

Single Entry Calculation Function List

Below is a table of various functions you will find available to use when creating Single Entry calculation fields in Intapp OnePlace.

Function	Description
IF	checks if a condition is met and returns a value if yes and if no
OR	checks if any conditions are met and returns "True" or "False", usually nested in an IF Statement
AND	checks if any conditions are met and returns "True" or "False", usually nested in an IF Statement
NOT	changes "True" to "False" and "False" to "True", usually nested in an IF Statement
INT	returns an integer value of a field
Average	calculates an average of a series of numbers
Median	returns the median number of a series
ROUND	round value to nearest value, specified by number of digits
RoundUp	rounds a number to the specific number of digits
RoundDown	rounds a number to the specific number of digits
MIN	returns minimum value of a series of numbers
MAX	returns maximum value of a series of numbers
IsNull	checks if a field is blank, usually nested in an IF statement
SetCurrency	create calculation field with number output and number type = currency
COMBINE	calculation should display values from all fields
Year	extracts and displays the year from a date
FiscalYear	extracts and displays the fiscal year from a date
Quarter	extracts and displays the quarter from a date
FiscalQuarter	extracts and displays the fiscal quarter from a date
Month	extracts and displays the month from a date
DayofWeek	extracts and displays the day of week from a date
Day	extracts and displays the day from a date
CONTAINS	checks if text, choice, reference, user fields contain a value, usually nested in an IF statement
LEFT	Returns the leftmost characters from a text value
RIGHT	Returns the rightmost characters from a text value
MED	Returns a specific number of characters from a text string starting at the position you specify
GetModifiedBy	returns the last user who modified the field
GetModifiedOn	returns the last date and time when the field was modified

Example Calculation Fields

Below are several example calculated fields. Note: *These examples will not match up exactly to your site, as the List names and Field names vary from client to client. These examples are intended to serve as a guide when you build your own calculation fields, not an exact replica of how they should be created.*

Example Calculated Field Name	List Calculated Field Created On	Type	Example Formula	Description
Future Contact Date	Companies	Single Entry	IF([Tier]="Tier 1",[Last Activity Date]+30,IF([Tier]="Tier 2",[Last Activity Date]+60,IF([Tier]="Tier 3",[Last Activity Date]+90,"")))	Calculates a future contact date based on which Tier the company is placed in. Assumes that there is a Tier field already in place on the Companies List. .
Future Contact Date	Contacts	Single Entry	IF(IsNull([Last Activity Date]),[Created Date]+[Contact Frequency],[Last Activity Date]+[Contact Frequency])	Calculates a suggested Future Contact Date based on the last activity that was tagged to the Contact. Assumes a Smart Field named Last Activity Date is set up.
Days Since Last Contact	Contacts and/or Companies	Single Entry	[Today]-[Last Activity Date]	Calculates the number of days since the last activity date. Assumes a Smart Field named Last Activity Date is set up.
Photo?	Contacts and/or Companies	Single Entry	IF(IsNull([Photo]),"", "Photo")	Calculates whether the entry has a photo uploaded to a field named "Photo". Assumes an image field named "Photo" exists on the relevant list.
% of Plan Completed	Plans	Single Entry	[Total Completed Goals]/[Total Goals]	Calculates the overall percentage of the plan that is complete. Assumes a field named Total Goals and Total Completed Goals exists on the relevant list.
Matter Name	Matters	Single Entry	[Client]&" "&"("&[Billing Client]&")&" "&[Matter ID]	Calculates a Matter name for new Matters. Assumes fields named Client, Billing Client and Matter ID exist on the relevant lists.