

How do I add age roll-ups to profile variables?



Unlike power surveys, surveys do not support the ability to dynamically update age roll-ups created with a Date question. Instead, you will need to export the data with the Date question, manually update the age roll-up values, and import the data into the profile variable.

Prerequisites

• Create profile variables for Age (Number type) and Age Roll-Up (Single Choice type).

Detailed Steps

Export the data

- 1. In the surveys app, click the survey whose data you want to export.
- 2. In the **Report** tab, open the standard survey report.
- 3. Click the report you want to export.
- 4. On the report toolbar, click Export > CSV (Response Data), and then select a

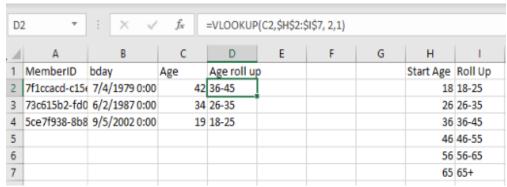
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All Active Exports dialog opens.

5. When the download is complete, in the **All Active Exports** dialog, click **Download** and then follow your browser's prompts to download and open the file.

Update the data manually in Excel

- In the downloaded CSV file, remove all columns except MemberID and Date question containing the age data.
- Create two columns labeled with the name of profile variables as they appear in your Community beside the date column in columns C and D.
 For example, "Age" and "Age Roll Up".
- 3. Create two columns named "Start Range" and "Roll Up Range" in columns H and I and populate them with the starting age of the roll-up and age roll-up values respectively. You will use these columns in the formula to reference the age range the member's age falls within.
- 4. In column C2, input the formula "=DATEDIF(B2, TODAY(),"Y")", where B2 is the date of birth. Double-click on the green dot to apply the formula to all rows.
- 5. In column D2, input the formula "=VLOOKUP(C2,\$H\$2:\$I\$7, 2,1)", where C2 is the Age value, \$H\$2:\$I\$7 is the array for the "Start Range" and "Roll Up Range".



6. Copy the values from the spreadsheet, including MemberID, into a new CSV file to import into the Community app.

Import data into Profile Variables

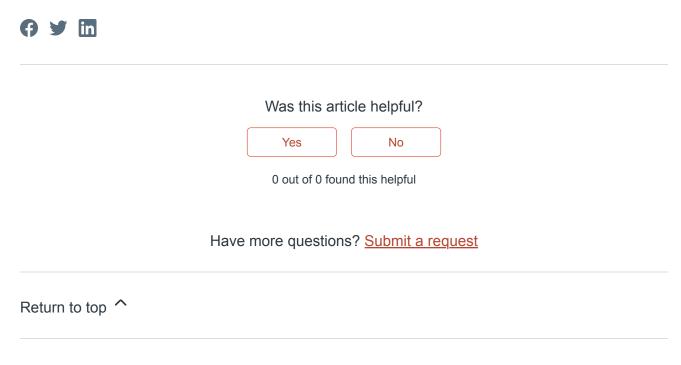
- 1. Import profile variable data by opening the Community app and doing one of the following:
 - Select Community > Member Groups.
 - Select Community > Profile Variables.
 - Select Community > Members.
- 2. On the toolbar, click **Import**.
- 3. Click **Choose File**, select a CSV file to import, and click **Open**.
- 4. Click Upload.

Tip: Age roll-up data does not update dynamically, so this task must be done yearly to keep the age roll-up up to date. Create a calendar reminder for yourself to manually update the roll-up annually.

More Information

Please click the WebHelp links below for more information:

- Create a profile variable
- Export a report to CSV
- <u>Import members or profile variables</u>



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