

# Helpful Hints for Formulas:

## *Creating Formulas and Formula Syntax*

### Common Syntax Examples

If you are unsure of the proper syntax, you can always rely on the **Formula Assistant**.

- ACCT.Account\_Code
- ASSUM.Assum\_Code
- ACCT.XYZ[DimensionName=DimensionValue]
- Time references:  
ACCT.XYZ[time=this-1]  
ACCT.XYZ[time=1/2009]  
ACCT.XYZ[time=this-12:  
this-1]
- Modeled sheets:  
ROW.Column\_Name  
ROW.LookupTable\_Name  
ROW.CalcAcct\_Code
- Spread 445, 454 or 544:  
SpreadXXX(ACCT.XYZ\*12)
- Date functions:  
Month(date)  
    If(month(this)>1,T,F)  
Year(date)  
    If(year(this)>2009,T,F)  
Fiscalmonth(this)  
Fiscalyear(this)  
Versionmonth(this)  
Versionyear(this)

### Creating Formulas:

- While on sheets: first key "=", either directly into a cell or into the Formula bar. "Capture mode" is available on sheets, which enables you to reference another cell by clicking on it.
- When using the formula bar, remember to click the green check mark to apply the formula.
- The **f(x)?** does not signify an error. This means the new formula has not been evaluated yet. Click Save to evaluate.
- The Formulas tab can be used to easily manage a formula on multiple plans. Formulas entered here will apply to all months in the current working version.
- Metric Accounts must always contain a formula. The formula is entered in the account set-up screen.
- To investigate a formula, right-click on a cell and select Explore Cell. This will allow you to drill down and determine the origin of the data.
- When dividing by zero or an empty account, use the Division Operator. Using the "/" will return a divide-by-zero error:  
  
    Div(Numerator, Denominator)
- To account for partial headcount, use the MonthFraction formula to return the fraction of the month worked:  
  
    Monthfraction(ROW.StartDate,ROW.EndDate)

*This document is intended as a quick reference tool. If you would like additional information about formulas, please consult the Formulas Guide here: <https://news.adaptiveplanning.com/docs/Training/Formulas.pdf>. There is also a recorded Free Live Training Session here: [https://community1.adaptiveplanning.com/ap/community/public/ap\\_community/training](https://community1.adaptiveplanning.com/ap/community/public/ap_community/training).*