ACA Dashboard Setup On-Site Steps

Once you have the **Bundle-ACA.zip** file on the customer site:

1. Extract all files
2. Add a permission “**Gadget\_All**”
3. Import Macro\_xml-Word\_Tools.xml
4. Import Macro\_xml-ACA.xml
5. Import Gadgets\_Samples.xml
6. Import Gadgets\_ACA Articles.xml
7. (Maybe) Import Gadgets\_Menu.xml
8. Attach **Employee\_HealthInsExpire.docx** to macro “**ACA Notify Employee of Expire**”
9. Attach **Employee\_HealthInsOffer.docx** to macro “**ACA Notify Employee of Offer**”

Create filters to support the ACA Dashboard gadgets:

1. Determine Attribute (if any) that indicates Full-Time designation
   1. Add custom field “Full-Time?” to the Attribute folder in Setup that is used at this site to indicate FT or not.
   2. This custom field should have Data Type set to “True/False” and Required
   3. Determine the Attribute item number used for this FT attribute
   4. Modify **FilterImport.xls** to replace all occurrences of “**PRAttribute8Item**” with the number of the Attribute Item used at this site.
2. When no Attribute is used to indicate Full-Time designation, then the filters that reference Attribute Item must be changed to refer to proper indicator at this site for employees that should be considered FT or not.

Filter list:

1. Filters needed on **Employees**:
   1. “? Missing ACA Designation – Hired”
   2. “? Missing ACA Designation – Terminated”
2. Filter needed on **Employee Attributes**:
   1. “? Missing ACA Designation – FT switch”
3. Filters needed on **ACA Records**:
   1. “Result Records”
   2. “Pending Notification”
   3. “Pending Notification of Offer”
   4. “Pending Notification of Expiration”
   5. “Waiting Response””
   6. “PT as ACA Full-Time”
   7. “Selected”
   8. “Declined”
   9. “Expired”
   10. “Result Records”
   11. “Designation Records”
   12. “Bogus Result Records”

As a workaround for transferring filters from one company database to another, we can use Excel AAS macros:

**FilterCapture-ACA.xls** copies the details for each filter specified to a rows in the selected worksheet. Filters are selected from across all packages based on text matching the Memo field of the filter.

Once the fields have been captures for all selected filters, these columns must be removed:

* IsBuiltIn
* SelectionLoadUpdates
* CreateDate
* CreateUser
* ReviseDate
* ReviseUser

**FilterImport.xls** can then be loaded with the data from the worksheet above, and formatted to match the sample FilterImport.xls worksheet.

Manual SQL for Employee Attributes filter:

--Attribute determining FT/PT

(PREmployeeAttributeItem.PRAttribute = '{9B4FE942-FDF5-4B49-BF87-06F841F0CF69}' /\* Class \*/

--Full/part time custom field

AND

(SELECT ai.CustomData.value('(/CustomData/Field[@Name="Full-Time?"]/@Value)[1]', 'bit')

FROM PRAttribute**8**Item ai

WHERE ai.PRAttributeItem = PREmployeeAttributeItem.PRAttributeItem)

--Does not equal previous value

<>

(SELECT TOP 1 ai.CustomData.value('(/CustomData/Field[@Name="Full-Time?"]/@Value)[1]', 'bit')

FROM PREmployeeAttribute8Item eai

JOIN PRAttribute**8**Item ai on ai.PRAttributeItem = eai.PRAttributeItem

WHERE eai.PREmployee = PREmployeeAttributeItem.PREmployee

AND eai.[Date] < PREmployeeAttributeItem.[Date]

ORDER BY eai.Date DESC))

AND PREmployeeAttributeItem.Date >= :Begin\_Date AND PREmployeeAttributeItem.Date < DATEADD(d,1,:End\_Date)

--ACA designation record is missing or incorrect

AND NOT EXISTS

(SELECT \* FROM PRACARecord aca

WHERE aca.PREmployee = PREmployee.PREmployee

AND aca.Type='D'

AND aca.EffectiveDate=PREmployeeAttributeItem.Date

AND (CASE aca.EmployeeDesignation WHEN 'F' THEN 1 ELSE 0 END) =

(SELECT ai.CustomData.value('(/CustomData/Field[@Name="Full-Time?"]/@Value)[1]', 'bit')

FROM PRAttribute**8**Item ai WHERE ai.PRAttributeItem = PREmployeeAttributeItem.PRAttributeItem

)

)