



# EXPERIENCE MAKERS THE SKILL EXCHANGE

**Calculated Fields Everyone Should Know**

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- Getting Queue Topic Onto Your Project
  - Queue Topic, Topic Group, or Parent Topic Group
  - Calculation Values on Projects During Conversion
- SLA Calculations
  - SLA Timestamp
  - Compliance Timestamp (i.e. First Time Status Is Set, First Time Assignment is Made, etc.)
  - Meet SLA?
- Complex IF Statements Trick

# Getting Queue Topic Onto Your Project



# GETTING QUEUE TOPIC ONTO YOUR PROJECT

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- Step 1: You need to put calculation on Request/Issue Custom Form
- Step 2: You need to add calculated field to the Project Custom Form
- Step 3: Convert Issue to Project

# GETTING QUEUE TOPIC ONTO YOUR PROJECT

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**Step 1:** You need to put calculation on Request/Issue Custom Form

For Queue Topic

*Queue Topic.Name*

For Parent Topic Group

*Queue Topic.Parent Topic Group.Name*

For Parent of Parent Topic Group

*Queue Topic.Parent Topic Group.Parent.Name*



## New request

Request Type

My Fabulous Request Queue

My Fabulous Request Queue

*Parent of Parent Topic Group*

Digital Request

Digital Request

*Parent Topic Group*

Corporate Website

Corporate Website

*Queue Topic*

New

## Details

Subject \*

# GETTING QUEUE TOPIC ONTO YOUR PROJECT

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**Step 1:** You need to put calculation on Request/Issue Custom Form

Example Formula

*CONCAT(Queue Topic.Parent Topic Group.Name," - ",Queue Topic.Name)*

Results in...

*Corporate Website - New*

Add a field    **Field settings**    Form settings    Form sharing

[Configure field](#)    [Share field](#)

Calculated Field

Label\* ⓘ  
Original Request Type

Name\* ⓘ  
Original Request Type

Instructions  
For Intranet & Website: CONCAT(Queue Topic.Parent Topic Group.Name," - ",Queue Topic.Name)  
For Email, Digital Ads, Print & Video: Queue Topic.Name

Format  
Text

**Additional settings**

Calculation [Maximize](#)  
CONCAT(Queue Topic.Parent Topic Group.Name," - ",Queue Topic.Name)

# GETTING QUEUE TOPIC ONTO YOUR PROJECT

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**Step 2:** You need to add calculated field to the Project Custom Form

On the project, you will add the existing field from the Field Library

You will the calculation field alone, and hit Apply

Then you will add the Name into the calculation field exactly as written

- This is a case sensitive field
- One exception... If you have a +, -, /, \* in the name, you will need to add curly brackets  
{*Original Request Type*}

The screenshot shows the 'Configure field' interface for a calculated field. At the top, there are two buttons: 'Configure field' (active) and 'Share field'. Below this is the title 'Calculated Field'. A yellow warning banner states: 'This field is also being used on other forms. Changing it here will also change it on those forms.' The form includes several sections: 'Label\*' with a value of 'Original Request Type'; 'Name\*' with a value of 'Original Request Type'; 'Instructions' with a text area containing: 'For Intranet & Website: CONCAT(Queue Topic.Parent Topic Group.Name, " - ", Queue Topic.Name)', 'For Email, Digital Ads, Print & Video: Queue Topic.Name', and 'On Project: Original Request Type'; and 'Format' with a dropdown menu set to 'Text'. At the bottom, there is an 'Additional settings' section with a 'Calculation' field containing 'Original Request Type' and a 'Maximize' button.

# GETTING QUEUE TOPIC ONTO YOUR PROJECT

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## Step 3: Convert Issue to Project

More > PROJECT My Fabulous Reques... / ISSUE Awesome Project Re...

ISSUE  
**Awesome Project Request** ☆ ...

← Issue Details

- Updates
- Documents
- Issue Details**
- Hours
- Approvals
- + Add custom section

> **Overview**

▼ **Test Custom Form - Issue**

Original Request Type ⓘ  
Corporate Website - New

PROJECT  
**Awesome Project** ☆ ...

← Project Details

- Tasks
- Project Details**
- Business Case
- Updates
- Documents
- Issues (0)
- Risks

> **Overview**

▼ **Test Custom Form - Project**

Original Request Type ⓘ  
Corporate Website - New

> **Finance**



# SLA Calculations



- Step 1: Calculate your SLA Deadline
- Step 2: Calculate Timestamp to see if you met the SLA Deadline
- Step 3: Did you meet it?

## Step 1: Calculate SLA Deadline

If you want to add full days, you can do `ADDDAYS` or `ADDWEEKDAYS` to your entry date.

*`ADDDAYS(Entry Date,2)` -- or -- `ADDWEEKDAYS(Entry Date,2)`*

The difference is needed if you want to count weekends are not.

If you want to add time, but not in full days (i.e. 3 hours), you can only use `ADDDAYS`

*`ADDDAYS(Entry Date,0.125)`*

**Step 2:** Calculate Timestamp to see if you met the SLA Deadline

If you are using fields like Actual Start Date or Actual Completion Date, you can skip this step.

If your SLA is dependent upon a status change (i.e. Under Review), you can use...

*IF(Status='URV',IF(ISBLANK(Under Review Timestamp),\$\$NOW,Under Review Timestamp),Under Review Timestamp)*

If your SLA is dependent upon an assignee being added to the request, you can use...

*IF(ISBLANK(Assigned To ID),User First Assigned,IF(ISBLANK(User First Assigned),\$\$NOW,User First Assigned))*

**Step 2:** Calculate Timestamp to see if you met the SLA Deadline

Order of Operations:

1. Create Calculated Field with Name & Label but NO calculation first
2. Click Save + Close and then reopen (You can try Apply, but sometimes this doesn't work)
3. Go back in pasting the calculation replacing the Field Name in the given formula for your field's name

## Calculated Field

Label ⓘ

User First Assigned

Name ⓘ

User First Assigned

Instructions

Format

Date/Time ▼ ⓘ

## Additional settings

Calculation

Maximize

IF(ISBLANK(Assigned To ID),User First Assigned,IF(ISBLANK(User First Assigned),\$NOW,User First Assigned))

## Step 3: Did You Meet It?

Now that we have our two date fields, we want to see if the SLA was met and (potentially) report on this in the future.

*IF(ISBLANK(User First Assigned),"Not Sure",IF(SLA Deadline<User First Assigned,"No","Yes"))*



# Complex IF Statements



- Step 1: Write out each IF statement out, one on top of the other
  - Step 1a: Validate each IF statement
- Step 2: Starting at the bottom of list, copy the IF statement and replace the TRUE or FALSE placeholder
- Step 3: Paste the long, complex IF statement into your Calculated Field



**Step 1:** Write out each IF statement out, one on top of the other

Remember, each IF statement should have a condition, TRUE value, and FALSE value.

Example: Calculating Priority for Team

```
IF(911 Request="Yes","Urgent",FALSE)
```

```
IF(Priority Calculation>30,"High",FALSE)
```

```
IF(Priority Calculation<10,"Low","Medium")
```

**Step 2:** Starting at the bottom of list, copy the IF statement and replace the TRUE or FALSE placeholder

First Step:

```
IF(911 Request="Yes","Urgent",FALSE)
```

```
IF(Priority Calculation>30,"High",IF(Priority Calculation<10,"Low","Medium"))
```

Second Step:

```
IF(911 Request="Yes","Urgent",IF(Priority Calculation>30,"High",IF(Priority Calculation<10,"Low","Medium")))
```

**Step 3:** Paste the long, complex IF statement into your Calculated Field

```
IF(911 Request="Yes","Urgent",IF(Priority Calculation>30,"High",IF(Priority Calculation<10,"Low","Medium"))))
```

## Calculation Editor

Minimize

```
1 IF(911 Request="Yes","Urgent",IF(Priority Calculation>30,"High",IF(Priority Calculation<10,"Low","Medium")))
```

### Formula

#### Expressions

Start typing field name...



Mathematical >

Text >

## Step 3: Paste the long, complex IF statement into your Calculated Field

```
IF(911 Request="Yes","Urgent",IF(Priority Calculation>30,"High",IF(Priority Calculation<10,"Low","Medium")))
```

The screenshot shows the 'Project Details' page for 'Awesome Project'. The page header includes project metadata: 'Awesome Project' (with a star icon), 'Percent Complete' (0%), 'Project Owner' (Anthony Imgrund), 'Planned Completion' (Feb 28, 2022), 'Condition' (In Trouble), and 'Status' (Planned). The left sidebar contains navigation options: Tasks, Project Details (selected), Business Case, Updates, Documents, Issues (0), Risks, and Show More. The main content area is titled 'Overview' and contains a section 'Test Custom Form - Project' with a table of data:

Is this a 911 Request?	Priority Calculation
No	25
Team Priority <sup>?</sup>	
Medium	
Original Request Type <sup>?</sup>	
Corporate Website - New	

Q & A



