PULSE DASHBOARD

How to Use Custom Formulas in Pulse Dashboard

Pulse Dashboard has many fields available from the Macola database that can be used to create custom reports in Pulse Dashboard and many additional fields not available from Macola that have be calculated and added to the available fields by Leahy Consulting. Each report in Pulse Dashboard has been designed to have available the fields most often needed by companies to monitor their activity on that report. While most needed fields have been added, at times there may be a field that is not available on a report to augment the information already available on a report. If by adding available fields together or adding a set percentage to an existing field to create a new field, the report may give additional insight into the workings of the company that are unique to the operation.

Adding Custom Formula fields to a report is possible in the Column Chooser for the area of a report where a new column is needed. If a report with a Custom Formula field is shared with another User, the new field will "travel" with the report but will not be available on other reports for the other User. If a shared report with a Custom Formula field is copied to create a new report, the Custom Formula field will be available on the new report. A Custom Formula field is associated with the particular instance of the report and does not transfer to other reports. Custom Formulas, once added to a report, may also be used in additional formulas on the report if needed.

In the example below an Inventory Stock Status has been used to show the same report with default columns. A new Custom Formula will be used to create a new column that may be used on the report.

Standard Report:

Stock Status				
Drag a column header here to	group by that column			
Cat - Prod Cat Cd	O/H Class A \$	O/H Class B \$	O/H Class C \$	O/H\$ ⊽
SP	\$3,342,465	\$97	\$9,203	\$3,351,765
MB	\$2,523,619 \$2,237,660	ֆՍ \$0 «Դ	\$0 \$0 *0	\$2,523,619 \$2,237,660
	\$14,381,725	\$97	\$0 \$11,393	\$14,393,215

Column Chooser:

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Category		Eult Formula Delete Formula	Add to Visible	- I	Visi	ble Order			<u> </u>	
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Inventory		Last IM Activity Date	Last IM Activity Dt		3	O/H Class B \$		None		
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nventory		On-Hand Amount (Class B)	O/H Class B \$							
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Creating a new Custom Formula Column:

- 1. Select Create Custom Formula
 - a. This window will allow for a New Column Name to be entered

Create Custom Formula	×
Please enter new custom formula name	OK
	Cancel
Class A and Class B \$	

- b. The Expression Editor window will open and is segmented into
 - i. Expression area where the formula will be created
 - ii. Basic Operator Icons and Listing of All Operators
 - iii. Categories
 - iv. Detailed Category Selection Definition

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c. Example A - Create a Column Adding two existing Columns



(Shown with optional Formatting and rounded to whole \$)

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(Shown with optional Total added)

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Cat - Prod Cat Cd	O/H Class A \$	O/H Class B \$	Class A and Class B \$	O/H Class ⊂ \$	0/Н\$ ⊽
SP	\$3,342,465	\$97	\$3,342,563	\$9,203	\$3,351,765
ASM	\$2,523,619	\$0	\$2,523,619	\$0	\$2,523,619
MB	\$2,237,660	\$0	\$2,237,660	\$0	\$2,237,660
UB	\$2.111.520	\$0	\$2.111.520	\$0	\$2.111.520
	\$14,381,725	\$97	SUM=\$14,381,822	\$11,393	\$14,393,215

d. Example B - Create a Column Adding 20% to an existing Column



(Shown with optional Formatting and rounded to whole \$)

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(Shown with optional Total added)

Stock Status					
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Cat - Prod Cat Cd	O/H Class A \$	0/H Class A \$ + 20%	O/H Class B \$	O/H Class C \$	0/Н\$ ⊽
SP	\$3,342,465	\$4,010,958	\$97	\$9,203	\$3,351,765
ASM MB	\$2,523,619 \$2,237,660	\$3,028,343 \$2,685,192	\$0 \$0	\$0 \$0	\$2,523,619 \$2,237,660
UB	\$2.111.520 \$14.381.725	\$2.533.824 SUM=\$17.258.070	\$0 \$97	\$0 \$11,393	\$2.111.520 \$14.393.215

e. Example C - Create a Column Comparing two Date Columns



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How To Use Custom Formulas to Convert Alphanumeric Values to Numeric

Many Macola tables have User Defined (or similar) fields in them that are stored in the database as alphanumeric character fields and not as numeric values that sometimes are used to store numbers. These "numeric" values sometimes are needed in calculations within Pulse Dashboard and alphanumeric values cannot be used in numeric formulas to add, subtract, multiply etc.

Creating a Custom Formula in the Pulse Dashboard Column Chooser it is possible to convert these alphanumeric "numbers" stored in the User Defined fields to numeric values in order to use them in arithmetic calculations.

In this example, (using the Reported Production Report) the Item User Defined Field 04 and Item User Defined Field 05 from the Item Master File are used to store "numbers" although these fields are defined as alphanumeric in the database. Numeric values are stored in these 30-character fields and will be used to multiply the two values then divide another value by the product of the User Defined 4 and 5 fields.

- 1. In the Column Chooser add the Item User Def Fld 04 and Item User Def Fld 05 to the report.
- 2. Create a Custom Formula and name it Std/Hrs Order.
- 3. Add the formula shown below where the Production Order Qty is divided by the product of UDF4 x UDF5 after they were converted to Integers.

f= Expression editor		×
[Production Ord Qty] / (ToInt([Item	User Def Fld 05 CycleTime]) * ToInt([[Item User Def Fld 04 Cavities]))
+ - × ÷ % Functions Operators Fields Constants	(…) = ≠ < ≤ (All) Today() ToDecimal() ToDouble() ToFloat() ToInt() ToLong() ToStr() Trim() Upper() UtcNow()	ToInt(Value) Converts Value to an equivalent 32-bit signed integer.
		OK Cancel

- 4. Add the new Column to the report.
- To show the new value as a 4-place decimal on the report use the Format setting in the Column Chooser to show the value as (N)umeric followed by the number of decimal places (4) – N4 in this case.

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Category 🛆	Full Caption 🛛 🗠	Column Caption	
			~
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	Extended Cost \$	Cost \$	=
	Original Count	Org Count	
	Original Item Number	Org Item #	
	Original Order Number	Org Ord #	
	PP Unit Cost \$	PP Unit Cost \$	
	Production Processing Customer Name	POP Cust Name	
**Custom Formula	Std Hrs / Order	Std Hrs / Order	
*Inventory	Aging Date	Inv Aging Dt	
*Inventory	Last IM Activity Date	Last IM Activity Dt	
*Inventory	Last Manufactured Date	Last Mfg Dt	
*Inventory	Last Purchase Date	Last Purch Dt	
*Inventory	Last Sale Date	Last Sale Dt	
*Inventory	Last Usage Date	Last Usage Dt	
*Pulse MRP - Item	Earliest Shortage Date	Earliest Shortage Dt (All Loc)	
*Dulca MDD - Tham	Farliest Shortage Date Japoring Deplenish	Farliast Shortage Dt (All Loc) - Japone Depl	

Vi	isible	Order			×
		Column Caption	Format	Freeze Pane	Merge
	1	Trx Dt		None 🛛 💌	
	2	POP Ord Type		None 🛛 💌	-
	3	POP Ord #		None 🛛 💌	-
	4	Item #		None 🛛 💌	
	5	Item Desc 1		None 🛛 💌	-
	6	Loc		None 🛛 💌	-
	7	Complete Fg		None 🛛 💌	-
	8	Production Ord Qty		None 🛛 💌	
	9	Production Reported Qty		None 🛛 💌	-
	10	Production Trx Reported Qty		None 🛛 💌	
	11	Item User Def Fld 04 Cavities		None 🛛 💌	_
	12	Item User Def Fld 05 CycleTime		None 🛛 💌	
a.	13	Std Hrs / Order	N4	None 🛛 💌	

📃 Show Row Indicator

Show Group Pannel

Finished Report

Theppe	uid Production										A91	C 4 - V - I	D
Diag is a	ing a collect foreign part to the collect												
TriDt	POP Ord Type	POP ord #	Zer #	Iten Desc 1	loc	Consists Fg	Production Ord Qty	Production Reported Qty	Production Trx Reported Qty	Item User Def Fld 04 Cavities	Iters User Cell Fid 05 Cycle Tave	Stid Hes / Order	
1												1	ň
\$11.5/1	C. P. 1	00000030	POP.	Parent Bern			10	7.00	1.00	6	3600	0.0005	ŝ
7/15/1	(P	00000030	FOF	Parent fem	_ 00		10	7.00	1.00	6	3600	0.0005	1
11/15/1	5 F	00000030	POP	Parent tem	_ 00		10	7.00	1.00	6	2600	0.0005	
12/15/1	5 P	00000030	POP.	Parent tem	00		10	7.00	1,00	6	3600	0.0005	
1/1 6/1	P	00000030	POP	Parent.tem	00		10	7.00	1.00	6	3600	0.0005	4
									11.00				

How to Use the Format Option in Pulse Dashboard

Numeric columns in Pulse Dashboard can be formatted to include the number of decimal places shown, percent signs and currency values. This can be for existing fields listed in the Column Chooser or new fields created by defined using a custom formula. This can be setup by any User in Pulse Dashboard.

In the Column Chooser any numeric or currency value field may be displayed as a currency value, a numeric value or as a percentage. Each of these may also be formatted to use the maximum decimal places as defined by Macola in the database.

In the examples below an Inventory Stock Status has been used to show the same report with standard formatting and with custom formatting. Values entered in the Format column in the Column Chooser control the display of the values on the report for that column.

Standard Formatting:

Create Custom Formula	Edit Formula Delete Formula	Add to Visib	le	Visible Order		-		×
ategory 🛆	full Caption 🗠	Column Caption	1	Column Caption	Format	Preeze Pane	M	erge
Custom Formula	20% Gost Rands	25% Gross Marian		> Ren #		kne	8	
inventory	Aging Date	Inv Aging Dt		2 Item Desc 1	6 2	lone	Lautor	-
inventory	Frozen Extendended Cost Amount	Frz Ext Cost \$		2. Barn Daf Lor		harman	-	-
Inventory	Last 3M Activity Date	Last IM Activity Dt		s albit cel co.	- 1	ALC: NO	3-	<u>-</u>
Inventory	Last Manufactured Date	Last Mfg Dt		a wyg Cost		ione.		19
rwentory	Last Purchase Date	Last Purch Dt		5 20% Gross Margin	1	lone	141	<u>الله</u>
rwentory	Last Sale Date	Last Sale Dt		6 Price		kine	100	<u>.</u>
Inventory	Last Usage Date	Last Usage Dt		7 Item Price Rakio		lone		ini .
Inventory	On-Hand Amount	0/H\$		a O(H Qty (AELoc)		lone.	1	
Inventory	On-Hand Amount (based on Average Cost)	0/H\$ (Avg)		9 O/H \$		lone	int.	-
nventory	On-Hand Amount (based on Last Cost)	0,H\$(Last)		and the state		SASS-	-	
rwentory	On-Hand Amount (based on Standard Cost)	0/H \$ (5td)						
rwentory	On-Hand Amount (Class A)	0/H Class A \$						
owentory	On-Hand Amount (Class 8)	0,H Class 8 \$						
Inventory	On-Hand Amount (Class C)	0/H Class C \$						
rwentory	On-Hand Amount (Other Classes)	0/H Other Classes \$						
rwentory - Historical Summary	On-Hand Amount Current Year Period 01	On-Hand \$ - Cur Year Per 01						
rwentory - Historical Summary	On-Hand Amount Current Year Period 02	On-Hand \$ - Cur Year Per 02						
rwentory - Historical Summary	On-Hand Amount Current Year Period 03	On-Hand \$ - Cur Year Per 03						
rwentory - Historical Summary	On-Hand Amount Current Year Period 04	On-Hand \$ - Cur Year Per 04						
rwentory - Historical Summary	On-Hand Amount Current Year Period 05	On-Hand \$ - Cur Year Per 05						
inventory - Historical Summary	On-Hand Amount Current Year Period 06	On-Hand \$ - Cur Year Per 06						
rwentory - Historical Summary	On-Hand Amount Current Year Period 07	On-Hand \$ - Cur Year Per 07						
nventory - Historical Summary	On-Hand Amount Current Year Period 08	On-Hand \$ - Cur Year Per 08						
wentory - Historical Summary	On-Hand Amount: Current: Year Period 09	On-Hand \$ - Cur Year Per 09						
rwentory - Historical Summary	On-Hand Amount Current Year Period 10	On-Hand \$ - Cur Vear Per 10						
overitory - Historical Summary	On-Hand Amount Current Year Period 11	On-Hand \$ - Cur Year Per 11						
nventory - Historical Summary	On-Hand Amount Current Year Period 12	On-Hand \$ - Cur Year Per 12						
nventory - Historical Summary	On-Hand Amount Prior Year Period 01	On-Hand \$ - Prior Year Per 81						
overitory - Historical Summary	On-Hand Amount Prior Year Period 02	On-Hand \$ - Prior Year Per 02						
inventory - Historical Summary	On-Hand Amount Prior Year Period 03	On-Hand \$ - Prior Year Per 03						
And and the second state of the second second	Conditioned Among with Dallace Manage Displayed Coll.	On-Mand # - Drive Value Day 04	120					

Stock Status w/o	Stock Status w/o Formatting										
Drag a column header here to group by that column											
Item #	v Item Desc 1	Item Def	Avg Cost	20% Gross Margin	Price	Item Price Ratio	O/H Qty (All Loc)	0/н\$ ⊽			
PRINTER	HP IV Laser Jet	CO	\$500.123456	600.1481472	\$995.00	2,400.00 %	1,000	\$500,123			
PRINTERDM	Epson Dot Matrix Printer	CO	\$500.000000	666	\$1,000.00	100.00 %	1,000	\$500,000			
MULTIPLEXOR	Thomas Conrad Multiplexor	LA	\$500.000000	600	\$1,000.00	100.00 %	1,000	\$500,000			
BRAVO	Acer Bravo P90	CO	\$500.000000	600	\$1,000.00	100.00 %	989	\$494,500			
MS-OFFICE-PROF	Microsoft Office Professional	CO	\$145.000000	174	\$349.00	100.00 %	1,000	\$145,000			
CPU	Mother Board FOR Parent	CO	\$0.000000	0	\$344.00	100.00 %	361	\$87,500			
								\$3,142,300			

Custom Formatting:

Create Custom Formula	Edit Formula Delete Formula	Add to Visib	le ,	W	able Order	_		-	* >
ategory ő	Full Caption 6	Column Caption	2		Column Caption	Format	Freeze P	sne	Merge
*Custon Formula	20% Gross Harpen	2075 Gross Margin	1	>	Item #		None		-
Inventory	Aging Date	Inv Aging Dt		12	Ren Gesr 1		Flore	(14)	0
Inventory	Prozen Extendended Cost Amount	Prz Exit Cost \$		1	Pero Def Loc		None	(m)	
Inventory	Last IM Activity Date	Last IM Activity Dt		1	Aug Cost	4 4 40 00	Part of	120	
Inventory	Last Manufactured Date	Lest Wig Dt			wyg cost	#,##0.00	rearie	1	
Sovenbory .	Last Purchase Date	Last Purch Dt		1.5	21% Gross Margin	62	None	141	
Inventory	Last Sale Date	Lest 5de Dt			Price		None	1001	
Inventory	Last Usage Date	Last Usage Ot		3	Item Price Ratio	P3	None	人間	
Inventory	On-Hand Amount	0,01\$		4	O(H Qty (All Loc)		None	1.00	
Inventory	On-Hand Amount (based on Average Cost)	O(H\$(Avg)		9	OH\$	C2	None	imi	
Inventory	On-Hand Amount (based on Last Cost)	0/H \$ (Last)		1.1	19974		20010		
Inventory	On-Hand Amount (based on Standard Cost)	0,H \$ (5kd)							
Inventory	On-Hand Amount (Class A)	O/H Class A \$							
Inventory	On-Hand Amount (Class 8)	O/H Class B \$							
Inventory	On-Hand Amount (Class C)	O/H Class C \$							
Inventory	On-Hand Amount (Other Classes)	O/H Other Classes \$							
Inventory - Historical Summary	On-Hand Amount Current Year Period 01	On-Hand \$ - Cur Year Per 01							
Inventory - Historical Summary	On-Hand Amount Current Year Period 02	On-Hand \$ - Cur Year Per 02							
Inventory - Historical Summary	On-Hand Amount Current Year Period 03	On-Hand \$ - Cur Year Per 03							
Inventory - Historical Summary	On-Hand Amount Current Year Period 04	On-Hand \$ - Cur Year Per 04							
Inventory - Historical Summary	On-Hand Amount Current Year Period 05	On-Hand \$ - Cur Year Per 05							
Inventory - Historical Summary	On-Hand Amount Current Year Period 05	Cri-Hand \$ - Cur Year Per 06							
Inventory - Historical Summary	On-Hand Amount Current Year Period 07	On-Hand \$ - Cur Year Per 07							
Inventory - Historical Summary	On-Hand Amount Current Year Period 05	On-Hand \$ - Cur Year Per 08							
Inventory - Historical Summary	On-Hand Amount Current Year Period 09	On-Hand \$ - Cur Year Per 09							
Inventory - Historical Summary	On-Hand Amount Current Year Period 10	On-Hand \$ - Cur Year Per 10							
Inventory - Historical Summary	On-Hand Amount Current Year Period 11	On-Hand \$ - Cur Year Per 11							
Inventory - Historical Summary	On-Hand Amount Current Year Period 12	On-Hand \$ - Cur Year Per 12							
Inventory - Historical Summary	On-Hand Amount Prior Year Period 01	On-Hand \$ - Prior Year Per 01							
	On-Hand Amount Prior Year Period 02	On-Hand \$ - Prior Year Per 02							
'Inventory - Historical Summary	and a second s								
'Inventory - Historical Summary 'Inventory - Historical Summary	On-Hand Amount Prior Year Period 03	On-Hand \$ - Prior Year Per 03	1.1						

Stock Status w/F	Stock Status w/Formatting										
Drag a column header here to group by that column											
Item #	V Item Desc 1	Item Def	Avg Cost	20% Gross Margin	Price	Item Price Ratio	O/H Qty (All Loc)	O/H\$ ⊽			
PRINTER	HP IV Laser Jet	CO	500.12	\$600.15	\$995.00	2,400.000 %	1,000	\$500,123.46			
PRINTERDM	Epson Dot Matrix Printer	CO	500.00	\$600.00	\$1,000.00	100.000 %	1,000	\$500,000.00			
MULTIPLEXOR	Thomas Conrad Multiplexor	LA	500.00	\$600.00	\$1,000.00	100.000 %	1,000	\$500,000.00			
BRAVO	Acer Bravo P90	CO	500.00	\$600.00	\$1,000.00	100.000 %	989	\$494,500.00			
MS-OFFICE-PROF	Microsoft Office Professional	CO	145.00	\$174.00	\$349.00	100.000 %	1,000	\$145,000.00			
								\$3,142,300			

Accepted Example Values for use in the Format Column of the Column Chooser:

Format Type	Decimal Precision	Format Entry Value	Example Data Value	Example Displayed Value
Currency	0	C0	512.1	\$512
	1	C1	512.1	\$512.1
	2	C2	512.1	\$512.10
Numeric	0	N0 (or #,##0)	512.1	512
	1	N1 (or #,##0.0)	512.1	512.1
	2	N2 (or #,##0.00)	512.1	512.10
Percentage	0	PO	0.25	25%
	1	P1	0.25	25.0%
	2	P2	0.25	25.00%

Please call our PULSE support desk us with questions and comments at (513) 723-8095 or Support@PULSEDashboard.com

We encourage phone calls with suggestions for making our software function better for your organization. We also offer custom modifications, and if your suggestion is applicable to other users, it may be made at no charge.

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