**Census Prompt / Input Flow**

1. Load source data
   1. To begin, open your census data file and then click the button below
      1. \*button: My census file is open\*
   2. Using the dropdown, select your census data file.
      1. *Script runs to import data – consider button*
   3. Add note/comment for first step:
      1. If you see a yellow ‘SECURITY WARNING’ message towards the top of your workbook, please click the ‘Enable Content’ button.
2. Load previous configuration
   1. Would you like to load a previously saved configuration?
      1. Dropdown with previous configuration names
         1. *\*button tied to a script loads previous inputs that were saved:*
            1. *Source data structure, transformation selections for column>row (if needed), unique ID selection/creation, plan inputs & transformation, relationship input, report output type, field formatting selections, report field selections*
         2. *Script would ‘jump’ you to end of process prior to export*
3. Configuration name
   1. Please name this configuration
      1. Cell input for users to name current configuration that will ‘save’ upon export
4. Source data structure
   1. How is dependent information shown in your source file?
      1. Separate rows
      2. Extra columns
5. (conditional) Transforming column-based -> row-based
   1. If ‘extra columns’ selected above, open mapping page / process
      1. Select dependent fields and which fields to merge them into
      2. *Script runs to transform data*
      3. **Data set is now in row-based format universally**
6. Identifying/Creating Unique ID (data now in row-based format)
   1. If your source data includes a field for individuals’ SSN (not just EE SSN), select the field name from the dropdown.
      1. If not, select the 3 fields containing individuals’: First Name, Last Name, Date of Birth
      2. **Data set is now row-based with unique ID determined**
7. (conditional) Multi-plan
   1. Data source contains repeated rows for each benefit plan an individual has. First, please select the field that identifies the plan type (Dental, Vision, etc).
      1. Dropdown selection for main field
   2. Please select all other fields that contain details for each plan (Effective Date, Coverage Amount, etc)
      1. Dropdown selection for info fields (separated by commas)
   3. *Script runs to transform data*
   4. **Data set is now row-based with unique ID without repeated benefit plan rows**
8. Relationship determination
   1. Please select the field containing the relationship of each individual (Employee, Spouse, Child, etc)
      1. Field dropdown
   2. Which value in this field identifies the employee?
      1. Dropdown containing the values from selected field
9. Report output type (row or column)
10. Custom data transformations/adjustments
    1. Method for users to apply custom data adjustments. Examples including:
       1. Data formatting
          1. Date, SSN, zip code, phone number, currency
       2. Text cleanup
          1. Trim spaces, case formatting, find and replace terms, split by delimiter, concatenate/join
       3. Ad hoc
          1. Age calculation from DOB
          2. Replace one value in a field with another
11. Report builder
12. Summary stats
13. Export
    1. *Export script also saves configuration*

**Training & Communication Notes**

1. Load source data
2. Load previous configuration
3. Configuration name
4. Source data structure
5. (conditional) Transforming column-based -> row-based
   1. You can type ‘relationship’ to automatically create a field that will list all employees as ‘Employee’ – you’ll need to add ‘Relationship’ in the field merge column for each of the ‘dependent relation’ field accordingly
   2. For each field containing dependent information, select the appropriate field to ‘merge’ the dependent information into (Dep1 DOB -> DOB)
      1. If there isn’t a ‘good fit’ available (ex: dependents’ names formatted as ‘lastname, firstname’ in same cells & employees’ formatted as two separate fields for last name & first name), you can create a new field by simply typing in what you want to name this field (ex: DepFullName).
         1. Be sure to enter (select / type / copy & paste) this new field name for the other respective dependent fields (ensure you have ‘DepFullName’ for dep2 name, dep3 name, etc)
      2. On the Report Builder page, you are able to adjust your data with a variety of functions, including via specified conditions. Continuing the example above, let’s assume the necessary output format is for all individuals to have their name in the same column as ‘LastName, FirstName’:
         1. Create a new custom column by clicking on the ‘new field’ at the top of the field list on the left side of the page and at the top input:
            1. Row1 (Function) = CombineFields
            2. Row2 (Delimiter) = ,
            3. Row 3 (Field1) = EE Last
            4. Row 4 (Field2) = EE First
            5. Call this field something recognizable, such as ‘EEFullName’
         2. Create another custom column:
            1. Row1 (Function) = Coalesce
            2. Row2 (Field1) = EE FullName
            3. Row3 (Field2) = DepFullName
            4. Call it something like ‘FullName’
6. Identifying/Creating Unique ID (data now in row-based format)
7. (conditional) Multi-plan
8. Relationship determination
9. Report output type (row or column)
10. Custom data transformations/adjustments
11. Report builder
12. Summary stats
13. Export

Important notes

* Build flexibility/support for up to 10 dependents
* Use ‘trim’ when creating computed key
* Loading messages
  + Calculating the square root of infinity…
  + 99 bottles of beer on the wall…
  + Spinning the hamster wheel…