Dot Notation: Building Formulas Like an Expert

What will we be covering?

- Location-based formula syntax
  - *this.version.description*
  - *search(this.account.name…)*

- New time formula references
  - *this.version.positionof(this.month)*

What is the benefit for you?

- Identify ways to make global formula updates without impacting historical data

- Create formulas with less maintenance moving forward

- Utilize custom calendars with new time syntax

#AdaptiveLive18

Let's Take a Deeper Look!

Live Demo

Dot Notation - Recap

- **Scenario**: I have a formula on a modeled sheet for Salary such as the below. I would like to change this formula without impacting historical versions.

  ROW.PartialHeadCount*if (ROW.per="hr",if (ROW.HoursPerWk=0,40,ROW.HoursPerWk)*(2080)/(480), 1/12) * ROW.PayRate

Steps:

1. Go to Modeling>Versions and place the word **Historical** in the description of all historical versions. New versions will not contain this word.

2. Go to the Salary formula above and update it such as
   if(this.version.description="Historical", ROW.PartialHeadCount*if (ROW.per="hr",if (ROW.HoursPerWk=0,40,ROW.HoursPerWk)*(2080)/(480), 1/12) * ROW.PayRate, <New Formula>).

Dot Notation - Recap

- **Scenario**: I would like to build a formula to grow all my Revenue accounts at a certain rate and all my Expense accounts at a separate rate. I do not wish to build hundreds of different formulas.

Steps:

1. In this scenario, my Revenue accounts all contain the word "Revenue". It would also work to use attributes or the descriptions of the accounts.

2. Create a generic formula using the *search()* and *account.name* functions. It could be something like the below. This says "If the name of the account contains the characters "Revenue", take this account from 12 months ago times the Revenue growth assumption, else take this account from 12 months ago times the Expense growth assumption.

   if(search(this.account.name,"Revenue")>0,ACCT.this[time=this-12]*ASSUM.RevenueGrowth,ACCT.this[time=this-12]*ASSUM.ExpenseGrowth)

Dot Notation - Recap

- **Scenario**: I am creating a Weekly modeled sheet. I have an example Pay Rate formula from a monthly sheet and need to adjust this for weekly planning.

  *if((**versionmonth(this**) >= 1) and ROW.Headcount=1 and ((isblank(ASSUM.Personnel.RaiseWeek) and **versionmonth(this)** = **versionmonth(ROW.StartDate)**) or (ASSUM.Personnel.RaiseMonth = 1)), ROW.PayRate[time=this-1]*ASSUM.Personnel.RaisePct, 0)*

Steps:

1. Identify time-based formula functions in the existing formula (*year()*, *fiscalmonth*(), *versionmonth()*, etc.). These are bold above.

2. Consider the best way to replace these with the new *positionof()* syntax, which finds the position of a given time period within a larger time period.

3. Go to the formula above and update it such as

    *if((**this.version.positionof(this.week)** >= 1) and ROW.Headcount=1 and ((isblank(ASSUM.Personnel_Weekly.RaiseWeek) and **this.version.positionof(this.week)** = **this.version.positionof(ROW.StartDate.week)**) or (ASSUM.Personnel_Weekly.RaiseWeek = 1)), ROW.PayRate[time=this-1]*ASSUM.Personnel_Weekly.RaisePct, 0)*

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