

# EXPERIENCE MAKERS THE SKILL EXCHANGE

**Calculated Fields Everyone Should Know** 

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#### **AGENDA**

- 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

- 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

# EXPERIENCE MAKERS THE SKILL EXCHANGE

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

For Queue Topic

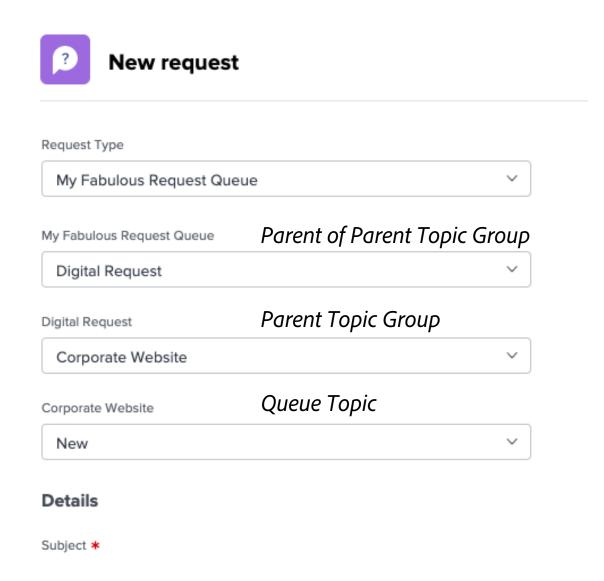
Queue Topic.Name

For Parent Topic Group

Queue Topic.Parent Topic Group.Name

For Parent of Parent Topic Group

Queue Topic.Parent Topic Group.Parent.Name



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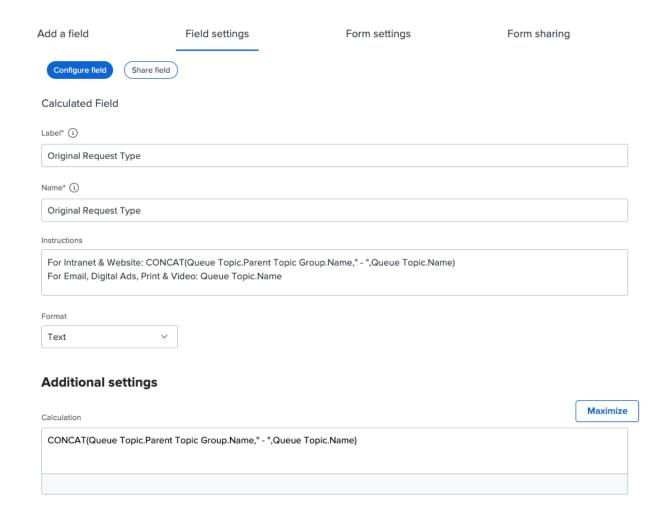
**Step 1:** You need to put calculation on Request/Issue Custom Form

Example Formula

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

Results in...

Corporate Website - New



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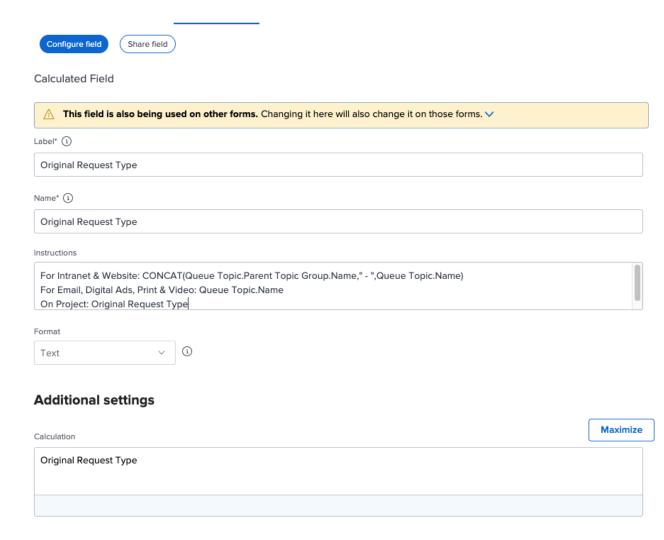
**Step 2:** You need to add calculated field to the Project Custom Form

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

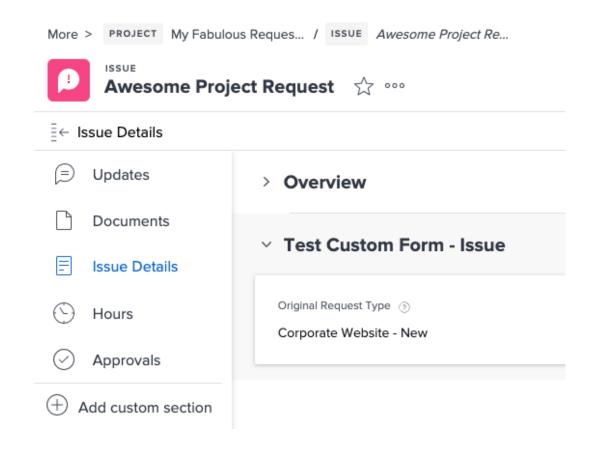
You will the calculation field alone, and hit Apply

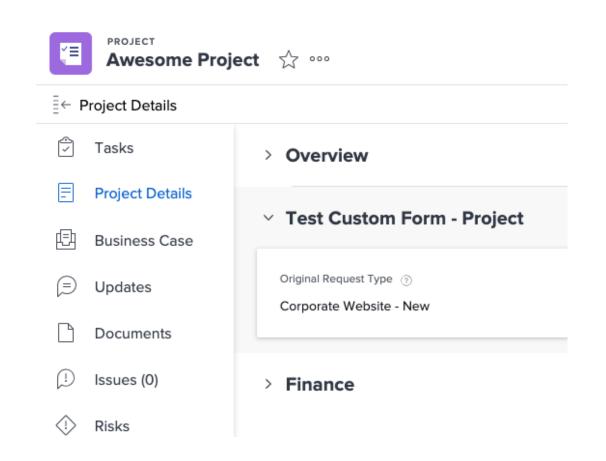
Then you will add the Name into the calculation field exactly as written

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



#### **Step 3:** Convert Issue to Project





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)

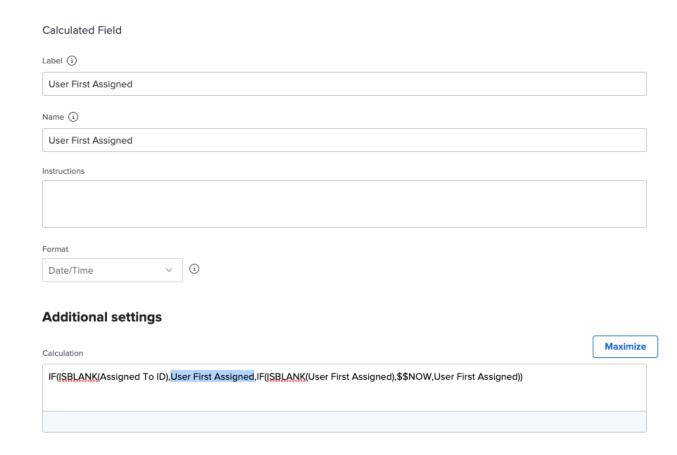
If your SLA is dependent upon an assignee being added to the request, you can use...

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:

- 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)
- Go back in pasting the calculation replacing the Field Name in the given formula for your field's name



#### **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")</pre>

**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:

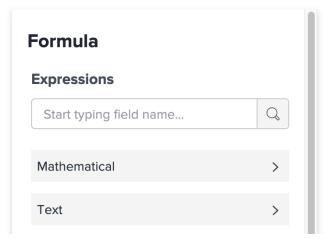
IF(911 Request="Yes","Urgent",IF(Priority Calculation>30,"High",IF(Priority Calculation<10,"Low","Medium")))

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")))

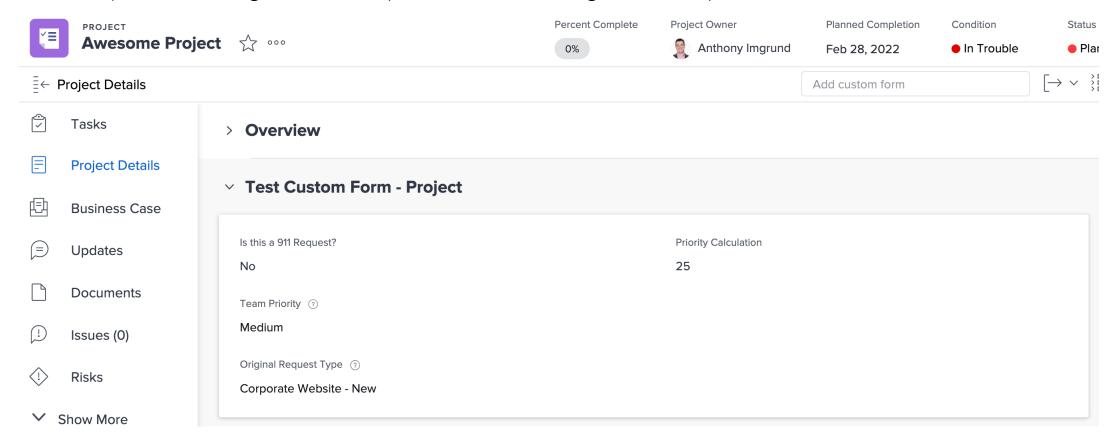
#### **Calculation Editor**





#### 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")))



Q & A



