



Calculated metrics for Creatio

Setup guidelines

Creatio labs

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Introduction

The "Calculated metrics for Creatio" add-on enhances your experience when working with Creatio dashboards and pages. The add-on enables using formulas for calculation of metrics. Using the calculated metrics might come in handy if you need to display a total sum for your orders in a specific currency, sales performance in percentage or the duration of a case stage in days.

Setting up the add-on

The "Calculated metric" dashboard

The "Calculated metric" dashboard displays a number calculated based on a specified formula, e.g., % of sales performance (Fig. 1).

Fig. 1 — Example of a "Calculated metric" dashboard



The calculated metrics can use from 2 to 4 variable parameters in their formulas.

If the "Calculated metric" option did not appear in the list of possible dashboard options after installing the add-on, perform the following steps:

1. In the "Custom" package, add a "Replacing client module".
2. Select "BootstrapModulesV2" as a parent object.
3. Specify the contents of all existing replacements of the BootstrapModulesV2 module in the source code (use square brackets).
4. Save the changes.

When you add or edit the "Calculated metric" dashboard, the metric setup page opens. On this page, set the key parameters that will be used to calculate the metric, namely, formula, additional data, title and display options.

[Title] — the dashboard name that will be displayed in the dashboard area.

[Formula] — formula used for calculation of the metrics.

Read A - D

[Object] — system object, whose data is used in the formula for calculation of the metric.

[Function] — value to use for the calculation as per the specified formula. Possible options:

- "count" — the number of object records, e.g., the total number of employees registered in the system.
- "sum" — the sum of values per column, e.g., the total duration of employee calls.
- "average", "minimum", "maximum" — the average, minimum or maximum value per column, e.g., the average duration of employee calls.

[Column] — the column used for calculation. The list of values contains numeric and date columns. For example, to calculate the average duration of employee calls, select the "Duration (minutes)" value (Fig.2). The [Column] field will not display if you select the "count" value in the [Function] field.

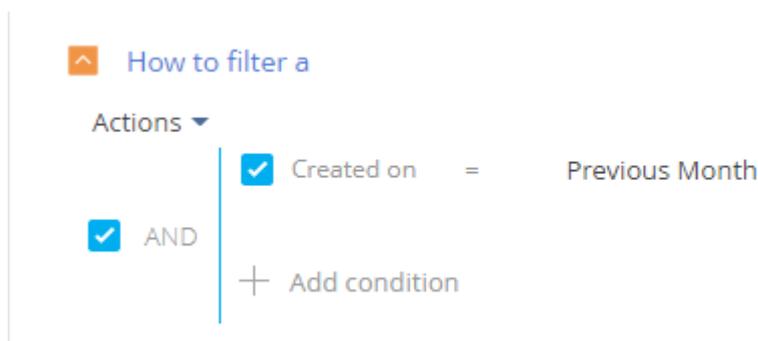
Fig. 2 — Example of configuring the [Read a] block in the calculated metric



How to filter A - D

The block is used to set the filter conditions for formula parameters. For example, to display the average duration of the employee calls for the previous month only, set the needed time period in the filter conditions: "Created on = Previous Month" (Fig.3).

Fig. 3 — Example of configuring the [How to filter a] in a calculated metric



How to associate A - D with section data

[Connect ... object with ... section by field] — populate the field if you only need to take into account the records selected in the section when calculating the metric. If you leave this field unpopulated, the filters applied in the section, will not be taken into account when calculating the metric. The field is only displayed if the [Object] field is populated and is not displayed when configuring analytics in the [Dashboards] section.

How to display

[Style] — the color of the metric title and value.

[Font size] — the size of the metric value font — "Default" or "Large".

[Format] — the format of displaying the metric value. Format settings are available in a separate window. To open the window, click .

[Text] — the text displayed together with the metric value. For example, if the value should have an "Employees — 513" format, enter the "Employees — {0}" mask value in this field. If it should be "513 people", enter the "{0} people" mask value.

[Number of digits after decimal point] — the accuracy of the metric decimal part. For example, set it to "1" to display the metric value with one digit after the decimal point. To display a number without the fractional part, set "0".

Adding a new formula

You can easily add custom formulas. Go to System designer -> "Lookups" section -> "The formula of the calculated metric". Open the lookup and add a new formula, populate the "Name" and "Formula" columns. For example, $(a + b) / (c + d)$. Open the dashboards again and make sure that the new formula appeared in the list.