRANSFORMATION' modal window. The 'Name' field contains 'DT'. The 'Data Transformation Type' dropdown is set to 'Multiplication'. The 'Start Value' and 'Multiplication Value' fields are empty. The 'DISPLAY' section shows the 'Format' dropdown and the 'Decimals' dropdown set to '0'. The background interface shows a tree view of data paths: Asset (selected), Business Units (Reference), Business Unit (selected), Activity Type (Reference), Activity Type (selected), Activity (Reference), and Involved.

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 Type** 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.