S20-Training Tracker Instructions

Office 2007/Excel 2007 Note:

This Excel workbook was created with Excel 2003 and if used in Excel 2007 it needs to be saved as an Excel 97/2003 workbook with macros. Excel 2007 will warn you that some information may be lost, but since this workbook does not use any unique Excel 2007 features, none will be lost.

I. INTRODUCTION

This spreadsheet can be used to schedule up to 25 people to 50 types of training

Some cells have attached notes as indicated by a small triangle in the top-right corner of the cell. Place the cursor over the cell and the note will be displayed.

If you find that any of the columns are not wide enough, you can adjust the column width by selecting "Format, Column, Width" from the Excel toolbar and then entering a number in the box.

II. INPUT SHEET

Two tables are provided on this sheet. One is for employee names and the other is for types of training. Names and training types can be modified as necessary to reflect personnel and training changes.

The items in these two tables are used in the drop-down menus on the Training Database sheet and on the various output sheets.

If you input duplicate employee names or training types, the cells with the duplicates will turn rose-colored to alert you to this condition.

III. TRAINING DATABASE SHEET

Training assignments are made by inserting a date and filling out the other columns in the row. Drop-down menus are used for the Employee and Training columns. The other cells can be filled in by typing the required information or by copying it from another cell. The Date column is formatted in the dd-mmm-yyyy format, but you can change it if you prefer another format. The date can be input in m/d/yy format or in any other acceptable date format. Likewise, the time can be input in AM/PM format such as 2:00 PM or using a 24 hour clock such as 14:00.

The training database has room for 5000 training assignments. If you run out of room, you can erase some rows (do not delete the rows, just erase the data) and then sort the database on the date column to put the training in chronological order and to put the blank rows at the bottom of the table.

If you assign someone to more than one training session on a given day, the persons name cell will turn turquoise-colored to alert you to this situation. If someone is assigned to more than one training session per day, all training assignments will be displayed in the various outputs.

You can filter the database to display only the desired date, employee, training, location, etc by clicking on the little down arrow in the table header row and selecting the item you would like to be displayed. You can filter the data on more than one column by selecting a filter in multiple columns.

'The little down arrow will be black if no filter has been selected and it will be blue if a one has been selected. You can remove the filter by selecting "All" from the drop-down menu. If you want to hide blank rows you can select "NonBlanks" from the bottom of the drop-down menu.

Once you have displayed just the items of interest, you may want to print the sheet. The print range has been set to use as many sheets of paper as necessary to print all of the displayed rows.

The sheet needs to remain unprotected for the data filters to work.

IV. INDIVIDUAL SCHEDULES, E-MAIL AND ESCHEDULE SHEETS

This sheet shows up to 50 training assignments for one individual. Simply select the name from the drop-down menu and fill in the start and end dates, and the table will show all training for that person in the selected time period.

When you click the macro button at the top of this sheet, the ESchedule sheet will be sent via e-mail to all of your people (who have an e-mail address). Insert your employee's e-mail address next to their name on the E-Mail sheet if you want them to be eligible to receive their schedule. Be sure to select employees to receive the calendar by clicking on the individual check boxes on the E-mail sheet, or you can choose the "Send to Everyone" option.

The ESchedule sheet contains the scheduling information on the Individual Schedules sheet and will be sent to your recipients as a single sheet Excel workbook. If any of your recipients do not have the Excel software, they can download a free Excel viewer form Microsoft at:

http://www.microsoft.com/downloads/details.aspx?FamilyID=c8378bf4-996c-4569-b547-75edbd03aaf0&displaylang=EN

The print range on both the Individual Schedule sheet and the Eschedule sheet has been set to show the schedule on a single sheet of paper.

V. TRAINING CHART SHEET

A training summary is shown in a table and in a chart on this sheet for all of your employees. Select a training type (or "All Training") along with a start date and end date. The training type is selected from the drop-down menu and the dates need to be typed in the cells. You also need to select the parameter (count, hours or cost) to be reported.

The print range has been set to show both the table and chart on a single sheet of paper.

VI. CAUTIONS

Do not add or delete rows or columns on any of the worksheets, for it may corrupt the spreadsheet logic. Rows and columns may be hidden if you do not need them or do not want to see them.

If cells with input data are hidden (the light green cells), any data contained in those cells will still be used by the spreadsheet.

VII. TECHNICAL SUPPORT

Technical Support is available by phone, fax or e-mail during normal business hours (Mountain Time).

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