

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.



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Home ~	My Tasks		—	

System Icon

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

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Dashboard Data Sets Tile

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

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Dashboard Name



Adding Multi-Column Sort to a Table

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

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Oct 2022	Mar 2023	12	388			
Nov 2022	Mar 2023	18	547			
Dec 2022	Mar 2023	10	323			
Jan 2023	Mar 2023	5	85			

Group Table View

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

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Edit

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



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General Panel

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

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Aggregated Formula Panel

5. Click the +Add Aggregated Formulas link.

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+Add Aggregated Formulas Link

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

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Type Formula Name				
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Allows mathematical operations including +, -,	,*, /, (). Dates and numbers must be entered i	n en-US format.		
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Create Table Formula Screen

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

Create Table Formula			×	
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Formula Allows mathematical operations including +, -, *	*, /, (). Dates and numbers must be entered in en	-US format.		
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Formula Name

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



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Included Functions Dropdown

- 9. Create a Formula by either:
 - Manually entering a formula in the **Formula** field.

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Column Difference			
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• 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.

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Column Difference			
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Add to Formula Link

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

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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.

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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.

Resolver.

Column Difference					
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Clear Link

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

Column Difference					
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Save Button