

Adaptive Live | 2019

Tips on Using Account Modifiers in Formulas

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Tips on Using Account Modifiers in Formulas

What will we be covering?

- Referring dynamically to time
- Referencing multiple levels/dimensions
- Referring to all but a few items
- Pull in data across levels using level attributes

How can we leverage this information?

- Create more effective formulas that won't need to be updated too often
- Easily refer to data across sheets without large formulas



Tips on Using Account Modifiers in Formulas - Recap

- Dynamic time reference:
 - Example: Summing the previous year of data in the salary account:
 - `ACCT.Personnel.Salary[time=this.year-1:this.year]`
 - Accounts in the formula will take on the time rollup of the account. You can utilize the average of a range using the rollup settings of the account.
 - Example: Detecting a leap year:
 - `IFF(this.Year.NumberOfDays > 365, ASSUM.DailySpread [time=this-48], ASSUM.DailySpreadAmt[time=this-12])`

Tips on Using Account Modifiers in Formulas - Recap

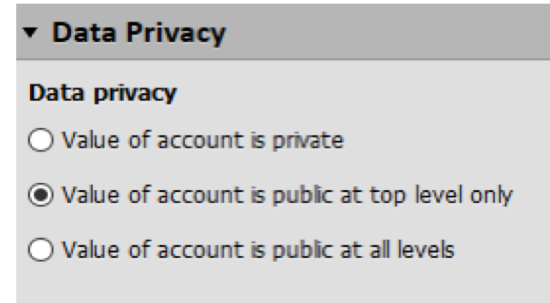
- Summing account modifiers:
 - Example: Adding headcount of some employee types:
 - Requires the account to be repeated for each modifier from the same dimension used
 - `ACCT.Personnel.Headcount[Employee_Type = Full Time] + ACCT.Personnel.Headcount[Employee_Type = Part Time]`

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- Referring to all but a few accounts:
 - Example: You would like to refer to all Products but Product 6 and 7
 - The first piece will not contain a modifier. The later parts of the formula would add the products together that you would like to remove, and they will be subtracted from the group.
 - $ACCT.ProdSalesCube.Units - (ACCT.ProdSalesCube.Units [Product = Product 6] + ACCT.ProdSalesCube.Units [Product = Product 7])$

Tips on Using Account Modifiers in Formulas - Recap

- Pull in data using a level attribute
 - With Data Privacy in accounts, there are three options – private, public at top level only, or public at all levels. This can be used when choosing the second option, public at top level only.
 - Create a level attribute and tag all levels needed with the value. You can view data from multiple levels without having to make the account public.
 - To pull data for all sales departments:
 - `ACCT.test[dept = sales]`



▼ **Data Privacy**

Data privacy

Value of account is private

Value of account is public at top level only

Value of account is public at all levels



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Q&A



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Thank You

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