Import Demo - Data Collections

In this video we will cover walking through entering data in a data collection field, pushing that data via an outgoing connection to a centralized table and managing a centralized location for dates to help in rolling forward future cycles of data collection for an ESG core team member. To begin we'll start at the employee info input section, where we'll notice that there are designated cells that have been highlighted in blue as well as this banner that says the sheet is in input mode. Input mode ensures that only cells that are highlighted in blue are able to have data entered and values changed. A data core reviewer will be able to designate which cells would be in input mode by selecting those cells and right clicking create input cell. Data providers would only have access to view the section and enter data in those blue cells, but would be unable to make any changes to the section structure, delete any content, or change any rows or columns as well. We are able to toggle input mode by right clicking disable input mode and then right clicking again on this section outline and selecting enable input mode. After the data provider has entered the values, a data reviewer after reviewing the values and confirming that they are as needed or expected, would navigate to the connections pane on the right hand side and then on the employee info file connection that is outgoing, select refresh, where we will see this loading icon, see that it is pushing the latest data that has been entered to a centralized table, where this data will then be able to be consumed later on in the reporting process. While this connection is updating, we will navigate here to the admin section of our inputs outlined, where we will highlight that there is a centralized dates location that allows us to manage the reporting cycle, so if I put 2022 as the next reporting year, the dates will update within this section but they will also update and populate the column headings as well that drive the other formulas, where we now see populated values in the ‘20 fiscal year and ‘21 fiscal year but also allows us to prepare this new fiscal year for 2022 by simply clearing out the fields and preparing them to be inputted by the data provider with those new values. Once the data provider has inputted those new values, we would see those respective formulas do their present calculation with the new values - and I'll just change a couple of these here as well, and once the data has been reviewed and is ready to be updated, a data reviewer would just select that outgoing connection and push the updated values to that centralized table.