Data Management Best Practices

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Below are some commonly used Excel functions to help map and normalize data into the **Data Template** for **TotalRewards Builder**. These functions are useful for cleaning, formatting, and preparing data for accurate uploads.

Common Excel Functions:

1. DOLLAR – Converts a number to text in currency format, with decimals rounded to the specified number of places.

- **Common use:** Benefits coverage amounts
- **Formula:** =DOLLAR(number, [decimals])
- **Meaning:** =DOLLAR(cell_reference, [number of decimal places])
- **Arguments:**
  - number *(Required)* – A number, a reference to a cell containing a number, or a formula that evaluates to a number.
  - decimals *(Optional)* – Digits to display to the right of the decimal point. Negative values round to the left of the decimal point. Default is 2.

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2. TRIM – Removes all spaces from text except single spaces between words.

- **Common use:** Cleaning irregular spacing in Names, Email Addresses, and Addresses
- **Formula:** =TRIM(text)
- **Meaning:** =TRIM(cell_reference)
- **Arguments:**
  - text – The text from which to remove extra spaces.

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3. PROPER – Capitalizes the first letter of each word, converting all other letters to lowercase.

- **Common use:** Formatting Names and Addresses
- **Formula:** =PROPER(text)
- **Meaning:** =PROPER(cell_reference)
- **Arguments:**
  - text *(Required)* – Text in quotation marks, a formula returning text, or a reference to a cell containing the text to convert.

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4. IFERROR / IFNA – Handles formula errors by returning a specified value if an error occurs; otherwise, returns the formula result.

- **Common use:** Preventing upload issues by replacing errors with blanks or default values
- **Formula:**
    - =IFERROR(value, value_if_error)
    - =IFNA(value, value_if_na)
- **Arguments:**
    - value *(Required)* – The value to check for errors.
    - value_if_error or value_if_na *(Required)* – The value to return if an error is detected (e.g., #N/A, #VALUE!, #REF!, #DIV/0!, #NUM!, #NAME?, or #NULL!).

 Note: Always test your formulas on a small data set before applying them to the full template to avoid introducing formatting errors into your upload.